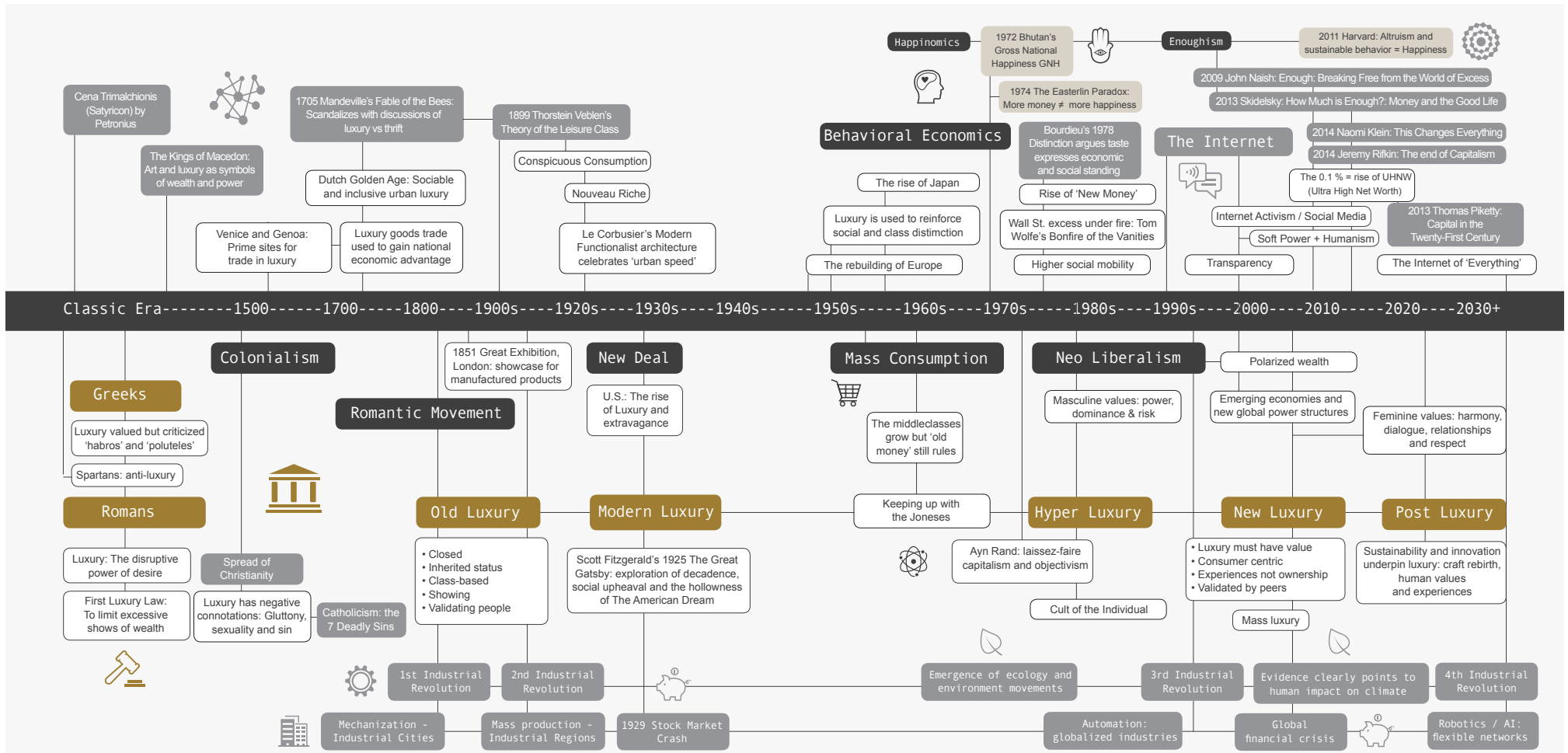


THE EVOLUTION OF LUXURY 2025+



PAST, PRESENT, FUTURE

LUXURY TIMELINE



NAVIGATING COMPLEXITY



New affluent millennials seek an intelligent balance between fast and slow paces of life

MEANINGFUL EXPERIENCES



Photo: Kjaer Global

New luxury customers are not looking for more; instead, they want authentic and meaningful 'deep' experiences

MULTIDIMENSIONAL THINKING

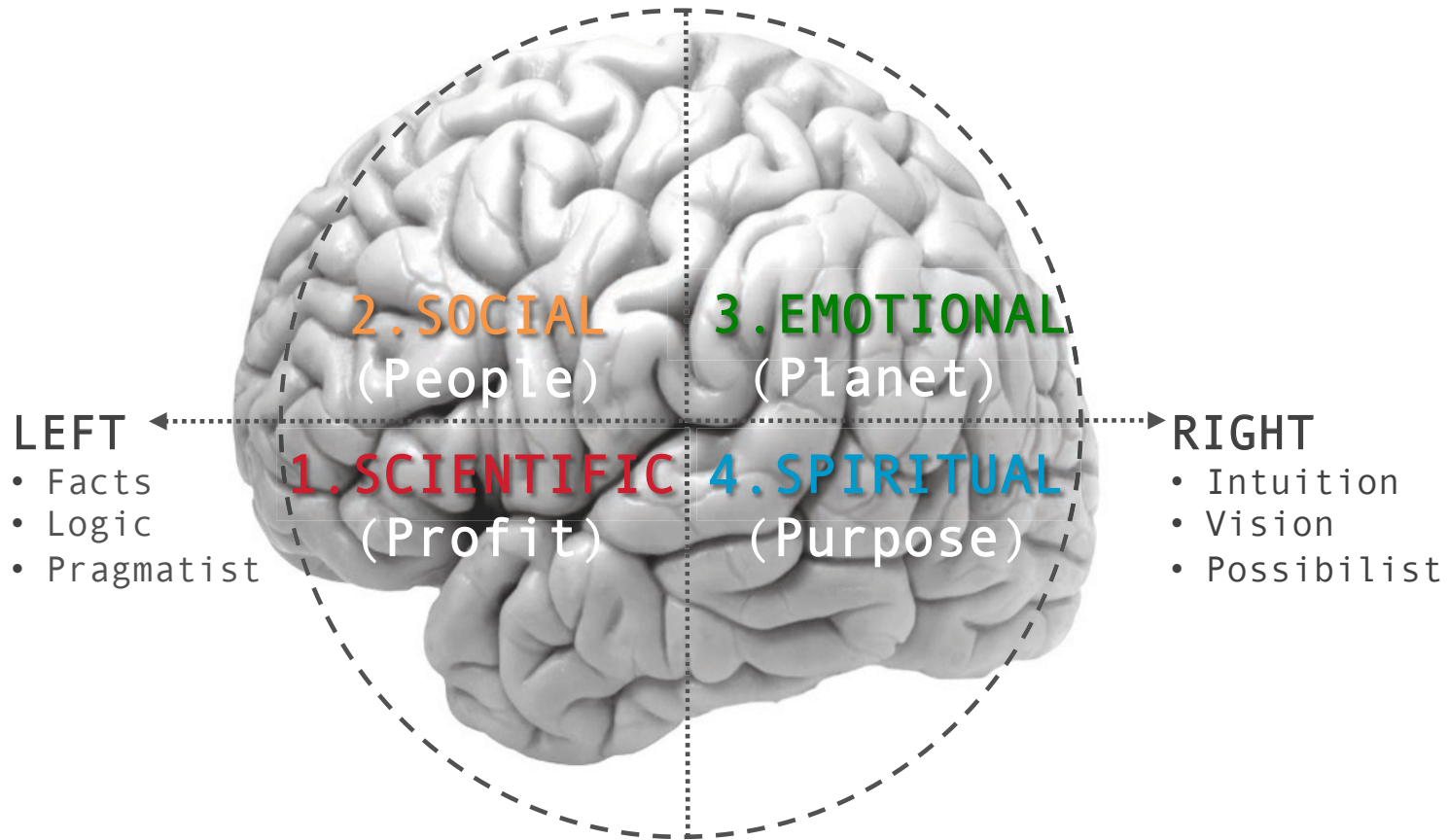


4. SPIRITUAL

3. EMOTIONAL

2. SOCIAL

1. SCIENTIFIC



The 21st century requires a much wider definition of success – hence, I propose a 4P outlook

TREND ATLAS 2025+



4. SPIRITUAL

QUALITY OF LIFE



Mindfulness

The Good Life

Happiness Hunting

UNIVERSAL VALUES



The Big Society

Enoughism

Purpose Driven Leadership

3. EMOTIONAL

POSITIVE WELLBEING



Active Leisure

Foodie Culture

Health = Wealth

MEANINGFUL EXPERIENCES



Authentic Storytelling

Cultural Consumption

Inclusive Design

The Real Thing

Collaborative Communities

Intelligent Reduction

Smart Living

A BETTER WORLD



Betapreneurship

Good Cause

Considered Consumption

One Planet Living

2. SOCIAL

COMMUNICATION



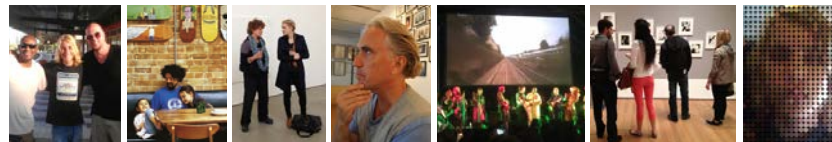
Education 4.0

Cloud Intelligence

Dialogue Driven

The Global Brain

PATCHWORK SOCIETY



Redefined Families

Free-Range Parents

Female Factor

No Age Society

Global Citizens

Creative Class

Digital Natives

CARING ORGANISATIONS



Lifelong Learning

Work/Life Balance

Social Capital

Brand Engagement

1. SCIENTIFIC

TECHNOLOGY

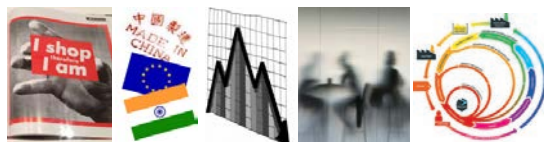


Bio Revolution

Clean Tech

Thinking Cities

ECONOMIC DRIVERS



Resource Shortage

Rising Economies

Turbulent Markets

Innovation Hubs

New Models

POLITICS & LEGISLATION



Soft Power

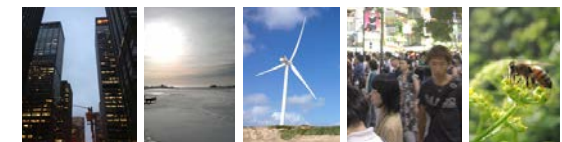
Radical Openness

Glocalisation

Health Challenges

Public Policies

ENVIRONMENT



Hyper Urbanisation

Climate Change

Green Growth

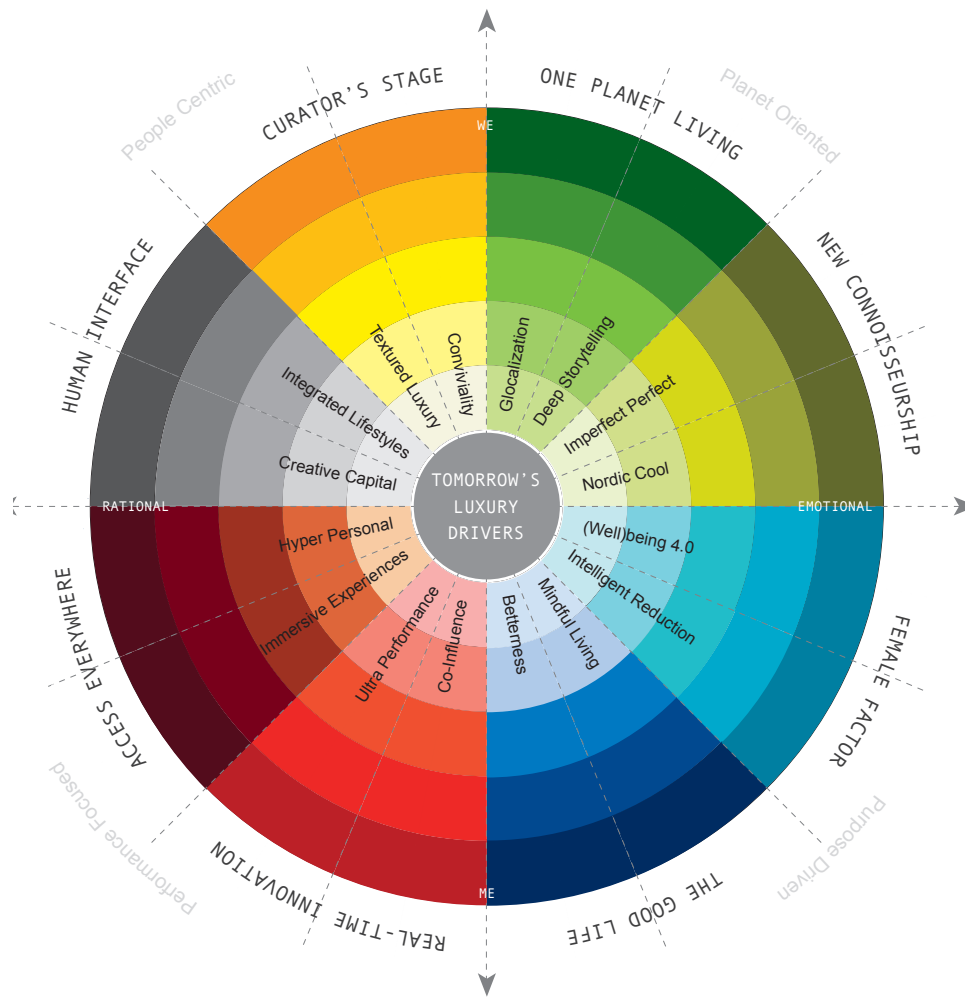
Crowded Planet

Bio Diversity

TREND COMPASS 2025+



- 4. SPIRITUAL
- 3. EMOTIONAL
- 2. SOCIAL
- 1. SCIENTIFIC



- * REAL-TIME INNOVATION
- * ACCESS EVERYWHERE
- * HUMAN INTERFACE
- * CURATOR'S STAGE
- * ONE PLANET LIVING
- * NEW CONNOISSEURSHIP
- * FEMALE FACTOR
- * THE GOOD LIFE

REAL-TIME INNOVATION

Co-Influence + Ultra Performance

“...balancing ‘real-time’ with ‘real-value’
innovation will be central to the future
connected luxury consumer.”


ACCESS EVERYWHERE

Hyper Personal & Immersive Experiences

"Multichannel communication will enrich the brand narrative and interaction to form part of a new luxury reality."

HUMAN INTERFACE

Integrated Lifestyles + Creative Capital



“New luxury is extraordinary and curated with a human-centric dimension where brands are validated by people, not the other way around.”

CURATOR'S STAGE

Conviviality + Textured Luxury



“There is a new sense of status found in having time to nurture relationships, cultivating skills and obtaining insider knowledge.”

Photo © Stefan Goldoni 2015 - Dubai camera club

ONE PLANET LIVING

Glocalization + Deep Storytelling

Photo © Kristin Gjerde 2015 - Juvel, a sustainable luxury jewelry brand in Norway, Sweden

“Deep luxury comes from feeling good about our purchases - they help express our own commitment to one planet living.”

NEW CONNOISSEURSHIP

Imperfect Perfect + Nordic Cool



“Rarity value, not price, is the key - it encompasses everything from single-estate coffee ... to niche independent fashion labels.”

FEMALE FACTOR

(Well)being 4.0 + Intelligent Reduction

"In a world dominated by choice and sensorial overload we are looking for the luxury of focus, flow and calm experiences."

THE GOOD LIFE

Bettersness + Mindful Living



“Tomorrow’s luxury must display a clear purpose and raison d’être – demonstrating how it contributes to ‘The Good Life’.”

Photo: © Kjaer Global 2015 - Myvan nature bath Iceland

WHO ARE TOMORROW'S LUXURY CONSUMERS?



PERSONA MAP



2. NEW SOCIALITES

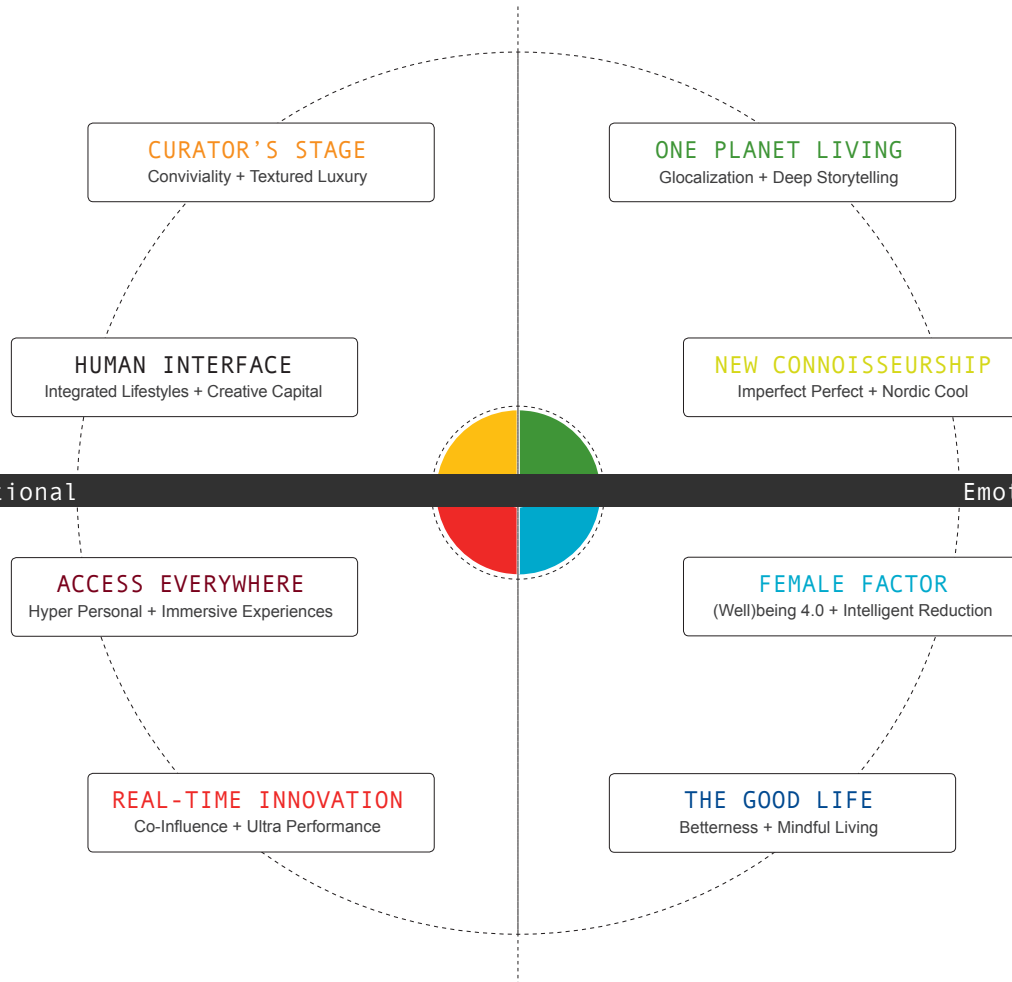


3. ADVENTURE HUNTERS

1. PROGRESSIVE OPTIMIZERS



4. IDEALISTIC PIONEERS



PROGRESSIVE OPTIMISERS



REAL-TIME INNOVATION

Co-Influence + Ultra Performance

ACCESS EVERYWHERE

Hyper Personal + Immersive Experiences

BEHAVIOR

- First Movers
- Aspirational
- Dedicated & Driven
- Forward Looking

PROFILE

Progressive Optimizers see innovation as the route to excellence. Found in all age groups – but especially among affluent Millennials – they set the trends that trickle down through the luxury market to the wider economy. These high achievers thrive in fast-paced environments and demand the best of themselves and their chosen brands.

QUANTIFIED SELF

Progressive Optimizers have bought into the idea of a quantified self, knowing that data will help them achieve ultra performance in everything from work and health to travel and entertainment. They understand their own worth, and happily 'trade' data in return for hyper personalization, co-influence and transparent benefits, but data privacy is key to them.

AUTOMATION VS CONTROL

Aware of the paradox of smart technology, Progressive Optimizers love the fact they can outsource tedious tasks, automate other chores and have real-time personalized experiences. The balancing act is in control – they need to feel that automation does not rob them of their autonomy or replace all 'human touch' interactions.

OPPORTUNITIES

Hugely influential and tech savvy, they want special treatment and access to innovative prototypes. Their influence is profound, as one of our experts advises: "Focus on creating enhanced relationships with these customers to become socially valuable ...inviting higher levels of participation and access to the brand".

REGIONAL INFLUENCE

Global, skewed Asia, EU, Scandinavia, North America, LTA and Middle East



Special treatment and access to innovative prototypes

"Millennial consumers, currently aged 18-34, will become the largest generational segment in the luxury market between 2018 and 2020."

Kjaer Global expert interview 2015

NEW SOCIALITES



Photo © Kjaer Global 2015



Photo © Kjaer Global

Highbrow to counter culture, and everything in between

“Offerings in this luxury segment will be safe, nice and more comfortable. Just the fact that you prioritize family shows a surplus in your time and energy, replacing luxury as it used to be - passive consumption.”

Kjaer Global expert interview 2015

PROFILE

For New Socialites, family comes first and status is living well and expressing themselves. Self-made rather than inherited wealth gives them a grounded perspective on life, but they thrive in creative communities. Time is their most precious luxury and they use a curator's stage to cherish convivial and life-affirming moments of slow living.

CULTURAL MAGPIES

New Socialites absorb a range of influences, from opinions of friends and tastemakers to face-to-face advice. Their definition of culture is similarly broad – highbrow to counter culture, and everything in between. Social memes are their currency and they enjoy disruptive ideas without forgetting the texture and value of cultural traditions.

SERENDIPITY VS PLANNING

Moments of serendipity are one of life's great joys, and New Socialites enjoy the 'stolen' luxury of unplanned moments, especially since most decisions are carefully planned. Time poor, they rely on digital media to research and evaluate, so respond to seamless online service, with opportunities to interact and read others' opinions.

OPPORTUNITIES

Underwhelmed by overt luxury, New Socialites do appreciate quality and love ideas that make life fun or super convenient. They crave solid advice and lasting relationships. One of our experts highlighted that, for them: "It's about craftsmanship... doing something really, really well through all layers: from sales and customer treatment to after-sale contact".

REGIONAL INFLUENCE

Global, skewed West, EU, Scandinavia, North America, LTA and Asia

HUMAN INTERFACE

Integrated Lifestyles + Creative Capital

CURATOR'S STAGE

Conviviality + Textured Luxury

BEHAVIOR

- Cultural Curiosity
- Expressive
- High Touch
- Personal Curation

ADVENTURE HUNTERS



Photo: © Kjaer Global 2015 - Haukefjell Norway

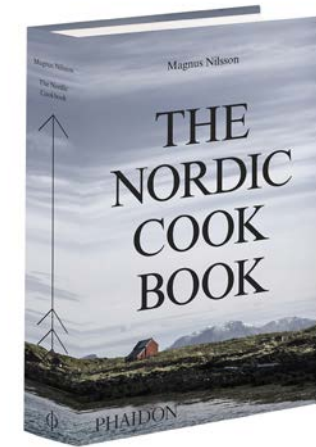


Photo: Kjaer Global 15 - The Nordic Cook Book

Swede Magnus Nilsson discovers local Nordic Cool

ONE PLANET LIVING

Glocalization + Deep Storytelling

NEW CONNOISSEURSHIP

Imperfect Perfect + Nordic Cool

BEHAVIOR

- Open & Sharing
- Sensorial & Tactile
- Experimental
- Responsible

PROFILE

Adventure Hunters seek life beyond the mainstream and have developed a new connoisseurship in their hunt for the authentic, the wild idea or the lived experience. Many are part of the upcoming millennial cohort and, while they find cultural sharing attractive, they expect luxury with a conscience and sense of place.

RAW LUXURY

The material world of luxury is a continuation of Adventure Hunters' passion for travel, food and artistic expression, so they favor the handcrafted, the tactile and the unspoiled. Their consumption universe can be lived, breathed and tell a unique story – their identity is underpinned by a pioneers' mindset.

SHARING VS FIRST EXPLORER

While Adventure Hunters are global citizens – inhabiting a digital universe, where stories are swapped and intelligence passed on – they crave unique discoveries. From the remote outposts of Nordic Cool to the ultimate deserted island, they like to put their flag up first, and then share the knowledge with their network.

OPPORTUNITIES

Adventure Hunters find things out for themselves, closely scrutinizing for quality, integrity and social responsibility, so this makes niche, intelligent messaging essential. Differentiation is more important than innovation. One of our experts sees himself in their mindset: "My generation is the future buyer of luxury, and we are searching back for traditional experiences."

REGIONAL INFLUENCE

Global, skewed Asia, EU, Scandinavia, North America, Australia & Middle East

"At a time where everything has become accessible, the idea of inaccessibility becomes an attractive path to follow for people – and for brands that aim to differentiate themselves."

Kjaer Global expert interview 2015

IDEALISTIC PIONEERS



FEMALE FACTOR

(Well)being 4.0 + Intelligent Reduction

THE GOOD LIFE

Mindful Living + Betterness

BEHAVIOR

- Principled
- Seeking Balance
- Self Development
- Experiential

PROFILE

Idealistic Pioneers are proud of their achievements, but measure success in meaning, not wealth. Seeking a balance in every aspect of existence, they want to give back to society. They practice everyday mindfulness and are on a quest for spiritual growth, craving intelligent reduction and elegant products tailored round them.

MECOSYSTEMS

Idealistic Pioneers perceive the world as a system of things and beings and put themselves at the center, expecting brands to treat them as unique individuals. They need to both stand out from the crowd and belong – personal pleasure with social principles – and love experiential and transformative luxuries.

PURPOSE VS PLEASURE

With high expectations in all areas, Idealistic Pioneers seek purpose and a clear raison d'être from brands – excellence and sustainable practices are a given. While luxury, for them, is the harmony of a life lived meaningfully, they enjoy sensorial pleasures without guilt and are attracted to intellectual meeting points that build connection.

OPPORTUNITIES

Aware of their privileges, Idealistic Pioneers are open to creative ideas grounded in radical thinking. They are particularly inspired by clever concepts with social value. As one of our experts notes: "Luxury brands have a responsibility to take the privilege seriously by providing leadership in creative, meaningful, ethical and sustainable design".

REGIONAL INFLUENCE

Global (skewed West & China) EU, Scandinavia, North America and Asia



Intelligent reduction and elegant products

“The nature of philanthropy has changed, from signing checks to deeper involvement – this requires reliable partnerships, and needs to be personal.”

Kjaer Global expert interview 2015

NEW LUXURY MANIFESTO



#1. INNOVATE OR DIE

#2. BUILD EXPERIENCES BEYOND PRODUCTS

#3. ENRICH LIVES, TIME IS IRREPLACEABLE

#4. ENABLE MEANINGFUL CONSUMPTION

#5. DELIVER ESSENCE, NOT EXCESS