



Connecting With Luxury Audiences

Consumers share a common definition of 'luxury'

Quality, innovation, exclusivity, and brand experience are shared attributes



Quality

"**High quality** or something that has a **really good reputation**... known for creating, providing, and **giving the best experience**."

"Luxury means **high-end**. It's not achievable for everyone."



Uniqueness

"Luxury is feeling like the item is super special... Luxury is more about **uniqueness**."

"When it comes to luxury stuff, I think I almost make an assumption about the quality, so **I focus more on the item being really unique**."



Exclusivity

"**More exclusive**. If it's inclusive, then it doesn't feel special."

"**It can't be accessible to everyone**. If it was, then they would need to create different tiers to move some people around."



Brand Experience

"I feel like they give a very **VIP feeling**, despite them having hundreds of clients. For that moment, you feel like **THE VIP**."

"[Unlike a drugstore], if I buy [makeup] from the standalone stores, **it feels like a more luxurious experience**."



Luxury audiences are **not** one size fits all



*"I think there is **status** involved in luxury... It says something about who you are and the **level of wealth** you **might have**."*

*"It's **something that you look forward to**, whether it's a big trip you planned or a restaurant you've been dying to try. Without luxury, that excitement would be missing."*

*"It's all about **being proud of what I own**... Maybe it's because of other people, but also because of me just wanting to **feel confident and good**. It's an extension of myself in some ways."*

Purpose

As the luxury category continues to evolve, *understanding the spectrum of audiences* is increasingly important.

Using quantitative and qualitative research, we've created four luxury audience profiles demonstrating the similarities & differences across the luxury spectrum and helping to inform media & marketing strategies.

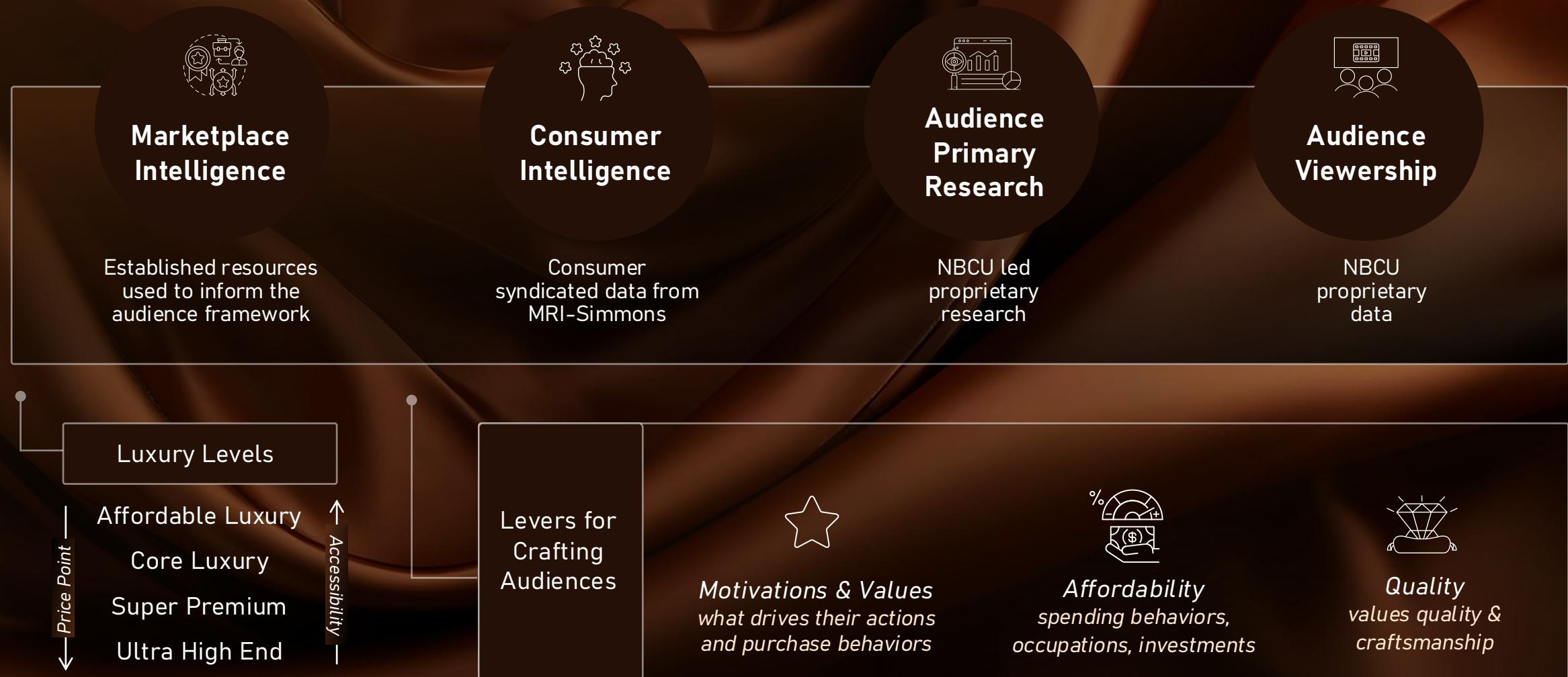


Overview of Audiences
Audience Deep Dives

Contents

Informing Luxury Profiles

To understand the luxury audiences, we turned to qualitative and quantitative information





Overview of Audiences

INTRODUCING ...

The *Four* Luxury Audiences



Emerging



Looking The Part



Quintessential Luxury



Elite
(a subset of Quintessential Luxury)



Aspirational

True Luxe

Who are the different types of Luxury Audiences



Emerging

Looking The Part

Quintessential Luxury

Elite

ASPIRATIONAL

TRUE LUXE

Impressionable **status seeker**, follows trends and stays brand loyal

Style savvy **tech enthusiast**, follows trends, and prioritizes premium brands

Sophisticated **trendsetter**, values exclusivity, and influenced by fashion and lifestyle trends

Excessive wealth, luxury, and covets **curated experiences**

Male / Female	53% / 47%	55% / 45%	54% / 46%	58% / 42%
Generations	16% Gen Z 43% Millennials	46% Millennials 25% Gen X	30% Millennials 29% Gen X	38% Gen X 37% Boomers
Race / Ethnicity	15% Black 19% Hispanic	73% White 8% Asian	78% White 11% Asian	86% White 8% Asian
Median HHI	\$100K	\$200K	\$350K	\$350K
Currently Married	55%	62%	69%	82%
Homeowners	68%	78%	87%	96%

What are the media habits of Luxury Audiences



Emerging

Looking The Part

Quintessential Luxury

Elite

ASPIRATIONAL

TRUE LUXE

Prefers digital platforms such as mobile internet, social media, and streaming for entertainment and inspiration

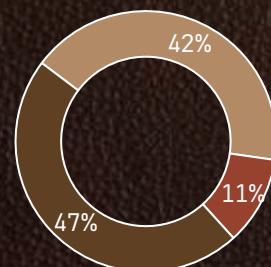
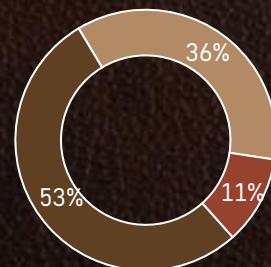
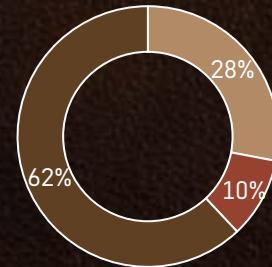
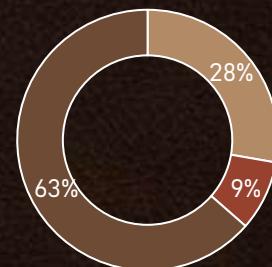
Digitally inclined, relying on podcasts, social media, and streaming to stay current

Prefers more traditional and established media, using newspapers, computers, and live TV to stay informed

Favors newspapers, magazines, and live TV for both entertainment and information

How They Watch¹

- Cordless
- Cord Loyalists
- Cord Shaver/ Cutter Intenders



Most Trusted Media²

Internet (Mobile: 21% | Computer: 21%)

Newspapers (23%) | Computer Internet (21%)

Newspapers (25%) | Computer Internet (21%) | Podcasts (9%)

Newspapers (30%) | TV (25%) | Podcasts (13%)

Main Sources of Entertainment²

Mobile Internet (40%) | Social Media (37%) | Podcasts (13%)

Mobile Internet (40%) | Social Media (39%) | Podcasts (14%)

Computer Internet (28%) | Magazines (7%)

TV (76%) | Magazines (11%)

NBCU Recommendations for Luxury Audiences

Aspirational (Emerging, Looking The Part)		True Luxe (Quintessential Luxury, Elite)
Prioritize opportunities with broader appeal that reach a younger and more diverse demographic, while maintaining the luxury feel		Focus on targeted opportunities and activations that feel more premium and exclusive to engage these niche audiences
<i>Cultural Moments</i>	Contextually relevant live programming (e.g., Awards, Red Carpet)	Bespoke integrations, amplification of existing partnerships, and opportunity for thought-leadership (e.g., CNBC Changemakers)
<i>Sports</i>	Broad appeal sports balanced with more focused sports (e.g., Olympics, World Cup, Kentucky Derby)	More focused sports programming (e.g., Golf, CNBC Sport)
<i>Custom Content</i>	Integrations and custom messaging aligned to content that engages aspirational audiences and naturally incorporates luxury (e.g., Emerging Artist Series, Bravo reality content)	Custom content & integrations in premium programming and business-focused IP (e.g., CNBC International/Domestic)
<i>Film</i>	Premium integrations or surrounding events with niche Universal Pictures and Focus Features films	Bespoke events aligned to Focus Feature movies, leveraging Luxury properties (e.g., stores, yachts) as the backdrop to Focus Features studio originals
<i>Multicultural</i>	Telemundo live events, sports, and original programming (e.g., Miss Universe, Velvet: El Nuevo Imperio)	New premium partnerships and amplification of clients' existing ones
<i>Streaming & Ad Innovations</i>	Targeted content ownership opportunities from original IP to ad innovations with the opportunity to shop or learn more	Key ownership opportunities and ad innovations that build upon the premium and exclusive nature of print (e.g., Brand Slate)
<i>Advanced Targeting</i>	Contextual targeting tailored to the program, audience, and luxury level (e.g., Core Luxury Apparel & Auto for Suits)	



Learnings & Best Practices

to help inform media & marketing strategies for luxury brands

Recognize

Distinct Audience Differences

Identify *who* the distinct luxury audiences are and their drivers for purchase

Craft

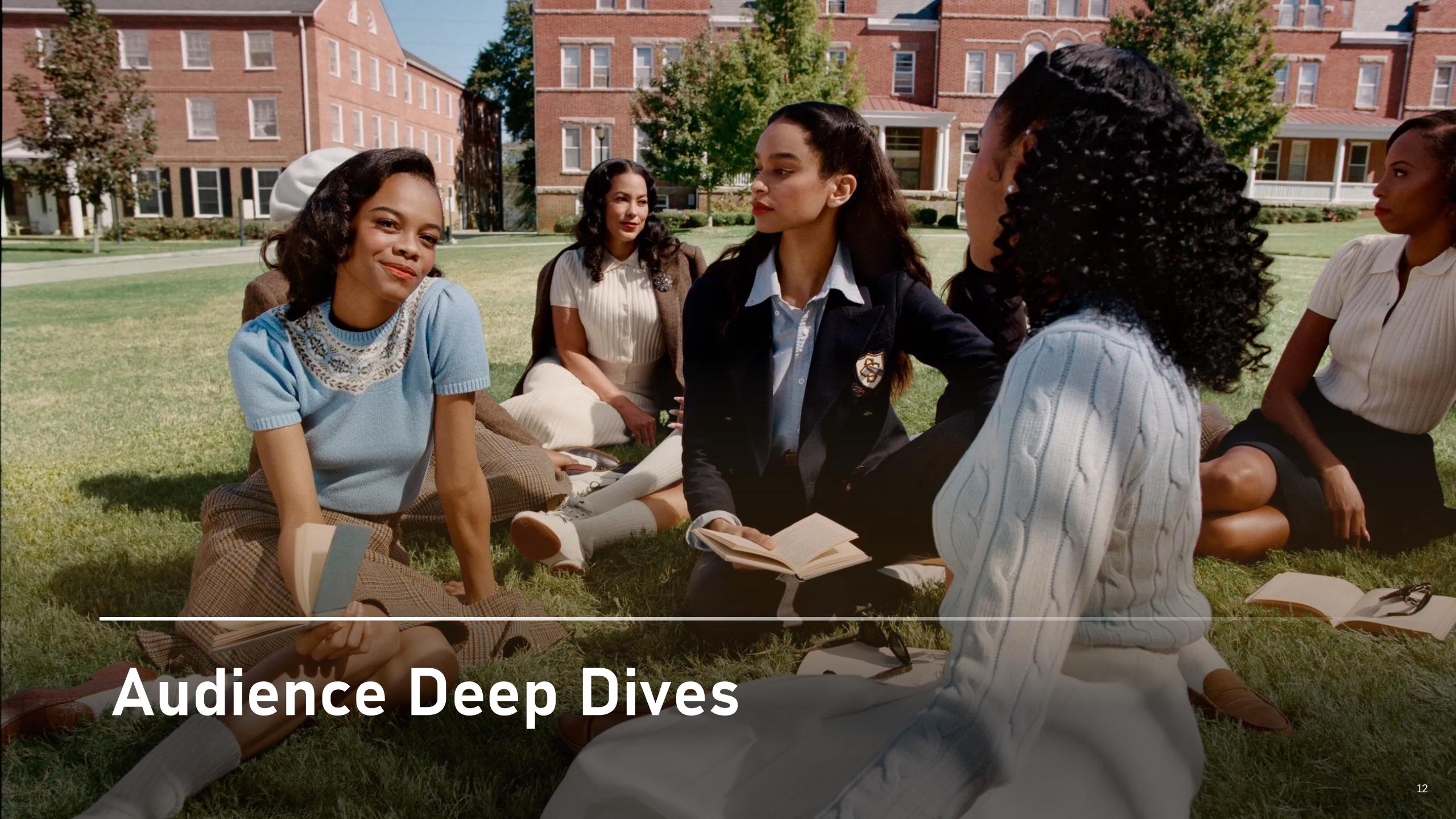
Relevant Messaging

Tailor messaging and content to align with each audience's mindset and motivations

Find

Synergies Across Media

Understand *how* luxury audiences engage differently and similarly across digital and traditional platforms



Audience Deep Dives

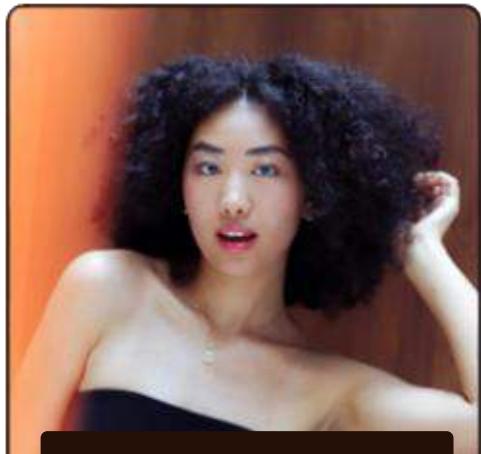


Emerging

The Emerging audience strives to afford more luxury items in the future. Motivated by aspirational values, they follow social media influencers and celebrities. They believe brand name is an indication of quality and are influenced by ads when making purchase decisions.

*“[Fine dining is] **an experience that you don't often get to indulge in**, so I think that when you do get to indulge in it, you have a different association with the experience, or it can be slightly more enjoyable because you're more relaxed or you're excited to experience this.”*

Aspirational Audience EMERGING



Impressionable status seeker, follows trends, uses discounts, and prioritizes quality

Olivia

Gender	53% M 47% F
Generations	16% Gen Z 43% Millennials
Race / Ethnicity	15% Black / African American 19% Hispanic
Median HHI	\$100K
Marital Status	55% Married 32% Never Married
Homeowners	68%

AFFORDABILITY

They don't yet have the financial means to purchase luxury products, so they rely on discounts or buying on credit



Bargain Shopper
109i



Financial Underdog
110i

MOTIVATIONS

They are motivated by appearances and aspire for future success



Impressionable Buyer
121i



Status Seeker
137i

QUALITY

On par with all luxury audiences, they prioritize quality in their purchases



Premium Techie
116i



Brand Reputation = Quality
112i

**Top
Brands**

BOSS
HUGO BOSS

SWAROVSKI

ARMANI



Emerging Media Behaviors

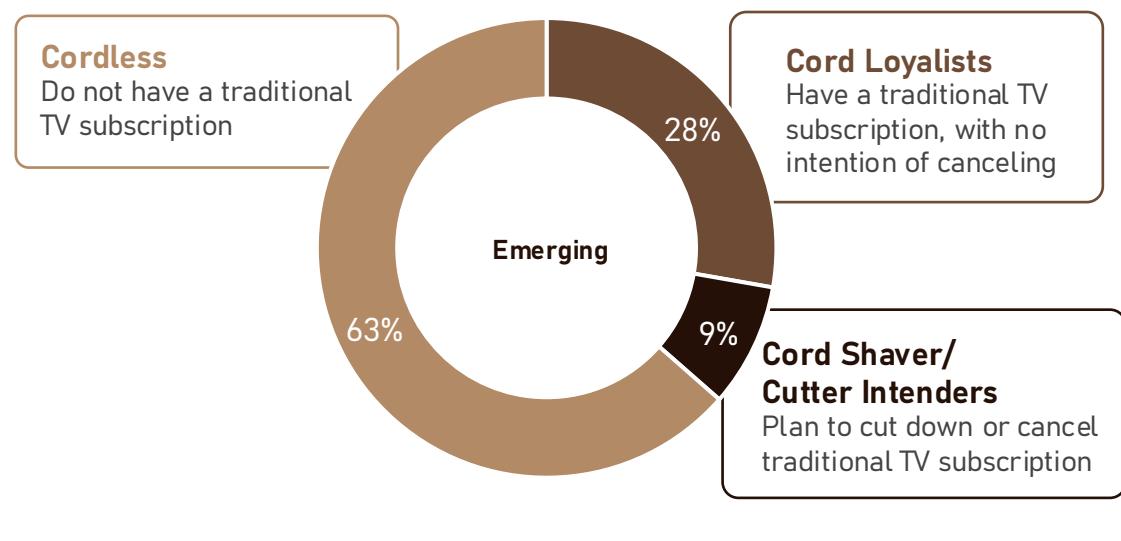
Olivia

HOW THEY WATCH¹

83%
of Emerging
stream weekly



57%
of Emerging watch **live**
traditional TV weekly



Emerging show a strong preference for digital media, including mobile internet, social media, and streaming for entertainment and inspiration.

MEDIA ATTITUDES¹

"Social media, TikTok, Instagram. I'm also not afraid to go up to strangers on the street and ask them where they got something. I've done that a few times."²



Emerging are **14% more likely** to say social media **gives them good ideas**



38% of the audience say they like that ads on streaming services are **interactive**, compared to 35% of all consumers



Emerging are **14% more likely** to say that mobile internet is their most trusted medium



Emerging Connecting at NBCU

Olivia

Emerging



33.5M

NBCU Cross-platform
HH Reach

What they're watching by **reach**

Linear



Peacock



What they're watching by **index**

Linear



Peacock





Looking The Part



Looking the Part cares about looking stylish and up-to-date on the most recent fashion trends. Active on social media, they follow influencers and brand campaigns to keep up with trends. As tech enthusiasts, they regularly upgrade their devices and favor premium tech brands. With their fast-paced urban lifestyle, their purchase decisions are heavily influenced by appearance and brand names.

"I grew up watching Project Runway, What Not to Wear, even some of the reality shows like The Real Housewives. Just seeing something and thinking, 'oh wow, that's really beautiful.' Yes, it's aspirational, but some of the women are also really successful in their fields and they worked really hard to be able to go out and buy certain things, and I like the idea of that as well."

Aspirational Audience LOOKING THE PART



Style savvy tech enthusiast, follows trends, and prioritizes premium brands

Sebastian

Gender	55% M 45% F
Generations	46% Millennials 25% Gen X
Race / Ethnicity	73% White 8% Asian
Median HHI	\$200K
Marital Status	62% Married
Homeowners	78%

AFFORDABILITY

Their purchasing power is starting to grow, allowing them to occasionally afford luxury products



Measured Investor
188i



White Collar Occupation
303i

MOTIVATIONS

They try to fit in by dressing the part and are influenced by activity on social media



Dress to Impress
108i



Social Media Group-ie
161i

QUALITY

On par with all luxury audiences, they prioritize quality when purchasing and influenced by brand name



Quality Over Price
115i



Brand Reputation = Quality
120i

**Top
Brands**

Brooks Brothers

D&G
DOLCE & GABBANA

ACURA



Looking The Part Media Behaviors

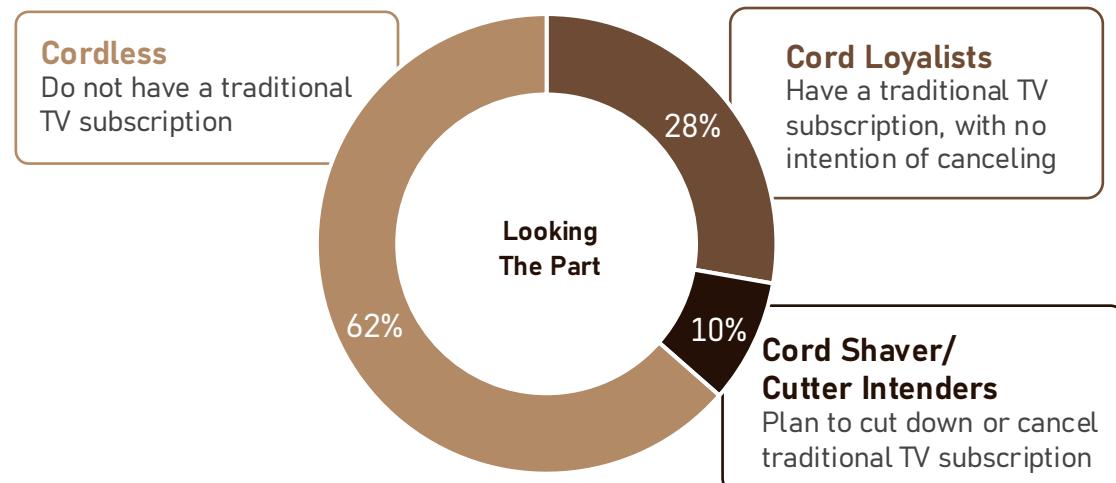
Sebastian

HOW THEY WATCH¹

85%
of Looking The Part
stream weekly



60%
of Looking The Part watch
live traditional TV weekly



MEDIA ATTITUDES¹

"I get a lot of ideas on social media. And then I'm looking at reviews. Reviews are probably the biggest thing, like people's experiences. I want to make sure they're positive."²



Looking The Part are **55% more likely** than the average consumer to have **listened to a podcast** in the past 30 days



48% of Looking The Part say mobile internet keeps them **up-to-date** with the latest styles and trends, compared to 40% of all consumers



Looking The Part are **21% more likely** to agree that social media is a **good source of learning**



Looking The Part Connecting at NBCU

Sebastian

Looking
The Part



14.6M

NBCU Cross-platform
HH Reach

Looking The Part enjoy live sports, reality, and comedy across the NBCU portfolio. Bravo shows, such as the *Real Housewives* franchise, are popular with this audience.

What they're watching by **reach**

Linear



Peacock



What they're watching by **index**

Linear



Peacock



Quintessential Luxury



Quintessential Luxury is made up of sophisticated trendsetters with inherited wealth. They value exclusivity and are often the first to experience new luxury products and services. As travel enthusiasts and frequent flyers, they seek unique, premium experiences around the world. They are confident and influential, often setting trends within their social circles.

*"Buy it once, buy it right, buy it for life,' so to speak.
If it's going to be more expensive, so be it."*

True Luxe Audience

QUINTESSENTIAL LUXURY



Sophisticated trendsetter, values exclusivity, influenced by designers and brand reputation

Elizabeth

Gender	54% M 46% F
Generations	30% Millennials 29% Gen X
Race / Ethnicity	78% White 11% Asian
Median HHI	\$350K
Marital Status	69% Married
Homeowners	87%

AFFORDABILITY

With higher purchasing power, they are able to regularly purchase luxury products and build their investment portfolio



Measured Investor
233i



Real Estate Investor
369i

MOTIVATIONS

They are motivated by designers and value brand name and product design over price



Designer-Driven
110i



Risk Taker
128i

QUALITY

On par with all luxury audiences, they prioritize quality products when purchasing, in addition to luxury experiences

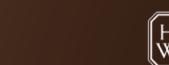


Luxury Traveler
120i



Quality Over Price
116i

Top Brands THE ROW



HARRY WINSTON





Quintessential Luxury Media Behaviors

Elizabeth

HOW THEY WATCH¹

80%
of Quintessential Luxury
stream weekly



63%
Quintessential Luxury
watch **live traditional**
TV weekly

Quintessential Luxury prefer more traditional and established media, using newspapers, computers, and live TV to stay informed.

MEDIA ATTITUDES¹



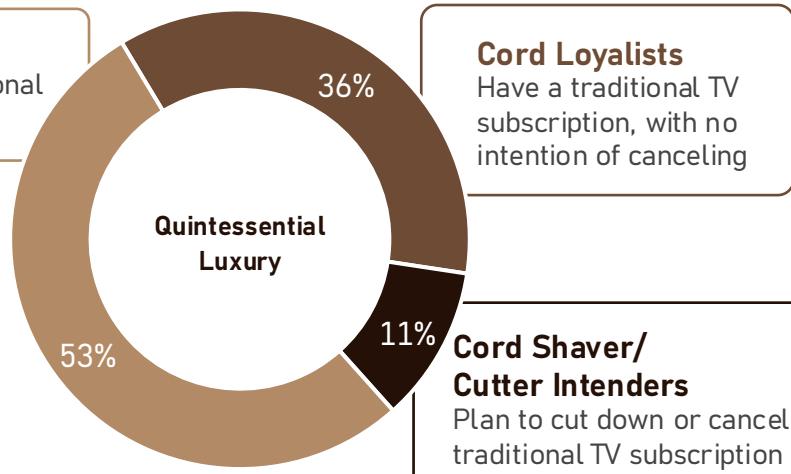
Quintessential Luxury are **28% more likely** to say newspapers are their most trusted media



63% of Quintessential Luxury say they use the internet on computer to **stay informed**, compared to 52% on average



Quintessential Luxury are **11% more likely** to say they enjoy streaming **live sports**





Quintessential Luxury Connecting at NBCU

Elizabeth

Quintessential
Luxury



5.3M

NBCU Cross-platform
HH Reach

Quintessential Luxury watch live programming as well as dramas. On Peacock, this audience prefers dramas and documentaries that may provide inspiration for fashion, travel, and exclusive experiences.

What they're watching by **reach**

Linear



Peacock



What they're watching by **index**

Linear



Peacock



THE THICK OF IT



Elite



Elites lead a lifestyle defined by understated luxury and curated experiences. As avid travelers, they seek exclusive, one-of-a-kind experiences. They are highly financially sophisticated and take a measured approach to their wealth, favoring niche designers and collectible items that reflect their sophisticated taste. They stay informed through print and online news, avoiding social media.

"My custom suit always makes me feel a little more confident... This suit fits me perfectly. I'm going to look great in it no matter what. I can wear it to a client meeting, I can wear it to dinner, I can wear it to a party and I'm going to be happy. I think there's a confidence that comes with that."

True Luxe Audience ELITE



Excessive wealth, luxury, and curated experiences

Maximilian "Max"

Gender	58% M 42% F
Generations	38% Gen X 37% Boomers
Race / Ethnicity	86% White 8% Asian
Median HHI	\$350K
Marital Status	82% Married
Homeowners	96%

AFFORDABILITY

With a vast portfolio of assets and investments at their disposal, they can afford the top tier of luxury goods



Measured Investor
359i



Financially Informed
244i

MOTIVATIONS

They are motivated by wealth, exclusivity, and personalization rather than keeping up with trends



Designer-Driven
238i



Elite Flyer
953i

QUALITY

They enjoy high-quality products and experiences that cater to their sophisticated tastes



Luxury Traveler
147i



Quality-First Auto Buyer
120i

**Top
Brands**



Van Cleef & Arpels





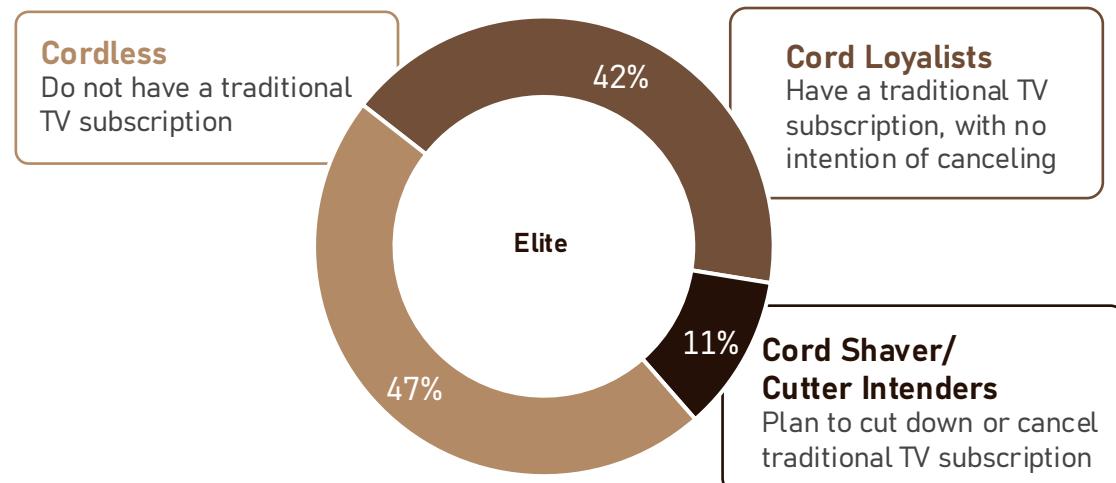
Elite Media Behaviors

Max

HOW THEY WATCH

79%
of Elite
stream weekly

75%
of Elite watch **live**
traditional TV weekly



Elite favor traditional media, relying on newspapers, magazines, and live TV for both entertainment and information

MEDIA ATTITUDES

 Elite are **51% more likely** to say newspapers are their most trusted media

 **76%** of Elite say TV is their **main source of entertainment**, compared to 62% on average

 **28%** of Elite read magazines to stay informed, compared to 17% of all consumers



Elite Connecting at NBCU

Max

Elite



482K

NBCU Cross-platform
HH Reach

Sports are key for the Elite group across English & Spanish-language programming. They prefer more niche sports, including cycling, swimming, skiing, and golf.

What they're watching by **reach**

Linear



Peacock



What they're watching by **index**

Linear



Peacock



THE THICK OF IT

As the industry continues to evolve, NBCU has

Learnings & Best Practices

Recognize Distinct Audience Differences

Identify *who* the distinct luxury audiences are and their drivers for purchase

Craft Relevant Messaging

Tailor messaging and content to align with each audience's mindset and motivations

Find Synergies Across Media

Understand *how* luxury audiences engage differently and similarly across digital and traditional platforms

and additional resources to help strategic planning & ideation

Category Trends & Strategic Recommendations



Thought Leadership



Opportunity Areas



For questions, please reach out to
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