



# Re Australian Luxury rframe





Australian  
luxury is  
evolving and  
expanding.

# Australia's diverse luxury consumers are reshaping the category to meet their varied needs and aspirations



## The Great Wealth Transfer

**\$3.5tr** will be inherited by Australians over the next 20 years; termed as the 'Great Wealth Transfer', where assets shift from Boomers to Millennials & Gen Z

—Bain & Co



## Changing Consumer Needs

**78% of global Gen Z consumers** want to be able to define their identity instead of being labelled by society.

—Global Networks 2019



## Unique and high octane experiences

High-net-worth individuals are increasingly chasing unique, adrenaline-fueled experiences beyond traditional luxuries. From base-jumping to extreme climbing, to space tourism, they're seeking thrills that push the limits.



## Health is the new wealth

The market for longevity describes goods and services aimed to help people age better. The wellness market is expected to reach **2.3 trillion by 2030.**



From this..



..to this..

# This is expanding the meaning of Australian luxury

The concept of luxury in Australia is evolving and expanding, from traditional associations with wealth, power, and prestige to include broader and more inclusive interpretations. No longer just about social status, it's embracing diversity and accessibility, challenging the conventional luxury narrative of hierarchy and superiority.



Hierarchically product ranges with increasing performance, quality, uniqueness, and price.



Services are based on a master-servant dynamic where the relationship is one-way, professional



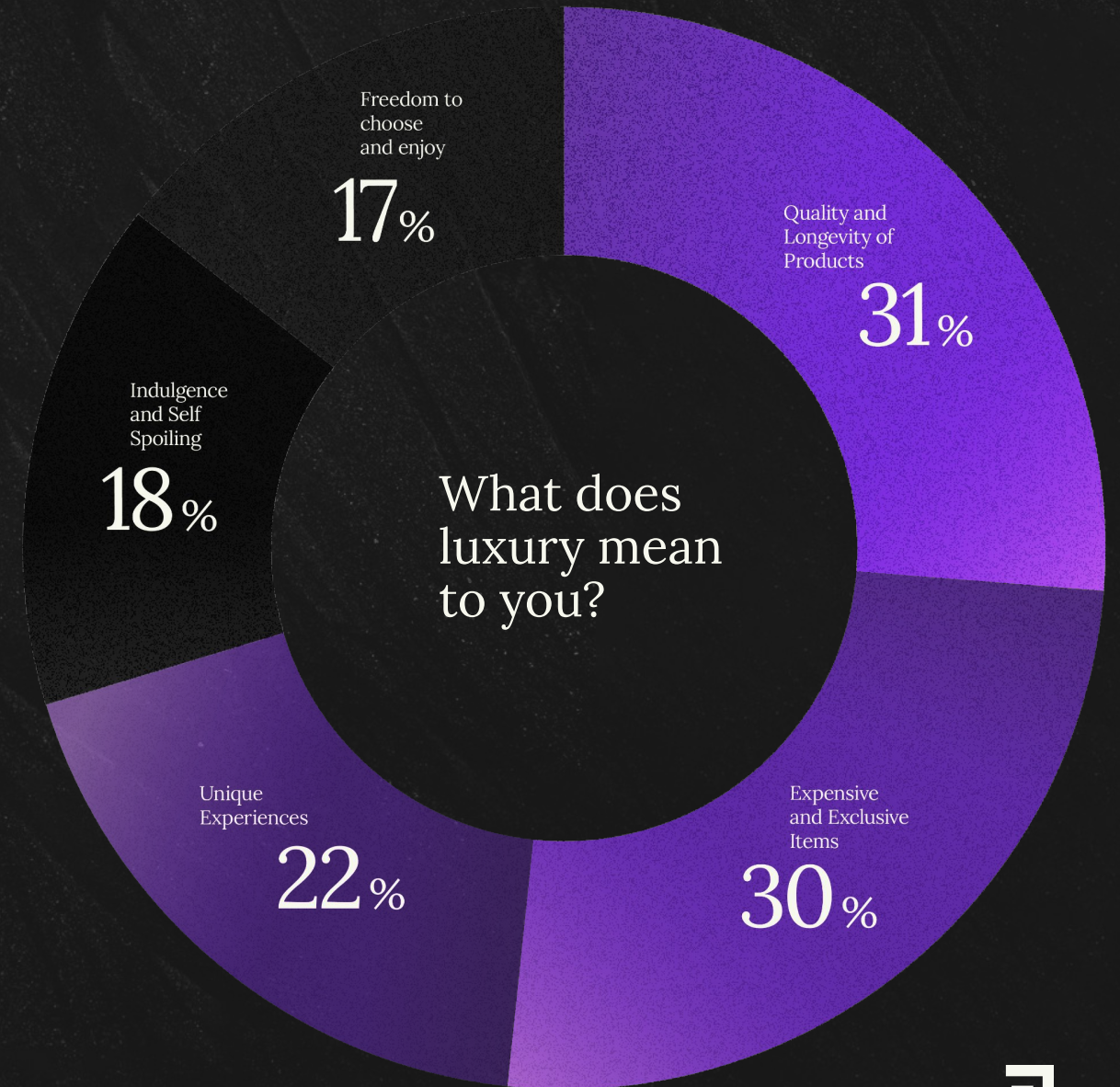
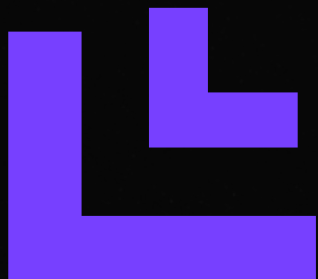
The experience is designed to distinguish the luxury consumer from 'the mass'



Whilst this traditional meaning of luxury remains, its expansion paves the way for new expressions of luxury to emerge in the Australian context.

# Today, the Australian luxury landscape is a blend of the traditional and emerging

This reflects the diversity of Australian luxury consumers and their nuanced understanding of luxury. Where the focus is shifting from exclusivity and expense to include aspects like quality, uniqueness, and the freedom of individual choice.





## Categories that Most Represent Luxury to Australians



30%  
Experiences



24%  
Automotive



20%  
Hospitality



17%  
Accessories



10%  
Fashion

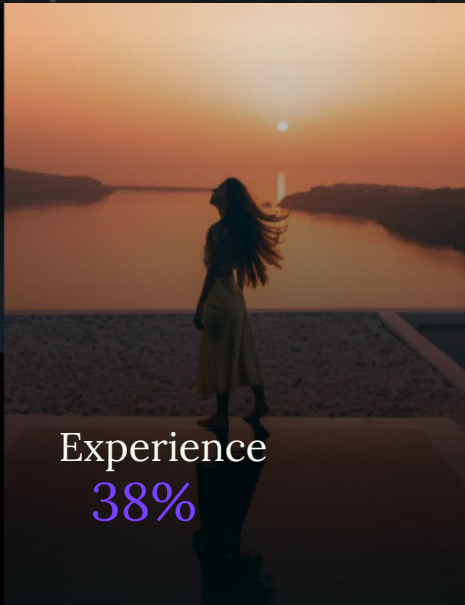
Where consumers see  
**experiences** are more  
luxurious than products

Immersive and memorable experiences now hold a greater allure than traditional luxury goods.

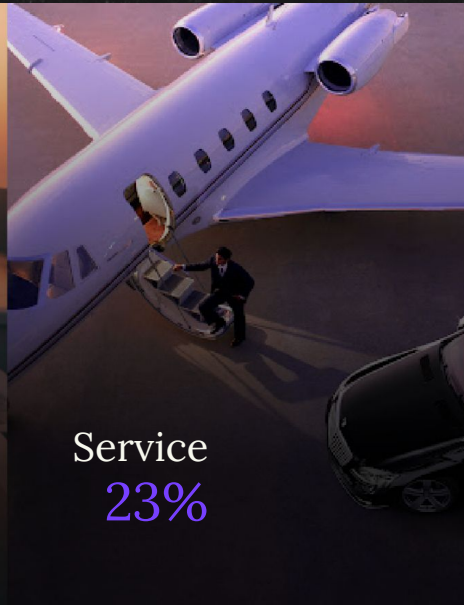
Australian luxury consumers emphasise experiences and increasingly service, as pivotal elements alongside product.



Product  
39%



Experience  
38%



Service  
23%

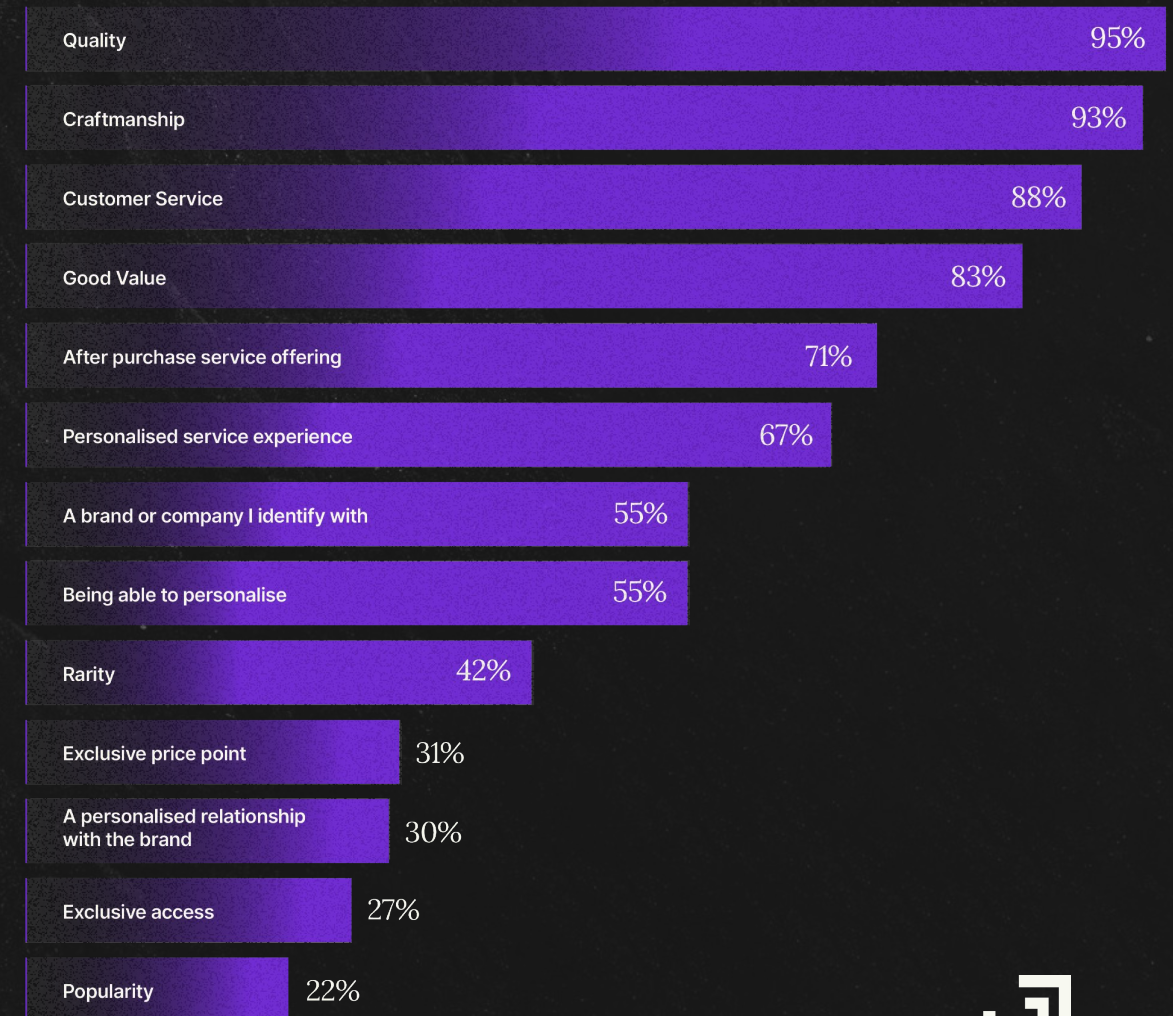
# Craftsmanship, quality and value are more important than exclusivity and price

While exclusivity has long been a hallmark of luxury, Australian consumers now prioritise craftsmanship, quality and value as drivers of purchase.

These more intrinsic motivations drive purchase decisions over and above rarity or popularity. This preference reflects a nuanced shift from overt markers of luxury towards more understated, quality-driven indicators.



## Purchase Drivers



# Brands that are delivering to these diverse aspirations, are experiencing high growth



3.7 bn

Aesop was sold for 3.7 billion to L'oreal, making it one of the biggest acquisitions of an Australian Luxury Business

—*Sydney Morning Herald*

€500

Jacquemus, the French luxury brand famous for his playful approach to luxury doubled its sales between 2021-22 and is expected to continue this growth rate to reach €500m by 2025. There are 335k monthly searches for 'Jacquemus bag' (comparative to 'only' 159k for Hermes Birkin)

—*StyleSage, Google Data*

1.76bn

Zimmerman's transaction value as the majority of the Australian brand was sold to a private equity firm.

—*AFR*

+25%

Despite economic turndowns, Hermès has experienced increased revenues in 2023, up 25% in the first 6m compared to 2022.

—*Hypebeast*

1bn views

Pharell Williams Louis Vuitton menswear fashion-show at Pont-Neuf in Paris has been the most viewed fashion-shows of all times.

—*Business of Fashion*





# Australian luxury is characterised by its diversity.

It's about more than simply what is owned, but instead how it aligns to individual values and aspirations.

Recognising this intricate landscape, brands must tailor their strategies to build market relevance and resonate with Australian luxury consumers.



# There are 10 distinct expressions of Australian luxury that brands can harness to build relevance.

These codes are evident across and within categories and speak to distinct aspirations and desires



## ARTISTIC SELF-EXPRESSION

The aspiration for uninhibited self-expression and creativity



## EMPOWERED INDEPENDENCE

The aspiration for intrinsic empowerment



## RELAXED EXPLORATION

The aspiration for time and relaxed exploration



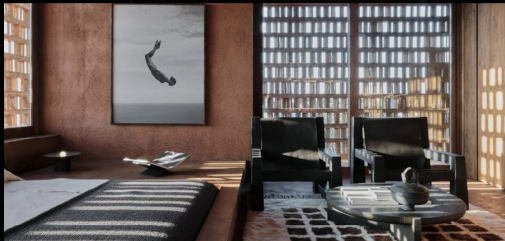
## VIBRANT VITALITY

The aspiration for vibrancy, youthfulness & joy



## SHARED CELEBRATION

The aspiration for connection and shared celebration



## HERITAGE REIMAGINED

The aspiration for the enduring, authentic and natural



## MAXIMISED POTENTIAL

The aspiration for personal growth and maximised potential



## POWERFUL PRESTIGE

The aspiration for achievement, mastery and success



## INDULGENT INTIMACY

The aspiration for intimacy and sensory pleasure



## DECADENT DISPLAY

The aspiration for status, indulgence and decadence

These expressions can be understood by two axis reflecting differing consumer aspirations

**MORE PROGRESSIVE**

Expressions are more innovative, individual and experiential

**EXTRINSIC LUXURY**

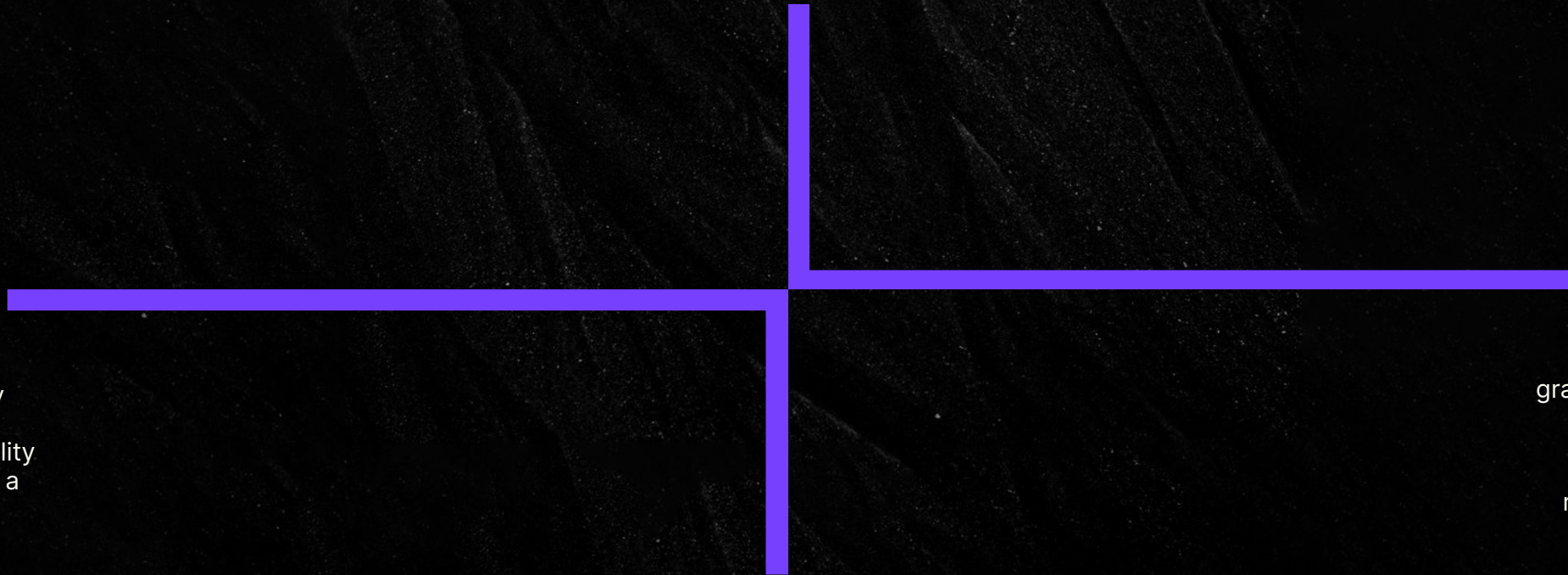
More outward display characterised by its recognition and visibility to others, serving as a means of social differentiation.

**INTRINSIC LUXURY**

More about internal gratification, enjoyment, and the personal experience of luxury, independent of its recognition by others.

**MORE TRADITIONAL**

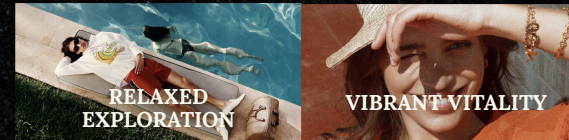
Expressions are more classic, enduring and opulent.



# How the expressions map

## MORE PROGRESSIVE

Expressions are more innovative, individual and experiential



## EXTRINSIC LUXURY

More outward display characterised by its recognition and visibility to others, serving as a means of social differentiation.



## INTRINSIC LUXURY

More about internal gratification, enjoyment, and the personal experience of luxury, independent of its recognition by others.

## MORE TRADITIONAL

Expressions are more classic, enduring and opulent.

# The codes are manifestations of the 4 distinct luxury aspirations

**Australian CALD luxury audiences** are more attracted to codes that are more **traditional** and **extrinsic**.



This group tend to be more attracted to Powerful Prestige & Decadent Display (ix267), expressions that visibly demonstrate **achievement, power and prestige**, reflecting a desired personal image

**Non-CALD Australians** are more attracted to **intrinsic** and **progressive** luxury codes



This group are more attracted to Vibrant Vitality and Shared Celebration, codes that emphasise **shared experiences, youthfulness and wellbeing**

**Gen Z luxury consumers** are more attracted to **progressive** luxury codes



This group tend to be more attracted to Artistic Self Expression (ix430) and Vibrant Vitality (ix290), expressions that emphasise individual **wellbeing and enable self expression**

# There is one distinctly Australian expression of luxury that has broad appeal for all

Despite their diverse aspirations, all luxury consumers are united in their love of Relaxed Exploration. This embodies Australia at its most aspirational- a blissful fusion of freedom and comfort amidst the beauty of nature. This expression celebrates the essence of laid-back yet adventurous Australian spirit, resonating deeply across the spectrum of luxury consumers.

44%

Of Australian luxury consumers rate Relaxed Exploration as their favourite expression of luxury

76%

Of Australian luxury consumers find Relaxed Exploration appealing

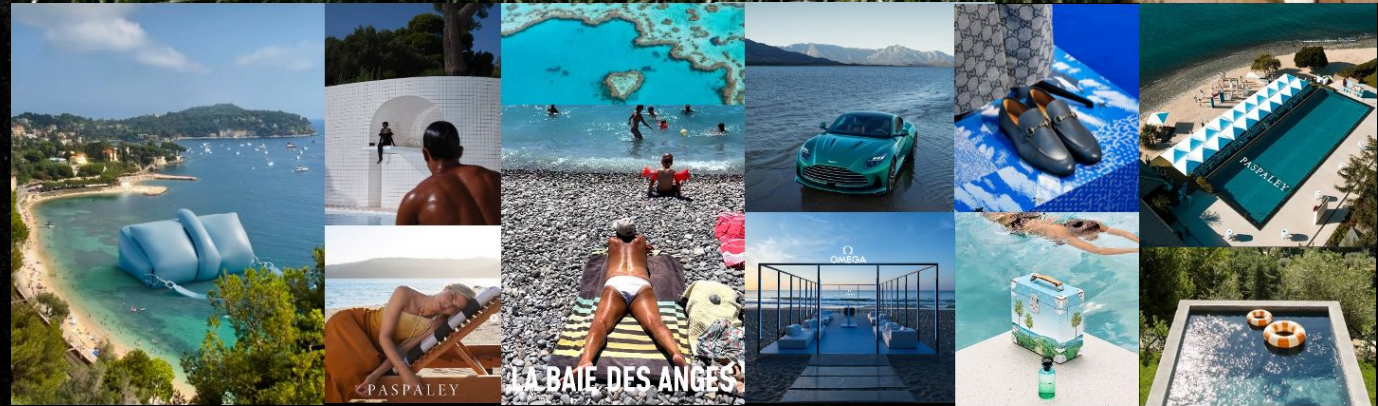
“

In Australia, people don't care what others think. They care about themselves...they enjoy their me-time...'

— Female, Luxury Consumer



## Relaxed Exploration





# This is the essence of Australian luxury

A laid-back yet aspirational  
approach to luxury

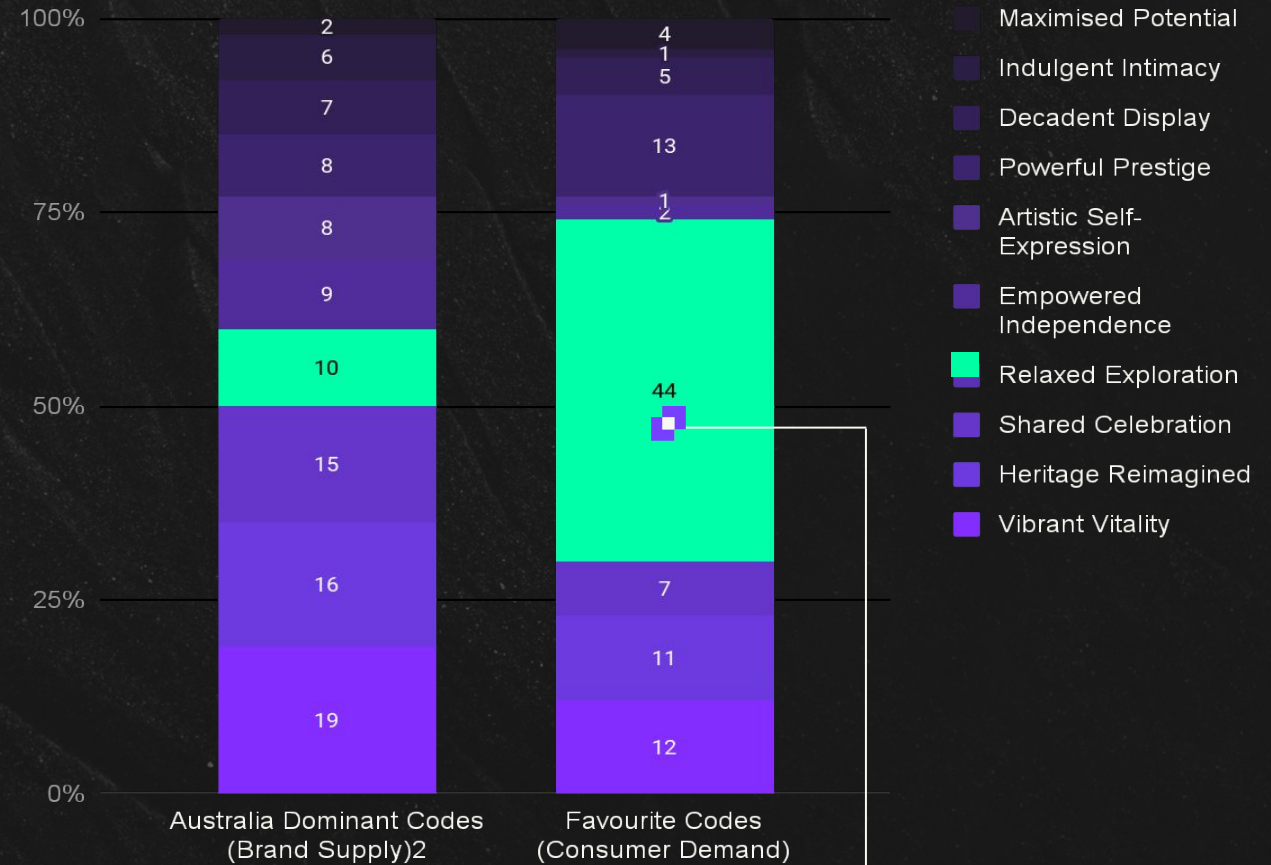
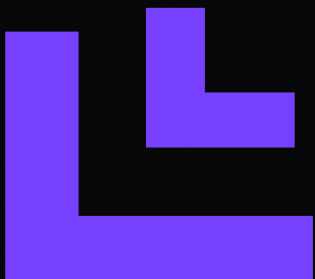
It offers moments to pause, relax and  
escape.

Deeply immersed in the beauty of nature,  
but offers time to focus on oneself

Laid-back luxury, adventure in comfort  
Its Australian life at its most aspirational.

# Brands can harness the power of this expression to close the gap on local demand.

There is big opportunity to build total market relevance, and close the gap between current brand supply and consumer demand, by tailoring to local preferences for Relaxed Exploration. Comparing the most dominant codes in Australia (supply) with the most attractive codes among Australians (demand) reveals a missed opportunity for luxury brands.



By harnessing the power of the Australian's favourite luxury code, brands can better appeal to the aspirations of all consumers.



“My colleagues in China would never see the value in booking themselves a suite, as they feel the room is for sleep only [that no one can see] However, my Australian colleagues are happy to book themselves a suite and enjoy it for themselves”

—Australian Female Luxury Consumer, Chinese Cultural Background

“Luxury for me is an internal thing, it’s not about signalling it to others. It’s the things that gives me the capability to operate in the world. It’s about how I feel about myself, and about being authentically myself and not swayed by everything on the outside”

—Australian Male Luxury Consumer, Australian

# Localising effectively also requires embracing more intrinsic luxury values

75%

Of Australian luxury consumers’ favourite expressions of luxury are more intrinsic expressions

## How to do this

- See luxury as a form of personal self-investment
- Emphasise intrinsic values, quality, craftsmanship and individual service
- Focus on the individual experience and enjoyment

# Delivering more personal and self directed luxury experiences

## How to do this

- Recognise luxury as an intimate, self-curated journey
- Cater to the individual's desire for autonomy in selection and customisation, ensuring a deeply personal connection to luxury items.
- Emphasise personal choice in both products and experiences, to enhance the personal significance of these moments.

Australians see luxury as deeply personal, and are self-directed in their engagement with the category.

Shop alone



Shop with others

Luxury is personal



Luxury is a way to express myself

Brands can further enhance appeal by targeting key purchase drivers specific to their category



## Reassure on longevity

**Categories:** Auto (*ix130*) and accessories (*ix114*)

The desire for **durability** and **value retention** in such high-ticket categories, makes aftercare services a crucial factor in the purchase decision. This not only provides practical benefits but also reinforces the brand's commitment and deepens trust and loyalty.



## Tailor to tastes

**Categories:** Experiences (*ix130*) and hospitality (*ix112*)

**Personalisation** stands as a key differentiator in experiential categories, turning each interaction into a bespoke encounter. Personalisation is not just a service; it should be a celebration of the individual's unique identity, delivering a more memorable encounter.



## Enhance exclusivity

**Categories:** Accessories (*ix146*) and experiences (*ix1133*)

**Rarity** serves as a significant purchase driver, elevating the allure and value of each offering, from limited edition, unique designs to once in a lifetime events and experiences. This scarcity not only enhances the desirability but also imbues the products and experiences with a prestige that cannot be replicated.



## Share values & ethos

**Categories:** Auto (*ix118*) and accessories (*ix129*), fashion (*ix113*)

**Brand ethos, values and narrative** add value to products that offer a visible display of personal taste. In these categories luxury brands act as a direct reflection of a consumer's identity, making the emotional connection and alignment with the brand's image a significant factor in the purchasing decision.

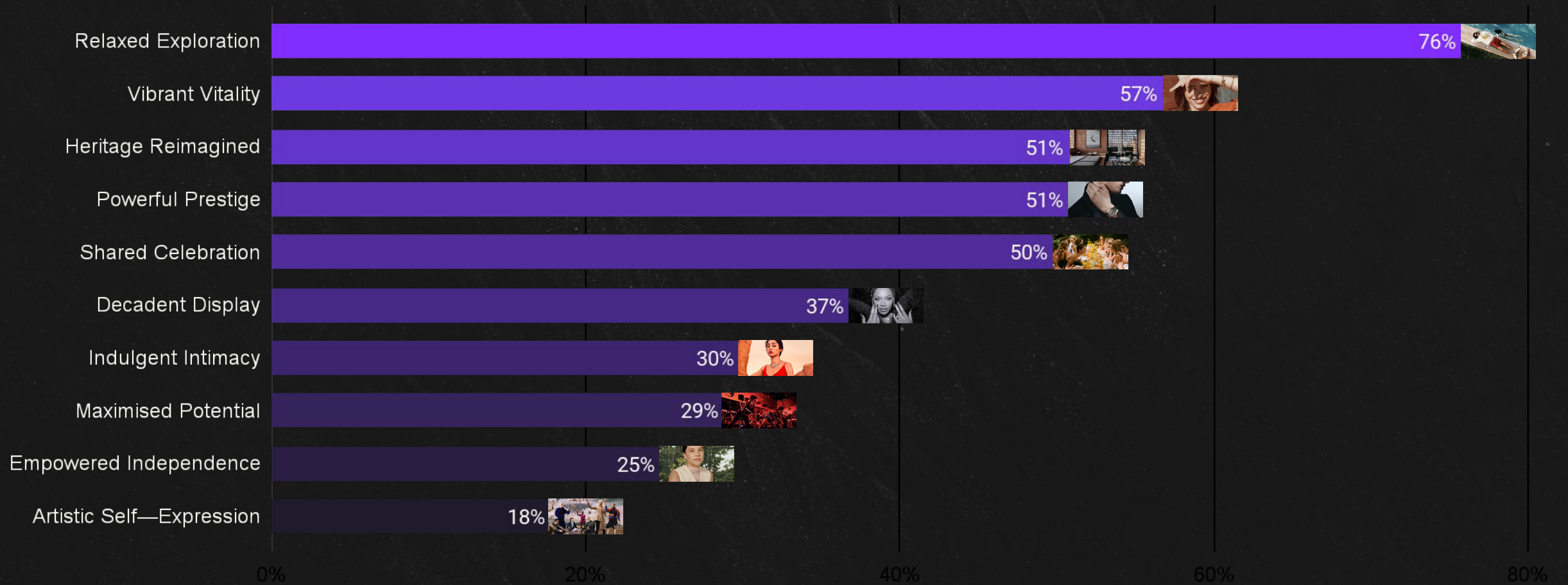
# The Australian



# Luxury Codes

A playbook for  
connecting with Aussie  
luxury consumers

# Appeal of codes with Australian luxury consumers



# A reminder of how the codes map

## MORE PROGRESSIVE

Expressions are more innovative, individual and experiential



## EXTRINSIC LUXURY

More outward display characterised by its recognition and visibility to others, serving as a means of social differentiation.



## MORE TRADITIONAL

Expressions are more classic, enduring and opulent.



## INTRINSIC LUXURY

More about internal gratification, enjoyment, and the personal experience of luxury, independent of its recognition by others.

The  
Luxury  
Code of

Relaxed

Exploration without compromising  
on comfort and relaxation

Exploration

## About

Relaxed Exploration is the luxury code that delivers people an emotional sense of resetting and recharging. It also caters to the need for 'safe exploration', a desire to explore without compromising on comfort.

## What's Rare

A feeling of relaxation, calm and the ability to focus on oneself

## What's Aspirational

A moment of pause and escape from the stress of everyday life

## Why it's powerful

Enables consumers to safely relinquish control of the lives and explore the unknown

## Attributes

- 

Relaxation
- 

Indulgence
- 

Comfort
- 

Exploration

## Key Categories & Brands

Travel, Hospitality, Real Estate

PASPALLEY

LUCY FOLK

CHRISTIE'S  
INTERNATIONAL REAL ESTATE

LUXURY ESCAPES

la prairie  
SWITZERLAND

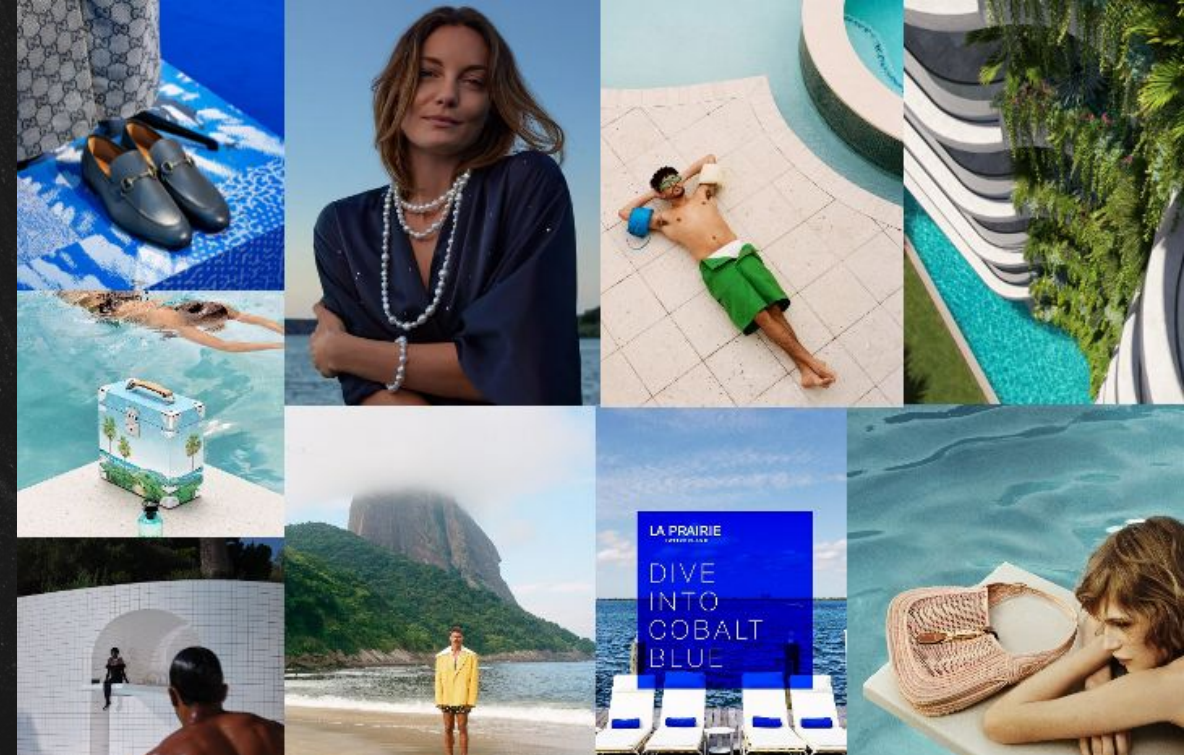
JACQUEMUS

Q  
QUINTESSENTIALLY

KOLLOSCHÉ



## How it looks, sounds & feels



## Looks like

- Explicit associations to the sea, water, ocean
- Lavish villas and sculpted swimming pools meet the natural world
- Emphasise stillness with people sitting, lying horizontal, blending in with their surroundings

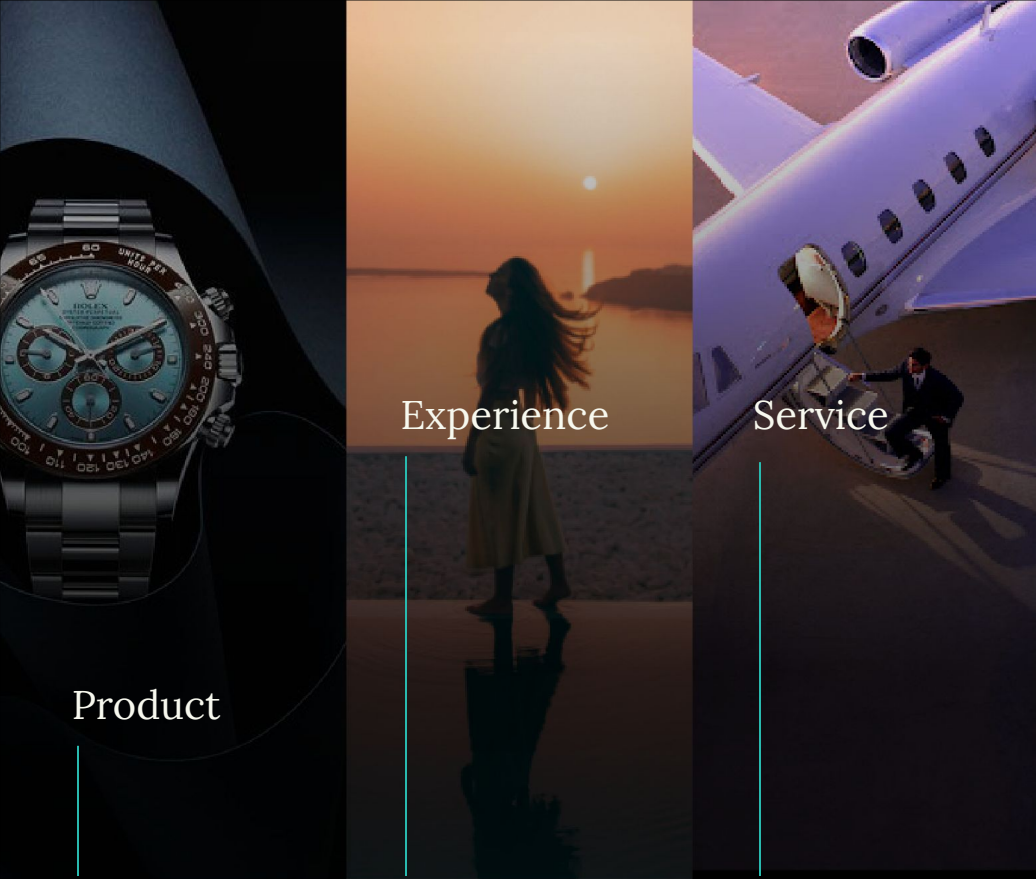
## Sounds like

- Focuses on being relaxed, in-the-moment -, 'refresh, replenish, relax'
- Reassuring privacy: 'private island', 'only a few guests', 'seclusion'
- Promising Discovery: 'explore the world of Aman'

## Feels like

- Peace, calm and unwinding
- Away from the everyday
- Jet-Setter but more discreet





Product

Experience

Service

# Aussie imperatives for luxury brands across marketing levers

## PRODUCT

**Emphasise relaxation**

**Focus on the natural influence on product especially from the ocean and water**

"Pearls inspired by nature", "Born from the earth, formed in the ocean", "Island essence"

## SERVICE

**Enable safe exploration**

**Make exploration comfortable and risk-free**

The butler service at Intercontinental at Hayman Island offers a private sunset picnic only reached by helicopter

## EXPERIENCE

**Transport people away**

**Transport people away from the mundane**

The immersive 'Explore' tab on Jacquemus website shows stories of the Riviera lifestyle Paspaley x Hamilton Island Race Week where the brand hosts a white luncheon' and discover experiences hosted by the brand Omega Summerblue Seamaster event in Sanya, China

**Market Appeal:** 76% of luxury consumers  
**Market Relevance:** Australia (10%), Global (6.56%)

This code is predominantly seen in experience and service categories, where brands offer a consumer experience that allows for a total break from the everyday.

Despite being the most preferred code for Australians, it is not dominant in the aesthetics of most brands.

**Offer products that prompt relaxing rituals**

The Aman Resorts shop offer products related to relaxation such as scents, candles and skincare.

**Offer privacy & curation**

The Aman Hotel concierge creates personally tailored and private itineraries that help people explore and discover without risk and in ultimate comfort.

**Curate itineraries for comfortable discovery**

Bentley's extraordinary journey in NZ is a 6 day tour across the south island with carefully curated activities, leisure lunches and exploration of the region's flora & fauna. The tour ends with private helicopters flying over the Queenstown peaks.

The  
Luxury  
Code of

Vibrant

The re-discovery of vitality,  
youthfulness & joy

Vitality

## About

Vibrant Vitality gives people permission to do more of the things that make them feel energetic and that delivers a sense of vitality, zest and energy. It's not about discipline, control and removing things but rather about the rituals of leading a wholesome lifestyle and the abundance of the things that make us feel good.

## What's Rare

A feeling of vitality and being at your prime

## What's Aspirational

Experiences that make you feel alive, either alone or with others

## Why it's powerful

Gives consumers permission to do more of what makes them feel good

## Attributes



Wellbeing



Community

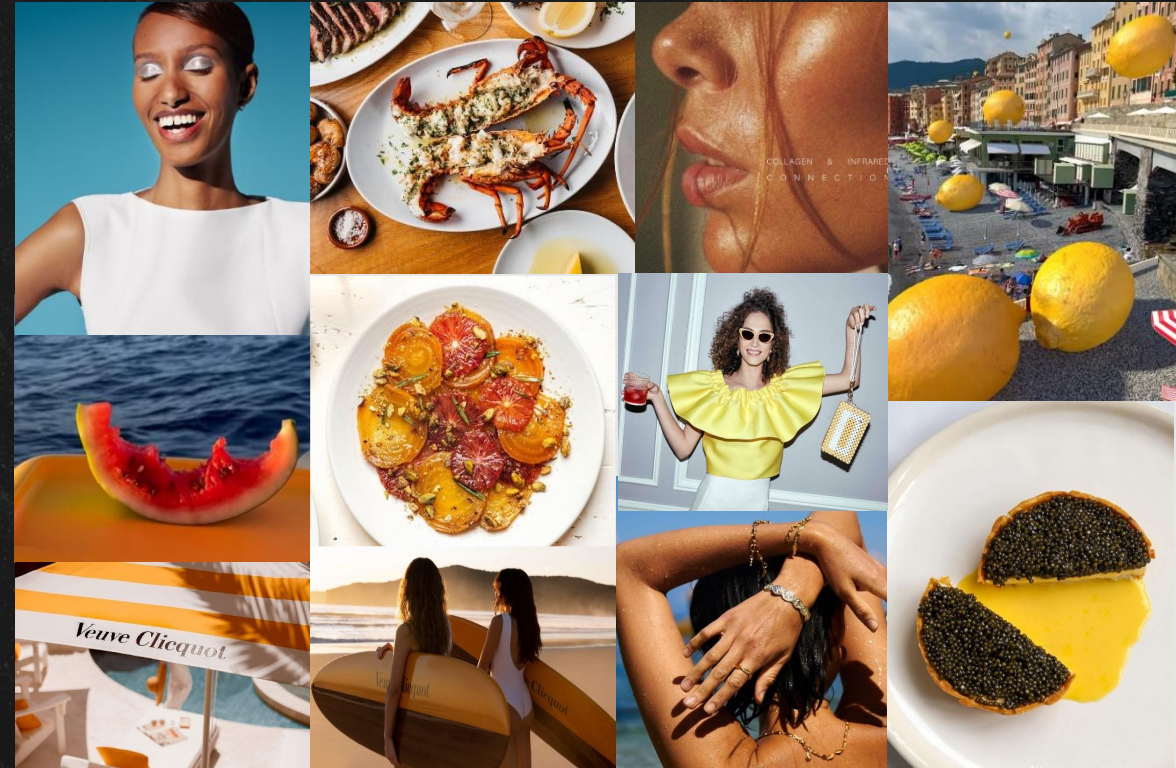


Joy



Playfulness

## How it looks, sounds & feels



## Key Categories & Brands

Restaurants & Bars, Health & Wellbeing, Travel, Real-Estate

JACQUEMUS

la prairie  
SWITZERLAND

merivale

NOBU

SLOW HOUSE

KOLLOSCHÉ

SOMA

Veuve Clicquot

## Looks like

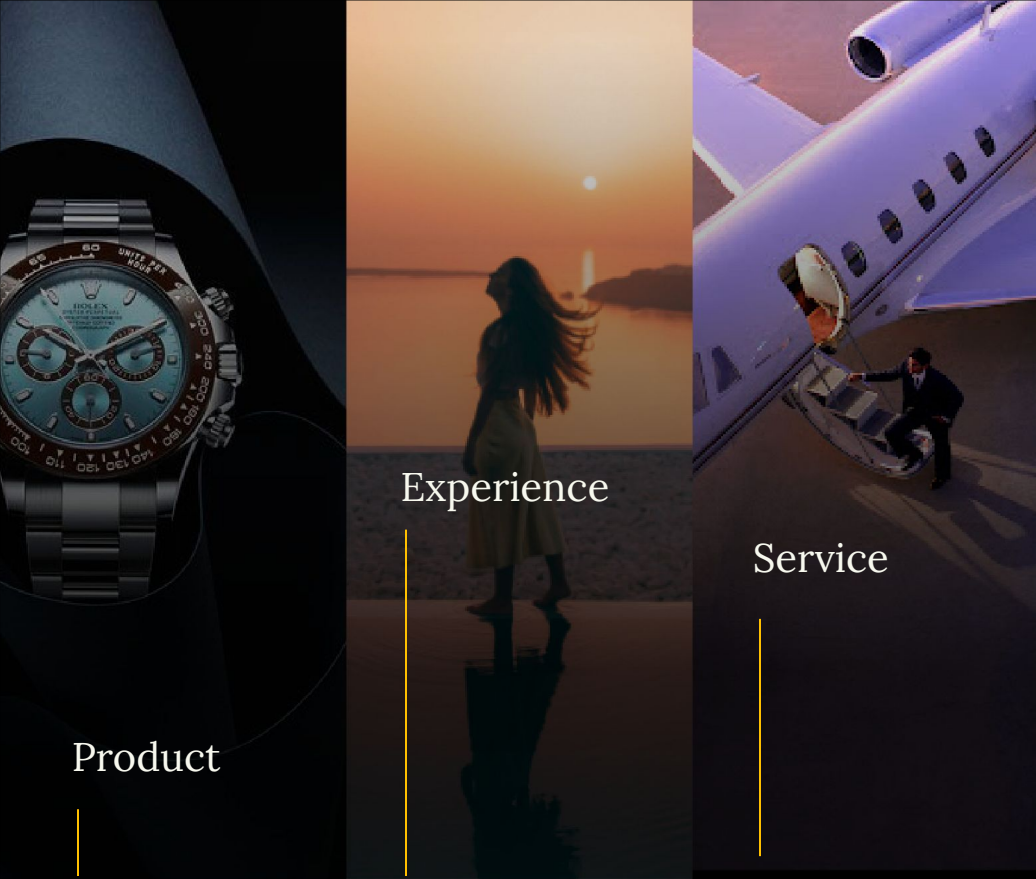
- Enjoying the sun in the outdoors
- Human beings at their prime
- Fresh & juicy food, often vibrant yellow, red & orange

## Sounds like

- The energy of the sun: 'the sun's energy captured', 'designed with an endless summer in mind'
- Self-care: 'your space, your routine, your wellbeing'
- A lifestyle of leisure: 'Les vacances', 'Coastal'.

## Feels like

- Zesty, Vibrant & Warm
- Flirty & Playful
- Sun on your face



Product

Experience

Service

# Aussie imperatives for luxury brands across marketing levers

## PRODUCT

**Inspire a vibrant yet balanced lifestyle**

**Inspire a wholesome and vibrant lifestyle with products that facilitate it**

Veuve Clicquot Hotel offer e-bikes, surfboards, surf lessons, yoga and a spa for exercise. Inside the rooms, rooms a Veuve fridge and a vinyl record player for personal relaxation. They also offer classes to inspire and through, champagne masterclasses, cinema, boat tours, and gastronomy.

## SERVICE

**Re-energise at a holistic level**

**A holistic approach to wellness**

Shelter positions themselves beyond just being a gym, by also hosting an organic juicery, a spa with freshwater ice baths and infrared saunas.

## EXPERIENCE

**Convivial experiences for shared joy**

**Show up in sunshine & bright day-light**

Hosting day-time sessions, outdoor venues such as rooftops, terraces or beachfront dining

The coastal venue of Mimi's by Merivale celebrates the coastal lifestyle

**At the right place & at the right time**

La Prairie offers pre-flight treatments at the Sydney Airport to prepare the skin for long-haul flights.

**Create room for conviviality, shared moments and joy**

Merivale's venues are designed for people to come together and enjoy shared moments through shared menus, convivial seating and communal areas such as courtyards

**Market Appeal:** 57% of luxury consumers  
**Market Relevance:** Australia (19.07%), Global (10.20%)

This code is the most dominant code for experiences & second most important for services. It signals a lifestyle of wholesomeness & vitality. As such, it's dominant in experience categories that reflect this lifestyle, such as restaurants, bars, health & wellbeing, travel & real-estate. A few luxury fashion brands, are tapping into this aspirational lifestyle through clothes worn in these settings (mostly resort & activewear).

The  
Luxury  
Code of

Heritage

Reimagining heritage &  
tradition for the modern day

Reimagined

## About

Heritage Reimagined recasts tradition & heritage in a modern context, delivering a sense of familiarity and exploration and creativity. This interplay between the past and what has been and the exploration of what could become delivers meaning and a sense of authenticity to the modern luxury customer.

## What's Rare

Authenticity, trust and things that endure





## Why it's powerful

Enables consumers to feel connected to a sense of the enduring and real

## What's Aspirational

Living a life that feels authentic, real and familiar, yet progressive

## Attributes

-  Authenticity
-  Tradition
-  Exploration
-  Creativity

## Key Categories & Brands

Travel, Restaurants & Bars, Automotive, Fashion and Accessories



## How it looks, sounds & feels



### Looks like

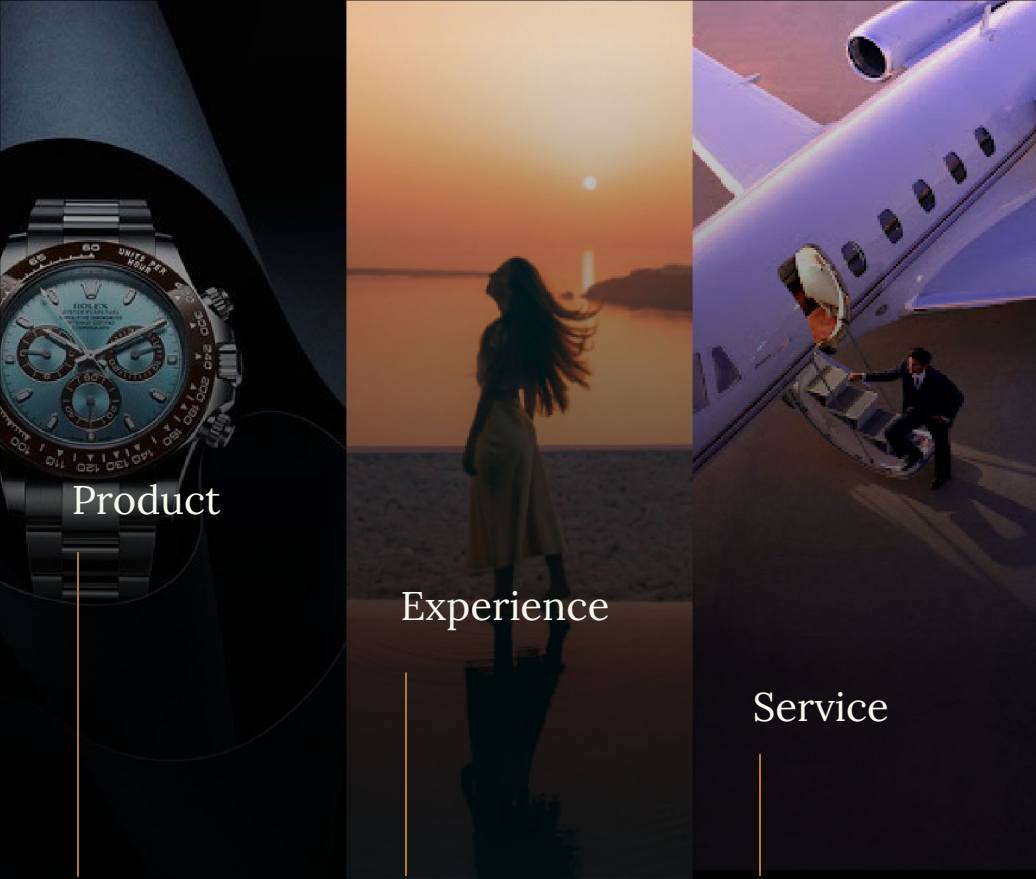
- Natural colours & materials: timber, bone, leather, clay, products shot in the middle of nature
- Showing the 'in-progress' process' or signs of the craft e.g, hands making, turning, spinning, stitches, the worn leather, the detailed joinery etc.

### Sounds like

- Informal yet professional, human and friendly tone of voice. Not hierarchical.
- Homage to provenance & place: 'Painted with pigment found only in Japan' 'Tasmanian Oak',
- Honouring Process: 'Hand-turned', 'Fire-glazed', 'Working with what already is there'

### Feels like

- Appreciation of nature, time, craftsmanship
- Still, Calm, Natural
- Familiar & Reassuring



Product

Experience

Service

**Market Appeal:** 51% of luxury consumers  
**Market Relevance:** Australia (15.56%) , Global (17.90%)

Heritage Reimagined is the dominant luxury code internationally and second most dominant in Australia. It has traditionally found its most common expression in product categories that sources its materials in nature and uses human craft to process it.

Increasingly it's manifesting in experience-categories like travel, restaurants, bars, hotels and automotive that deliver to an increasing need for authentic, real & meaningful experiences.

# Aussie imperatives for luxury brands across marketing levers

## PRODUCT

**Demonstrate unique 'know-how'**

### Elevate the Process

Tell a story about how materials are sourced and the humans that craft the products. Talk about how nature is respected, and inherent irregularities or imperfect characteristics are elevated.

### Celebrate provenance

Tell a story about the place where it's made, sourced or the place where a philosophy is inspired

### Upgrade with modern technology

For improved function or sustainability. Land Rover remade into an electric vehicle to be more environmentally conscious

## SERVICE

**Enable longevity of use**

### Provide customisation services

To enable product fit with personal preferences, making the products relevant in people's life for longer.

### Provide maintenance & repair services

For prolonging the life of products

### Non-hierarchical style of service that feels

Informal and friendly yet professional, avoiding a hierarchical 'master-servant' style of service.

## EXPERIENCE

**Evoke a sense of presence, awe and knowledge**

### Create an experience to evoke presence, knowledge and awe

Through placemaking for physical experience or film for a digital yet immersive experience.

Aesop retail spaces are all paying homage to the local area and RM Williams travelling leather workshop 'The Hut' is a mobile workshop that brings leather craft to consumers.

### Positively improving the natural world, the community & people living in it.

Volvo Living Seawall conserving sea-life in the Sydney Harbour.

The  
Luxury  
Code of

Powerful

The pursuit of individual  
success through mastery &  
achievement

Prestige



## About

Powerful Prestige is about earning power and authority through prestigious achievements and mastery of skills. It presents a need for external validation and acknowledgement showcased through traditional symbols of success and power.

## What's Rare

A feeling of personal success & achievement

## What's Aspirational

Automotive, Banking & Finance, Health & Wellbeing

## Why it's powerful

Enables consumers to feel pride and progress in themselves

## Attributes

-  Mastery
-  Innovation
-  Power
-  Achievement

## Key Categories & Brands

Travel, Restaurants & Bars, Automotive, Fashion and Accessories



## How it looks, sounds & feels



### Looks like

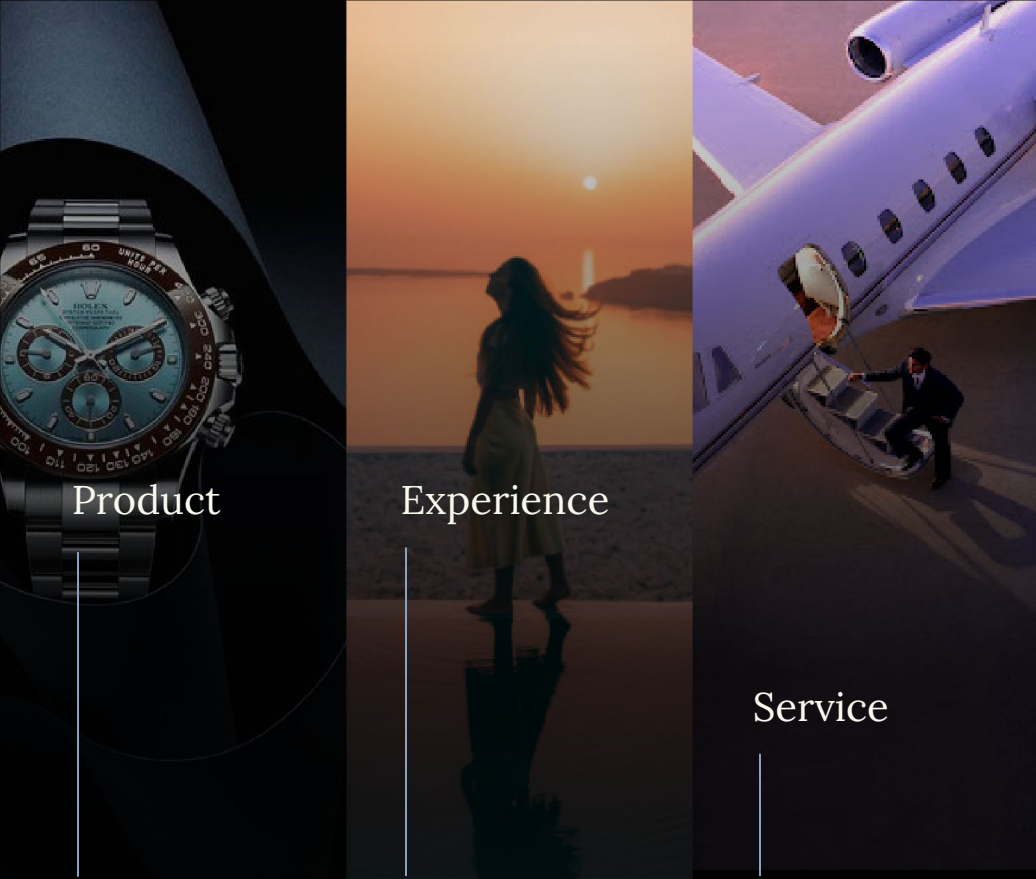
- Cool tones with accents of warmth: B&W imagery, blue tone lighting, royal gold embossed
- Classic power attributes; the black executive suit, stripped back hair, tall skyscrapers

### Sounds like

- Authoritative and dominant but not aggressive.
- Specialist Expertise 'understands your personal situation and gives you the solutions you need'
- Renowned Experience 'Australia's largest and most experienced private wealth teams'

### Feels like

- Controlled & Confident
- Trusted & Reliable
- Engineering & Precision



Product

Experience

Service

# Aussie imperatives for luxury brands across marketing levers

## PRODUCT

Engineered to excel

### Emphasise product superiority, history, innovation, and excellence

IWC watches initially sourced hydropower from the River Rhine in Schaffhausen and is a pioneer in the use of ceramic and titanium in watchmaking, gained from liaising with experts in the aviation and aerospace industry

### Build hierarchy into the product collection

The 8 tiers in Omega's Seamaster Summerblue collection have darkening colors related to their water resistance e.g., lighter blues are for shallow depths while darker blues are for deeper.

## SERVICE

Offer expertise, advice & coaching

### Tailored advice

Offering a high level of customisation and personal solutions based on individual context and needs.

### Demonstrate expertise

NAB Private Wealth Partners demonstrate expertise through monthly research and insights newsletters on topics such as 'The future of wealth'

### Coach for skills,

Services in this space also move beyond advisory into coaching individuals to give them the skills to ultimately become self-sufficient

## EXPERIENCE

Tiered experiences with exclusive benefits

### Tiered loyalty to distinguish status

Capella Hotels 'DISCOVERY' program is a tiered membership that offers a range of exclusive benefits to Titanium members only e.g., early check-in/late check-out, room upgrades and higher earn-rates

Crown Rewards offers a 'Black Tier' which is 'invite only'

### Exponential returns

Elevated Barn is a coaching retreat that offers 'alumni members' access to a global community and annual events to continue building the network.

Market Appeal: 51% of luxury consumers  
 Market Relevance: Australia (8.42%) , Global (13.15%)

Powerful Prestige is most dominant within product, mainly within watches and cars, that come from a heritage of mastery and prestige, and can act as symbols of status..

The  
Luxury  
Code of

Shared

Moments to connect and  
enjoy life's luxuries together

Celebration

## About

Shared Celebration is about the shared moments & experiences with the people we care about the most as well as new connections. It's the access to community and connection and enjoying and indulging together. After all, life's luxuries are best enjoyed, when shared.

## What's Rare

A feeling of togetherness

## What's Aspirational

To overtly enjoy decadent things in life

## Why it's powerful

Enables consumers to indulge and signal their status to others

## Attributes



Creativity



Community



Indulgence



Tradition

## How it looks, sounds & feels



## Key Categories & Brands

Restaurants, Health & Wellbeing, Travel & Hospitality

SHELTER

ACE HOTEL

R. M. WILLIAMS  
EST. 1932. AUSTRALIA

merivale



SALON HER

PUBLIC

SAINT HAVEN  
PRIVATE WELLNESS CLUB

SOHO HOUSE

## Looks like

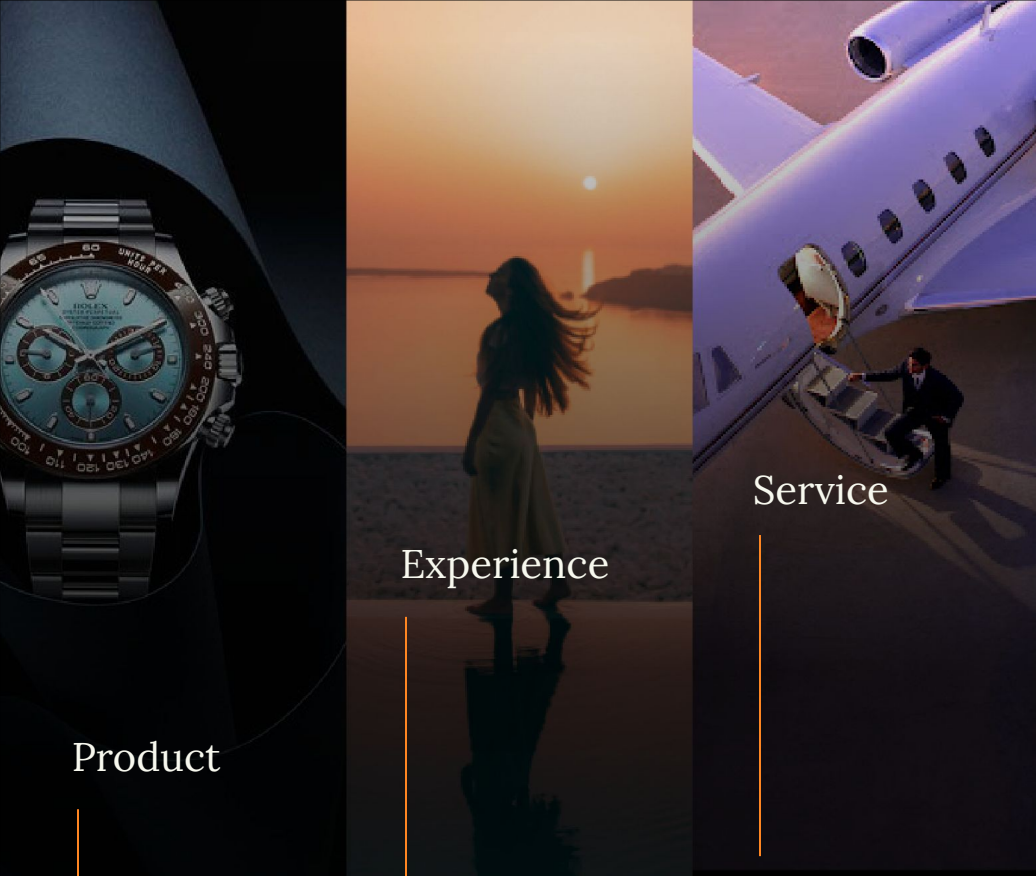
- Feels like your living-room, backyard or garden
- Shared Plates, Shared Tables, Shared Moments
- People enjoying themselves, laughter, fun times, a good vibe

## Sounds like

- Warm and Familiar Places 'home', 'haus', 'neighbourhood', 'lobby' 'vibe', 'welcoming home feeling'
- Private & Exclusive 'hidden' 'tucked away', 'private', 'invite-only', 'member-event', 'the a-list', 'secret codes'

## Feels like

- Celebratory & Special
- Convivial & Communal
- Memorable



Product

Experience

Service

**Market Appeal:** 50% of luxury consumers  
**Market Relevance:** Australia (14.7%) , Global (10.36%)

This code is the most dominant code for services as the category most intimately linked creating shared moments e.g., restaurants, bars and hospitality. It is also increasingly dominant in the health & wellness categories, such as gyms which have started to focus on creating a more connected and communal experiences.

# Aussie imperatives for luxury brands across marketing levers

## PRODUCT

**Emphasise the occasions where products are used**

**Show how the product is used in shared moments**

Such as dinners, parties or family gatherings

**Products are part of a shared identity**

RM Williams collaborated with the Wallabies for a product collection celebrating Australian rugby legends.

## SERVICE

**Facilitate shared moments**

**Assist people without hosting their own gatherings & celebrations**

Merivale offers event styling based on your ideas and ability to collaborate with their creative team to bring a vision to life  
 Salon Her is a hair salon but offers venue hire for launch events, intimate immersions or brand activations

## EXPERIENCE

**Amplify moments of connection & celebration**

**Tap into events in wider culture**

Events during Melbourne Cup, NYE or Pride. Collaboration with their restaurants offering lunch packages and afterparty access.

**Design for community & connection**

Using round-tables, shared tables or round sofas to create a sense of community

**Make it exclusive**

Lucy Folk organised an intimate dinner event with supper-club group Arlo Communal

Icebergs hosts exclusive bar takeovers with 4 different bars, 4 Sundays in a row

The  
Luxury  
Code of

Decadent

Indulging in decadence,  
status and showing it off

Display

## About

Decadent Display caters to the individual need for status, hedonism and belonging to an exclusive group who share these values. The trophies and symbols of success feel wasted if not flaunted. Extrinsically motivated and characterised by explicit symbols of status & success.

## What's Rare

A feeling of liberated hedonism and indulgence

## Why it's powerful

Enables consumers to indulge and signal their status to others

## What's Aspirational

To overtly enjoy decadent things in life

## Attributes

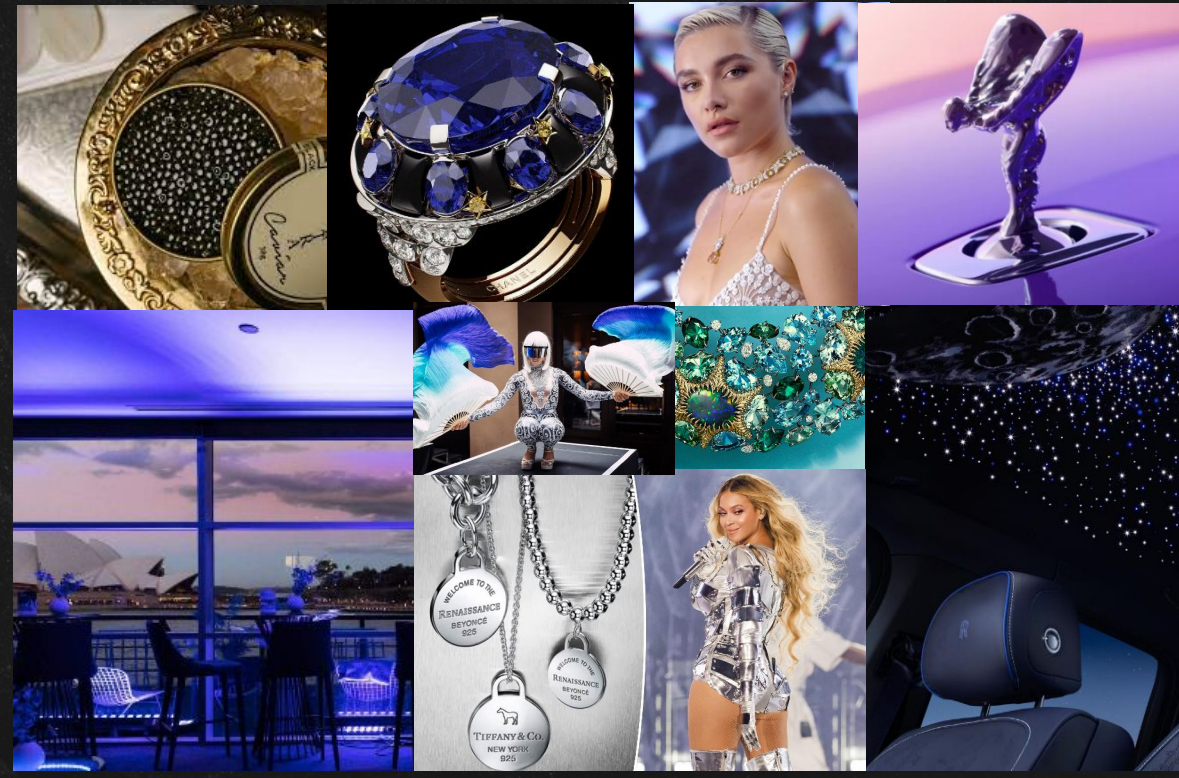
-  Indulgence
-  Community
-  Status
-  Power

## Key Categories & Brands

Accessories, Automotive, Finance and Real Estate



## How it looks, sounds & feels



### Looks like

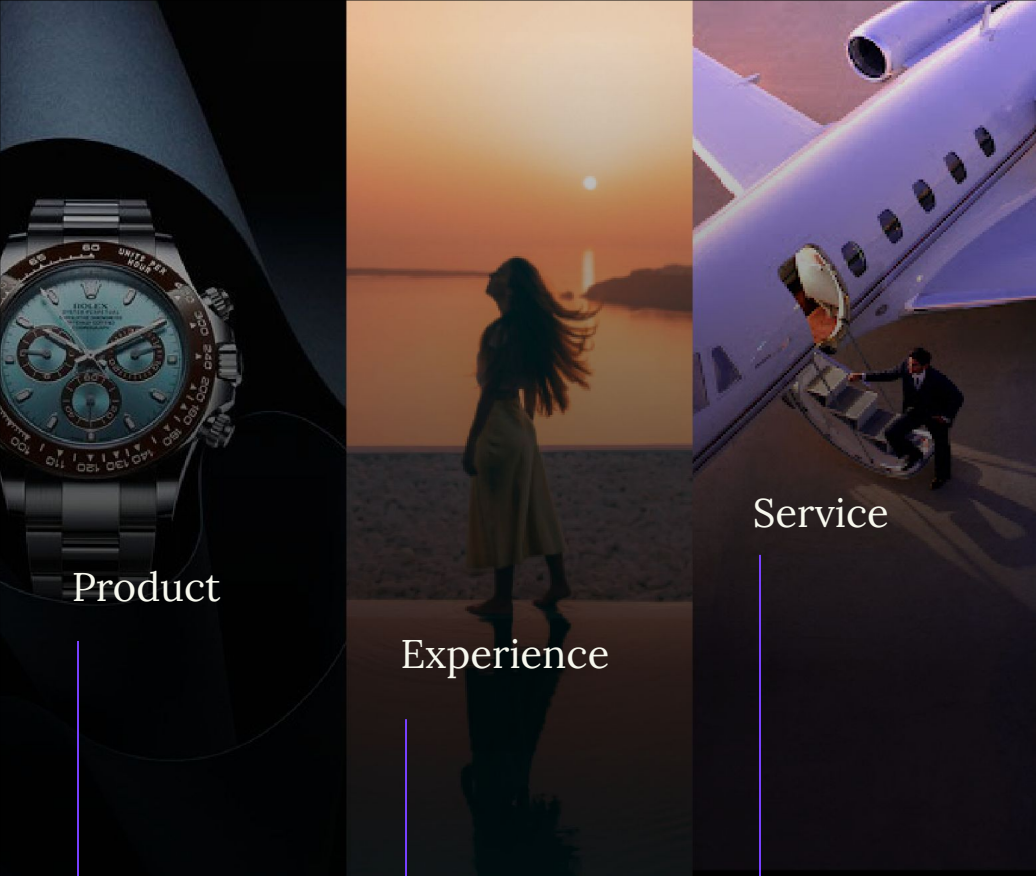
- Diamonds, Crystals, Bling & Velvet as symbols of prosperity and extravagance
- Flamboyant & Grandiose: Sky-High, On podiums, flying to be visible for everyone to see
- Dark, Night-time

### Sounds like

- Grandiose 'breathtaking', 'world's most famous', 'extraordinary', 'mansions', 'high jewellery', royal'
- Mysterious 'Ghost', 'Spectre', 'Phantom'
- 'The Spirit of Ecstasy'
- Royal: 'La Vie Royal', 'Centurion'

### Feels like

- Decadent & Opulent
- On top of the world
- Like a show



Product

Experience

Service

# Aussie imperatives for luxury brands across marketing levers

## PRODUCT

Create explicit symbols of status

### Explicit and overt status symbols

The interlocked C's of Chanel, the Black AMEX Centurion credit card, the ritual of 'vodka & caviar' shots.

### Scarcity is key

The 'hard to get' creates desire e.g., limited edition Aston Martin Valour

### Leverage well-established 'heritage' status

Symbols such as caviar, diamonds, champagne

## SERVICE

Give access to 'inside' information

### Provide 'insider' information

Crown Hotels offer 'up-to-date' insights and expert knowledge on the places to visit in the city

Capella Culturists are the hotels' curators of culture and experiences

### Services for convenience & time-saving

Services taking care of mundane chores such as cleaning, laundry, reservations to free up time for hedonistic pursuits

## EXPERIENCE

Being part of an exclusive club

### Make people feel like they're part of an exclusive club

By distinguishing VIP consumers from the rest e.g., via priority access, VIP lounges, invite only events, secret loyalty program tiers.

### Out-of-the-ordinary experiences

AMEX 'Money Can't Buy Experiences'  
Tiffany & Co as the official jeweller for the Beyonce Renaissance World Tour, providing her jewellery and designing her outfits embellished in diamonds.

**Market Appeal:** 37% of luxury consumers

**Market Relevance:** Australia (6.65%) , Global (12.34%)

Decadent Display is present across all categories but most dominant in service & experience categories that usually help cater to big-ticket items such real-estate.

In product categories it is seen in the traditional symbols of wealth such as jewellery, watches, homes, cars, and yachts. Increasingly seen in experiences that promote exclusivity e.g. Amex airport lounges, Chanel pool parties & private gatherings.



The  
Luxury  
Code of

Indulgent

The search for romance,  
intimacy & sensory pleasures

Intimacy

## About

Indulgent Intimacy is centred around the universal need to love and feel loved, where the desire for intimacy, indulgence and commitment materialises in sensory indulgence. This is combined with the transformative aspects of romance where the mundane reality transforms into love and magic.

## What's Rare

A feeling of intimacy & sensory connection

## Why it's powerful

Gives back intimacy & sensorial connection that is lost in our technological everyday

## What's Aspirational

To live and elevated life with an abundance of love and intimacy

## Attributes

-  Indulgence
-  Love
-  Intimacy
-  Sensorial

## How it looks, sounds & feels



## Key Categories & Brands

Fashion, Accessories, Restaurants & Bars



## Looks like

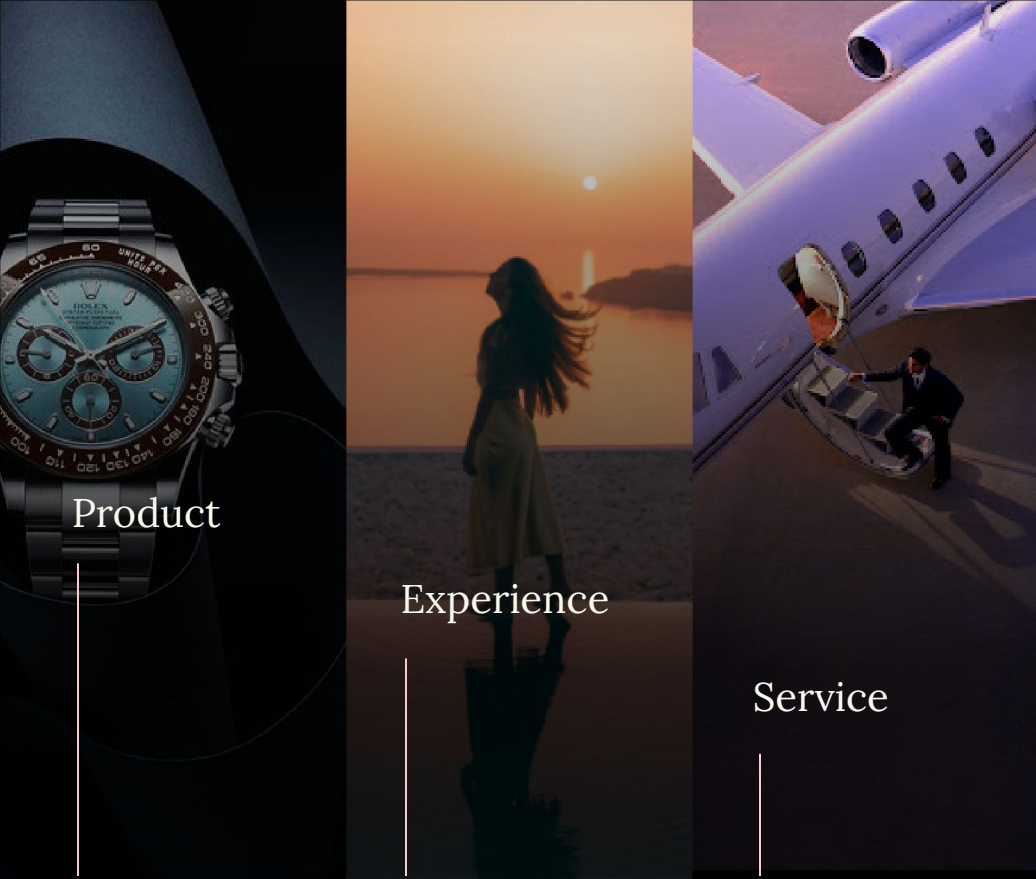
- Delicate materials: Silk fabric, flower petals, precious gemstones, fine jewellery
- Mystical enchantment: Constellations, dreams, fairies, magic, mythology
- Pleasureful indulgence: Fork in cherry juice, creamy lipstick texture, soft peachy couch

## Sounds like

- Naming conventions evoking commitment e.g. 'Love Lock', 'Knot', 'True', 'Forever'
- Evoking the mood: 'Ambient', 'Atmospheric', 'Focus on theatrical'
- Emphasising the 'out of ordinary', enchanted and transformative 'poetry of time', 'celestial bodies', 'extraordinary'

## Feels like

- Sensuality & Romance
- Pleasure, Passion & Indulgence in oneself, others & the natural
- Heart over brain, emotions over logic, dreams over reality



Product

Experience

Service

# Aussie imperatives for luxury brands across marketing levers

## PRODUCT

### A token for commitment

#### Design with commitment in mind

Classical styles that evoke longevity and commitment where the idea of 'forever' is promised.

#### Dial up the senses

Through indulgent textures, haptics, immersive scents and sounds

#### Foster intimate product usage

Build out touch points within and around the product to build a continuous relationship through packaging, wrapping, product storage boxes or a product app for pre/post purchase.

## SERVICE

### Foster a continuous relationship

#### Offer consultations to explore needs

By-appointment-only' consultations where consumers are invited to take a seat in a private setting to discuss needs and desire

#### Intimate online-shopping

Cartier Distance Sales Service offer boutique level hospitality to your door

#### Services that elevate the purchase moment & post-purchase experience

Signature gift-wrapping, packaging, in-store engraving, ability to register purchases & warranty - Tiffany Lifetime Service shows commitment to a continuous relationship

## EXPERIENCE

### A multi-sensorial experience

#### Memorable store-experience

Creating theatre and ceremony around the purchase Dior stores offers a seat with a glass of champagne, chocolate & branded tableware

#### Intimate events

Intimate events to preview new collections and often take place in private residencies

#### Sensorial elevation that heightens intimacy

Eating in the dark, signature scented stores, ambient live music, soft materials and shapes of furniture to create a feeling of intimacy & indulgence

**Market Appeal:** 30% of luxury consumers  
**Market Relevance:** Australia (5.93%) , Global (4.59%)

Indulgent Intimacy is dominated by the jewellery category as the ultimate proof of romantic love and relationships that stand the test of time.

Restaurants and bars are enhancing their intimate dining experiences by encouraging and facilitating sensorial exploration through vision, taste and scent & textures.



The  
Luxury  
Code of

Maximised

Maximising human  
potential & performance

Potential

## About

Maximised Potential is focussed on individual performance and explores the frontiers of human potential & capability where community and competition act as a tool to push yourself harder, both mentally and physically.

## What's Rare

Feeling capable to achieve one's full potential

## What's Aspirational

To reach one's full potential

## Why it's powerful

Enables consumers to explore their full capability and potential

## Attributes

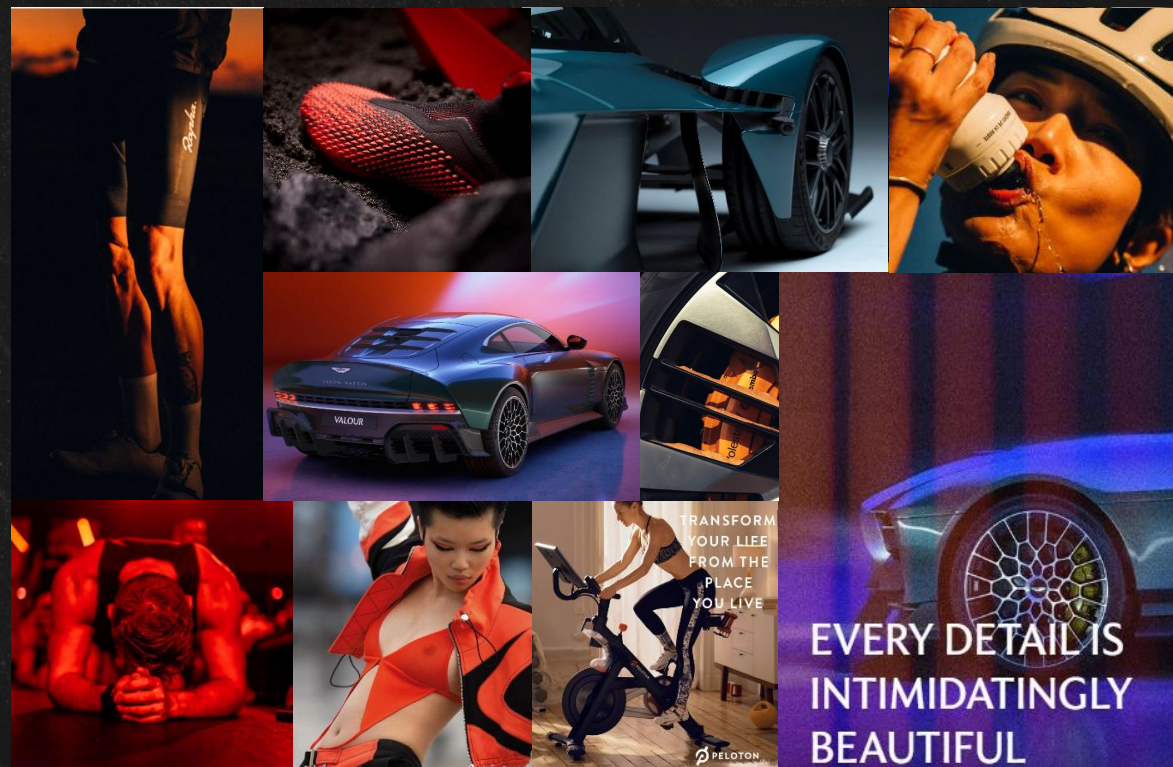
-  Creativity
-  Community
-  Achievement
-  Challenge

## Key Categories & Brands

Automotive, Health & Wellbeing, Banking & Finance



## How it looks, sounds & feels



EVERY DETAIL IS INTIMIDATINGLY BEAUTIFUL

### Looks like

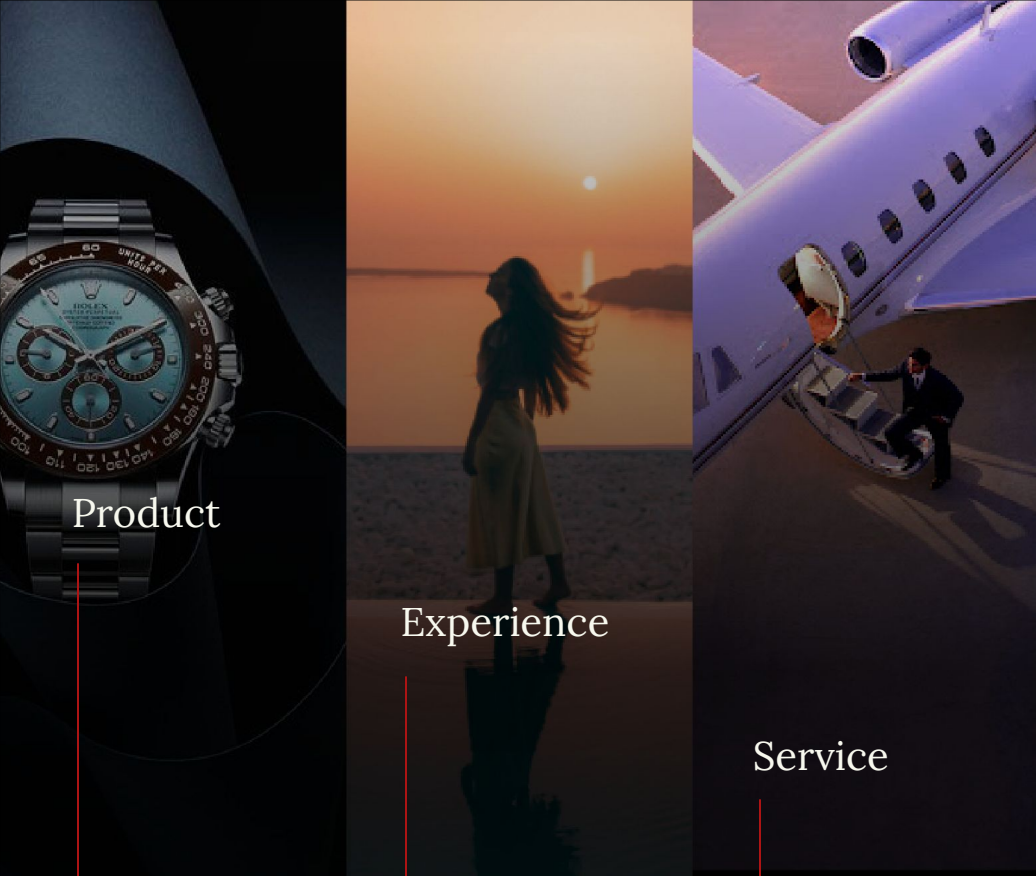
- Athletic poise, curved patterns, sleek and sculpted lines
- Tonal lighting explores sculpted achievement
- Dynamic captures of blurry energetic scenes that could almost be missed

### Sounds like

- Motivation & Adrenaline - 'everything is possible', 'become the best version of you',
- Performance & Excellence - 'designed for efficiency', Performance by Design'
- Threatening & Combative: 'Predator' 'Demonskin sole',

### Feels like

- High-Energy, Loud & Dynamic
- Limitless potential, driven relentless
- Tenacious, driven, relentless



Product

Experience

Service

**Market Appeal:** 29% of luxury consumers  
**Market Relevance:** Australia (2.42%) , Global (10.51%)

Generally, occupying product categories associated with adrenaline, high-energy and speed, such as automotive, fitness, fashion, sports. Increasingly seen in high-energy experiences mainly in health & wellbeing as gyms are becoming spaces to maximise potential and performance.

# Aussie imperatives for luxury brands across marketing levers

## PRODUCT

**Harder, Better, Faster, Stronger**

### Performance through precision design

Optimised to go further than what is expected and maximise the potential of products

### Designed for movement & flexibility

sleek, agile and optimised to be pushed to the limit of what is possible.

Dion Lee MotoCross jacket for movement and breathability, featuring moto technique of heat pressed foam patches

## SERVICE

**Monitoring performance and progress**

### Quantification of performance

Saint Haven offering bespoke biometric monitoring providing in real-time holistic recommendations

### Competitive comparison

Enabling people to monitor other's progress and performance to motivate and push

Peloton's leaderboard tab built into the Peloton screen, where users can view others' performance.

## EXPERIENCE

**High-energy experiences to push limits**

### High-energy sensory stimulation

Dramatic lighting, high-energy music and immersive audio systems to energise and spark intensity

### Collective challenges

Enables people to share the experience with other highly motivated individuals.

Barry's App offers online workouts and the ability to create 'your own digital Red Room' with an inbuilt Red Room filter.

### Experiences on the frontiers of possibility

Porsche 'Darwin to Bondi' electric road trip crossing 5000km of remote conditions.

The  
Luxury  
Code of

Empowered

The power over self  
through awareness and  
vulnerability

Indepen—  
dence

## About

Empowered Independence is about the power over self rather than over others, achieved through embracing self-awareness, vulnerability, softness and creativity as sources of strength.

## What's Rare

A feeling of strength through self-awareness and vulnerability

## Why it's powerful

Enables consumers to embrace their softer sides and still feel empowered & confident

## What's Aspirational

To find power through one's whole self

## Attributes

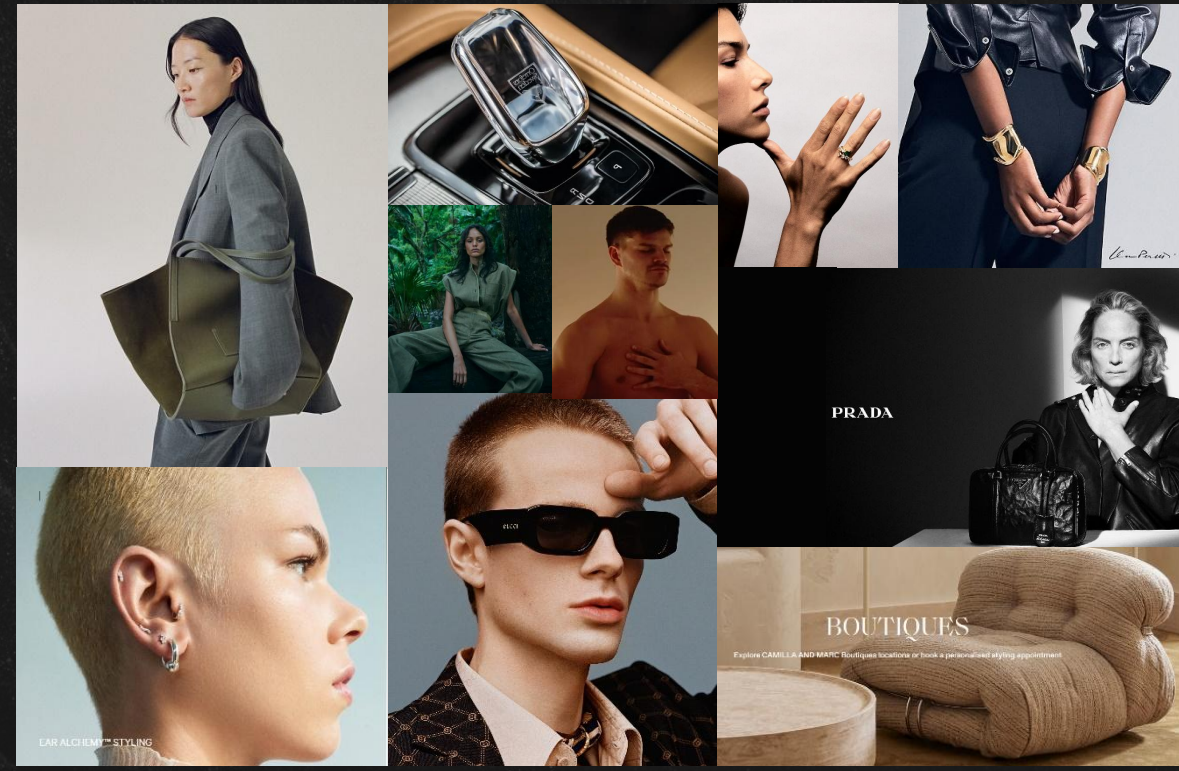
-  Creativity
-  Empowerment
-  Love
-  Knowledge

## Key Categories & Brands

Fashion, Accessories



## How it looks, sounds & feels



### Looks like

- A play of contrasts: hard & soft, organic & structured, minimal yet statement-making
- Protective gestures combined with a confident & empowered look
- Nature adding depth e.g., flowers, leaves, sunsets as a backdrop

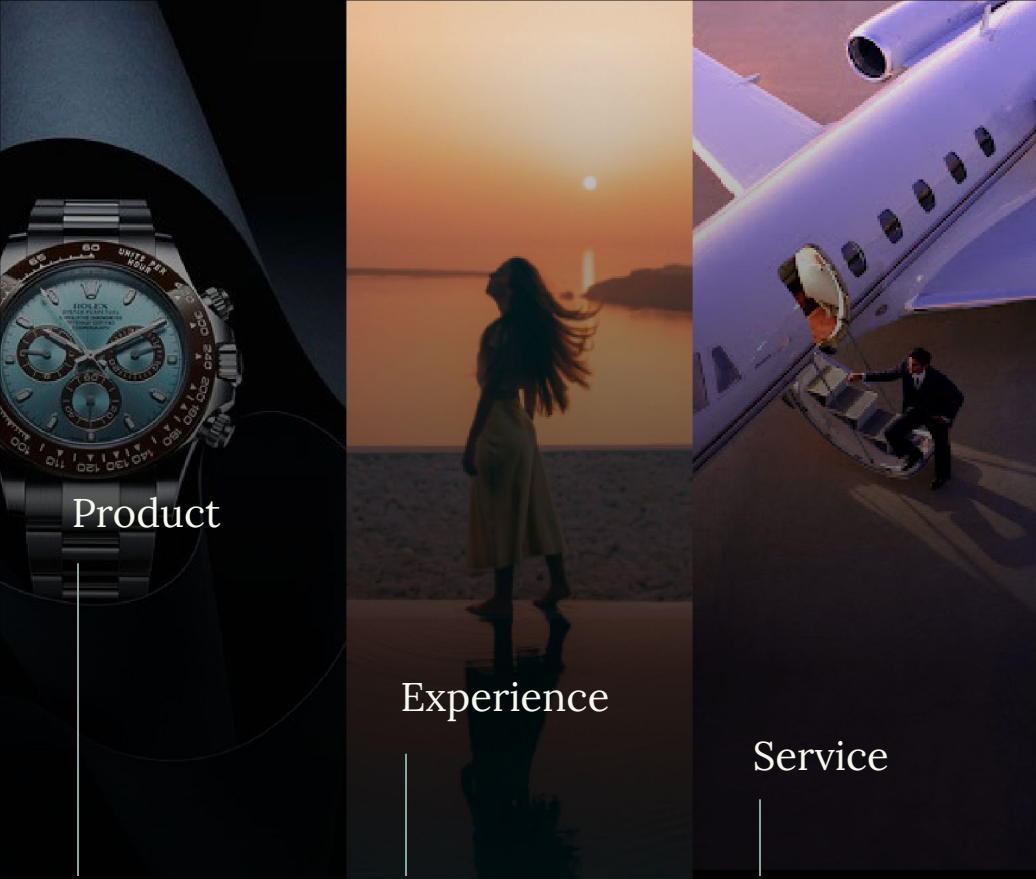
### Sounds like

- Contrasts 'reveal vs restraint', 'structured yet decisively relaxed', 'fluid forms and structured tailoring'
- Timeless & Classic 'timeless simplicity' 'the timeless trench', 'the forever dress'
- Sensual - 'grounded in delicate lace', 'sensual texture', subtle brass monogramming on hangers'

### Feels like

- Honest & Sincere
- Graceful & Quiet
- Confident & Empowered





Product

Experience

Service

**Market Appeal:** 25% of luxury consumers  
**Market Relevance:** Australia (9.44%) , Global (7.61%)

This code is most dominant within product categories that are closely tied to the individual expression of luxury such as fashion and accessories, serving as an external marker of empowerment and strength.

# Aussie imperatives for luxury brands across marketing levers

## PRODUCT

**Less is more**

### Classic, minimalist & timeless design

Allows the focus to be on the person rather than the brand e.g., no visible logos

### Products that fit into people's lives

Seen in the focus on staple items and essential pieces that 'works with' what consumers already has.

### Planet & People Conscious

Step by Step guides to a circular wardrobe, transparent stories of source origin - C&M campaign 'Ovaries, talk about them' to raise consciousness on ovarian cancer. S&S commitment to ocean conservation

## SERVICE

**Empowering services**

### Curated services based on the person

Sarah & Sebastian 'Ear alchemy' is a curated ear styling service that provides a curated service based on individual 'ear anatomy'

### The service sections are often not called service

but 'customer care' to evoke a sense of comfort and psychological safety

### Show up where people are rather than making them come to you

Prada offers customer care to people through social media channels, meeting people where they are and empowering them get the service they need through channels they prefer.

## EXPERIENCE

**Elegant Experiences**

### Elegant & Simple 'Boutiques'

Retail Stores are called 'boutiques' rather than stores and have a minimalist yet warm interiors, sparsely decorated to let the products shine and focus on the relation to the consumer.



The  
Luxury  
Code of

Artistic

Uninhibited self-expression &  
connection to a creative community

Self—  
expression

## About

Artistic Expression is the luxury code that focuses on uninhibited self-expression and creative exploration. It is the visionary imagination of new possibilities and original ideas which creates connection to an exclusive creative community.

## What's Rare

A feeling of uninhibited self-expression

## Why it's powerful

Gives consumers a sense of confidence, fulfillment and self-esteem

## What's Aspirational

Being a creative taste-maker

## Attributes

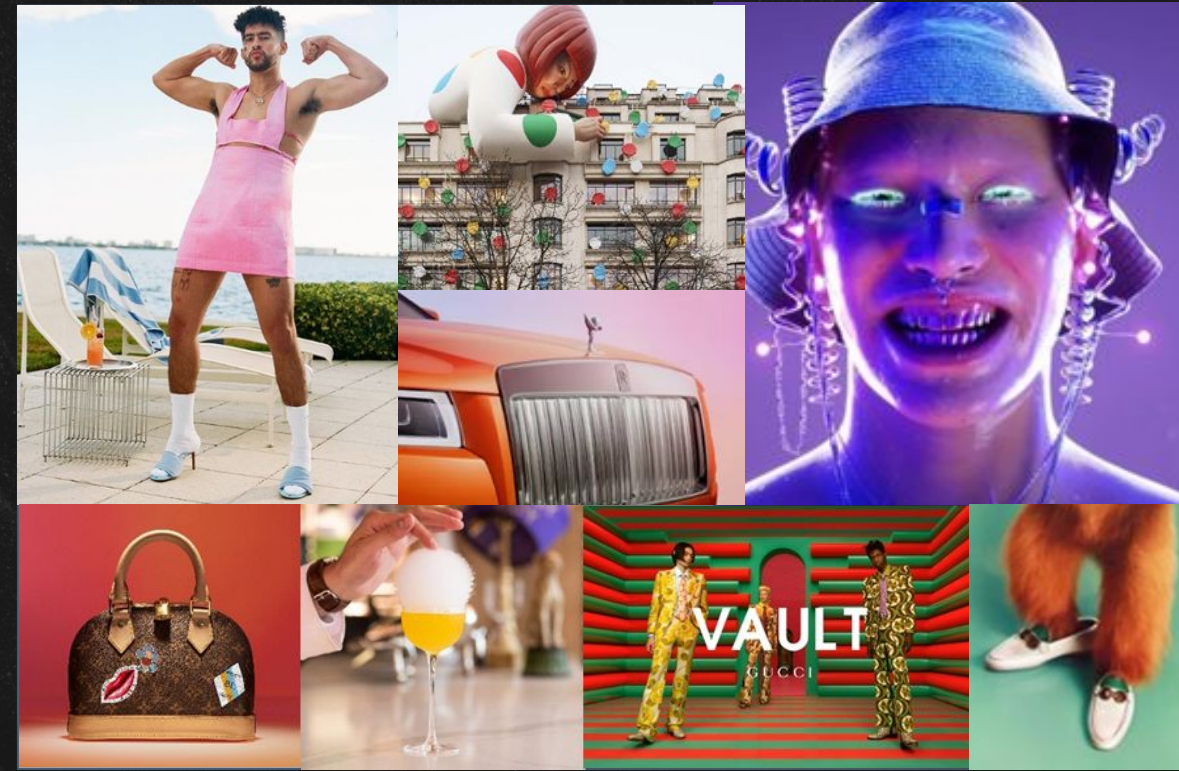
-  Creativity
-  Self Expression
-  Growth
-  Independence

## Key Categories & Brands

Fashion, Accessories, Restaurants & Bars



## How it looks, sounds & feels



### Looks like

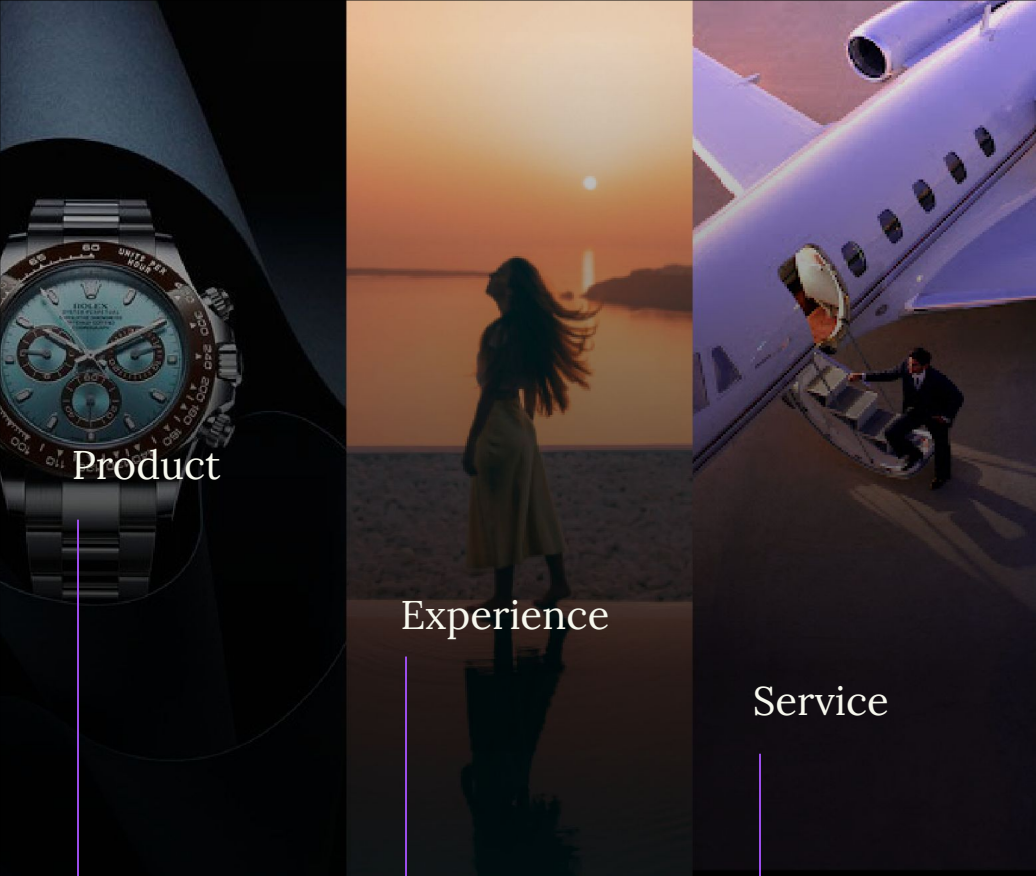
- Colourful, Cool & Not giving a f\*\*\*
- Artistic Expression: illustrations, mixed media, crafts, photography, high-art, AI art
- Genre-agnostic: old mixed with new, past mixed with present & future, unisex fashion

### Sounds like

- Personal Expression: 'Embodying the client's character and vision', 'Celebrations of originality'
- Creative Freedom: 'Limitless Imagination' 'Your choice of luxury'
- Cross-disciplinary collaboration: 'realised by a unique constellation of creatives'

### Feels like

- Forward-Looking & Progressive
- Immersive & Experiential
- New-to-World Expressions



Product

Experience

Service

**Market Appeal:** 18% of luxury consumers  
**Market Relevance:** Australia (7.81%) , Global (6.78%)

This code is more niche and predominantly seen in product categories that facilitate self-expression, such as fashion & accessories.

As experiences have skyrocketed in demand, product categories are venturing out to create experiences, mainly through creative events, shows and retail spaces. This code is also present in restaurants & bars, who are pushing the limits of creativity through inventive menus and dining concepts.

# Aussie imperatives for luxury brands across marketing levers

## PRODUCT

Collections built around creative ideas

**Build a brand and product portfolio led by a creative visionary leader**

Seen in creative directors for major fashion brands or automotive e.g. Pharrell Williams for LV.

**Cross-disciplinary collaborations**

Venture out from your immediate category to take inspiration from other disciplines. This fuels the reinterpretation and remixing of ideas to create something original and new.

**Create limited edition collectibles**

Gucci launched a limited SUPERGUCCI NFT collection, featuring digital characters wearing Gucci outfits.

## SERVICE

Creative involvement & customisation

**Invite consumers to be involved in the creative process**

Rolls Royce Ghost invitation-only collaboration between patrons and artisans to design unique cars. Louis Vuitton personalisation service for their leather-goods.

**Allow virtual try ons**

Gucci's AR app allows consumers to virtually try on products at home, before purchasing.

## EXPERIENCE

Build cultural capital

**Collaborate with the art world**

Brand exhibitions such as Gucci Garden physically & virtually on Roblox  
 Gentle Monster have 100+ in house artists specialising in spatial art incl. architecture, sculpture & robotics

**Create a community that is a melting-pot of ideas**

Soho House creative community  
 Chanel Connects podcasts  
 Gucci Vault, an online concept store and experimental space with a 'play-to-know' experience