

RESEARCH

North American consumers rank 'comfort' highest among list of luxury attributes: report

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Shoppers are increasingly seeking personal indulgences peppered throughout daily life, per the largest U.S. media agency's latest study. Image credit: Shutterstock

By AMIRAH KEATON

Buyers across North America are switching up how they view and value luxury, according to a new report.

Published this month, findings from Horizon Media's [New Codes of Luxury: Aspirational Shifts in North America](#) suggest that these shoppers' luxury preferences have changed over the past few years, shifting as a result of many cultural, existential and socioeconomic influences. Experts are pointing to a wide range of resulting implications for heritage brands looking to connect with consumers across the continent.

"Luxury isn't necessarily meant to be relatable," said Maxine Gurevich, SVP of Cultural Intelligence at [Horizon Media's](#) WHY Group, New York.

"It's always been and continues to be aspirational," Ms. Gurevich said. "But as the cultural landscape has changed, so have people's aspirations, and those aspirations are far more individual than they have ever been."

For the New Codes of Luxury study, Horizon Media engaged with multiple research methodologies, mainly a proprietary study of 2,000 adults 18+ in the U.S. and Canada (English and French), weighted to be representative of age, ethnicity, region, and income. Additional approaches included desk research, an audit of luxury cultural signals across business sectors and a semiotic analysis of luxury "codes" and aesthetics.

Aspirations ascend

The largest U.S. media agency, per [Ad Age Data Center 2023](#), is exploring the evolution of the luxury landscape in the West.

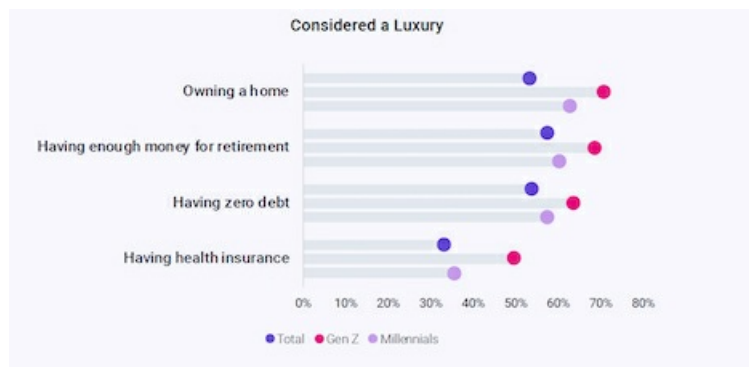
The report outlines that, in a rapidly changing world, luxury is no longer defined solely by opulence and exclusivity, shedding light on the evolution of aspirational consumer preferences across the United States and Canada.

The concept of luxury has been upended in both regions, giving rise to a more inclusive and individualistic notion of what constitutes a luxury experience.

First, its authors posit that economic challenges, including inflation and income inequality, have led more than half of respondents to view necessities like owning a home, becoming debt-free, or having enough money for retirement as luxuries.

This perception is particularly pronounced among younger generations, such as Gen Z 65 percent of Gen Z and 64 percent of Millennials feel they will never reach the personal or financial success of their parents.

"It's not so much that there's a collective disdain for conspicuous consumption, but there's frustration around the fact that the American Dream the idea and expectation that you will fare better than your parents is no longer true for a majority of young people," Ms. Gurevich said.



More than half of survey respondents view necessities like owning a home, becoming debt-free, or having enough money for retirement, as luxuries. Image credit: Horizon Media

The sentiment informs what Horizon Media identifies as the three modes of luxury that currently coexist, each catering to different audiences and demographics.

"Traditional Luxury" embodies opulence and exclusivity, embracing heirlooms, craftsmanship and durability most, while "Contemporary Luxury" aligns with modern values such as innovation and sustainability think NFTs, alternative materials and luxury EVs.

"Heirlooms, durability, and craftsmanship were identified as the top attributes of traditional luxury overall, but there are also category expectations and personal aspirations at play," Ms. Gurevich said.



"Traditional Luxury" and "Contemporary Luxury" precede "Personal Luxury," the third and most new category. Image credit: Horizon Media

"For example, our study found that within the fashion sector a category defined by craftsmanship and durability these propositions are table stakes," she said. "However, the cultural expressions of these values are changing."

The most recent mode, "Personal Luxury," centers around individual aspirations, financial circumstances, life stages, and social worlds, and is on the rise.

Comfort is king

Nearly seven of every 10 respondents expressed considering luxury an occasional treat, while 34 percent view it as a daily self-indulgence. This trend is even stronger among multicultural audiences in the U.S. (see story), reflecting a shift from Traditional Luxury stances to a more inclusive mindset.

"[Values are] being redefined by the bottom-up, like content creators that focus on deconstructing leather goods to show how they're made and determine which are worth the money," Ms. Gurevich said.

"Value is being highly scrutinized, especially with the rise of dupe culture and quiet luxury trends, and brands will need to strategically communicate these values in new ways," she said. "People aren't just seeking overt expressions of status and legacy through brand names, and Gen Zers in particular are looking for brands that help them stand out in order to fit in."

Interestingly and across generations, [New Codes of Luxury](#) found that American and Canadian consumers value comfort over all else.

Qualities of Luxury Important to Me					
	1	2	3	4	5
TOTAL	Comfort	Pampering	Extravagance	Exclusivity	Experience
GEN Z	Comfort	Exclusivity	Experience	Pampering	Aesthetics
MILLENNIAL	Comfort	Pampering	Exclusivity	Experience	Extravagance
GEN X	Comfort	Pampering	Craftsmanship	Experience	Extravagance
BOOMER+	Comfort	Pampering	Extravagance	Craftsmanship	Exclusivity

American and Canadian consumers value comfort over all else. Image credit: Horizon Media

Across various categories, including travel ([see story](#)), dining, fashion ([see story](#)), groceries, wellness, auto ([see story](#)) and tech, respondents consistently ranked comfort as their top luxury attribute.

Experts share that in a world filled with uncertainty, comfort has become aspirational, particularly for Gen Z, who seek solace and support from the brands they engage with.

"While comfort was the number one luxury attribute all generations said mattered the most to them personally, comfort can mean wildly different things to different people," Ms. Gurevich said.

"For some, comfort is the soft surroundings of a room at the Four Seasons," she said. "For others, specifically Gen Z, comfort is being able to tune out the external world in favor of retreating into your own head space (helped by a pair of noise-canceling headphones).

"The key for brands will be to learn what people aspire to and to understand how those aspirations shift alongside cultural change."