

THE NEW LUXURY.

A report on the
changing landscape
of luxury retail.



WHAT'S IN STORE?

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WHAT IS THE NEW LUXURY?

In this report we explore *how* the shifting luxury retail landscape is finding meaning in a world where *authenticity*, *scarcity* and *reality* are creating new challenges and opportunities.



Luxury is changing, & with it the rules of desire.

As traditional symbols of wealth lose their power to captivate, a new understanding of luxury is emerging. Less defined by ownership and more by what we know, how we feel and where we have access.

For brands and retailers, this represents a challenge and an opportunity. The question is no longer what makes something luxurious, but what makes it desirable, meaningful and worth experiencing.



CONSUMER TRIBES



A CHANGING LUXURY LANDSCAPE

“Luxury is *changing*, in the past it was clear—defined by material abundance. But *now*, luxury is a *state of mind*, an *experience & narrative expression*.”

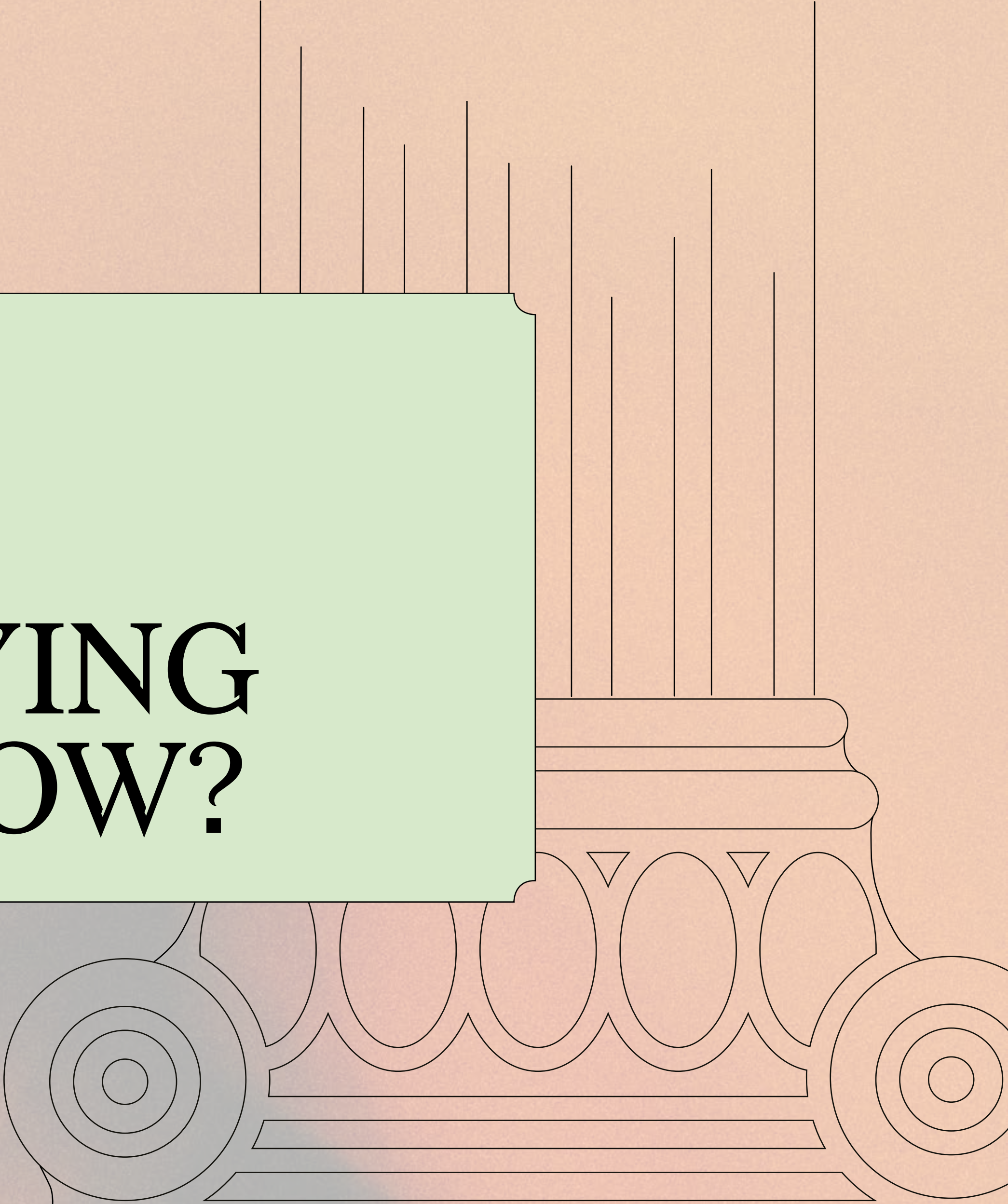
JOSH KNOX — CREATIVE DIRECTOR, D4R



CONSUMER TRIBES



WHO'S BUYING LUXURY NOW?



WHAT'S DRIVING LUXURY TODAY?

To answer the questions, 'Who's buying luxury now?' & 'What's driving luxury today?' we have to understand the broader customer landscape and what they ascribe value to, defining the various types of wealth as applicable to their lifestyle. **These can be broken down into the following four currencies:**

LUXURY CURRENCY

CONSUMER STATE

RETAIL DRIVER

Wealth

"I CAN AFFORD THIS."

MATERIAL ABUNDANCE & SERVICE

Knowledge

"I KNOW WHAT THIS IS."

CURATION & DISCOVERY

Access

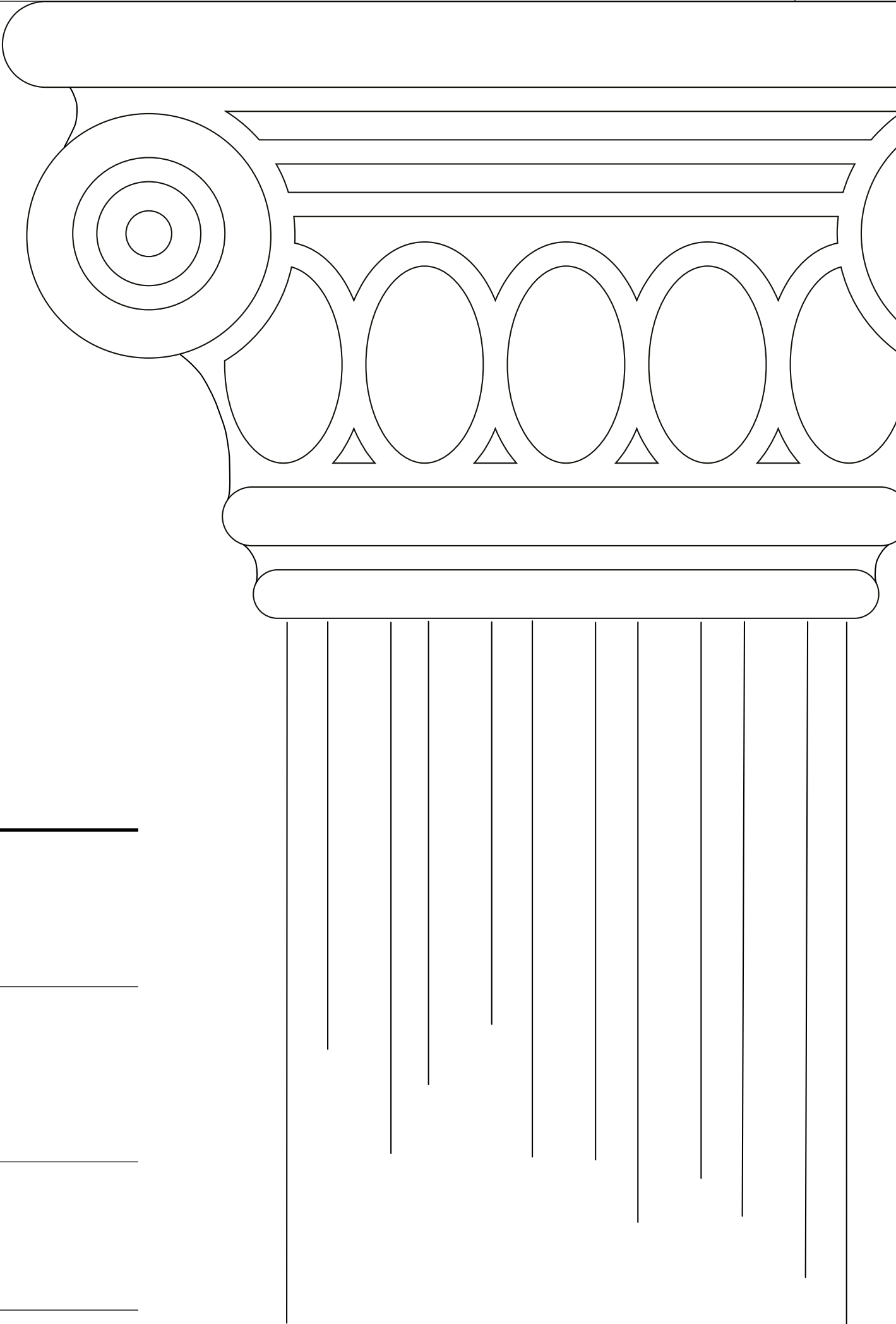
"I CAN GET WHAT OTHERS CAN'T."

EXCLUSIVITY, VIP TREATMENT & DROPS

Experience

"I'VE EXPERIENCED SOMETHING OTHERS HAVEN'T."

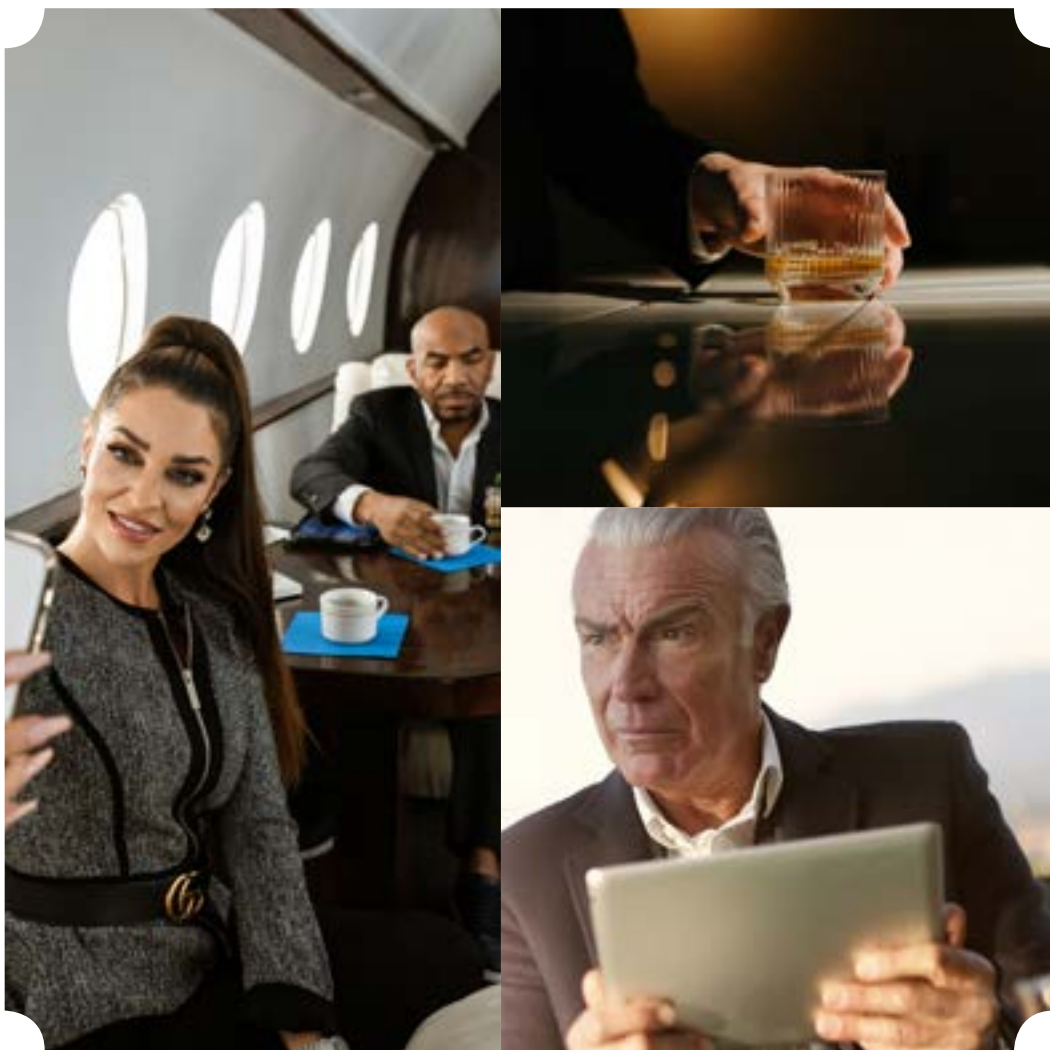
HOSPITALITY, IMMERSION & CULTURE



LUXURY SHOPPER TRIBES.

Rather than defining consumers through restrictive demographics such as age and financial status, we believe it's more insightful to explore groups of shoppers united by shared attitudes, interests and behaviours; communities of shoppers we call tribes.

These tribes allow us to step into the mindset and vibe of the shopper, highlighting the commonalities they share; from lifestyle to, their individual definition of luxury and the pain-points that disengage them.



Established elite.

"I DON'T NEED TO PROVE I CAN AFFORD IT"

WHO?

This is traditional luxury's customer. They regularly make high ticket purchases, especially when the products are niche, avoiding things that feels easily attainable or mass-market.

The signals that drive them are craft, rarity, provenance and discretion. They prefer spaciouly composed retail, with high levels of on-demand service. Think private salons, residential hospitality, material richness, knowledgeable associates and discreet access.

Interestingly, older luxury consumers remain particularly focused on ownership, trust and quality; research from AlixPartners found Gen X and Boomers place especially high importance on quality aligning with price.



New wealth.

"LUXURY TELLS THE STORY OF WHERE I'VE GOT TO."

WHO?

Younger affluent consumers, often founders of new challenger businesses, crypto, tech/finance wealth, or content creators are a rapidly emerging HNWI tribe of luxury customers.

They're fluid in the brand choices, and as a result are more comfortable to mix all manner of brands together. Shopping LV & Nike, representing a niche Japanese label or independent jewellery designer.

They want recognition and access, beyond simply expensive marble and ostentatious surroundings. They want to feel like they are welcome and they belong.



The culture creators.

"IF EVERYONE KNOWS ABOUT IT, I'M PROBABLY ALREADY BORED OF IT."

WHO?

This is an especially interesting tribe for contemporary luxury retailers and brands looking to attract new loyal shoppers.

This tribe doesn't necessarily have the most disposable income, but they have high cultural capital. They're designers, architects, versed in fashion, musicians, collectors, and highly informed enthusiasts.

Their status comes from knowing, rather than simply owning. So, obvious codes of luxury can actually sometimes repel them. They want to take risks, they crave the genuine cutting edge, and engage in the discourse and creation of culture too, shaping it.



The luxe aspirants.

"I'VE WANTED THIS FOR SIX MONTHS."

WHO?

Arguably one of the most misunderstood luxury consumer tribes. They aren't wealthy enough to buy into luxury on a whim. Instead, they save up and accumulate wealth, selectively trading up for meaningful purchases: a designer handbag, high end fragrance, trainers, jewellery, beauty, a signature watch or elevated fashion item. Price increases have put considerable pressure on this group; EY found 62% of aspirational clients had abandoned a luxury purchase, with price the leading deterrent. But this makes the purchase ritual even more important. They want to feel: I'm entering the luxury world.



Conscious connoisseurs.

"I WANT TO UNDERSTAND WHAT IT IS , WHY I NEED IT AND WHERE IT COMES FROM."

WHO?

This consumer scrutinises the relationship between price, material, provenance and longevity, opting for circularity over a quick dopamine hit. Their homes are well considered, and their wardrobes are curated capsule collections. Investing in furniture, food, architecture, wellness and travel alongside fashion. They research everything before committing to buy. Where was the leather sourced? Who made the garment? Can the watch be serviced in twenty years? Resale is an important factor too; 'EY found 54% of luxury consumers would buy certified pre-owned product directly from a luxury maison', suggesting circularity is intrinsic to luxury service.



Experience collectors.

"I'D RATHER HAVE AN AMAZING EXPERIENCE THAN ANOTHER THING."

WHO?

This tribe defines luxury as the places they have been and purchases are tied as mementos of these experiences. A weekend at Aman Kyoto, a tasting menu in Copenhagen, an Art Basel trip, wellness retreat or Glastonbury hospitality package competes directly with a new handbag. Their Instagram camera roll probably explains their luxury consumption better than their wardrobe. Objects remain desirable, but increasingly when they unlock an experience or preserve the memory of one. Their must-have could be a Leica camera, technical outerwear, hotel-exclusive fragrance or an object only available at the destination where they discovered it.



Drop hunters.

"I NEED WHAT EVERYONE ELSE CAN'T GET "

WHO?

The drop hunter is a consumer who emerged following the sneaker and streetwear movement. They live for hyped product drops, sometimes for personal bragging rights, sometimes for resale value. Their behaviour attracts and feeds into the hype machine, following exclusive drops, short runs, and scarcity driving mania for grailed luxuries. Online they track incoming new releases via Discord and restock communities, understanding release calendars and resale values astutely. Scarcity turns shopping into a sport, with successful cops forming victory stories to regale.

CONSUMER EXPECTATIONS

CONSUMER	RETAIL EXPECTATIONS	DISENGAGEMENTS
Established Elite.	Privacy & discretion , Trusted advisors, Appointment led access, Product reservations, Hospitality, Craft & provenance, Home, hotel or destination delivery , Personalised experience.	Long queue systems , Loud & crowded flagships , Over-familiar service, Mass CRM emails, Artificial scarcity, Status theatre , Luxury pricing without discernible quality.
New wealth.	Shop & pay their way , Members-only spaces, Limited editions, Invitationals , Personalisation & genuine creative freedom, brand collaborations, service rituals , connected clienteling via messaging apps, inter-sectional culture .	Stuffy traditions and elitist etiquette , slow service, judgemental interactions , generic VIP service tiers, over- formality , digital & physical friction.
The culture creators.	Constant newness and discovery , emerging designers represented, creative collaborations, editorial cross-merch and curation, unexpected categories, staff that live and breathe the culture, non-commercial multi-layered events.	Obvious trend chasing , influencer saturation , shallow selfie moments, mainstream celebrity collabs, staff who know less than they do , algorithmic design , cultural appropriation without genuine platforming.
The luxe aspirants.	A sense of occasion , warm welcomes , clear product education, beautiful packaging and gifting ceremonies , test and trial opportunities , entry level edits, personal styling guidance , digital hand-off into store.	Feeling judged , unclear or hidden pricing , being ignored in favour of wealthier clients, aggressive selling, intimidating boutiques , poor aftercare, finding exclusive product elsewhere post purchase.
Drop hunters.	Physical product drop and launches, store exclusives , surprise releases, collaborations, digital access to physical spaces , community events, genuinely scarce product, regular newness , digital queue systems , grand unboxing .	Poor queue management , fighting bots for popular items, mass production following a successful drop, brand entering their culture without credibility , lack of drop transparency , no photography rules .
Experience collectors.	Multi-sensory experiences , analogue workshops , travel linked experiences, cultural programming , locality or destination specific products, dwell spaces, behind the scenes access, memorable narratives, social currency .	Static convenience led retail , endless racks and ultra high density product , transactional service, homogeneous flagships , manufactured "immersive" activations, over-reliance on digital , lack of discovery beyond product.
Conscious connoisseurs.	Celebrations of craft , repair and renew services , product restoration , certified resale , makers working in-store , accountable supply-chains , transparent provenance , product care advice , circularity in-store.	Green-washing , planned obsolescence, excessive packaging, poor repairability, synthetic storytelling , inflated pricing, manufactured hype , heavy use of digital .

“Luxury products and services have long been emotionally evocative, but as the concept of luxury becomes more experiential, emotion becomes a core driver behind the connective and cultural expansion of this sector”

FIONA HARKIN, DIRECTOR OF FORESIGHT, THE FUTURE LABORATORY

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LUXURY MARKETPLACE TRENDS



LUXURY RETAIL SAFARI.

BRANDING > BLANDING > GRANDING

LUXE BRAND RE-EMBELLISHMENT

BRANDING > BLANDING > GRANDING

Recently luxury brands have refined themselves to the point of losing their identity, but in a world where emotion & authenticity have become increasing priorities, a new renaissance of heritage & story-telling has dawned.

SAINT LAURENT

BALENCIAGA

BALMAIN

CELINE

BERLUTI

LA
FAMIGLIA



GUCCI



L'ARCHE
TIPO



GUCCI.

TAPPING INTO HERALDIC CULTURE

For Spring/Summer 2026, artistic director Demna delivered something beyond the expected runway formats of yesterday. Instead, Gucci opted for a cast of archetypes, presented as a 'famiglia', mirroring the various people that make up a family defined by roles and personas.

Delving into their archive to build the graphic system for the collection, the brand has effectively leveraged it's heritage with a contemporary edge. The campaign feels coded in the silver screen and media production, referencing both film titles and editorial mastheads. This gives the campaign a retrospective feel, celebrating the past whilst editing for current relevance.

The heraldic elements feel authentic because they come from the brand's historic archives. The heraldic elements feel authentic because they draw from the brand's historic archives, while their embellishment and whimsy evoke an almost fantastical vision of medieval Italy.

Gucci of all the fashion houses is synonymous for layered looks that feel richly adorned, and so tapping into their archives taps into a seam of authentic narrative. Though heraldic their campaign and brand image doesn't feel elitist or performative. Instead the brand feels more playful and multi-faceted than ever reflecting their diverse audience in style.

“Leaning into Demna’s surrealist style, the result blends tradition with play, luxury with experimentation and elegance with sensuality.”

— HYPEBAE





BURBERRY.

RE-EMBELLISHING THROUGH HERITAGE

Burberry is a brand that worked hard to reinvent itself following an era of negative perception. In its efforts to re-amplify the brands luxury image it took measures that followed a more focussed and minimal approach to brand expression within the luxury fashion world; Enter the great 'blanding' era.

By simplifying their logo, refining the brand back to its core elements and focussing on product, many fashion houses created an expectation of what luxury fashion should be. However this approach led to over-homogenisation of brand image, meaning what signified luxury as a whole became in essence, mundane.

Today, Burberry has moved beyond this period of conformity, choosing instead to embrace what makes the brand distinctly its own. Leaning into their brand archive, they have injected a sense of heritage, curating elements of the past with creative expression and celebration of individuality valued in the present, moving from branding to 'granding', a grand, more narrative abundant identity.

This comes to life through a narrative based around the brands knight cavalry asset, heraldic revelry and even a new typeface for their logotype; all of which feel steeped in British culture and history.

“Bold modernization in service of a historic brand’s established identity is one way to push the boundaries of design while preserving authenticity and consumer trust.”

— THE DRUM

BURBERRY
LONDON ENGLAND

BURBERRY



THE CORTÈGE.

AN IMMERSIVE EVENT WITH A COMPELLING BRANDWORLD

The Cortège is somewhat of an enigma when it comes to adequately describing exactly what it is. This is because it's a multi-faceted, multi sensory experience, it is both a celebration of culture and a lament of the loss of it in the modern world; coining itself as a 'festive funeral for our times'.

This theatrical experience is coded in niche communities and culture from around the globe, through the lens of celebration and loss. The narrative is richly adorned, expressing diverse craft, story, cuisine, music and more acting as a panacea to homogenised global culture which is diluting traditional practices.

“The ‘escapism economy’ is expected to grow to £10.35 trillion (\$13.9 trillion, €11.9 trillion) by 2028. McCann’s 2025 global survey of more than 16,000 people in 16 countries revealed that 56% ‘encourage brands to inspire them with dreams’”

— MccANN

The brand building and marketing comms tap into cross-era and cross-culture codes, creating a deep connection to spiritualism, mysticism and localised superstitions. With such a powerful and vibrant identity, 'the cortège' is a masterclass in world building, with its level of detail transcending inspiration, into belief.

From the website to the event, its narrative is the embodiment of the hyperphysical design direction inspiring a generation of performative and engagement-led experiences. Leaning into authentic representation of culture is key to communicating it successfully, especially when the line between appropriation and representation is such a fine line to travel.

Many are craving experiences that transport them elsewhere: to another world, another time or an imagined reality. As everyday life becomes increasingly complex, escapism is fuelling a fascination with idealised pasts, ancient cultures and slower, more whimsical ways of living. These aren't always histories people have experienced themselves, but carefully constructed worlds that offer comfort, discovery and temporary distance from the present.

RETAIL IMMERSION & STORYTELLING

BRAND & RETAIL TEMPLES

FROM FLAGSHIP TO BRAND HOLY GROUND

Until now, the pinnacle of a brands presence was the flagship, now its transcended into something more...

Flagship stores were and still are often the pinnacle space where brands can call home, inviting their shoppers to experience the brand world at its best.

However, more recently, both stores and temporary experiences have elevated into something more than this.

These new spaces act as multi-faceted brand anchors, immersing shoppers in sensorial experiences that drive belief, through engagement, earning true brand affinity — We call these 'Brand Temples'.

A place steeped in rich narrative that turns shopper communities into brand believers — connecting on a deeper level.



ASICS.

A KINETIC PLAYSCAPE, A TRANSPORTATIVE EXPERIENCE

Asics used Milan design week in 2026 to blur the lines between product launch, performance and play. Entitled the 'Kinetic playscape', the experience transformed Garage 21 into a sequential journey through 5 interconnected environs, exploring the relationship between boy, movement and space.

Rather than focusing solely on the GEL-KINETIC 2.0 product, the experience honed in on hyper-physicality. Visitors were invited to move through a series spaces, stepping through portal entrances that framed each environment. Each space felt new, yet cohesive and wholly enveloping, transporting visitors somewhere else.

This collection of environments evoke the feeling of entering a spiritual space. The experience feels less like a stand alone commercial pop-up and more a temple, an ode to cultural phenomenon and community engagement.

Sound, movement and scenography deepen this sense of ritual, with each space encouraging a different mode of interaction. What makes 'Kinetic playscapes' particularly interesting is the way the product becomes the entry point rather than the culmination of the experience.

Ascis has created a strong example of rich world building through its physical experience. Thresholds, sensory cues and spatial storytelling all elevate a temporary activation into something that feels considered, immersive and almost sacred.

“People don’t build relationships with brands because they’re exposed to them, they build relationships because they participated with them.”

— SPIRO, EXPERIENTIAL MARKETING IMPACT REPORT, 2026



XINU.

LAYERS OF BRAND DEPTH, FROM ANCIENT MYSTICISM

Luxe fragrance brand Xinu elevate fragrance to an elementally reverent experience through connection to South American ancient mythos. This deeply ritualistic presentation, builds connection to the narrative and mystique of ancient indigenous culture. By presenting product in this way shoppers feel like they are participating in the brands narrative, with the fragrances moving beyond the olfactory.

The brand describes itself as a brand that 'documents and pays homage to the visual, olfactory vastness and exoticism of the American Continent'. To achieve this, they tap into the esoteric nature of their origin, hyper local cultures and the mysterious ancient ancestral civilisations of the past.

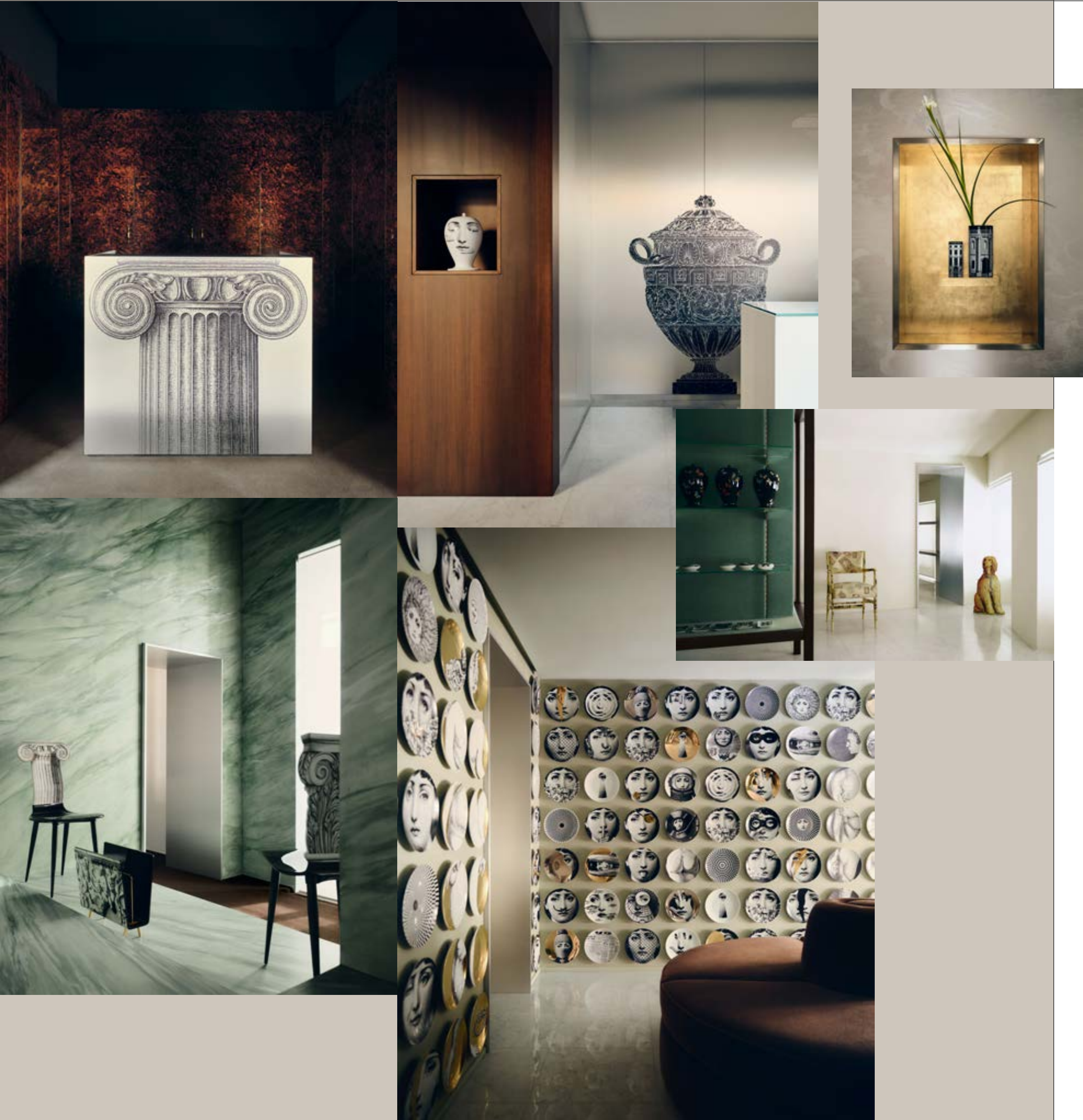
Their boutiques are coded with Mayan, and Latin American historic details, with the brand name Xinu hailing from the Otomi language, meaning nose.

In an interview with Dezeen the boutique was described as featuring 'a stack of black-cement blocks form[ing] a ziggurat in the centre — The colour and shape of this structure were influenced by the basaltic prisms of San Antonio el Mogote, a geological and archaeological site in the northwest of Oaxaca state'. This connection to hyper localised references is what makes the experience feel authentic.

“Light becomes precise and shadow becomes structure, defining depth, rhythm, and silence.”

— XINU, OAXACA BOUTIQUE LAUNCH 2026





FORNASETTI.

AN EVER EVOLVING BRAND UNIVERSE

Fornasetti has created something that feels less like a flagship store and more like a temple to its own mythology. Classical references, surrealist imagery and an ever-evolving archive come together to create a space reverent of ancient, theatrical and the slightly otherworldly.

It would simple to display the history of the brand; the store brings it back to life. Visitors are invited into a world shaped by recurring symbols, faces, architectural motifs and decorative codes, each one building on the last.

There is a ritualistic quality to the journey too. Fornasetti describes the experience as moving from a public dimension into something “more intimate and contemplative”, and the space reflects that shift. As you move through it, repetition creates familiarity, while small changes in form, scale and decoration keep the experience feeling alive.

The result feels less governed by traditional retail logic and more by Fornasetti’s own internal language; a strange, richly layered world that sits somewhere between archive, temple and imagined civilisation.

“The most radical thing you can do with a legacy is to trust it enough to let it evolve.”

— BARNABA FORNASETTI, 2026



SKIN1004.

TEMPLES TO RETAIL

SKIN1004 has created a flagship that feels less like a skincare store and more like an immersive natural landscape. Drawing on the brand's connection to untouched nature, the Soho space transforms a long, narrow footprint into an architectural journey where layered timber evokes the texture and scale of a carved canyon.

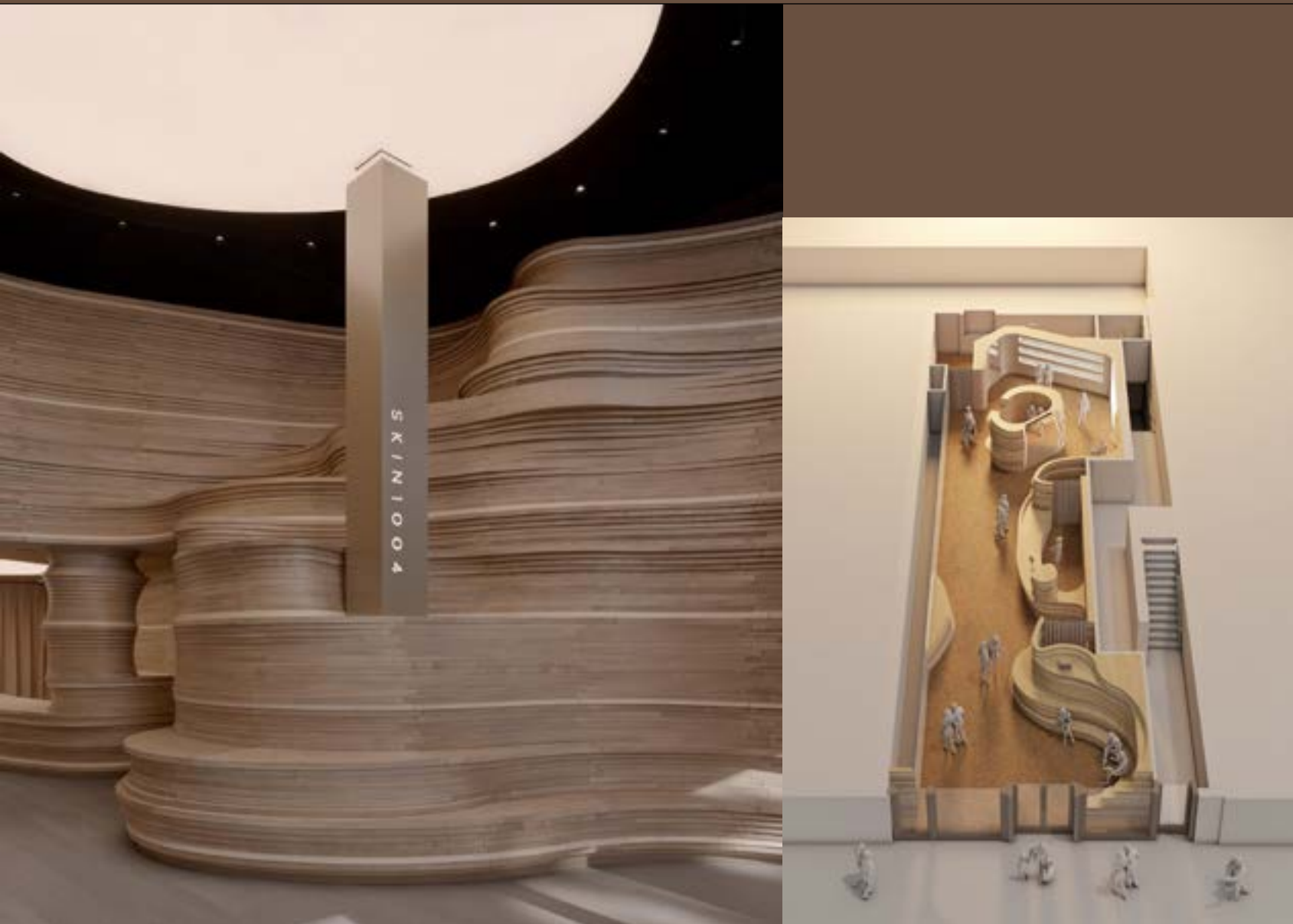
The space gives the brand's philosophy physical form, rather than relying on graphics or messaging. Undulating wooden structures become seating and display, allowing customers to move through the environment as if exploring a natural gorge. Every element reinforces the brand identity, creating something that can be experienced instead of simply being observed.

A strong sense of progression shapes the journey, balancing stand out moments with more intimate areas for product interaction and consultation. Compared to the Seoul flagship, the New York store feels more refined and curated, expressing the same narrative through a more sophisticated architectural language.

This has resulted in a retail destination that feels closer to a gallery than a traditional store, translating SKIN1004's vision of untouched natural into a distinctive and memorable world.

“Its central ambition is to create a setting in which visitors can breathe in and genuinely connect with the brand’s ethos.”

— LMTLS ARCHITECTURE, 2026



CHALLENGING LUXURY PRECONCEPTIONS

LUXURIFICATION OF THE MUNDANE

CHALLENGING LUXURY PRECONCEPTIONS

This trend flips luxury on its head; what if the mundanity is now luxurious?

As traditional markers of luxury reach saturation point in mass culture (see: the internet's fixation on the Hermès Birkin), consumers are growing desensitised to conventional luxury signifiers. So familiar have so many of us become with the imagery of these symbols that their inherent exclusivity is tarnished.

In response, we're seeing a regression to the most basic human needs, now reframed through a luxury lens — take Loewe's co-opting of the humble vegetable, the gnarly heirloom tomato chief among them, which has since kickstarted a trend for the mundane made covetable.

COMMERCIAL CONFECTIONERY.

CANDY MADE LUXURY

In this editorial photo project by Commercial Confectionery, cheerfully cheap sweet treats are reframed through a luxury lens, inviting the viewer to inspect, study and admire these unremarkable delectables.

The subjects are neon-wrapped Mexican dulcería sweets; everyday, disposable, and rarely noticed. But the treatment borrows entirely from luxury still life: clinical studio settings, restrained lighting, and precision props (one

sweet is even held in a steel clamp, framed like a watch movement under inspection). The clash between cheap, saturated colour and cold, clinical staging makes the ordinary suddenly feel worth studying.

The series has since expanded into a physical publication: a zine, poster and holographic postcards, drawing on the visual language of Mexican papelería (stationery shop) culture, further blurring the line between everyday retail ephemera and collectible object.

Composition, lighting and context alone can make the overlooked feel precious, suggesting that “luxury” is becoming less about materials or price, and more a perceptual lens that can be applied to *almost* anything.





GENTLE MONSTER.

'VEGGIEMON' TAKEOVERS

Gentle Monster's 2026 Veggie Collection has turned up in stores from LA to Seoul to Bangkok, and the premise is simple, yet whimsical: take the vegetable aisle and blow it up to hyperphysical proportions. Tomatoes, broccoli, eggplant, radish; all rendered as room-sized plush characters, planted across a fictional farm built upon the shop floor.

Vegetables are a ubiquitous foodstuff; but scale and personification work hard to make the meaning less like produce and more like a collectable character. A photo booth lets shoppers turn themselves into Veggiemon too, so the spectacle doesn't stay in the retail environment; it goes home with people as a memento and outwards into the social ether as aspirational luxury cachet.

The staging transcends the products, while harking back to them, with each of the 10 pairs of glasses in the campaign range representing a vegetable.



“What elevates it is scale and staging: proportion and personification turn produce into luxury icons.”

— ROSIE PRESTON-CARY,
SENIOR BRAND DESIGNER,
D4R





JO MALONE.

LEVERAGING NICHE CREATORS & THE VEGETABLE TREND

Jo Malone London is a brand built on restraint; heritage British fragrance, understated packaging, scent notes described in the language of English gardens. It therefore came as a surprise to see Jo Malone team up with Tiny Chef, the viral felt puppet who's spent his career on Instagram and, until his abrupt Nickelodeon cancellation last year, on children's (but we're fans too!) TV. The collaboration promotes the brand's new Veggies Collection: colognes built around butternut squash, carrot, and beetroot, styled with oversized, storybook-scale produce.

The pairing reads less is no stylistic accident, rather its more like a calculated play for relevance. Tiny Chef comes with a young, deeply online, fiercely loyal fanbase; the audience Jo Malone doesn't traditionally reach through candles and cologne. Vegetables meanwhile, as we've already deduced, are having a moment of their own. Borrowing both at once is a shortcut into culture that a traditional fragrance house couldn't manufacture on its own; the hope being that today's Tiny Chef fan is tomorrow's full-price customer.



“Tiny Chef was a natural collaborator for our Veggies Collection because his curiosity, craftsmanship and joyful approach to storytelling aligned so closely with the spirit of Jo Malone London.”

— JOE DANCEY,
GLOBAL BRAND PRESIDENT,
JO MALONE LONDON



MOVING OUT OF TRADITIONAL SHOPPING ENVIRONMENTS

BRANDS IN RESIDENCE.

MEETING SHOPPERS IN MORE INTIMATE SPACES

Brands in residence, take shopping to a new level, from product to shoppable lifestyles.

The very best experiences within the luxury sphere don't always happen in traditional DTC & wholesale environments. Instead, they are appearing in more intimate spaces that offer a more holistic way of shopping, selling whole lifestyles over more singular itemized purchases.

The expectations of HNWI's have driven demand for increasingly exclusive experiences and new ways to access luxury brand offerings. Desire for spaces where interests converge has given rise to experiences that feature; hospitality, culture, wellness, retail, art, community, and digital infrastructure.



R.H – THE GALLERY.

BRINGING RESTORATION HARDWARE'S LATEST OUTPOST TO LDN

Restoration Hardware (R.H) have launched their latest outpost in Mayfair, London, transforming the idea of a furniture store into an immersive destination. Situated in the restored Uxbridge house, an 18th century Palladian mansion, R.H creates 5 floors of furniture, interiors, architecture, hospitality and culture; selling a shoppable lifestyle rather than showcasing individual products.

Featuring a layered experience, visitors explore residentially styled collections within historic state rooms, a functioning wine bar and tea salon, a large restaurant, private lounges, landscaped terraces and indoor gardens. Even the location of the store is carefully considered, ensuring the brand is situated in Mayfair's art, fashion and hospitality neighbourhood, instead of traditional furniture districts.



For the establish elite, there is discretion, service, heritage and residential luxury. R.H behaves like a grand hotel or members club, where product remains central but experience drives belief and affinity through the R.H lens.



CLINIQUE LA PRAIRIE.

EXPLORING THE FUTURE OF LIVING WELL

Clinique La Prairie is a Swiss longevity focussed brand founded by Dr.Niehans, whose legacy has grown into a world renowned pioneer in medical longevity, preventative medicine and luxury wellness.

In the brands first foray into a residential product, they have launched 13 stand-alone homes which each provide direct access to the Clinique La Prairie health resort.

The direct access approach as a structural feature of CLP's residential living offer is an example of how nuance and access are some of the highest signifiers of wealth.

This brand logic has contributed hugely in the value of the AMAALA villas being priced into the highest tier of ultra-prime real estate globally.



Clinique La Prairie shows us that luxury is moving from something consumers visit, to something they inhabit. Branded residences create an opportunity to build longer term relationships that evolve over time.



N°001 MINAMI AOYAMA.

ASTON MARTIN TAKES UP RESIDENCE IN JAPAN

Aston Martin as an established maker of automotive excellence has branched out; seeking to elevate the name as a symbol of quality across the luxury sector.

This has resulted in the iconic British brand realising a luxurious private house in Tokyo's Omotesando neighbourhood. This luxury residence offers design and details, completely shaped by Aston Martin's vision as well as features dedicated for the car collector.

The brand chose Tokyo as its first residence location due to the cities iconic influences surrounding culture, heritage and style; all of which are a priority to the historic car maker.

This move into the wider luxury lifestyle is a signal, showing how diversification of product and service can future-proof a brand, giving it purpose beyond its origin. In the inherent unpredictability of the global climate, consumers seek comfort in luxury names they can trust.



'Inside, we've catered to the senses, using a holistic combination of elements and materials to create a calm and relaxing space for them to retreat.'

— Marek Reichman
Executive VP & CCO, Aston Martin.

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LUXURY EXPERIENCES



THE LUXURY EXPERIENCE TOOLKIT.

Luxury experience toolkit.



Friction that fuels engagement.

High street brands seek to smooth the retail experience so much so that shopper convenience takes over, reducing dwell times and empowering shoppers to complete their missions and then move on. True luxury is born of discovery and moments that cause shoppers to deliberately slow down, whilst still providing the services they expect.



Total immersion, shoppable reality.

Luxury experiences should surround the shopper, enveloping them in a shoppable reality, transporting them away from mundane distractions. Total immersion offers shoppers a sense of escapism, drawing focus to a narrative journey, a reason to believe. The opportunity is to transform stores into unforgettable experiential destinations, giving luxury shoppers a compelling reason to travel.



The exclusively esoteric cachet.

Whether its the types of influencers a brand uses, to the hand of the maker celebrated in its content sphere, exclusivity is still driving luxury experience. From luxury brands in APAC favouring the scholar over the socialite, to tailored luxury drawing parallels, through a love of human art signalling quality. What consumers value is shifting back to human authenticity, rewarding the curious.



Brand world to Brand mythos.

Yesterday, we talked about the power of the brand and how limited brand guideline documents had evolved into holistic brandworlds. Now, comes the next shift, elevating to brand mythos, an almost spiritual, lore for brands. A narrative so immersive shoppers have a reason to believe, a model where the ethos is felt, and deeply resonated with, leading to brand evangelism.



FAVOURITES FROM THE D4R STUDIO



VIEWS FROM THE STUDIO.

Our studio of multi-disciplinary creatives always stay close to codes of culture and design, in this chapter they give their opinion on the discourse of *the new luxury*.

TO MY SHIPS.

LIBERTY, LONDON



“Re-framing
everyday bodycare
into an *artfully*
luxurious moment.”

Molly Jarvis

RETAIL DESIGNER

Discovering the brand

I discovered To My Ships during a visit to Liberty London, drawn in by an ethereal retail presence that effortlessly eclipsed the surrounding brands.

Experiencing the brand in a retail setting is akin to reading a poem or a historical novella. The captivating visual stimuli-paired with the brand's intellect, high-efficacy ingredients, and evocative storytelling cards draw you directly into the To My Ships universe.

A lyrical destination for bodycare

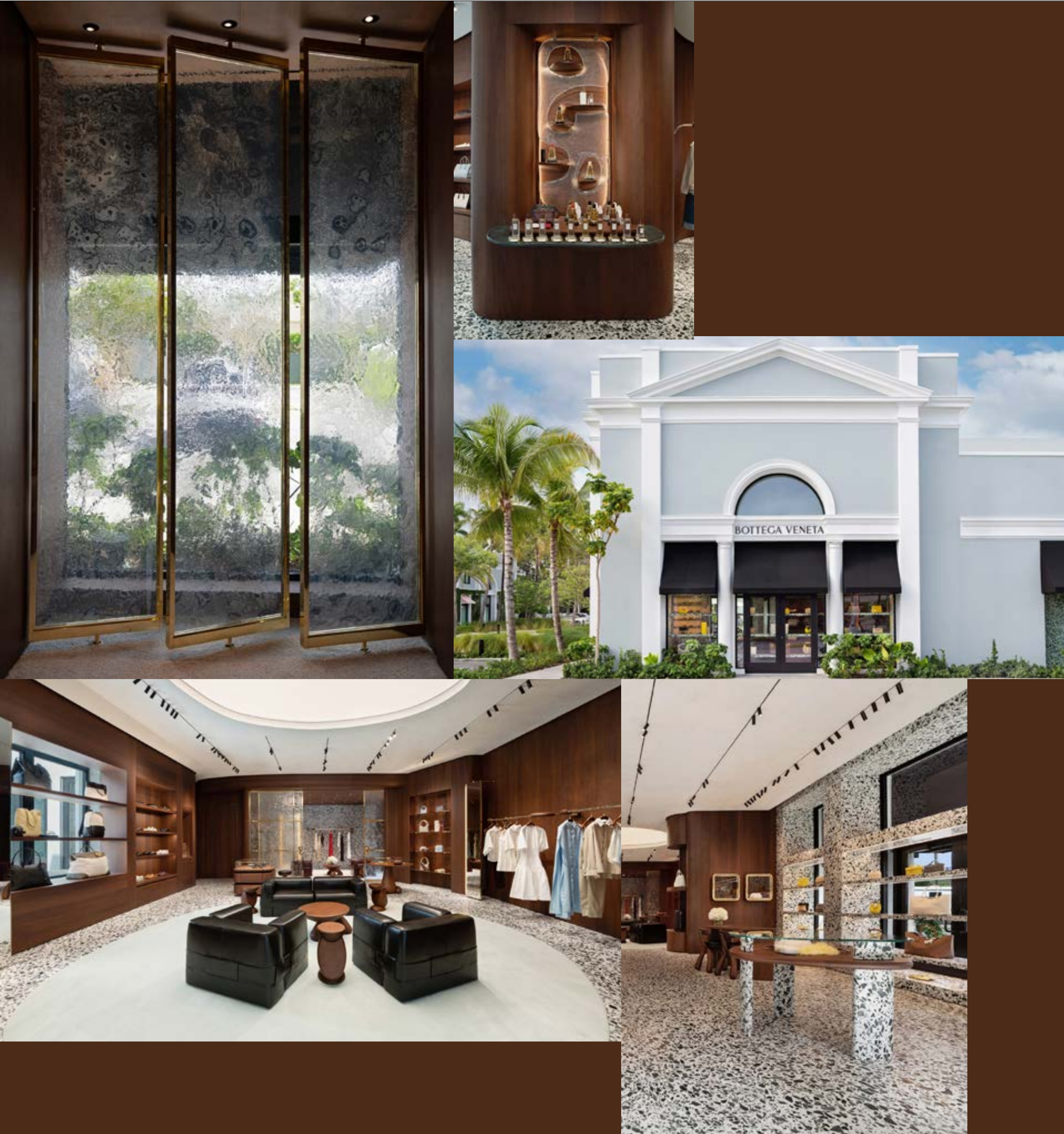
Founded by Daniel Bense in 2024 he initially sought out to elevate the intimate daily ritual of applying deodorant. But through thoughtful craftsmanship and inspiration drawn from the classics, the brand has catapulted into the desired luxury sector.

Interlacing beauty, function, and intelligence, each product transforms standard routines into meaningful rituals offering quiet intention in an increasingly demanding world. Products priced at an average of £79, To My Ships taps into a \$6.8 trillion global wellness market, where personal care is no longer just hygiene, but a vital investment in everyday well-being.

Architecturally ancient in style

Inspired by Homeric mythology, the brand embeds its product displays within subtractively carved, sculptural monoliths. Letting raw textures and unbridled light command the atmosphere which gives rise to a serene architectural silence. These historical backdrops tap into an enduring visual language of ancient opulence and grandeur, grounding visitors and cultivating an intuitive, subconscious trust.





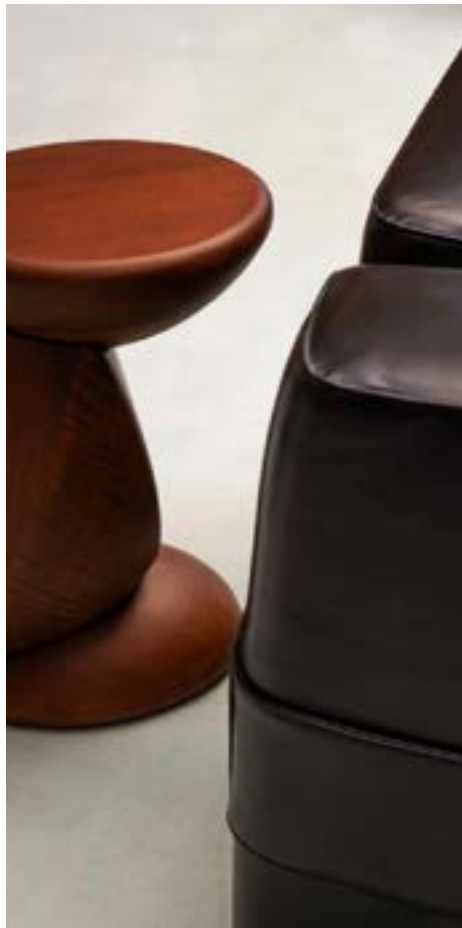
BOTTEGA VENETA.

PALM BEACH, FLORIDA, USA

Bottega Veneta's Palm Beach boutique demonstrates how luxury retail can communicate value through craftsmanship before product. The store draws on the brand's Italian heritage through thoughtful Murano glass paired with terrazzo flooring and architectural references to post-war Italy, creating an environment where materiality and craftsmanship take centre stage. Instead of competing for attention, the space reflects the house's signature restraint, allowing quality and detail to do the talking.

The store focusses on creating an atmosphere of quiet confidence. Every element reinforces the notion that true luxury is rooted in craft rather than overt displays of status.

This brings out a retail experience that feels closer to a curated residential interior than a traditional boutique, demonstrating how thoughtful design can elevate brand perception long before a purchase is made.



“For me, this is a powerful reminder that the most luxurious spaces don't shout for attention, they create a sense of luxury through *thoughtful design*.”

Katie Askew

SENIOR RETAIL DESIGNER

BERSHKA

FLAGSHIP STORE, VALENCIA

This store has such a calming feel. I love the soft colour palette, it reminds me of candy & ice cream, soft and fluffy. The layout creates an interesting journey around the store through each department. The store has a ‘Wow’ statement entrance with its slightly oversized checkout.

The whole theme throughout the store seems relaxing, fresh and somewhere you would like to spend time shopping. The store includes up to date technology including changing rooms with digital screens so you can share on social media and booth checkouts for a faster service.

Upon entering the store, shoppers are funnelled into a corridor featuring the brand’s latest collections in a setting which pairs sleek new interventions with a retained backdrop of classic moulded wall panels.

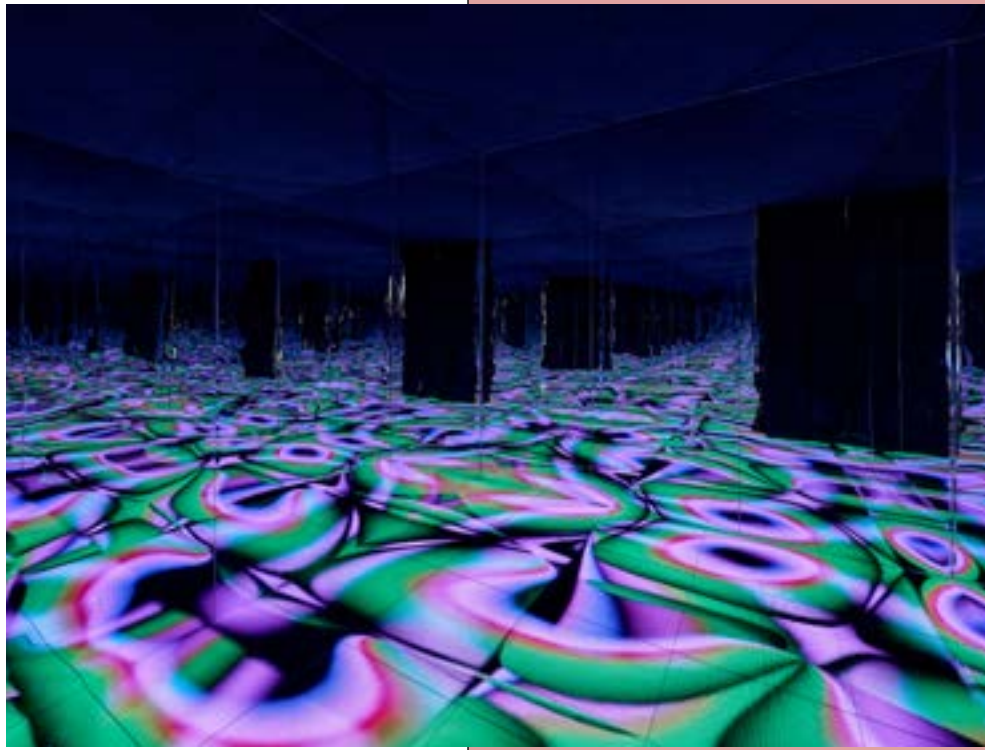
While the majority of display units line the walls, the core is fairly uncluttered and voluminous, allowing bold volumes to take centre stage, such as the all-pink cashier’s desk which reaches upwards, all the way to the mezzanine level.

Mind you, the store has been designed with versatility in mind, allowing different configurations when required. Also, in line with the sustainability standards of the design practice, the interior uses eco-friendly materials and energy-efficient solutions.

“The store has a ‘Wow’ statement entrance with its oversized checkout.”

Louisa Furely

SPATIAL DESIGN



WHAT IS LUXURY?

To my mind, it's not just the quality of materials or the specification of the fixings. It's more about the visual area given to creating a 'feel' or an ambiance around the products. It's about the space that surrounds the sale.

And luxury doesn't necessarily mean minimalism. It can be really ornate or even quite OTT!

Luxury retail environments are being reimagined as immersive, multi-sensory destinations where architecture, art, hospitality and retail converge. These spaces are designed not only to attract customers, but to hold their attention, to deepen their connection with the brand and to create moments that extend beyond the visit itself.



The aura of luxury.

By establishing the aura of a luxury retail environment, the stage is set to really engage the customer. There is a sense of belonging - a wealthy customer knows that they are being talked to on their own level - therefore the product display can be focussed on more top end products.

It's an opportunity to convey to the customer that 'yes, we get you - come in, relax, there's no pressure, take your time in understanding the quality we have on offer'.

Element of expectation.

The space given to creating the luxury environment of a retail establishment creates a feeling of trust in the customer as they know that this is a considered approach - they understand that they are not in a 'hard sell' environment.

There is now an expectation in the mind of the customer that they will now only see a quality of product that matches their own level of quality. The aspirational customer is drawn in with the right mind-set....'you know that I only want to see the best so that's all I expect to see'.

Association with quality.

Many luxury retail environments associatethemselves with the perception of luxury in other areas. A clothing brand may employ a theme leaning on the aspiration of travel. A perfume brand may use the subtlety and finesse of art to allude to the complexity of it's own products. Many luxury retail spaces are using influences drawn from travel, art, music and nature.



“Luxury retail environments are being *reimagined* as immersive, multi-sensory destinations.”

Chris Dyer

SENIOR CREATIVE ARTWORKER





HERMÈS

SAUT HERMÈS 2026

Saut Hermès 2026 is an equestrian event hosted by Hermès within the iconic glass roof of the Grand Palais in Paris. It brings together the worlds leading show jumpers and emerging riders under 25, celebrating the brand's deep-rooted connection to horsemanship while transforming sport into a cultural experience. Hermes uses the occasion to express its heritage and craftsmanship through a highly curated world built around the horse.

What makes the event compelling is its ability to blur the boundaries between competition and brand experience, both working together to create a spectacle consumers don't want to miss. Alongside elite sporting performances, visitors are invited into an immersive environment of elegance and creativity, reinforcing Hermès' position as a cultural tastemaker over simply a luxury retailer.

This created a powerful example of how luxury brands can create relevance and emotional connection through experiences that embody their history and purpose.

“I see horses as the roots of luxury symbols of status and heritage that continues to shape modern competition and refined craftsmanship.”

Rohsie Ede

MOTION GRAPHICS DESIGNER



PANPURI

MAKING SCENT INTO A TANGIBLE EXPERIENCE

As someone who loves to collect high end scents, Panpuri is on my radar as a must try brand and I haven't even had the pleasure of experiencing their scents yet. In fact the brand-world I find so convincing, and their stores so compelling in design, that I already have a reason to buy.

Each space features something new, giving the brand the power to show up anywhere with any colour, and completely own it. Taking a leaf out of the Aesop playbook the brand leans into luxury through creatively curated spaces with a clear ethos and design narrative.

Each store feels like a temple to the olfactory, and its sheer quality and curated beauty tells me all I need to know about the quality of their product. The single minded commitment to a localised design direction gives faith and credence to the brands authenticity.

Panpuri comes to life with such style and unique service offer that their concept feels distinct. The Panpuri flavour of originality dials up the feeling of luxury through its sheer attention to detail and how each store features a creatively constrained palette.

“A true example of how a brands reality represents its product originality and builds desire, even without experience.”

Josh Knox

CREATIVE DIRECTOR



113 SPRING

SOHO, NEW YORK CITY

“Reimagining the store as an *evolving space* rather than somewhere purely focused on selling.”

Georgia Parris

SPATIAL DESIGNER

113 Spring is a concept-led retail and community space in Soho, designed by Snøhetta as an evolving platform for innovation and discovery. The space operates as a flexible environment where retail, workshops, consultation and culture exist side by side.

Built around rotating themes and adaptable interventions, it is designed to continuously evolve, creating reasons for visitors to return and engage in new ways.

What makes 113 Spring particularly compelling is its shift away from transaction driven retail towards participation and transformation. Modular displays and immersive digital content work together to create a space focused on engagement and community over consumption. This allows for a highly contemporary model of retail, where value is created through relevance and ongoing interaction.



WOLVES OF TOKYO

KENSINGTON OLYMPIA, LONDON

If there is one thing luxury brands are finally beginning to understand, it's that customers are no longer impressed by obvious displays of wealth. In an age where almost anything can be purchased online, the real value lies in creating an experience that feels distinctive, memorable and impossible to replicate elsewhere. London's new Wolves of Tokyo restaurant captures this shift perfectly.

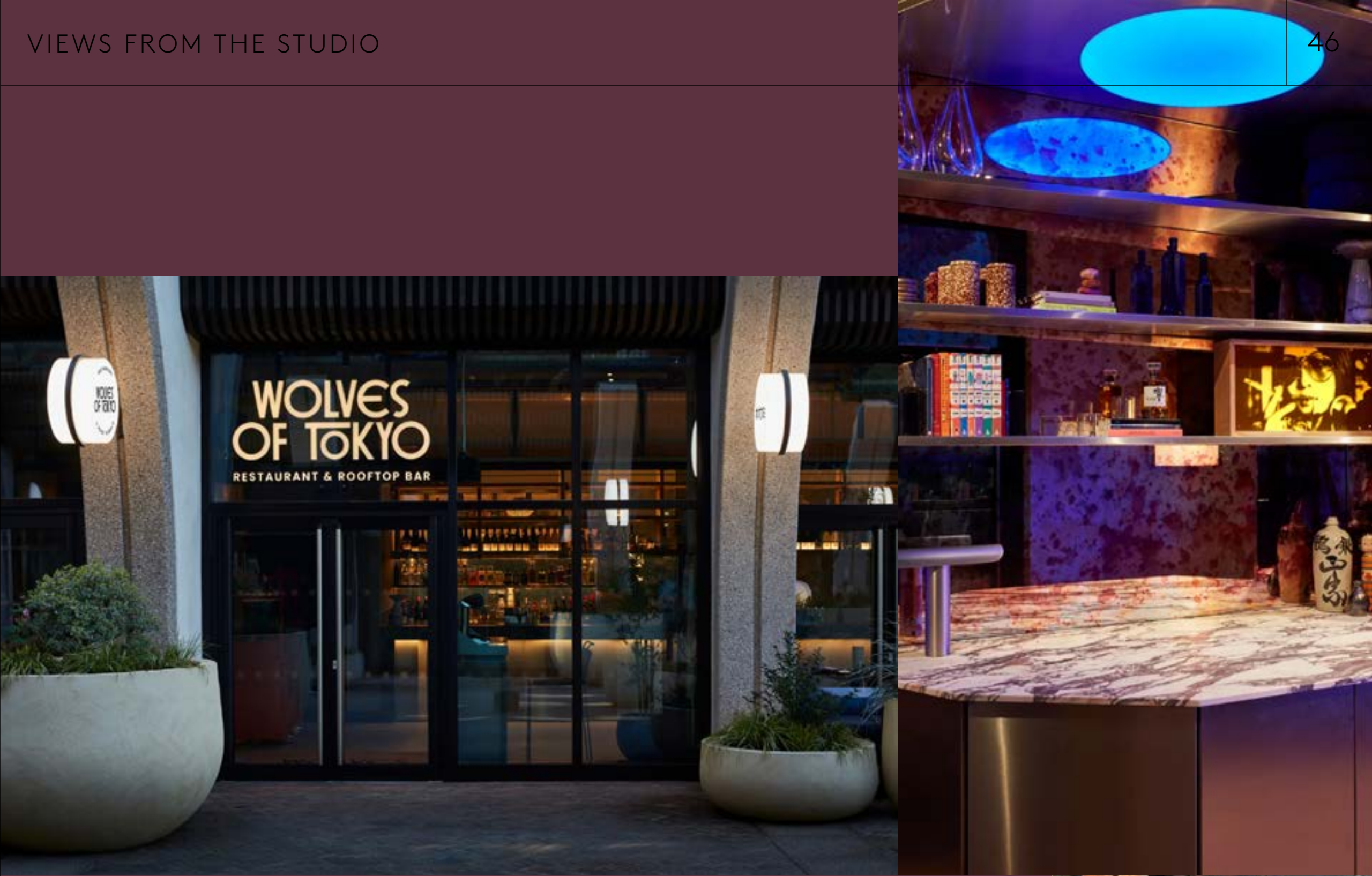
What makes the project particularly compelling is its refusal to lean on predictable luxury tropes. Rather than relying on extravagant materials, oversized logos or familiar Japanese visual clichés, the designers have built an immersive world shaped by atmosphere and storytelling. The moody Japan-noir concept runs through every aspect of the experience, creating a sense of intrigue that begins long before the food arrives.

In my view, the restaurant's greatest success is their commitment to consistency. It often feels like branding, interiors and customer experience are developed in isolation, resulting in spaces that feel disconnected, at Wolves of Tokyo, every touchpoint appears to work together. From the menus and signage to the furniture and even the bathrooms, each element contributes to a single narrative. The result is a space that feels considered instead of just decorated.

This is exactly where luxury retail and hospitality design is heading. Today's consumers are looking for emotional engagement over status symbols, they want environments that transport them somewhere different and create stories worth sharing. Exclusivity is increasingly defined by how a space makes people feel, not by how much money has been spent on it.

What Wolves of Tokyo demonstrates is that the most effective premium experiences are often built through dozens of subtle decisions rather than one dramatic statement. Carefully curated details, controlled palettes and hidden discoveries can be far more powerful than overt attempts to signal luxury. The restaurant feels less like a venue and more like a destination, which is arguably the highest compliment any hospitality brand can receive.

The lesson here is that luxury today is about immersion. Brands that can create coherent worlds and meaningful experiences will continue to stand out, while those relying solely on traditional markers of prestige risk feeling increasingly outdated. Wolves of Tokyo isn't just an interesting restaurant design project, it's a strong example of where experience-led luxury is heading next.

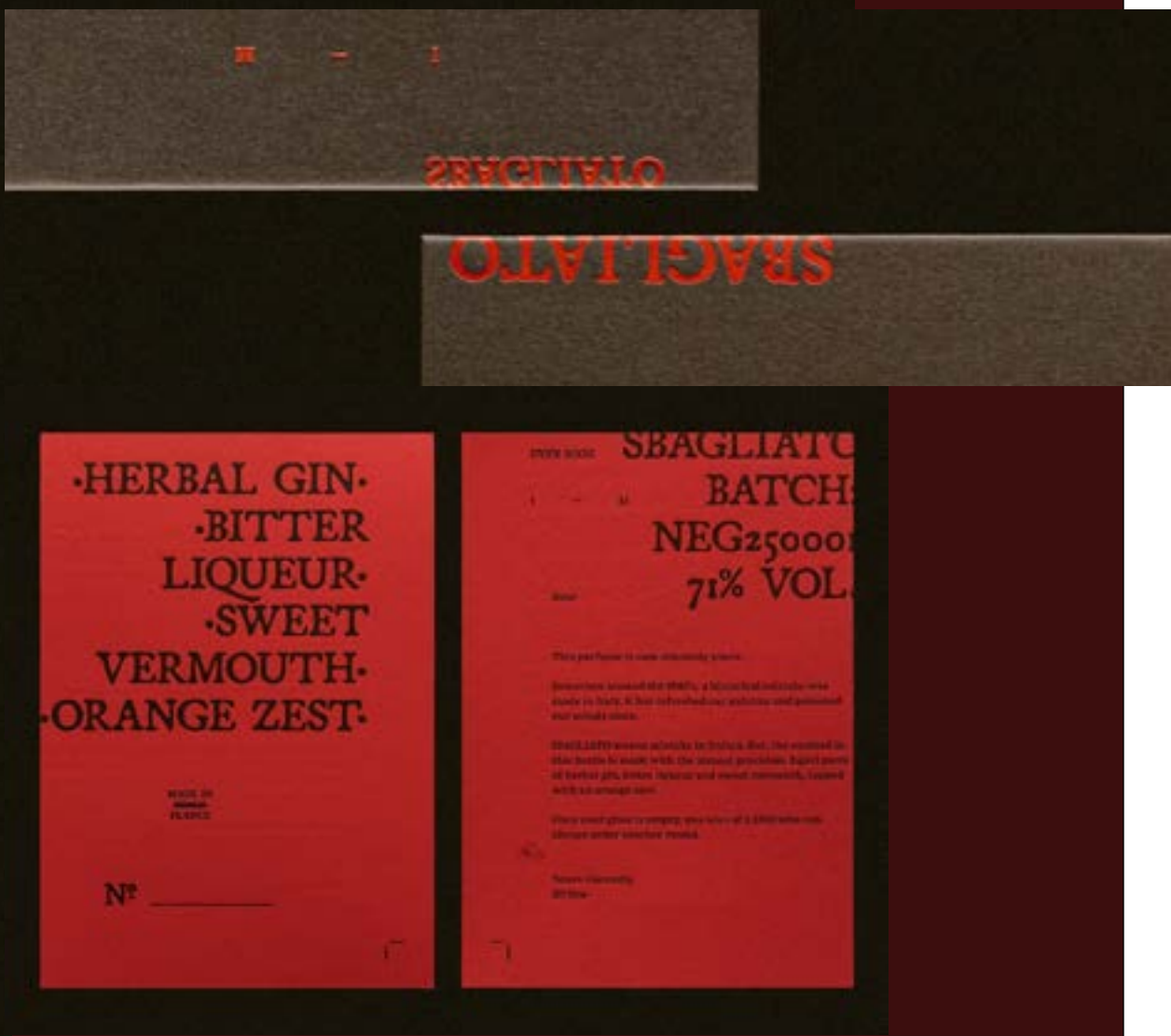


“I love how they have mastered the *destination*, instead of just the venue.”

Lizzie Williams

JUNIOR GRAPHIC DESIGNER





OVER SOON

PERFUME HOUSE

Over Soon, a perfume house from the studio N° One, releases each fragrance as a single numbered edition of 1,000 bottles. When the last is sold, there is no reissue and no sequel. Buyers become part of a closed group of 1,000, the only people who will ever be able to reorder that scent. Its exclusivity; by design.

Its intrinsic scarcity led to a distinctive design decision, with every perfume getting its own world, with its own identity, bottle, packaging and even a logo in a different typeface. Three shared rules keep the range coherent: brown packaging, a recurring signifier and a "0001 to 1,000" edition mark on every box. The results are concept-led. Grinder's wordmark splits into mirrored fragments, echoing ingredients that can all be ground. Sbagliato, a Negroni in perfume form, celebrates the cocktail's status as a "mistake" with a vivid red pack and a "Made in Italy" line struck through to read "Made in France". Forever Bouquet's lettering falls into the shape of a flower, reflecting a dark, elegant nocturnal floral.

The studio worked from a 12-point manifesto written at the outset, including the rule "Everything is a canvas, paint on it", which is why even the ingredients list is designed. The materials reinforce the handmade feel: foil-blocked board, deckle-edged paper with coffee-ring stains, glassine envelopes and embossed boxes.

Photography deliberately ignores mass market convention. Bottles are half-hidden and shot on warm, grainy medium-format analogue film, so the product stays enigmatic until you hold it. Each order arrives with a letter from N° One opening "This perfume is now sincerely yours", so the language of gatekeeping continues after purchase.

Over Soon shows that exclusivity is most convincing when it shapes the whole experience rather than sitting on top of it. Limited supply, distinct brand worlds, tactile craft and deliberate ambiguity all reinforce one message: not everyone will get one. The brand name says the same thing, since these perfumes will all be over soon.

“My favourite thing about *Over Soon* is that they treat *aspirational design* and *true exclusivity* as a singular narrative.”

Rosie Preston-Cary
SENIOR BRAND DESIGNER



DESIGNARETAIL • DESIGNARETAIL

THE NEW LUXURY



CONCLUSION.



In conclusion, *'The New Luxury.'*

This report offers a snapshot into the direction of travel for luxury. Across the board, luxury is becoming more than material possessions. Status is transcending exclusivity, and value is ever more intangible than ever.

Although luxury is moving into a new phase of discovery for consumers, we're seeing a web of anchor points supporting its growth. From heritage and provenance, to knowledge and creative cachet; luxury is moving towards a more meaningful sense of richness, not always centred around monetary net worth or down to an individual's income.

As traditional milestones become harder to reach, what luxury means is becoming highly personal to both individuals and brands. As we navigate this 'New Luxury', we look forward to guiding and supporting brands to stay relevant and keep ahead of the curve, with experiences that drive curiosity, and brand love.

Need help
unlocking
the *power*
of luxury
experience?

Let's talk.

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