

QUARTERLY NEWSLETTER

季度行业快讯

[2025 Q1 EDITION]

2025 第1季度刊

Welcome to the first edition of our newsletter — your quarterly briefing from 1up digital.

Created for decision-makers in the luxury and lifestyle space, this newsletter delivers a sharp, curated perspective on what's shifting — and what's on the horizon — across brands, consumers, platforms, and digital culture in China.

In this issue, we use the 2025 Milan Design Week and Salone del Mobile as a lens to examine two defining trends reshaping the luxury landscape: **the lifestyle turn and cultural immersion experiences.** We explore how these trends are being expressed globally — and how they're being echoed within China. From shifts in consumer mindset to innovations in branded content and experience, and the evolution of platform ecosystems and digital capabilities, we unpack the key signals shaping the next chapter.

We close with a look at how the convergence of AI, e-commerce, and content is driving a new growth logic — opening up more nuanced, perception-driven paths for brands to break through in China's complex market.

We hope this newsletter becomes a valuable companion as you navigate a fast-evolving industry — not just to stay in step, but to lead the way forward.

欢迎订阅 1UP Digital 季度快讯首刊!

这是 1UP Digital 为奢侈品与生活方式领域的决策者准备的内容速递,聚焦品牌、消费者、平台和数字文化在中国的最新变化与前瞻趋势。

本期我们借着 2025 米兰设计周和米兰国际家具展的热度,聊聊当下正在重塑奢侈品行业的两大趋势:**生活方式化和文化沉浸体验**。从全球视角到中国落地,我们一起看看这些趋势如何影响消费者心智、品牌内容玩法、平台生态以及数字能力的升级。

此外,我们还关注了一个越来越重要的话题: **AI + 电商 + 内容**的融合,正在如何为品牌打开一条更有感知力、更贴近本土语境的全新增长路径。

希望这份简报能帮你把握行业风向,不只跟上趋势,更能走在前沿。

Table of Contents 目录—

Opening Briefing 用篇速递

2025 Q1 Market Overview

2025 Q1市场概览

(Section 1)

Global Lens | 全球视角

How Luxury is Using Lifestyle to Redefine Identity

奢侈品牌如何用"生活方式"建立身份

(Section 2)

China Resonance 中国共鸣

From Product Consumption to Emotional Engagement

从买产品,到玩情绪:消费者心态正在升级

(Section 3)

Platform Evolution | 平台变化

How AI and Content Are Refining Shopping Experiences AI 与内容正如何重塑购物体验

(Section 4)

Case Highlights | 案例亮点

When Design Inspiration Meets China's Growth Engine

当设计灵感撞上中国增长引擎

Opening Briefing

开篇速递

E-commerce Shines in 2024

with Strong Growth Signals Across Platforms

Leading platforms saw strong performance in 2024, driven by key growth engines like smarter tech upgrades, precise user engagement, local strategies, and improvements in supply chain and logistics. Among these, smart technology was the biggest driver—powering the entire e-commerce chain and enabling data-driven improvements in user operations and supply chain efficiency.

2024年电商表现亮眼,多平台释放增长信号

头部电商平台通过智能化技术升级、精准的用户运营、本地化策略以及供应链与物流优化等多方面的核心增长引擎,驱动业绩增长。其中,智能化技术升级是最重要的核心增长引擎,它贯穿于电商运营的全链路,为用户运营、供应链优化等提供了强大的技术支持和数据驱动的基础。

阿里巴巴2024年底发布最新财报业绩(截至2024年12月31日)

- → **总营收:** 2801.54亿元人民币,同比增长 8%,超出市场预期(2773.7亿元)
- → 净利润显著增长
- → 淘天集团营收: 1360.9亿元,同比增长5%
 客户管理收入达1007.9亿元,增长9%
 88VIP核心用户达约4900万,同比双位数增长
- → 国际数字商业集团: 收入增长32%, 达377.56亿元, 跨境业务表现强劲

京东 2024全年财报表现

- → 全年营收: 11588亿元, 同比增长 6.8%
- → Q4营收: 3470亿元,同比增长13.4%,创两年来单季最高增幅
- → 核心业务(零售、物流、健康)稳步扩展, 为未来高质量增长打下坚实基础

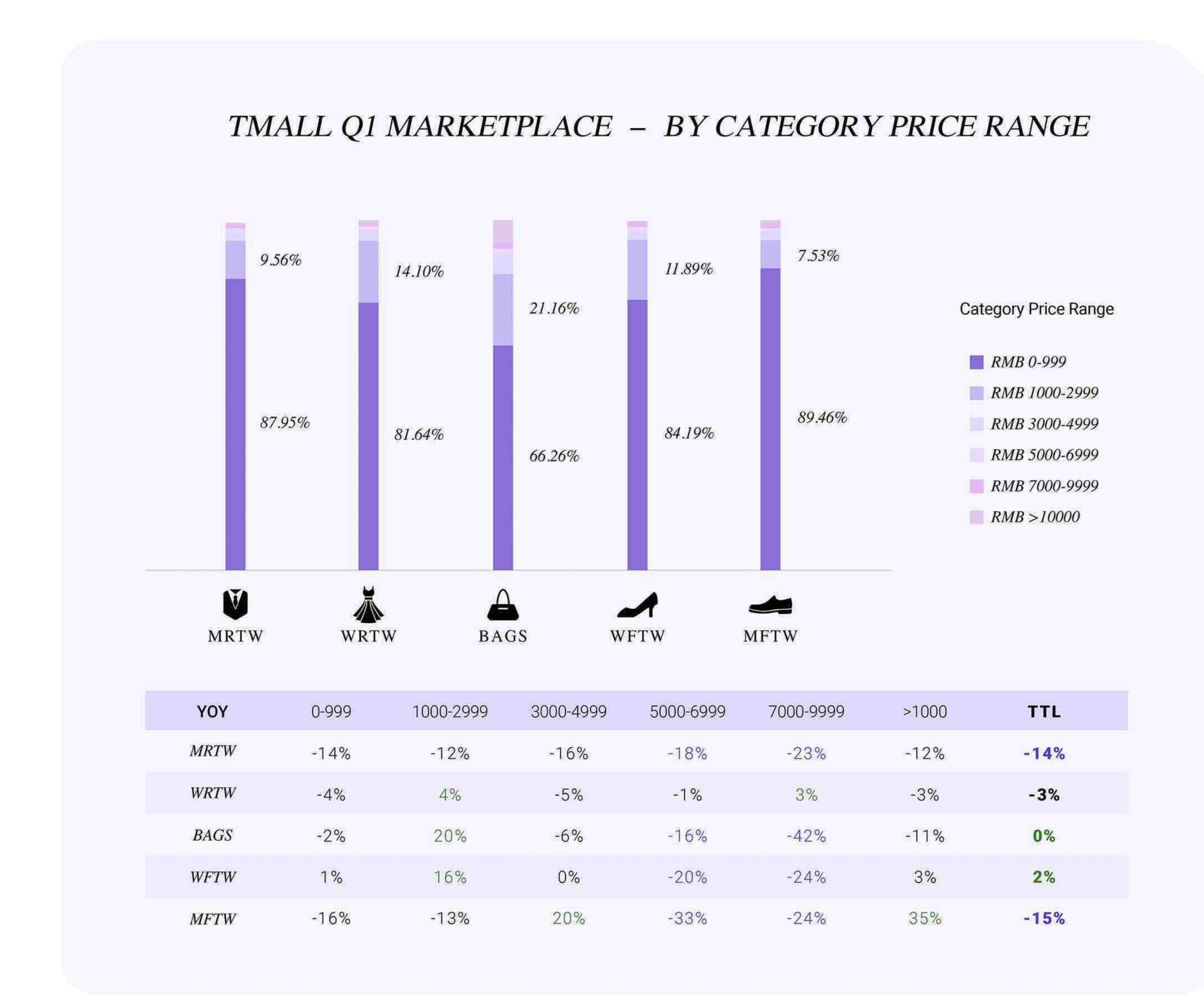
Fashion Trends:

Rational Spending Boosts Mid-Tier and Premium Opportunities

The overall consumer market remains under pressure, with significant declines in the high-end segment (¥5,000+). In contrast, the ¥1,000–2,999 range has shown resilience and even slight growth, emerging as the mainstream price band balancing rational spending and quality upgrades. As value recognition in the high-end market needs to be rebuilt, mid-tier and affordable luxury categories are showing strong growth potential.

Fashion整体趋势:消费趋于理性,轻奢与中端品类显现结构性机会

消费市场整体承压,高端(5000元以上)价格段下滑显著;1000-2999元区间表现抗跌甚至小幅增长,成为理性与升级并存下的主流价带。高端市场需重建价值认同,中端与轻奢品类展现稳健增长潜力。



减 WRTW(女装)

1000-2999元价格带占比最高(14.10%),且同比增长4%,表明中端女正装需求稳定;相比其他品类,女士正装受经济波动影响较小,消费韧性较强;整体价格分布略向中高价带偏移,但未脱离大众市场基本盘。

WMRTW(男装)

87.94%的销量集中在1000元以下,显示该品类以平价市场为主;高端段(5000元以上)同比下滑显著,反映男性消费者正转向更保守、实用的购买选择;整体消费趋势偏向性价比导向,高端需求收缩明显。

→ WFTW(女鞋)

84.19%销量来自1000元以下,高端段 全线衰退,7000-9999元跌幅达33%, 说明女鞋需求高度集中于日常平价产品, 高端化尝试未获市场认可。

A Bags(包袋)

价格分布多元,中高端段(3000-6999元)占比 21.16%,但5000-6999元段同比暴跌16%, 显示奢侈包袋需求遇冷; 万元及以上段微增2%,轻奢段(1000-2999 元)激增20%,印证消费者转向"轻奢/设计师品牌"的替代选择。

→ MFTW(男鞋)

89.46%销量依赖1000元以下市场, 仅1000-2999元段微增2%,整体同比 下滑15%,反映男鞋需求疲软,且缺乏高端 增长动力,亟需产品创新或场景化升级。

女装细分类目观察:

高端稳固、新锐破圈, 品类分化加剧



女士衬衫TOP品牌

Store	Units	Net Sales	мом	
RALPH LAUREN官方旗舰店	1,265	2,156,850	323%	
uooyaa乌丫旗舰店	761	1,330,999	625%	
ICICLE之禾官方旗舰店	356	976,758	279%	
moco官方旗舰店	695	855,985	205%	
edition官方旗舰店	439	810,978	135%	
JNBY官方旗舰店	546	685,709	32%	
13DEMARZO旗舰店	361	678,486	559%	
lefame旗舰店	329	646,064	113%	
THEORY官方outlets店	446	560,445	278%	
雅莹官方旗舰店	215	505,684	100%	

女士衬衫: 爆品驱动, 高端与新锐并存

爆品效应

UOOYAA衬衫(¥1799)销量342件环比 +1755%,13DE MARZO与 Ralph Lauren同现热销, "设计+品牌"双驱动效应显著。

高端品牌壁垒稳固

Ralph Lauren三款上榜彰显高端市场统治力,经典款持续贡献稳定营收,3000+价位仍由传统奢侈品牌主导。

新锐突围

UOOYAA/13DE MARZO凭设计美学破圈, MOCO借内容营销溢价,消费者愿为小众 设计买单,细分赛道潜力释放。

女士半身裙TOP品牌

Store	Units	Net Sales	мом
moco官方旗舰店	2,117	2,794,194	128%
annandelman旗舰店	610	861,152	57%
edition官方旗舰店	269	671,931	275%
THEORY官方旗舰店	637	638,911	Ĩ
shushutong旗舰店	174	562,510	181%
uooyaa乌丫旗舰店	256	508,324	86%
致知服饰旗舰店	401	437,090	N.
ICICLE之禾官方旗舰店	114	389,728	2087%
Massimo Dutti官方旗舰店	339	369,510	578%
IINCBOUTIQUE旗舰店	148	317,814	127%

女士半身裙: 成熟品牌主导, 格局固化

规模优势

Theory半裙销量637件/销售额63万+,显著领跑女士半身裙品类。

格局固化

Theory、Massimo Dutti等国际成熟品牌垄断榜单,新品牌突围困难。

女鞋洞察: 品类分化, 增长逻辑各异

品类分化显著

女士休闲鞋由 GUCCI、Golden Goose等主导,体量大、竞争激烈;芭蕾鞋则偏小众,高价品牌如FERRAGAMO与中端品牌COS构成"两端结构"。

价格带呈阶梯分布

休闲鞋集中在 1,000-5,000 元价位, 为消费主力区间; 芭蕾鞋则出现两极分化,高端超 6,000 元与中端 1,000-2,500元占主导。

爆款逻辑各异

Golden Goose 联名款与 Miu Miu 运动鞋 (+1700%)带动休闲鞋热度; COS芭蕾鞋 (302件,+631%)以高性价比 突围,形成中端爆款。

增长引擎不同

休闲鞋增长依赖明星同款(如 ASH)和品牌联名(易烊千玺 × Golden Goose); 芭蕾鞋则靠独特设计(如 UMA WANG 手工款 5,116 元) 与平价爆品共同驱动。



女士休闲鞋TOP品牌

Store	Units	Net Sales	мом
GUCCI古驰官方旗舰店	326	2,929,700	27%
Golden Goose官方旗舰店	396	2,134,200	194%
ash官方旗舰店	1,003	1,681,488	115%
MIU MIU官方旗舰店	177	1,473,550	288%
lostinecho旗舰店	988	1,264,221	210%
BIRKENSTOCK官方旗舰店	900	1,212,960	180%
ALEXANDER MCQUEEN官方旗舰店	225	1,167,700	43%
UGG官方旗舰店	918	1,159,582	92%
annandelman旗舰店	742	934,456	27%
MARNI官方旗舰店	260	884,451	122%

女士芭蕾鞋TOP品牌

Store	Units	Net Sales	мом
Maison Margiela官方旗舰店	257	1,457,770	88%
ROGER VIVIER官方旗舰店	80	578,400	77%
TORY BURCH汤丽柏琦官方旗舰店	324	576,115	64%
LABELHOOD蕾虎旗舰店	105	537,174	125%
FERRAGAMO菲拉格慕官方旗舰店	71	468,802	59%
COS官方旗舰店	363	459,850	552%
lostinecho旗舰店	287	362,092	482%
REPETTO官方旗舰店	111	289,369	76%
ICICLE之禾官方旗舰店	100	258,302	91%
CHOCO CONCERT旗舰店	234	257,166	138%

Takeaway

- → 高端市场仍由传统奢侈品牌把控, 但小众设计品牌 (UOOYAA、13DE MARZO)借差异化破圈
- → 品类分化明显, 休闲鞋靠营销&联名, 芭蕾鞋靠设计&平价爆款
- →成熟品牌(Theory、Ralph Lauren)在核心品类占据统治地位,新品牌需精准切入细分赛道

Home & Lifestyle Trend Overview:

Essential Needs Stay Strong, Premium Holds Up, Non-Essentials Face Pressure.

Home & Lifestyle整体趋势: 刚需稳健、高端抗跌,非必需品类承压

2025年Q1与2024年Q1数据对比:

	销量	营收
餐饮具	-18%	-4%
厨房/烹饪用具	-15%	0%
厨房电器	-5%	12%
床上用品	-18%	-2%
家居饰品	-24%	-12%
家庭/个人清洁工具	-22%	-5%
家装灯饰光源	-41%	-10%
居家布艺	-26%	-7%
收纳整理	-25%	-5%
住宅家具	-16%	-11%





整体表现:

消费收缩, 高端驱动结构性机会显现

整体趋势:量减收降,高端家居展现增长韧性

整体家居消费持续收缩,多数品类销量与营收双降,家装灯饰光源(销量-41%|营收-10%)、家居饰品(销量-24%|营收-12%) 跌幅最为明显,反映非刚需装饰性消费显著下滑。尽管如此,高端市场正在释放结构性机会。虽总量减少,但客单价持续上扬,尤其在厨房电器等品类(营收+12%)表现突出,暗示中高端产品仍具吸引力,高端家居的消费潜力有望持续释放成为增,长的关键。

厨房电器逆势增长

销量仅-5%但营收+12%,表明产品升级(如智能厨电)推高客单价, 对冲销量下滑。

逆势突围,智能升级推高客单

厨房电器客单价275.1元,营收83亿, 验证智能家电(如洗碗 机、高端烤箱)的 溢价能力。

住宅家具: 高客单撑营收,消费回暖与装修季共振

住宅家具以仅3150万销量贡献134亿营收, 客单价高达426.5元,显示高端化趋势显著。



家居消费三月回暖: 高端稳健、刚需走量, 餐饮具现价格压力

整体增长趋势

多数品类在三月实现销量与营收双增长,显示春节后消费回暖。

住宅家具

月均营收超4.2亿元,但销量仅排名第7,凸显其高客单价特性。尽管销量波动较小,营收在三月显著回升,表明消费者对高端家具的需求稳定,且可能受春季装修季推动。

家装/个人清洁工具

销量稳居第一,月均40.7万件,但营收表现中等,属于高频刚需品类。

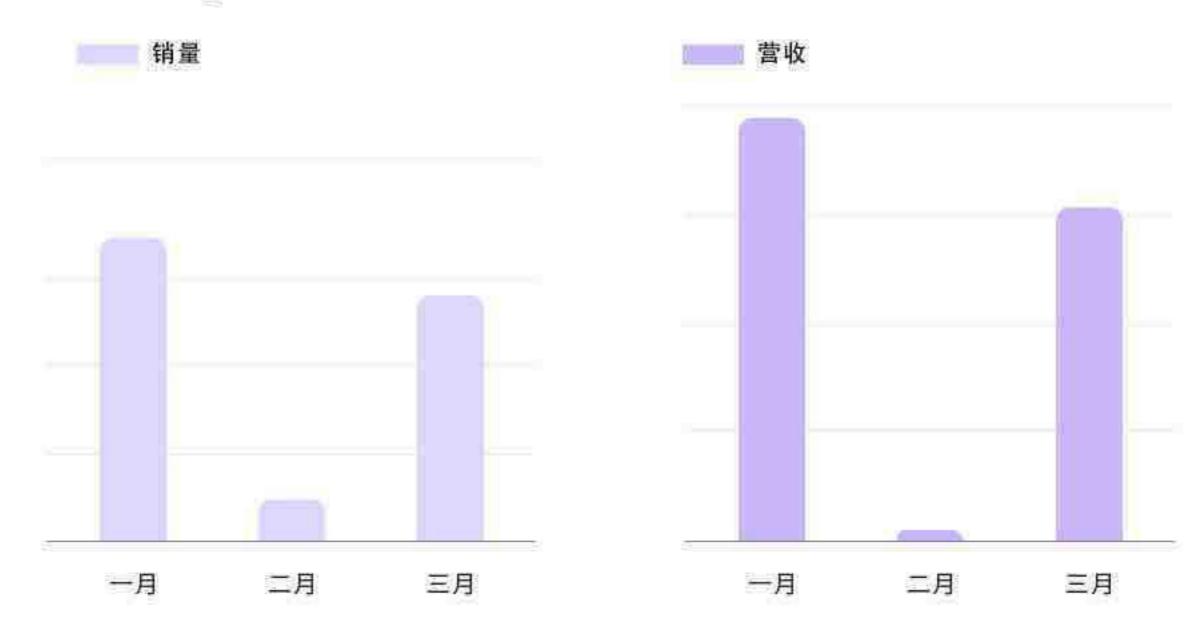
餐饮具

三月销量增长11.9%,但营收仅微增2.7%,反映客单价下滑风险。

住宅家具:

刚需扛鼎、结构升级, 新兴品类蓄势待发





住宅家具以134.38亿元季度总收入稳居第一, 是第二名的3.6倍,支撑家居大盘。住宅家具 集中爆发于1月,收入47.87亿元,占季度 总额的35.6%,显著受春节装修/焕新影响。

适老&设计品类爆发,结构优化成增长新动能

2025 Q1 住宅家具二级类目YOY

2020 Q1 IL L303		
	销量	营收
案/台类	29%	0%
成套家具	-90%	26%
床垫类	-36%	-13%
床类	28%	-31%
儿童家具	-8%	-14%
根雕类	-53%	-31%
柜类	1%	10%
红木家具	-51%	-7%
户外/庭院家具	4%	-30%
几类	-3%	0%
家具辅料	-69%	-16%
架类	-23%	11%
镜子类	-16%	3%
屏风/花窗	-32%	-24%
沙发类	-27%	-35%
设计师家具(NEW)	53%	83%
适老家具	154%	188%
箱类	-21%	-10%
休闲家具	-19%	8%
桌类	-7%	-2%
坐具类	-12%	4%

高增长品类(销量&营收双增长)

适老家具(销量+15%|营收+188%)和设计师家具 NEW(销量+5%|营收+83%)成为增长双引擎,前者受益于定制化需求爆发及客单价跃升,后者凭借设计溢价快速打开高端市场。

结构升级型品类(销量下滑但营收上升)

成套家具(销量-30%|营收+20%)、餐具 (销量-23%|营收+11%)和柜类(销量-13%| 营收+10%)均呈现销量下滑但营收增长 态势,反映消费升级趋势下,客单价提 升和产品结构优化成为关键增长动力。

稳定型/轻波动类目

案/台类(销量+29%|营收0%)呈现量增不增收态势,反映中低端产品主导销售; 而休闲家具(销量-9%|营收0%)表现持平,暗示市场趋于饱和或面临替代品竞争压力。

刚需领跑、高值支撑, 长尾品类待深耕

2025 Q1 住宅家具二级类目销量与营收

	销量	营收
案/台类	91,180	59,629,664
成套家具	7,927	10,764,750
床垫类	688,286	760,279,141
床类	820,434	1,569,837,606
儿童家具	2,129,167	1,146,285,645
根雕类	1,916	585,689
柜类	3,948,781	2,350,644,651
红木家具	1,674	18,735,576
户外/庭院家具	174,241	212,859,852
几类	1,490,830	691,662,949
家具辅料	84,504	2,828,390
架类	7,918,660	1018,850,521
镜子类	2,098,366	212,003,604
屏风/花窗	71,150	22,566,708
沙发类	835,870	1,806,113,886
设计师家具(NEW)	8,041	10,011,098
适老家具	10,239	18,971 586
箱类	151,675	15,382,876
休闲家具	4,459,650	590,075,345
桌类	2,808,405	1,878,402,641
坐具类	3,701,297	1,041,699,432

第一梯队(销量百万级以上,营收超5亿)

桌椅、坐具、儿童家具等品类销量和营 收均处于领先位置,构成平台住宅家具 板块的主力。儿童家具在高销量基础上 维持较高营收,显示出强劲的市场渗透 力与增长潜力。整体呈现出刚需属性明 显、购买频次相对更高的消费趋势。

第二梯队(销量几十万至百万,营收过亿)

床垫、床类尽管销量不如头部品类, 但营收水平突出,说明客单价高、用户 投入大。柜类在销量靠前的同时营收 表现优异,显示出高价值品类结构。 户外家具虽销量不高但营收较大,呈现 明显的季节性拉动效应。

第三梯队(销量<10万但营收超千万)

沙发、屏风、梳妆台等典型大件家具销量相对较低,但单品价值高、拉动营收能力强。此类产品多为非刚需、长决策周期商品,受家装场景影响较大。整体呈现出"低频高值"的消费特征。

第四梯队(潜力待挖或边缘化)

红木家具、设计师家具、家具材料等品类销量与营收均处于低位。红木家具因消费人群有限、价格较高,表现出小众收藏型特征。设计师家具虽为新兴类目,当前体量较小,仍处于市场培育阶段。家具材料类目偏向专业用户或DIY群体,受众面窄。

家居饰品:

高增长赛道爆发、刚需品类稳盘、结构升级与挑战并存

家居饰品市场分化: IP联名与高端化驱动增长, 传统品类承压

2025 Q1 家居饰品二级类目YOY

	销量	营收
摆件类	-13%	-14%
壁饰	-35%	-38%
创意饰品	-21%	-8%
雕刻工艺	-27%	6%
风铃及配件	-10%	9%
工艺船	-25%	-54%
工艺伞	21%	-15%
工艺扇/团扇/喜扇/折扇	-19%	4%
花瓶/花器/仿真花/仿真饰品	-17%	-6%
家居香薰	-7%	-0%
家居艺术品	-66%	-36%
家居钟饰/闹钟	-9%	2%
家饰软装搭配套装	-24%	-3%
蜡烛/烛台	-5%	-5%
其他工艺饰品	88%	58%
贴饰	-30%	-15%
相框/画框	-31%	-22%
香托/香盘/香座/香插	10%	184%
照片/照片墙	-43%	11%
执照框	125%	-47%
装饰挂钩	17%	-11%
装饰挂牌	-64%	-18%
装饰画	-20%	-11%
装饰架/装饰搁板	51%	36%
装饰器皿	-25%	-17%

高增长品类(销量&营收双增长)

其他工艺饰品(销量+88%、营收+58%) 或受益于IP联名,香托类(销量+10%、 营收+184%)因高端化提价,装饰架 (销 量+51%、营收+36%)反映家居收纳 需求升温。

销量下滑但营收增长(客单价提升)

风铃及配件(销量-10%、营收+9%)与工艺架(销量-25%、营收+6%)通过价格或结构升级实现正向营收。

稳定型品类(小幅波动)

部分家居品类销量小幅下滑但营收趋稳 (如家居香薰-7%|0%、烛台-6%|-3%), 需通过节日营销和场景化组合提升转化。

下滑品类(销量与营收双降)

摆件类(-13%|-14%)、装饰类(-35%|-38%) 与创意饰品(-21%|-8%)或面临市场饱和、 产品老化及竞品替代危机。

家居装饰品类格局:刚需贴饰领跑,装饰类梯队分化明显

2025 Q1家居饰品二级类目销量和营收

	销量	营收
摆件类	6,567,363	925,125,939
壁饰	79,851	8,574,648.15
创意饰品	855,368	22,564,582
雕刻工艺	245,609	50,735,576.4
风铃及配件	45,689	1,594,874.18
工艺船	2,586	611,156.13
工艺伞	25,817	1,265,052.88
工艺扇/团扇/喜扇/折扇	30,088	3,266,384.41
花瓶/花器/仿真花/仿真饰品	2,628,640	195,826,276
家居香薰	1,212,510	141,438,990
家居艺术品	629	841,699.72
家居钟饰/闹钟	677,752	70,751,286.1
家饰软装搭配套装	14,374	3,475,871.14
蜡烛/烛台	121,219	8,119,319.28
其他工艺饰品	26,177	945,976.1
贴饰	15,533,130	430,537,775
相框/画框	3,865,175	112,947,927
香托/香盘/香座/香插	39,341	3,093,273.72
照片/照片墙	46,988	4,405,770
执照框	3,266	97,919.87
装饰挂钩	140,764	3,363,091.79
装饰挂牌	58,780	1,528,381 38
装饰画	3,462,000	731,538,274
装饰架/装饰搁板	8,156	650,821.59
装饰器皿	641,239	41,838,913.4

销量冠军

贴饰类以 1553 万的销量遥遥领先,显示出强劲的市场需求,可能为高频刚需或爆款产品。

第二梯队(100万-1000万)

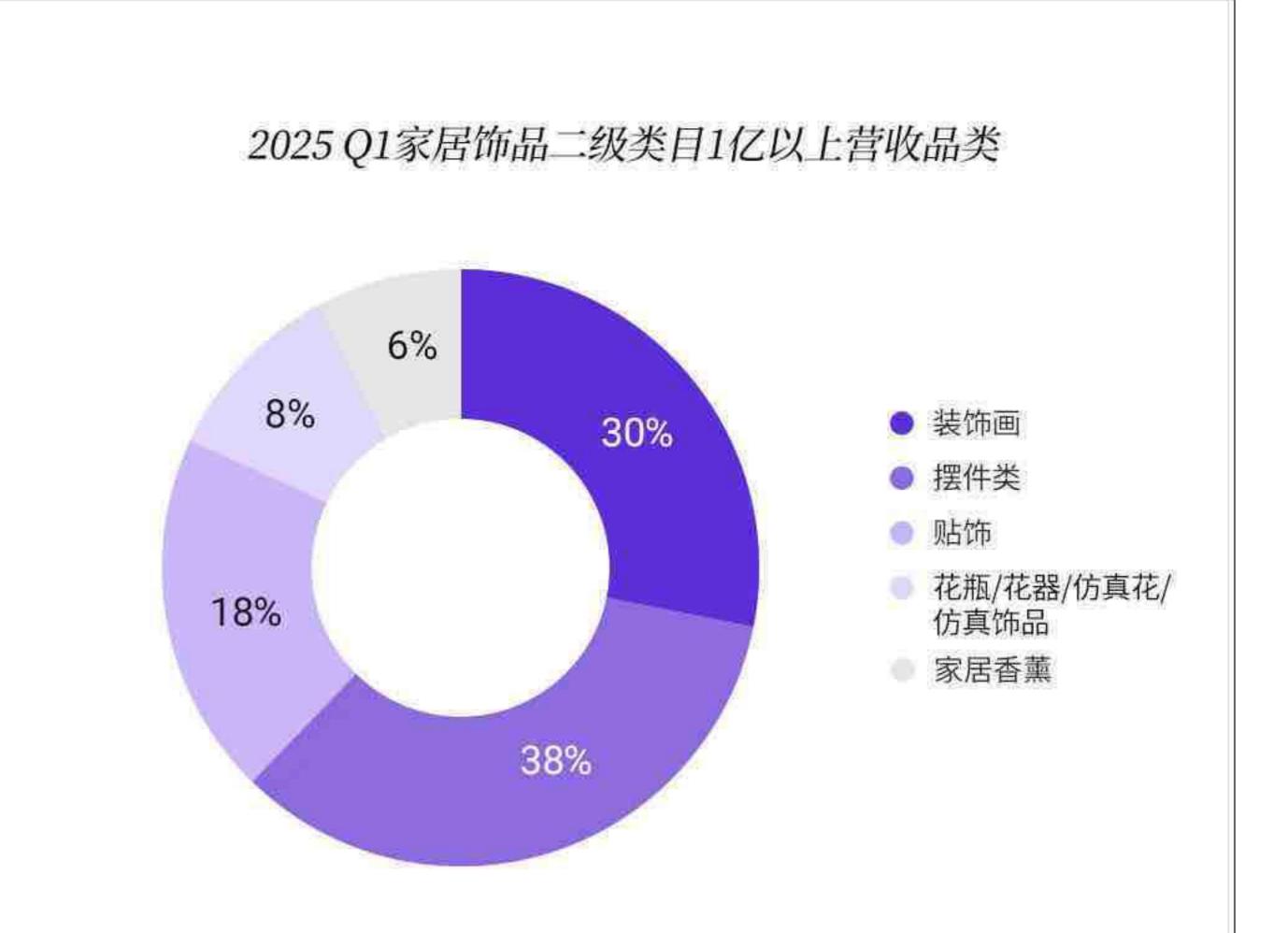
包括摆件类、相框/画框、装饰画、花瓶/仿真花、家居香薰等,均为热门装饰类产品,市场接受度高,需求稳定。

中等销量(10万-100万)

如创意饰品、家居钟饰、装饰器皿等,虽不属主力品类,但具一定吸引力,适合打造差异化产品线。

低销量(1万以下)

如工艺船、执照框、家居艺术品等, 偏小 众、专业性强,或因使用场景受限 而销量较低。



营收观察

三大品类 贡献九成业绩 香薰品类表现亮眼 装饰画、摆件类、贴饰三大品类贡献超 90%营收,是绝对的营收支柱。 装饰画营收最高,可能因高客单价(如定制油画)或品牌溢价。 家居香薰表现亮眼(6%营收),反映"悦己经济"趋势。 (Section 1)

Global Lens

How Luxury is Using Lifestyle to Redefine Identity

The 2025 Salone del Mobile and Milan Design Week

have emerged as key platforms for luxury brands to express their evolving lifestyle philosophies.



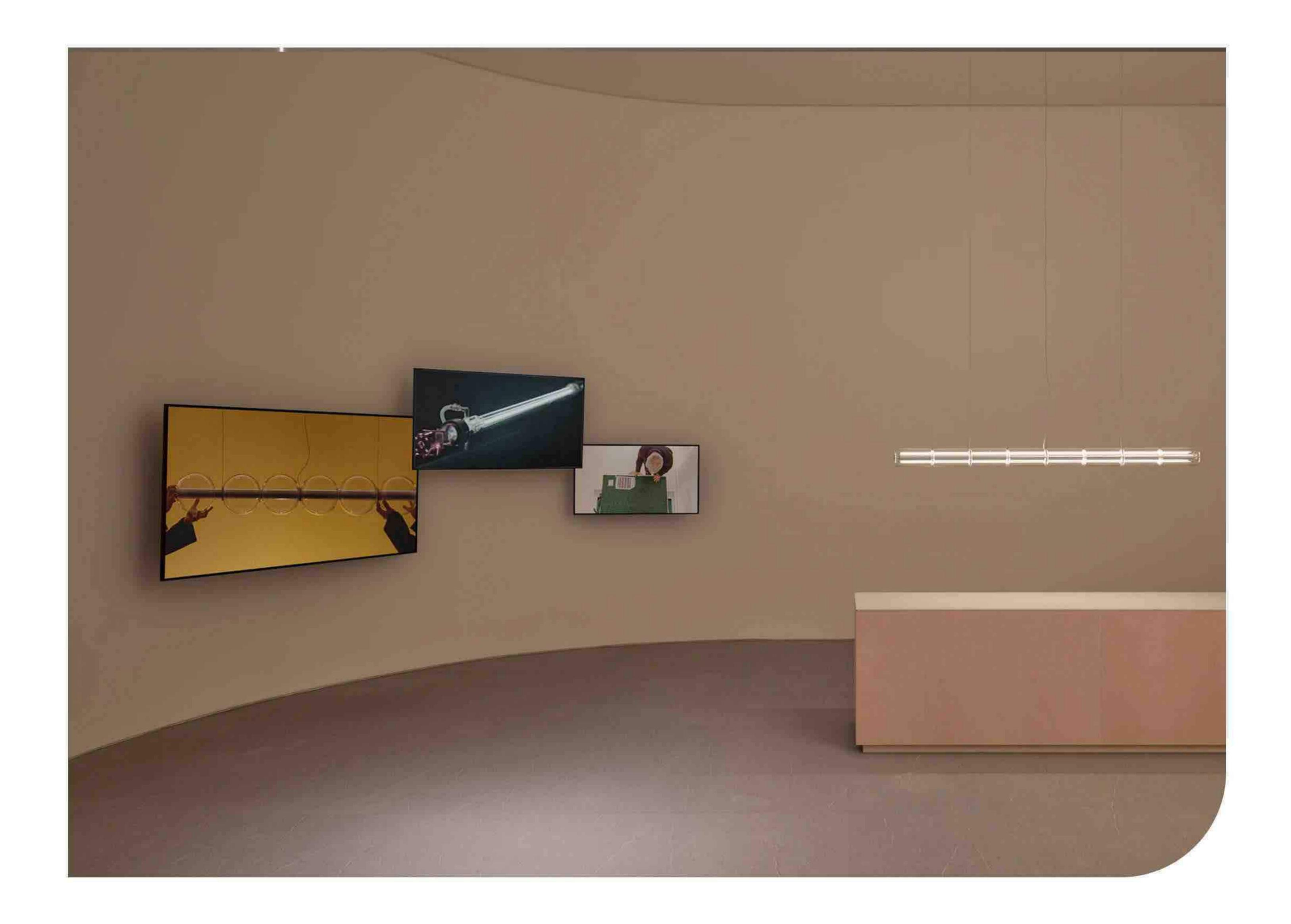
Design, long considered a vessel for emotion, is now taking center stage as a means for brands to forge deeper, more human connections. This year's fair, themed "Thought for Humans," sparked meaningful dialogue around the role of design in addressing not just aesthetics, but human needs and emotions.

In this context, design transcends visual appeal, becoming a medium rich with emotional and cultural resonance. We see luxury brands redefining the essence of "luxury"—shifting from the ownership of rare objects to the expression of a mindful, **intentional lifestyle and way of living**.

We saw four emerging trends highlight how this shift is shaping the future of high- end design and consumer experience.

Trend 1: Emotional Design

Emotional design is making a strong comeback, as brands focus on creating sensory-rich and introspective environments that resonate deeply with individuals.

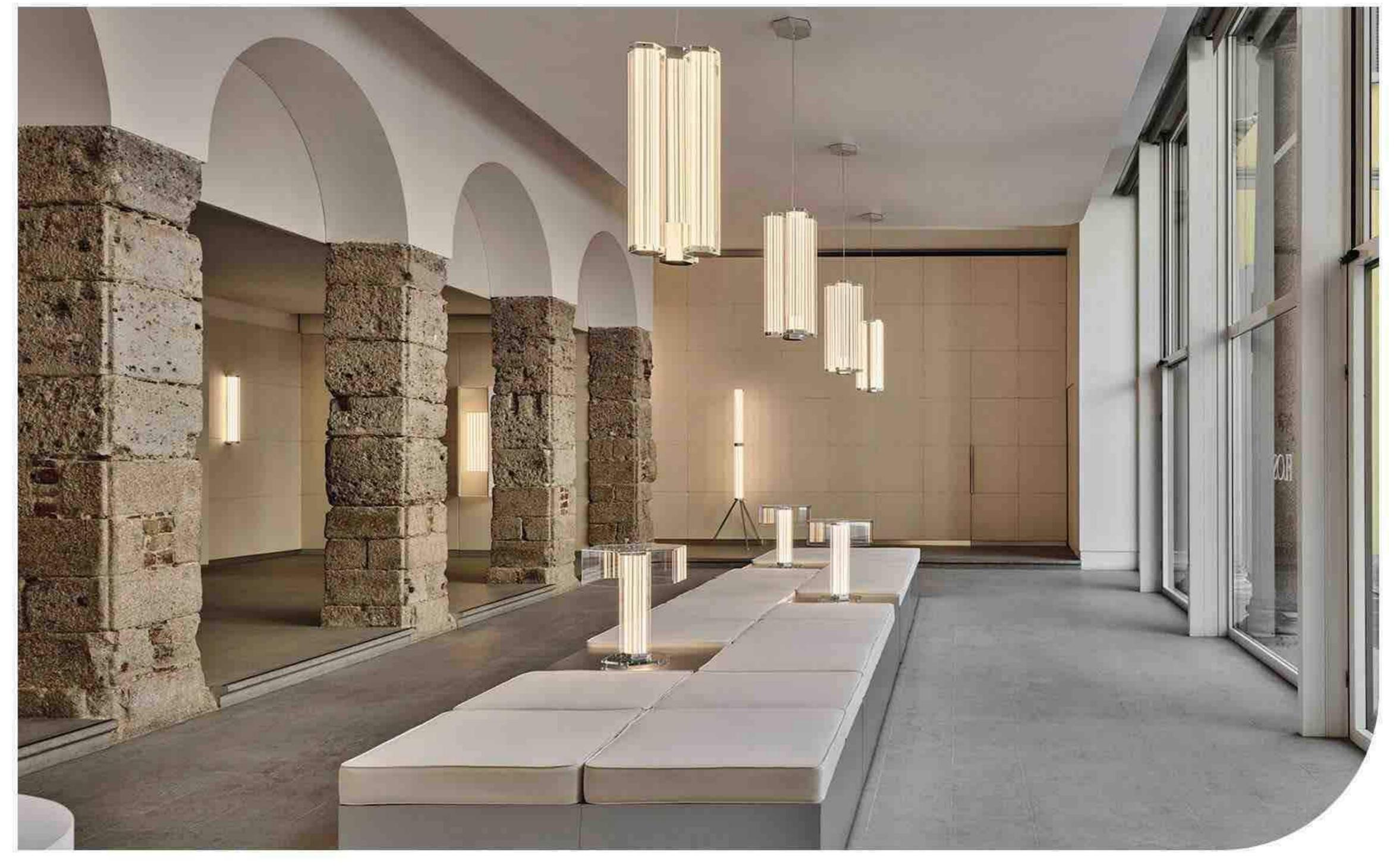


Flos' "The Light of the Mind" installation transformed its stand into a subjective, meditative space.

Through seven evocative video narratives, the installation explores the creative process behind Flos' newest collections, inviting visitors to reflect on memory, imagination, and emotion. This journey blurs the line between thought and design, offering an intimate connection between viewer and object.

Flos' New Collection further reinforces this approach, using tactile materials, atmospheric lighting, and nuanced color palettes to evoke quiet contemplation and sensory engagement.





Takeaway

Flos has long transcended its role as a mere lighting brand to become a cultural symbol in the world of luxury home design. A Flos piece in a luxury residence holds the same emotional and aesthetic resonance as a masterpiece painting displayed in a living room.

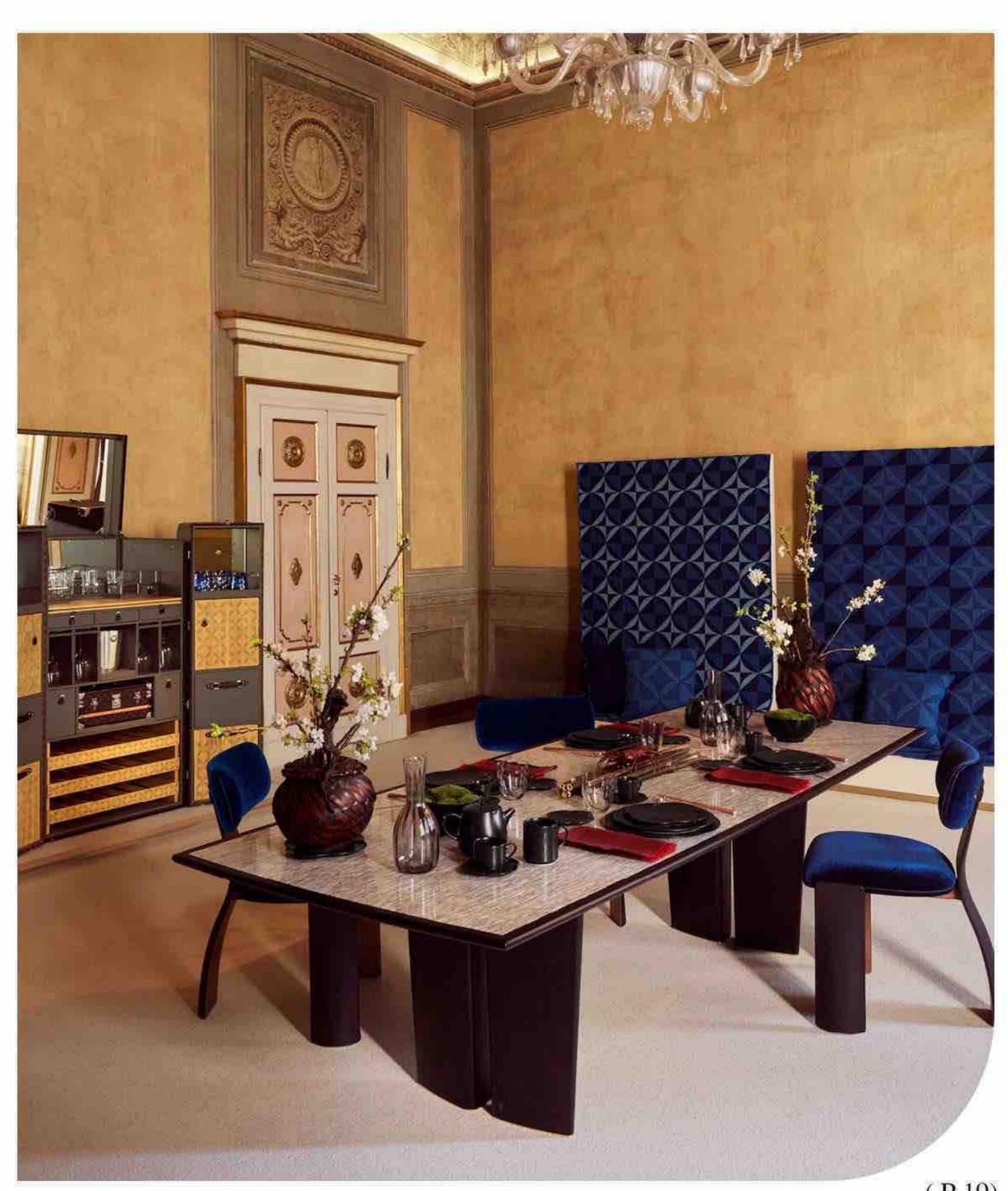
Trend 2: Cultural Storytelling

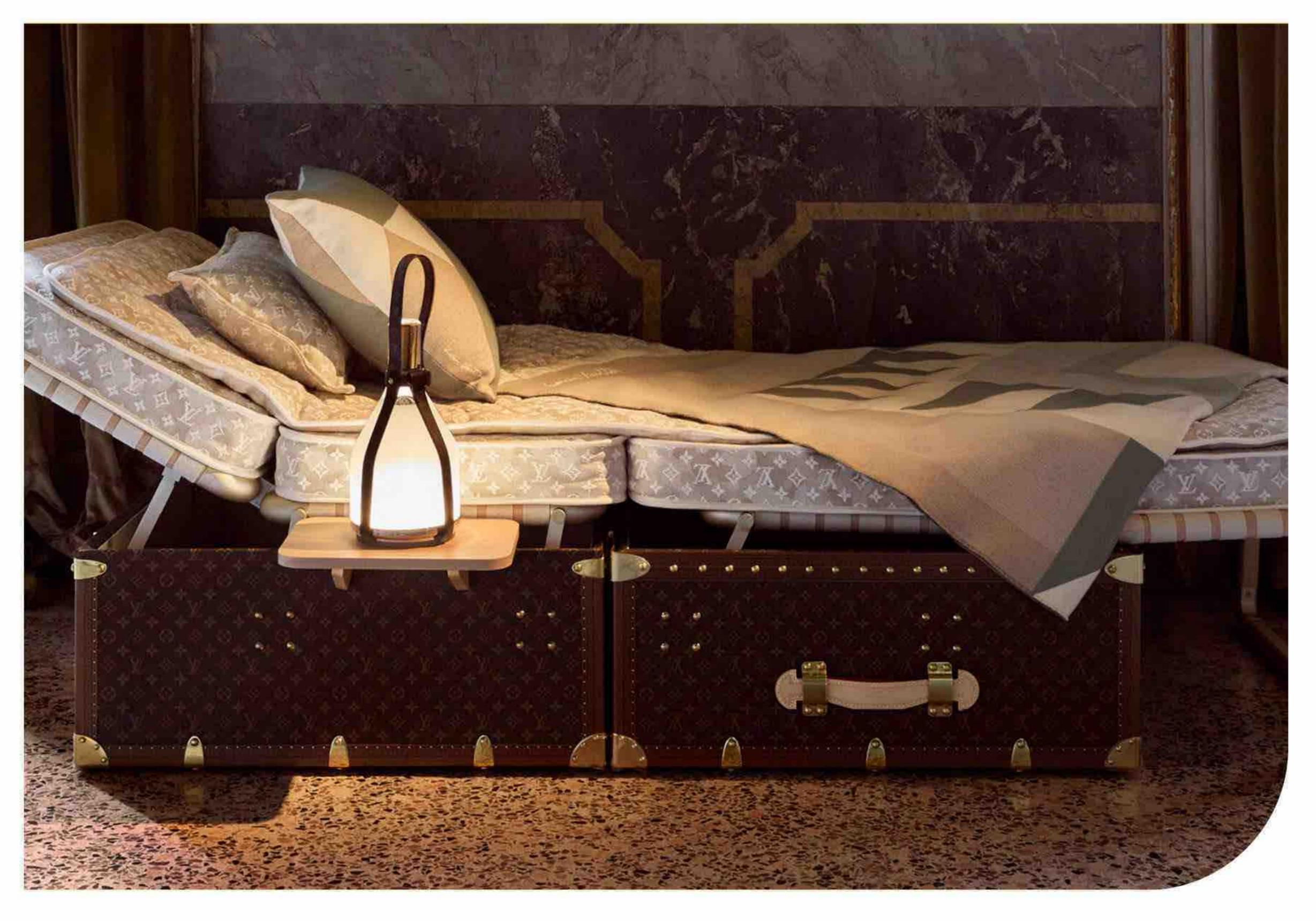
Luxury brands are increasingly narrating the cultural heritage behind craftsmanship, deepening their identity through the stories of making.

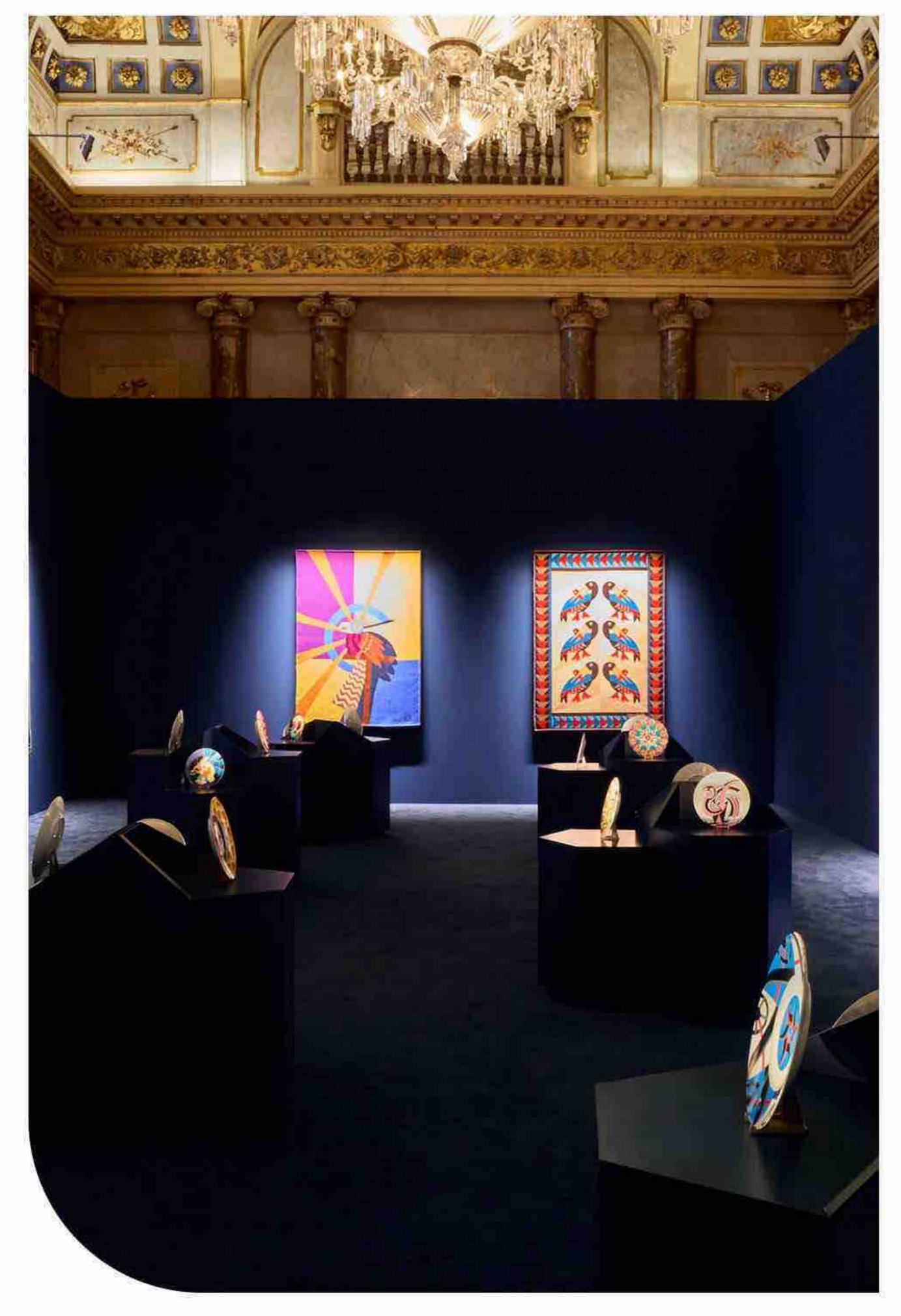


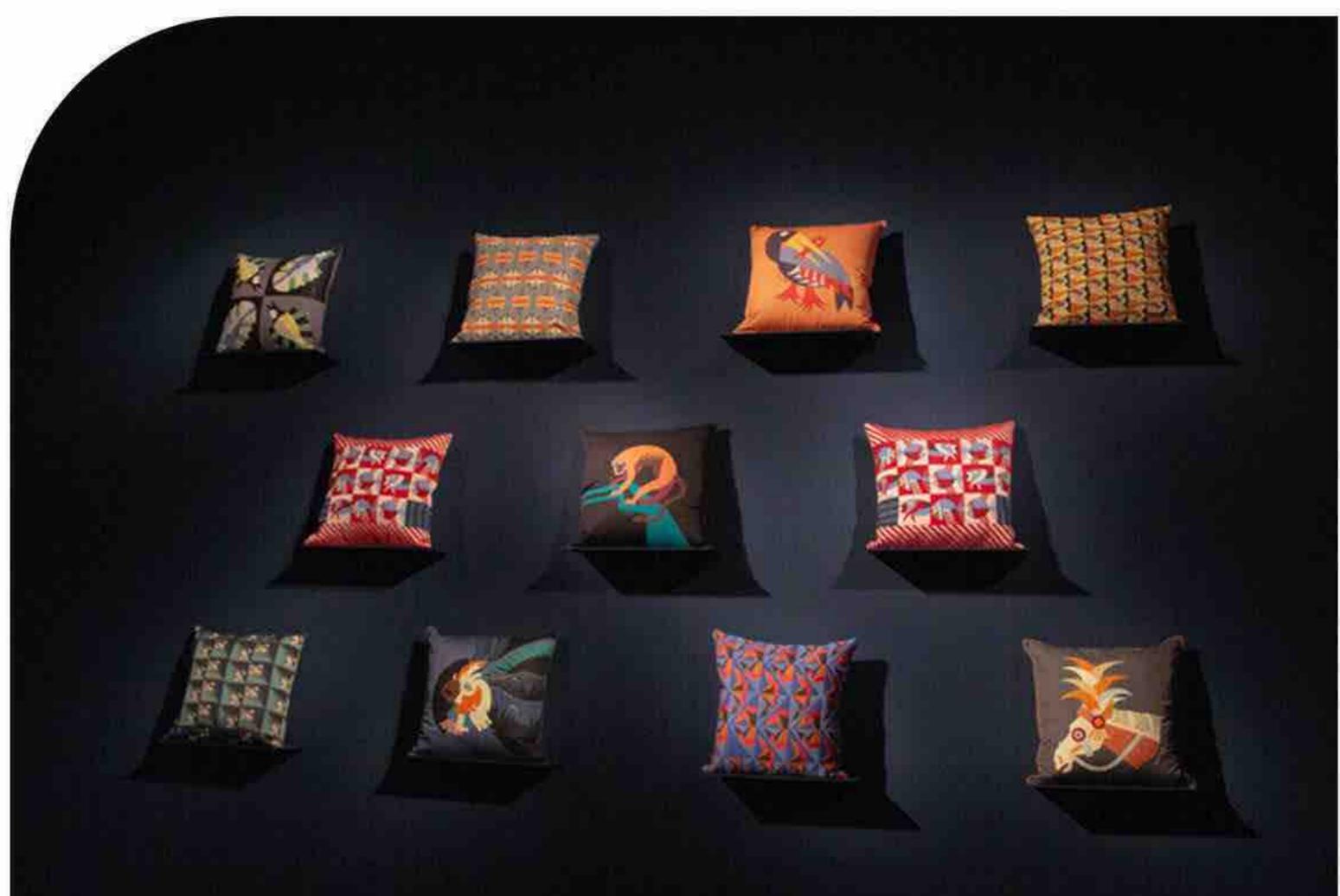
Louis Vuitton's Objets Nomades collection exemplified this trend through thoughtful collaborations with globally renowned designers like India Mahdavi, Patricia Urquiola, and Estúdio Campana.

Unveiled at the historic Palazzo Serbelloni, the exhibit fused luxury craftsmanship with storytelling, each piece embodying a narrative rooted in place, identity, and artistic interpretation. The installation played with virtual and physical realities, anchoring heritage in both tangible design and conceptual expression—an elegant merger of past, present, and future.









Takeaway

Louis Vuitton's bold presence at the Salone del Mobile, along with the continued expansion of its Objets Nomades home collection, signals a new phase in top luxury brands' strategic shift toward

Home and Lifestyle. This move is not merely a product line extension, it reflects the deeper transformation underway in the luxury industry in the new era of consumer mindset shift.

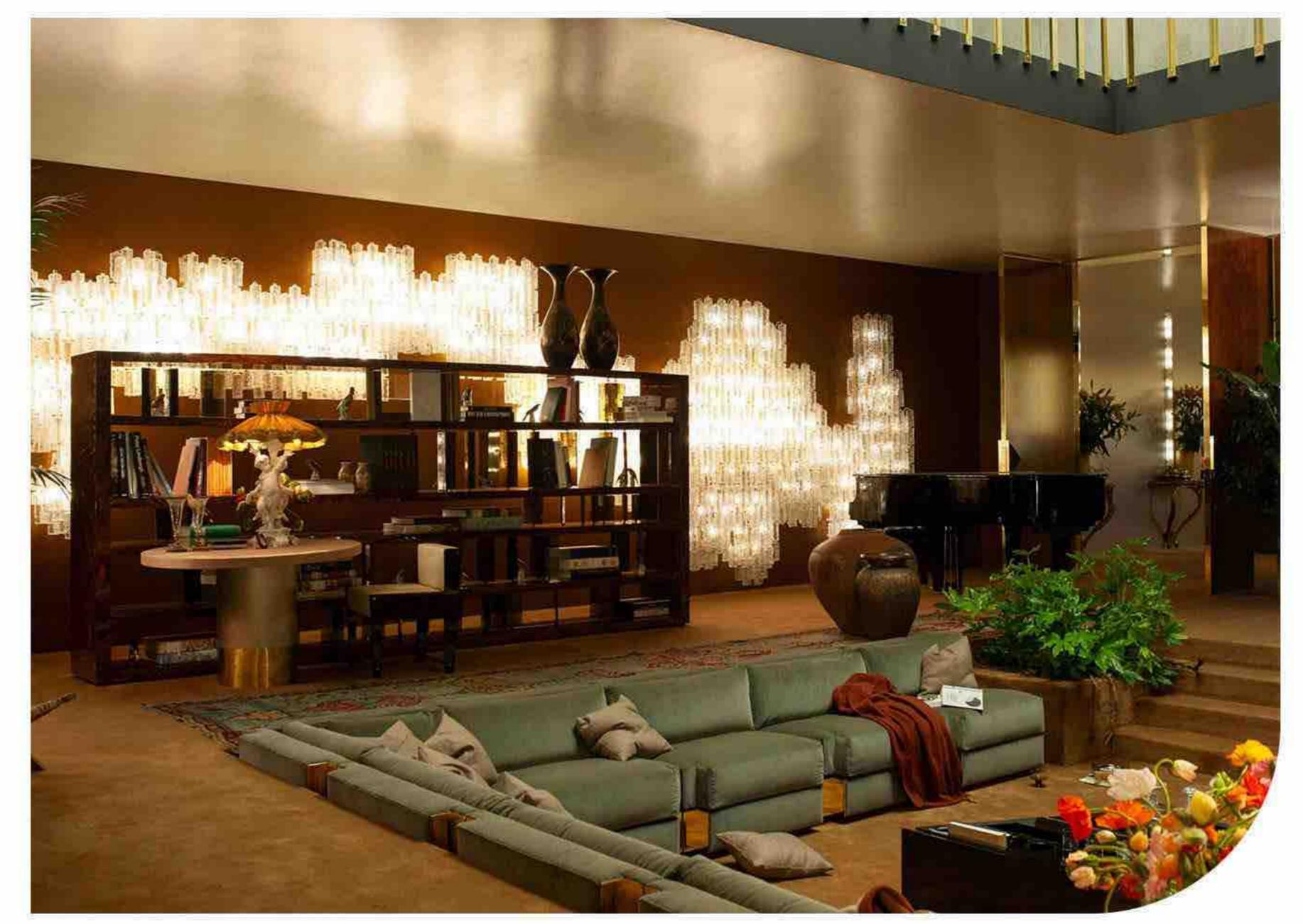
Trend 3: Experiential Lifestyle

Brands are crafting complete sensory environments that reflect lifestyle ideals, transforming design into a lived, immersive narrative.

Loro Piana's La Prima Notte Di Quiete exhibition recreated a vintage cinema- inspired apartment. The brand wove a full sensory story using natural materials like cashmere and agave, accented with brass and mirrors to play with light and texture.

Auditory elements such as raindrops, telephone rings, and progressive lighting enriched the experience, transforming the installation into a cinematic yet intimate narrative. This "low-tech, high-perception" approach emphasized tactility and emotional ambiance, reflecting a new standard of luxury lifestyle design: immersive, holistic, and emotionally resonant.







Takeaway

Luxury brands are moving beyond products to create immersive experiences.

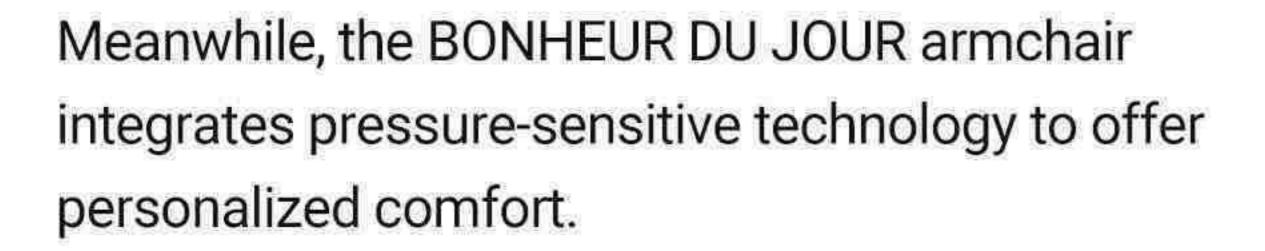
Through 'low-tech, high-sensory' storytelling, they blur the lines between retail, hospitality, and art. Luxury is no longer just an object, but a desired moment in time and space.

Trend 4: Tech Integration

Technology is no longer an add-on, but being seamlessly integrated into design not just for convenience, but to drive sustainable innovation.

Kartell showcased this shift through a series of Al-enhanced, sustainable, and emotionally intelligent products.

The A.I. Lite chair, developed with AI algorithms, reduces material use by 23% and carbon emissions by 37%, making it a leader in eco-conscious innovation.

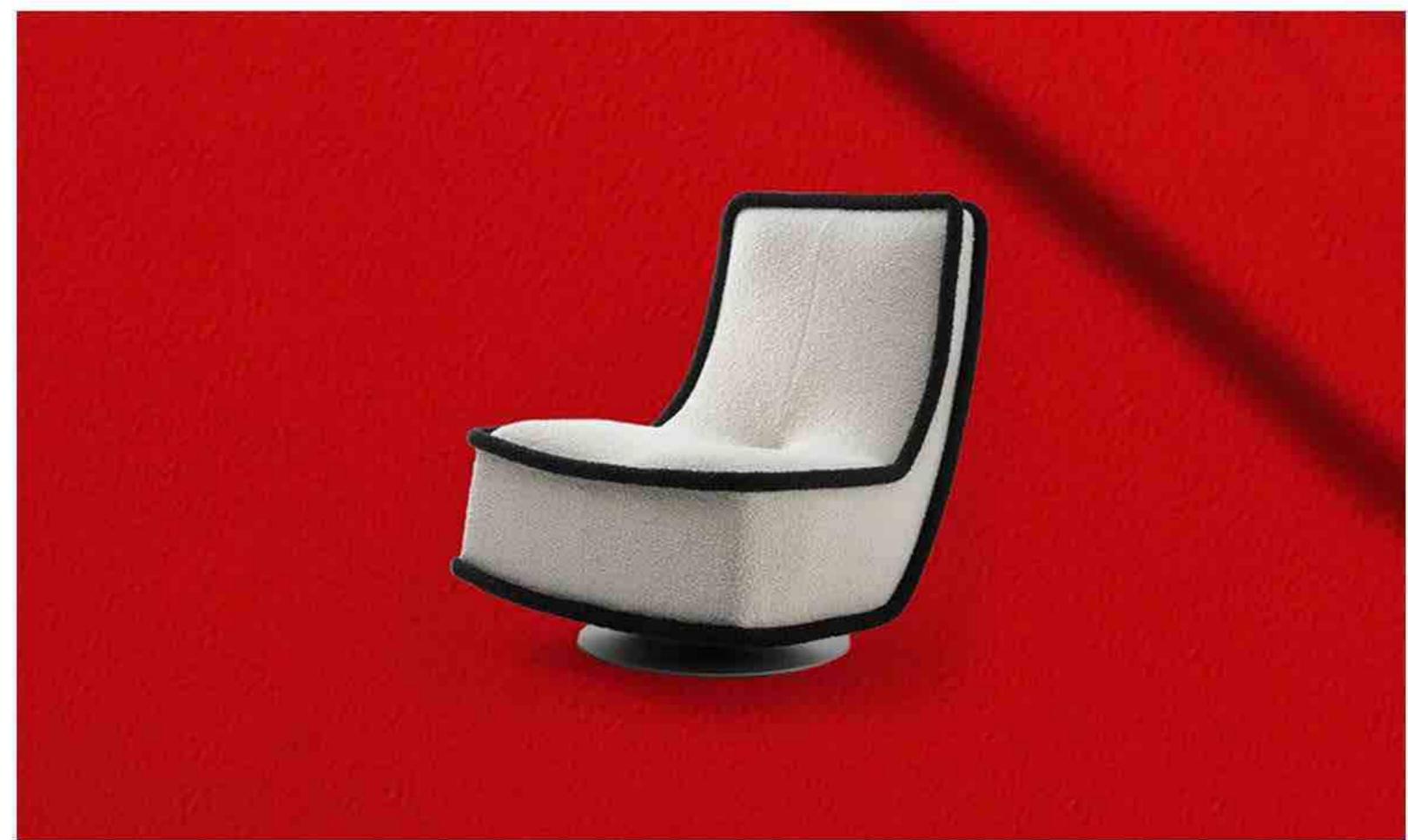


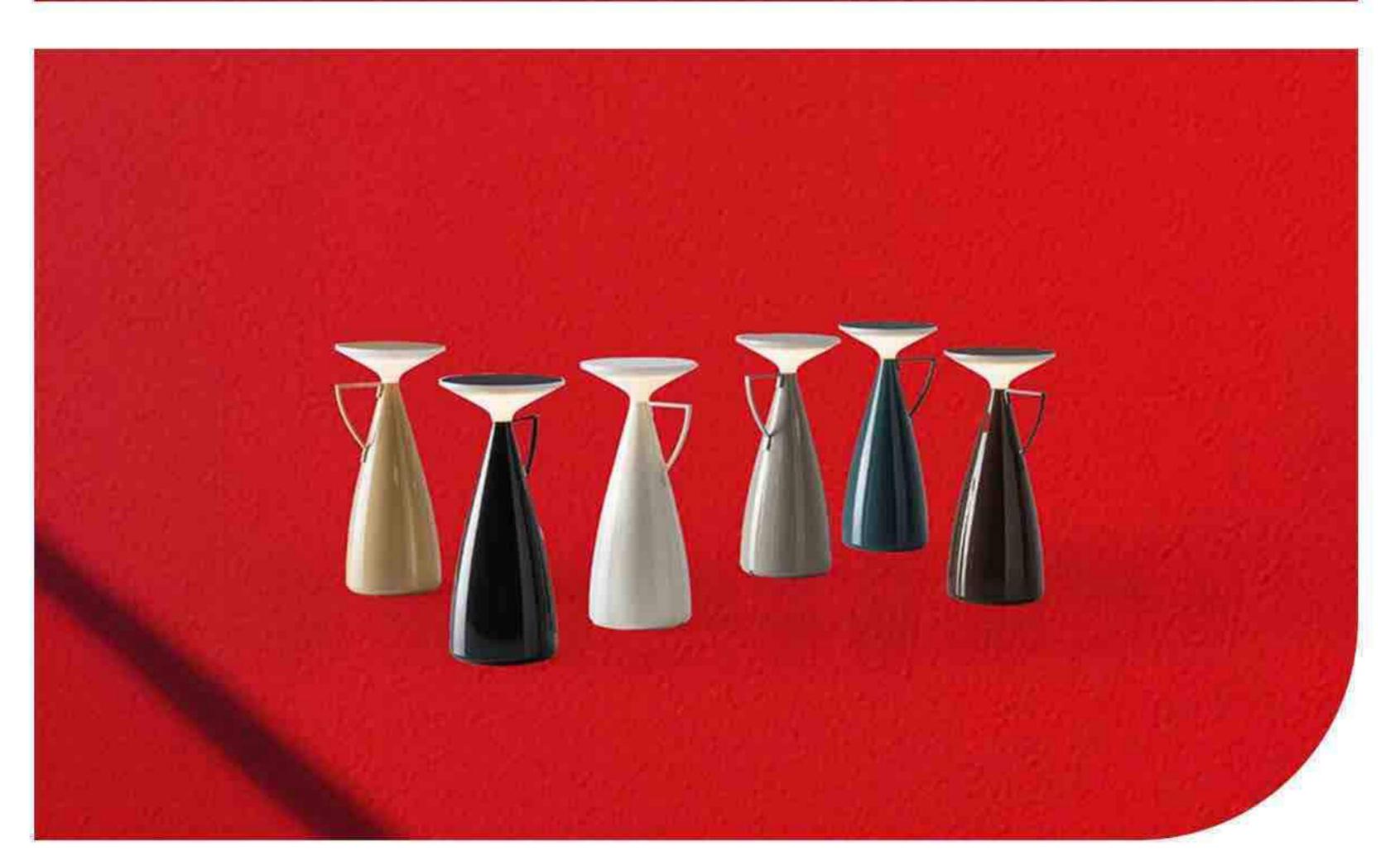
The CAMOMILLE charging lamp pairs functional utility with poetic form. Each piece demonstrates that technology, when thoughtfully embedded, can amplify human experience and emotional depth— making life better, not just smarter.

Takeaway:

Technology is becoming central to design, with smart, invisible features like pressure-sensing chairs and charging lamps enhancing both function and feeling. This marks a shift toward 'tech humanism'—where innovation serves real need of people, not just showcase.







(Section 2)

China Resonance

From Product Consumption to Emotional Engagement These global trends are also increasingly relevant in the Chinese market.

While overall luxury spending in China declined by 18–20% in 2024, consumer sentiment remains resilient, with 56% of consumers expressing optimism for 2025.

More importantly, their expectations of luxury brands are evolving—moving beyond status symbols **toward deeper emotional connections**, **cultural authenticity**, **and meaningful storytelling**, **and upgraded shopping experience**.

The Rise of Emotional Luxury:

How Cute Became Premium

As consumer values shift from status display to emotional resonance and cultural identity, a new wave of luxury is emerging—one that prioritizes storytelling, sentiment, and social relevance.

Pop Mart's IP Labubu offers a striking example of this evolution, demonstrating how "cute culture" can transcend niche appeal to reshape the definition of luxury.



In 2024, Pop Mart's IP Labubu made the leap from niche subculture to mainstream fashion. At its Harrods London pop-up, the blind box series sold out in just two seconds, marking a record-breaking debut in the toy section and capturing the attention of high- net-worth collectors.

On TikTok, the hashtag #StylingMyBagwithLabubu generated over 1.1 million posts. A Labubu × Vans figure originally priced at RMB 599 is now reselling for around RMB 14,000—a 23x price increase in one year—positioning Labubu as more than a trend toy, but an emotional luxury asset.

Takeaway

Labubu's rise isn't accidental—it signals a shift in how consumers define luxury.

Today's luxury is no longer just about rarity or price, but emotional resonance, personal identity, and cultural relevance. Labubu represents a new wave of luxury that's playful, expressive, and community-powered. Driven by the emotional economy and viral cultural mashups, the "cute economy" doesn't just go premium—it's reshaping what modern luxury looks and feels like.

Cultural Encounters:

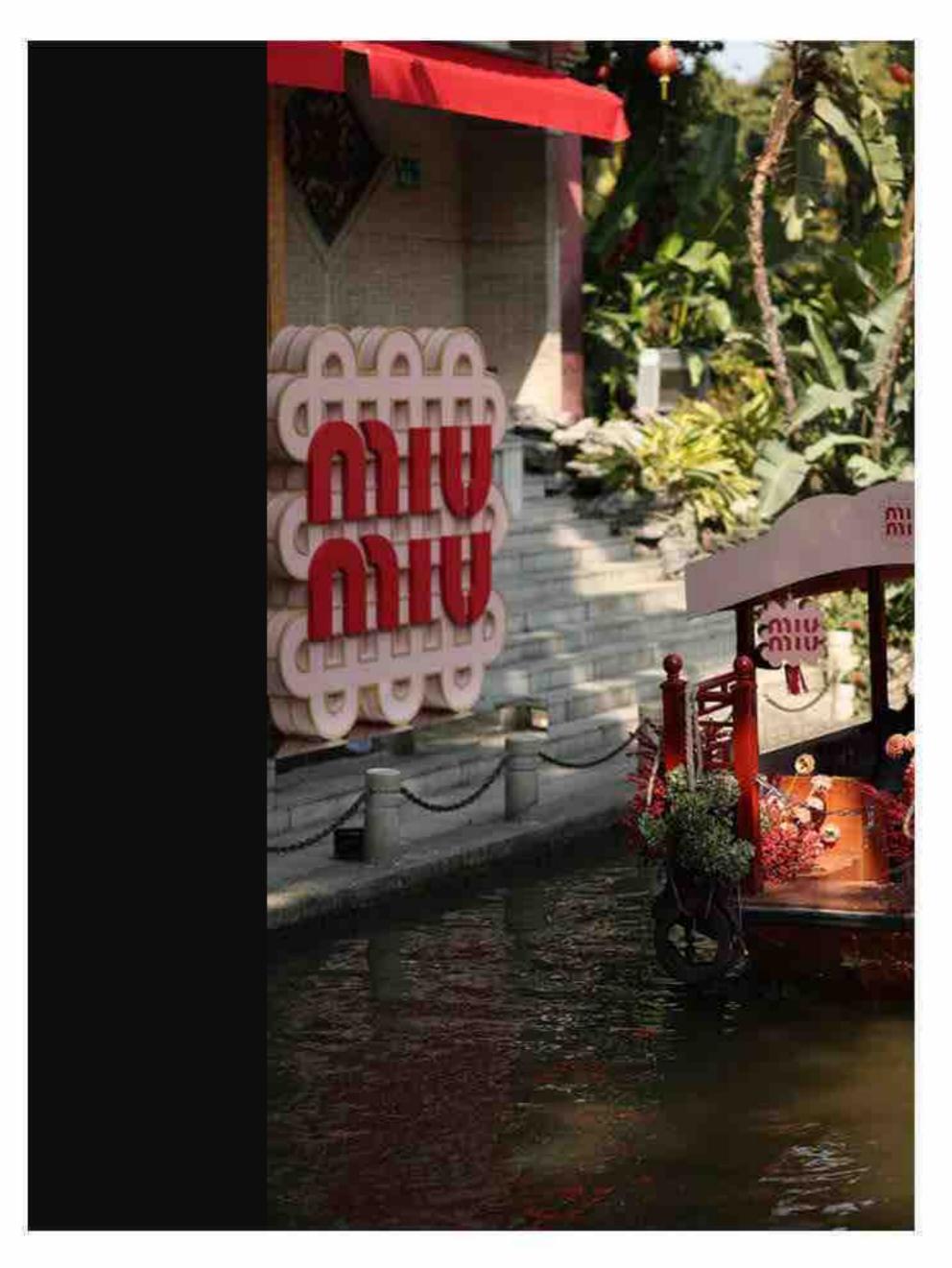
Local Relevance and Heritage

As cultural authenticity becomes a key driver of brand affinity, luxury labels are embracing localized storytelling to deepen emotional connection.

Miu Miu's 2025 Chinese New Year campaign presents a fresh take on luxury branding. By blending regional traditions with local cultural relevance, the brand resonated with a new generation of culturally attuned consumers.



Miu Miu's "Right on Time"
Lunar New Year campaign
spanned Shanghai,
Guangzhou, and Beijing,
blending local traditions with
contemporary culture.







From vinyl drops and flower boat parades to a winter playground on Shichahai, each activation offered sensory-rich, immersive experiences. By weaving music, local rituals, and celebrity appeal into the festivities, Miu Miu transformed seasonal marketing into a culturally rooted brand journey—redefining what localized luxury can look like.

Takeaway

Miu Miu's campaign sets a new benchmark for localized luxury—moving beyond traditional festive promotions to create immersive cultural experiences that invite participation. By weaving local rituals, sensory touchpoints, and contemporary storytelling, the brand builds a deeper emotional connection with Chinese consumers and redefines how luxury engages with culture.

Immersive Lifestyle Fluid Spaces

Luxury brands are reimagining physical spaces as experiential ecosystems blending storytelling, sensory design, and sustainability to create environments that engage, inspire, and adapt to evolving lifestyles.

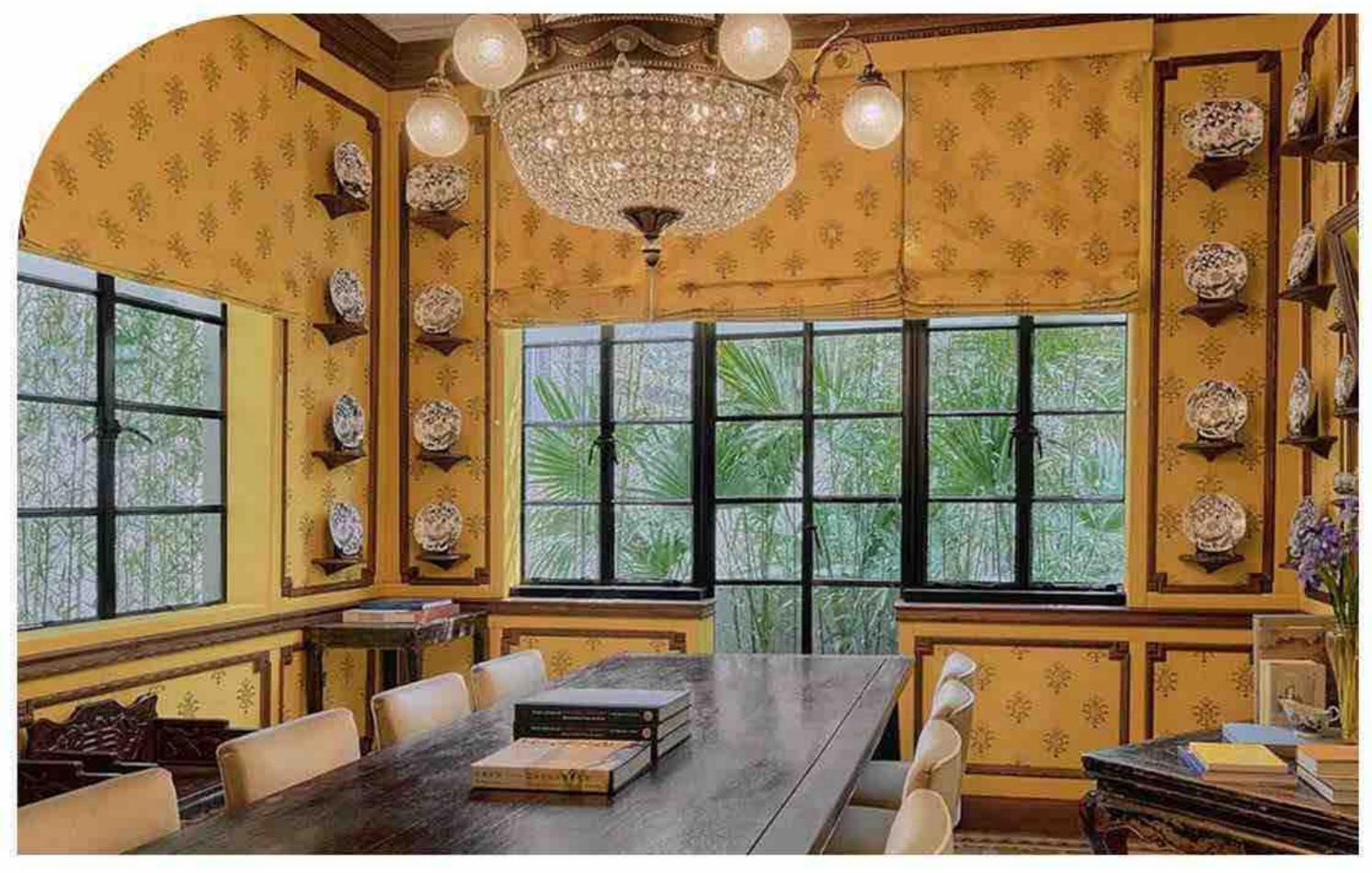


Loewe × Hello Bike Urban Roaming Project

Loewe partnered with Hello Bike to create a fragrance-infused cycling route in Shanghai, complete with branded bikes, artful pit stops, and a curated city map—turning everyday transport into a mobile luxury experience.

Prada Rong Zhai Restaurant

Prada turned Shanghai's Rong Zhai mansion into an artist-themed restaurant, merging haute cuisine, contemporary art, and fashion into a five-sense journey—complete with Prada porcelain and AR art commentary.



Longchamp Garden at Zhongshan Park

Longchamp brought its Live Green collection to life with an eco-friendly pop-up in Zhongshan Park, where visitors engaged in plant-dye DIY and garden activities—blending sustainability with lifestyle-driven luxury.

Takeaway

Luxury brands are increasingly blurring the lines between fashion, art, and everyday experiences by creating immersive, sensory-driven environments, transforming traditional luxury into experiential, lifestyle-driven narratives that engage consumers on a deeper, more personal level.

AI-Powered Luxury:

Redefining Personalization and Experience

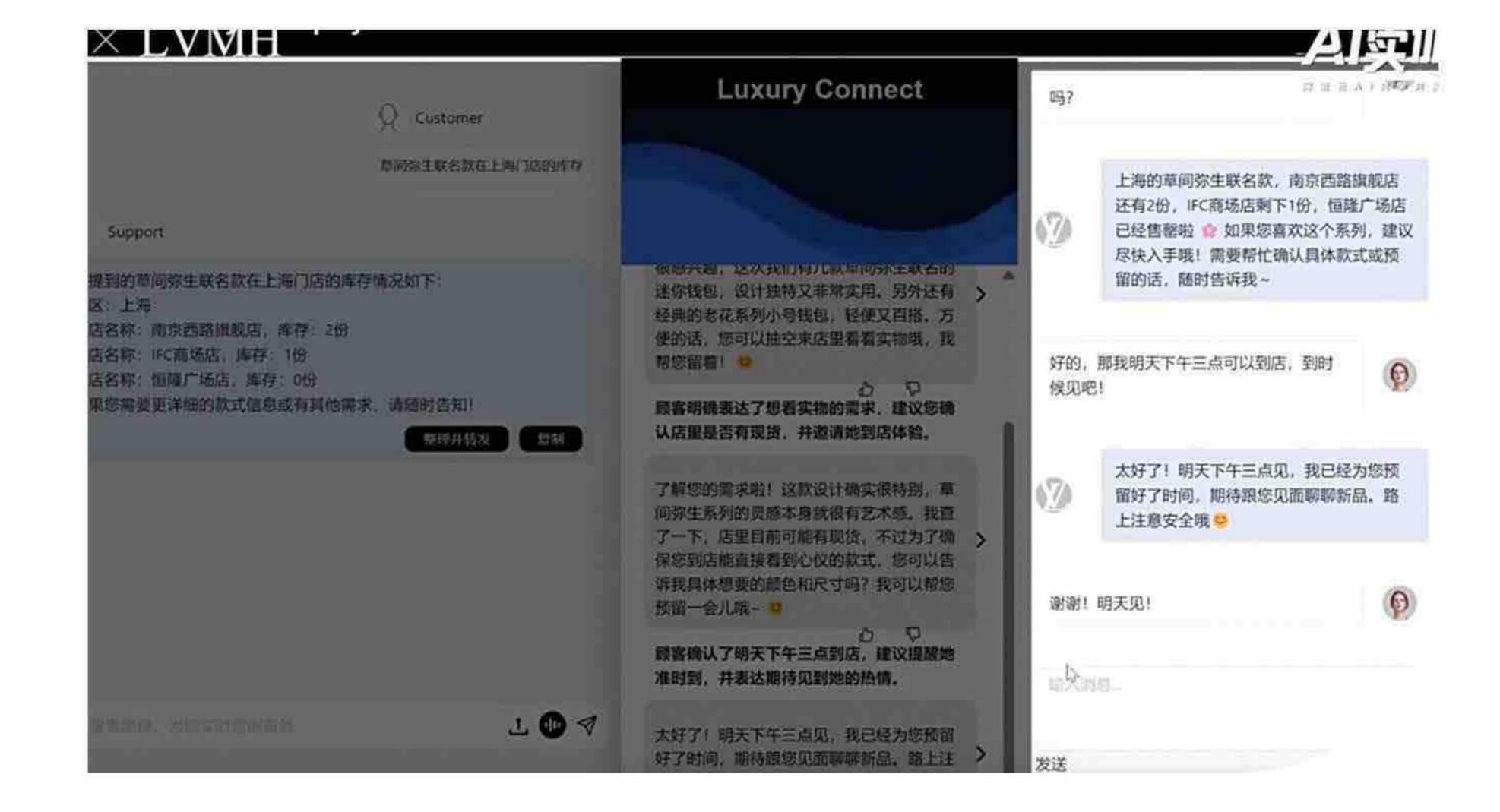
The luxury industry is increasingly leveraging AI to transform marketing, customer service, and design, creating personalized, cutting-edge experiences that elevate brand engagement customer experience.

LVMH's partnership with Alibaba Cloud reflects this shift—training digital talent and exploring virtual try-ons, smart service, and trend prediction. AI is now a key force redefining the luxury experience.



In March 2024,
LVMH and Alibaba
Cloud launched their
second Al Academy,
challenging teams to
reimagine luxury
retail with real-world
Al solutions.

Accenture's winning concept was an AI stylist using AR and emotion recognition, boosting dwell time by 40% and conversions by 25%.
Runner-up Artefact created SAIA, an AI assistant enhancing everything from store layouts to personalized aftercare—tested at Sephora and Bulgari Hotel.



Takeaway

LVMH and Alibaba Cloud's AI Academy demonstrates how AI is revolutionizing luxury retail. With solutions like the AI virtual stylist and the SAIA assistant, the industry is enhancing customer engagement, improving operational efficiency, and driving innovation through personalized, data-driven experiences.

(Section 3)

Platform Evolution

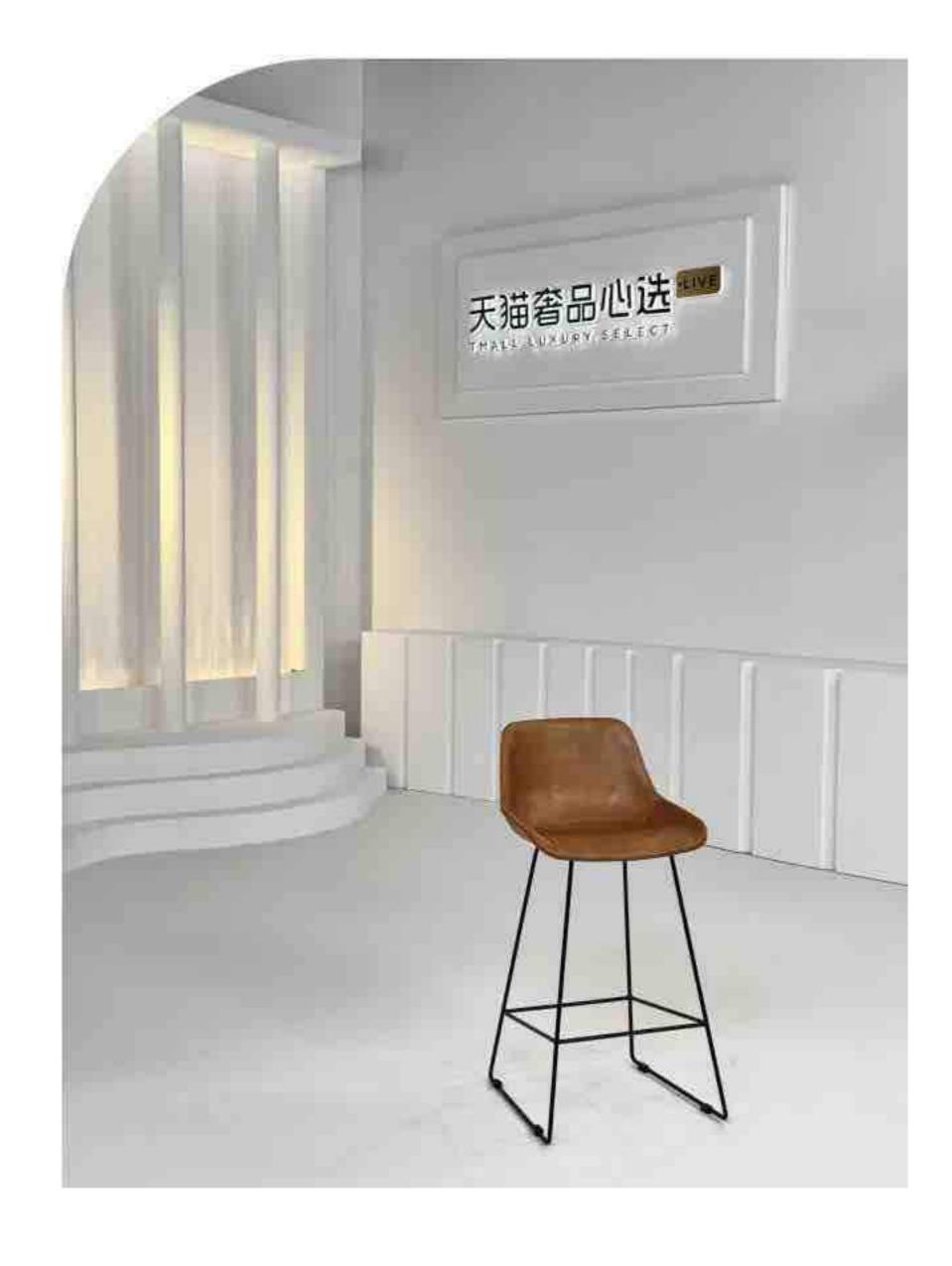
How Al and Content Are Refining Shopping Experiences

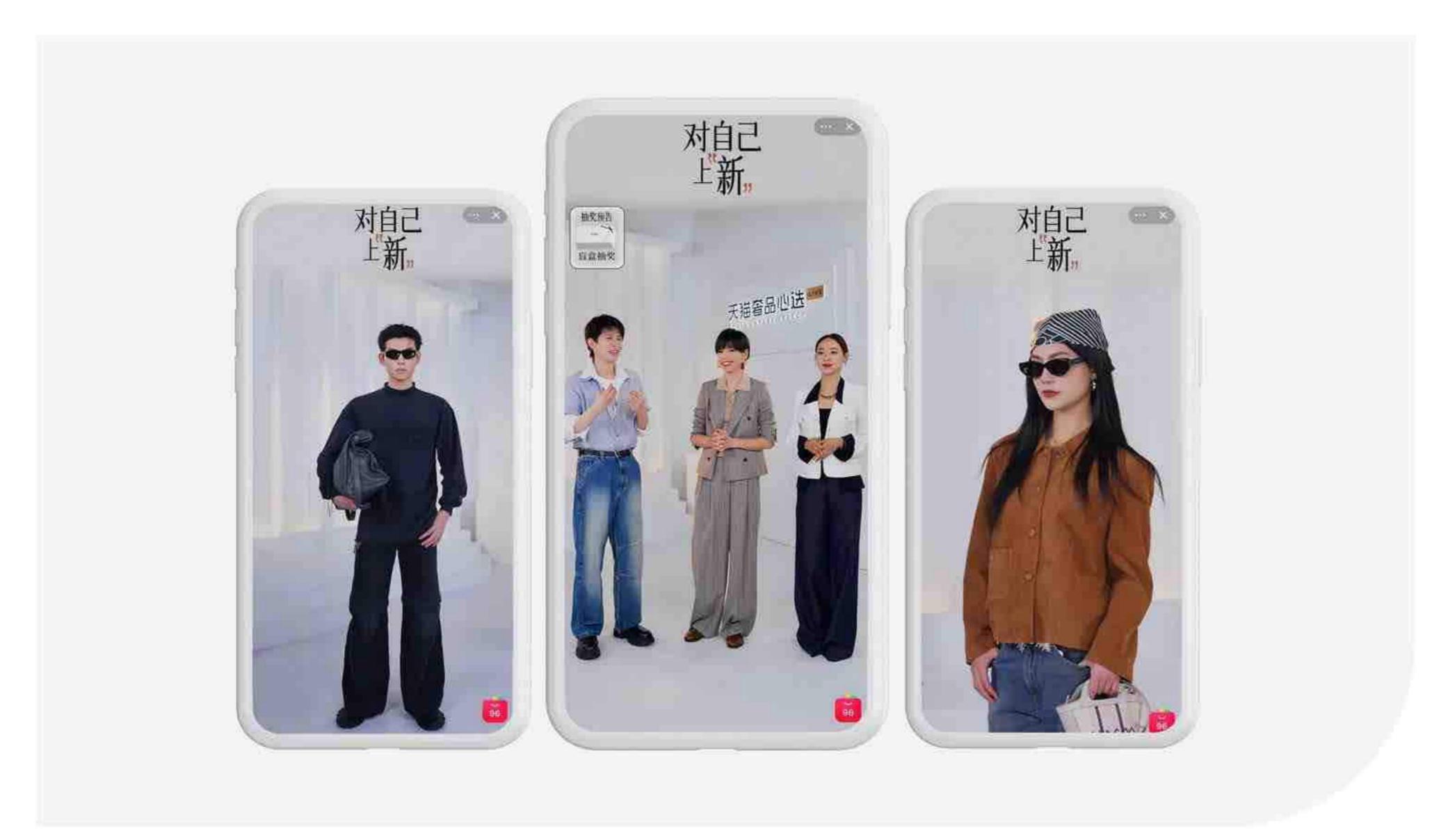
While design trends set the direction, their realization and impact ultimately depend on how they are delivered and experienced—through channels, platforms, and technology.

In China, the translation of these trends into consumer engagement is being actively shaped by **platform innovation**. From Al-driven personalization to immersive storytelling formats, Chinese digital platforms are redefining what "immersive retail" means—not just as a physical experience, but as a fluid, content-rich journey that spans online and offline touch points.

Immersive Retail Upgrade

Tmall and JD continue to enhance their livestreaming scenarios, driving a deeper integration of content and consumption.





Tmall Luxury Select: Redefining the Luxury Livestream Experience

Tmall Luxury Pavilion's "Luxury Select" livestream features 30+ top brands, offering a premium, immersive shopping experience with celebrity guests and full-look styling. Its debut drew millions—over 90% first-time viewers, mainly high-net-worth consumers aged 25–34. By combining official brand endorsements and flagship authenticity, it addresses trust in luxury e-commerce. Curated styling and cross-brand pairings blend storytelling with sales impact.

Takeaway

Tmall's "Luxury Select" livestream blends platform traffic with interactive content, preserving brand image while boosting conversions through cashback and mystery boxes. As a cost-effective acquisition channel, it reinforces Tmall's leadership in luxury e-commerce by merging trust, experience, and performance. Its "content + commerce" model enables a full-funnel journey from awareness to loyalty, driving luxury's digital evolution.

JD.com's AI Livestreaming: Scalable, Smart, and Strategic

Tmall Luxury Pavilion's "Luxury Select" livestream features 30+ top brands, offering a premium, immersive shopping experience with celebrity guests and full-look styling. Its debut drew millions

—over 90% first-time viewers, mainly high-net-worth consumers aged 25–34. By combining official brand endorsements and flagship authenticity, it addresses trust in luxury e-commerce. Curated styling and cross-brand pairings blend storytelling with sales impact.



At Balabala's children's wear livestream, JD.com's Yanxi virtual host broadcasted non-stop for 24 hours, contributing 15% of total revenue. In By-health's livestream, an innovative "Al host + CEO co-host" dual-virtual format was tested, with Al-driven hourly sales 2.6x higher than human hosts.

Takeaway

JD.com's AI livestreaming solution is reshaping digital commerce by making livestreams more scalable, personalized, and cost-efficient. The integration of digital humans enables continuous, high-quality engagement while lowering operational barriers for brands. With proven results in conversion uplift and brand adoption, this hybrid model signals a new standard for intelligent retail.

Segmentation of Social Scenarios

WeChat leverages its "Gifting" feature to transform social relationships into more context-driven consumption touchpoints, creating a closed-loop conversion from relationship chains to consumption chains.







La Mer Gifting Process

WeChat Gifting: Turning Social Ties into Sales

WeChat is turning social interactions into shoppable moments through its "Gifting" feature, linking personal relationships with consumption. On Jan 20, 2025, Oriental Select's WeChat Store hit ¥1M in daily sales—80% from gifting. Popular items include Rosa roxburghii juice and fresh fruit, with senders enjoying app-exclusive member pricing. By Dec 2024, the feature had driven ¥400M in GMV and nearly 2M daily orders, showcasing its mass appeal and commercial impact.

Takeaway

WeChat's Gifting function effectively transforms emotional connections into high-conversion shopping triggers, demonstrating how social interaction can be reimagined as a scalable e-commerce driver within closed-loop ecosystems.

AI-Powered Motivational Insights

Xiaohongshu released 2025 Home & Lifestyle Scenario Insight White Paper, introducing a new "Scenario-Based Motivation Model".



Key Shifts in Consumer Insight with AI

From Manual to Model-Driven:

Al extracts multi-dimensional tags, emotional patterns, and hidden opportunities.

From Keyword Heat to Motivation Mapping:

Trends are linked to deeper psychological drivers (e.g., balcony renovation \rightarrow urban stress relief \rightarrow foldable product demand).

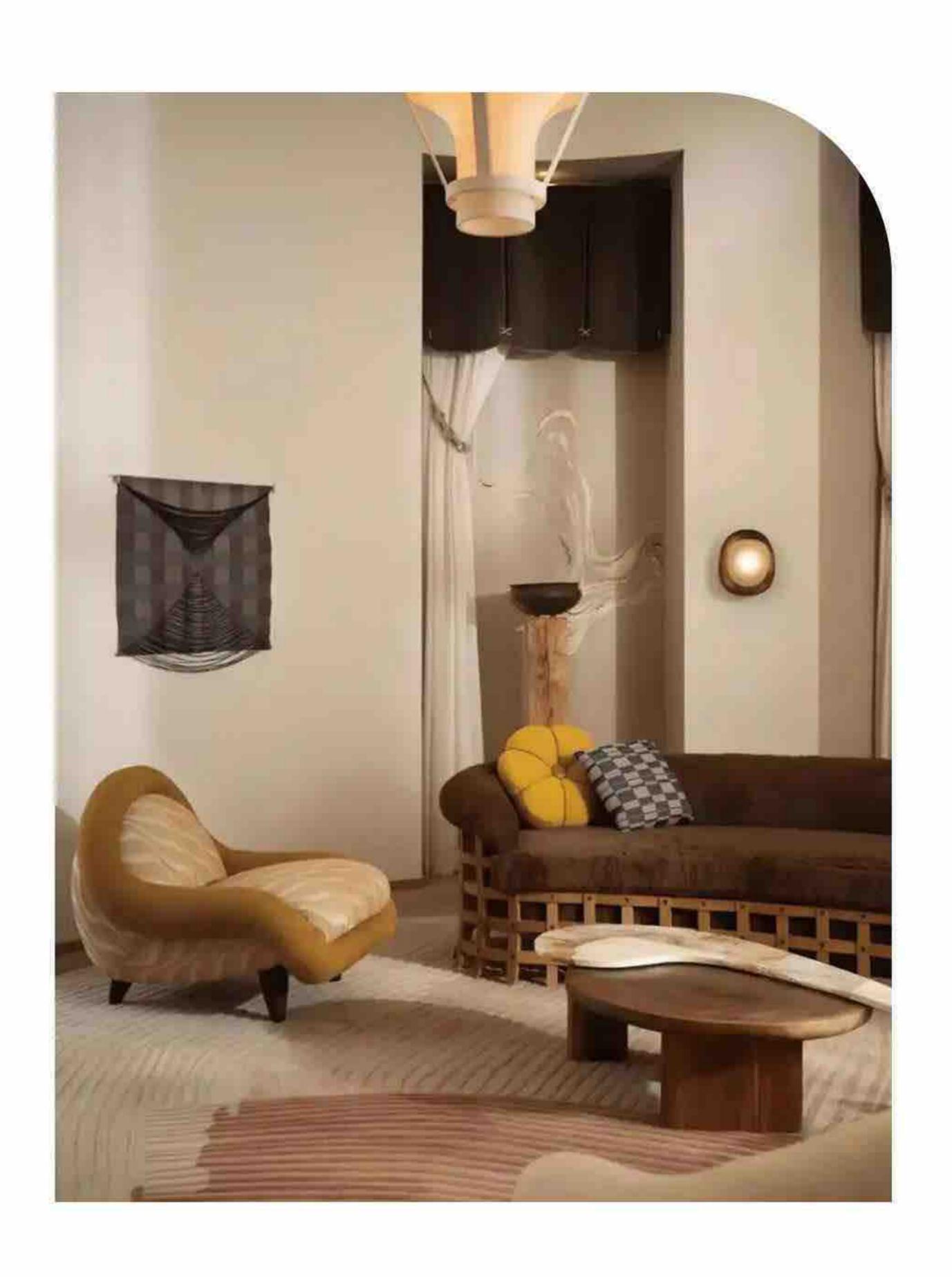
From Product Features to Lifestyle Narratives:

Using a Time-Space-People-Task lens, AI reveals emotional shifts-like kitchens as wellness hubs or living rooms as family zones.

New model: AI + JTBD for Lifestyle Brands

Xiaohongshu's new model integrates AI with the Jobs-To-Be-Done framework, using large language models (LLMs) to generate culturally nuanced, emotionally resonant insights.

This empowers brands to better understand real-life user needs and drive full-funnel growth, from content inspiration to conversion, by transforming how products connect with everyday life.



Takeaway

By moving beyond product features to lifestyle storytelling, Xiaohongshu empowers brands to connect more authentically with consumers' daily lives—unlocking richer, culturally resonant growth opportunities. (Section 4)

Case Highlights

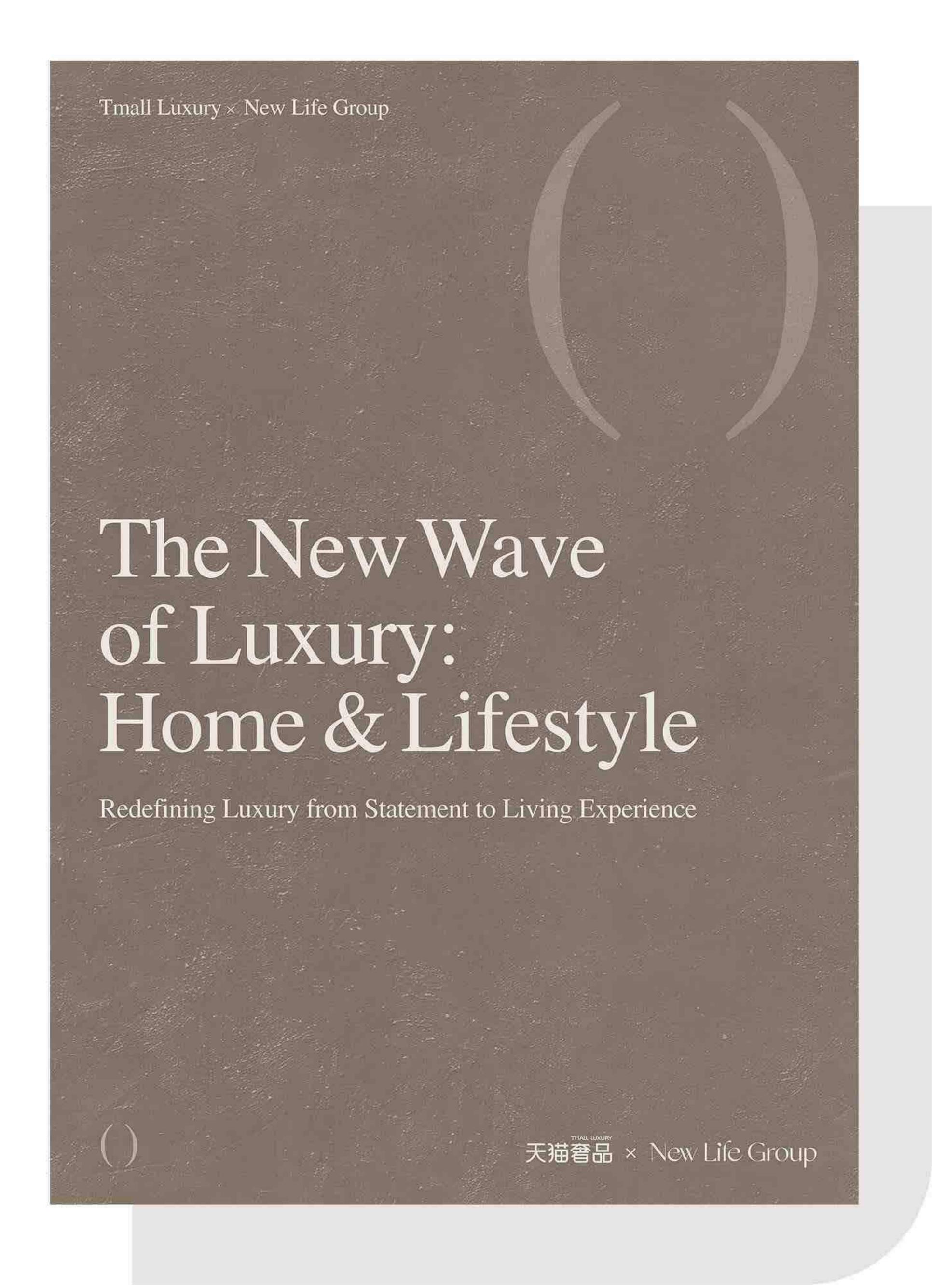
When Design Inspiration Meets China's Growth Engine

Luxury in China is evolving—driven by emotional needs, cultural identity, and the demand for meaningful experiences. As design, storytelling, and commerce converge, brands are rethinking how to connect.

The following methodology and case studies show how global and local players are turning these shifts into real impact through innovation, design, and technology.

Trend Methodology

Tmall Luxury x New Life Group Launch "New Wave of Luxury: Home & Lifestyle"



The report focuses on the rise of the high-end home and lifestyle market in China. It explores the evolution of luxury goods, the potential of the Chinese market, and combines insights into consumer mindset upgrades,market growth, and brand perspectives. The report delves into industry trends and challenges, offering platform-driven solutions to promote industry development and providing strategic direction for high-end brands to seize new opportunities.

1UP Showcase (1)

How Global Chinese Influencers Elevated Flos' Presence in China

Objective

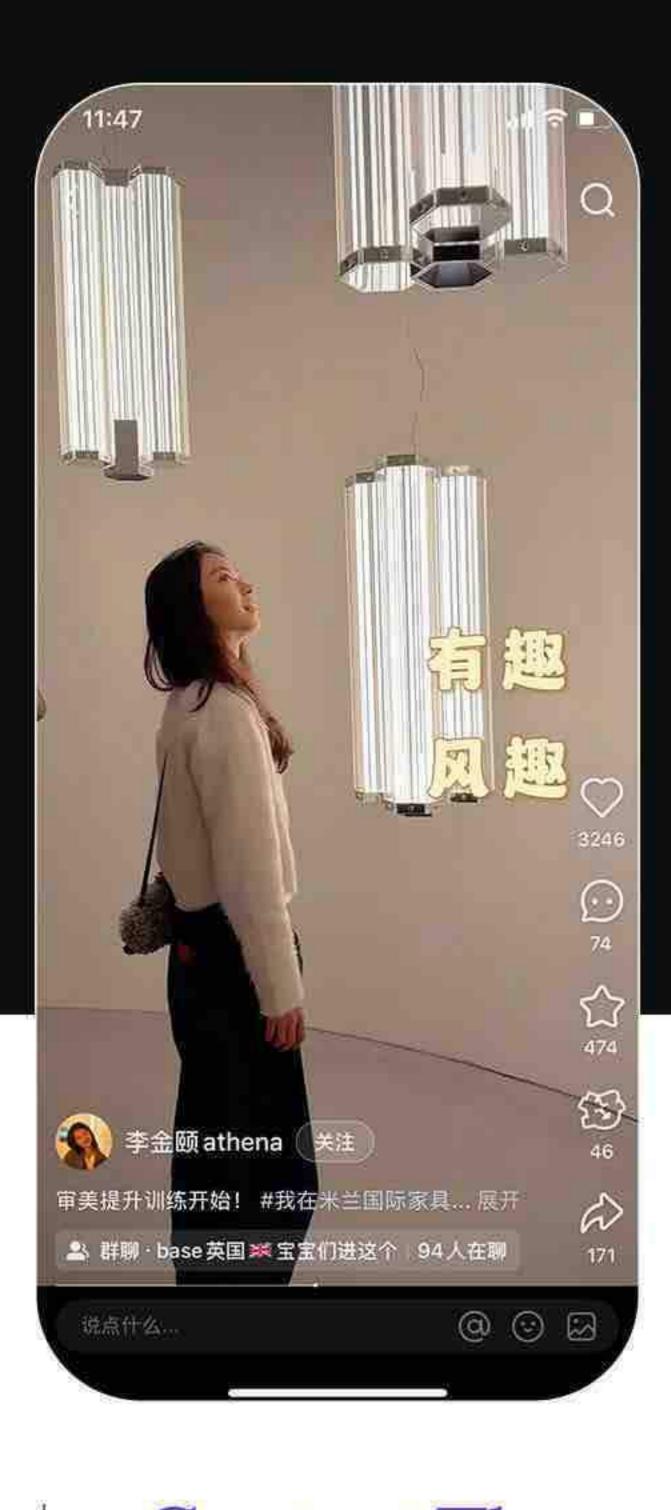
Boost Flos' brand awareness in China by leveraging Global Chinese Influencers (GCIs) to authentically showcase its Salone del Mobile and Milan Design Week exhibitions through authentic, lifestyle-driven storytelling.

Why GCIs?

International Perspective – Aligns with Flos' global design ethos.

High Engagement – Their followers trust recommendations on luxury/design.

Cultural Bridge – Connects Flos' Italian heritage with Chinese audiences.





Strategy

Parterres with 4 GCIs with expertise in design, luxury, and travel.





Content Themes

- Behind-the-scenes exhibition tours.
- Styling Flos lighting in aspirational interiors.
- "Design Meets Lifestyle" storytelling.

Results

- ~250K Total Reach.
- +3.2K Engagements (Likes, Collects, Comments, Shares).

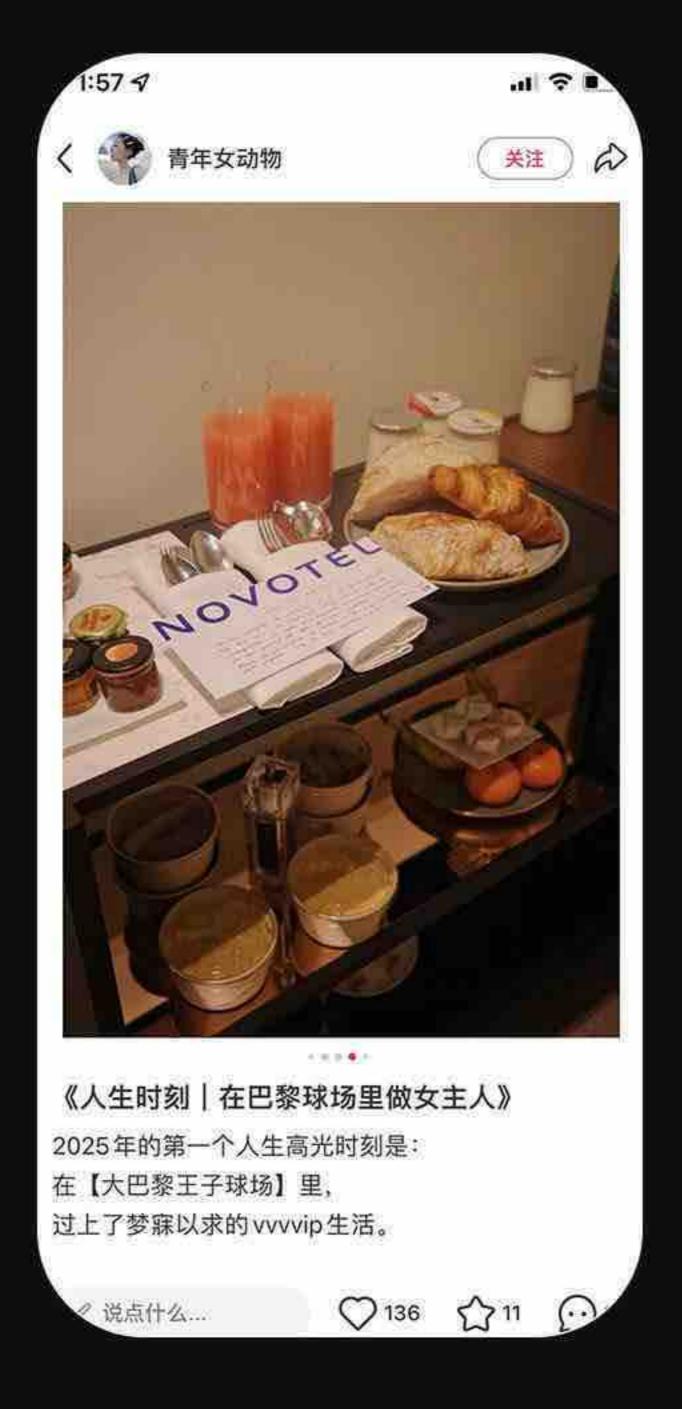
Key Takeaway

GCIs effectively translated Flos' design excellence into culturally relevant content, boosting visibility among Chinese luxury consumers.

1UP Showcase (2)

How Global Chinese Influencers Turned Novotel's Stadium Suite into a Must-Share Lifestyle Experience





Xiaohongshu post by @青年女动物 achieved an interaction rate 32% higher than platform benchmarks, effectively tapping into female and lifestyle communities.

Objective

Transform Novotel's pioneering "La Suite Novotel by ALL.com" experience into a social milestone through immersive storytelling and emotional resonance.

New Role of GCIs

Not just cultural connectors, but experience amplifiers — making once-in-a-lifetime moments into socially desirable rituals.

Strategy

- Tapped into authentic passions by blending sports with luxury lifestyle.
- Crafted immersive rituals like sleepwear match viewing, overnight stadium stays, and exclusive behind-the-scenes access.
- Built layered narratives that captured excitement, intimacy, and prestige.

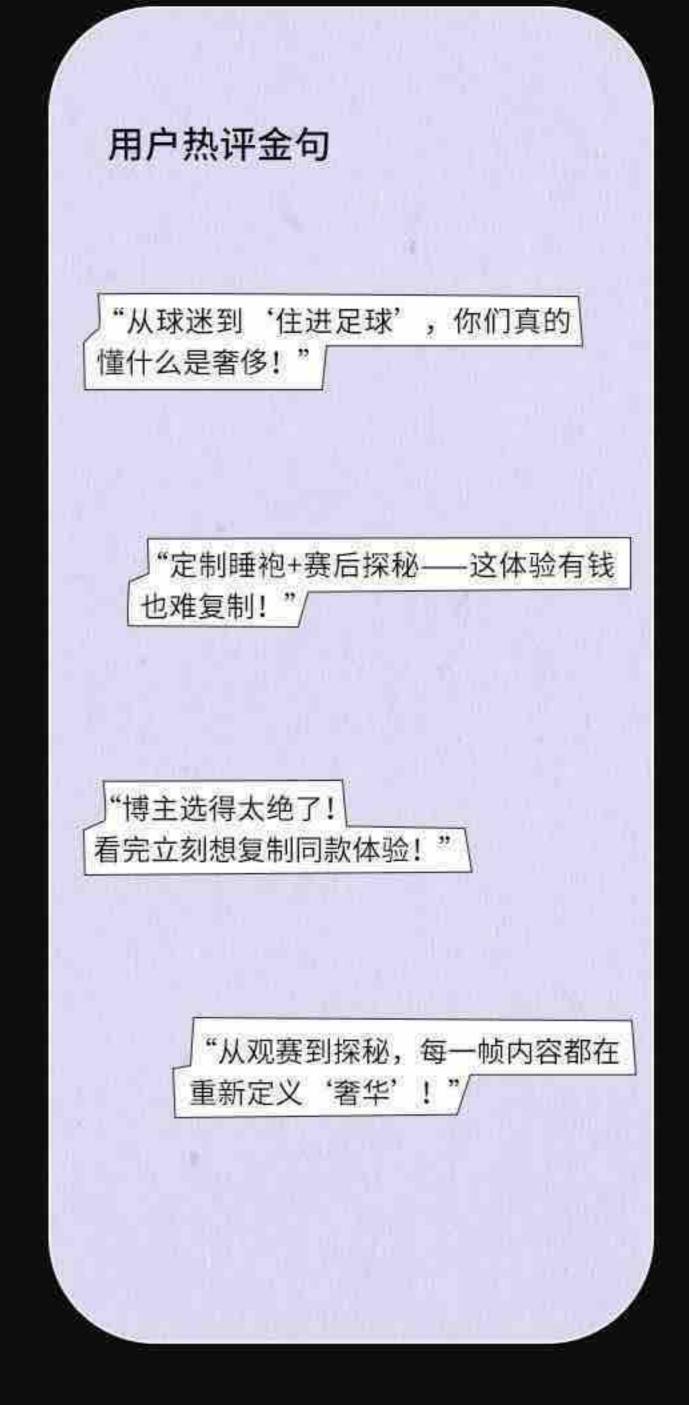
Results

Over 726K views, 15.7K engagements across platforms.

Elevated Novotel beyond hospitality, into aspirational lifestyle conversations among global Chinese audiences.



Instagram Reels and Plogs showcased high-end aesthetics, driving international visibility.



Comments celebrated the experience as "the ultimate dream for football fans."

Key Takeaway

Experiences that break boundaries, when amplified by the right storytellers, can become consumers' most treasured social memories.

Conclusion | 结语

Lifestyle speaks to the heart, while growth strategies appeal to the mind. In 2025, the two converge at the intersection of immersive experience and active participation. Luxury brands are evolving beyond symbols of status or transactional endpoints—they are becoming co-creators of cultural moments and advocates of meaningful living. By embracing local cultural narratives, multi-sensory spatial storytelling, and Al-powered innovation, the luxury industry is entering a new growth phase marked by humanity, engagement, and sustainability.

These emerging trends reflect a deeper consumer desire for emotional resonance and shared values, pushing brands to strike a delicate balance between exclusivity and accessibility. When luxury becomes something to be felt, explored, and co-created, a new growth paradigm—one rooted in cultural relevance and adaptive business resilience—comes into view.

生活方式打动人心,增长策略理性驱动。2025年,沉浸式体验与主动参与成为二者的 交汇点。奢侈品牌正在从身份符号转向文化共创者与美好生活的倡导者。

通过融合本土文化、多感官空间叙事和AI创新,奢侈品行业正迈入一个更具人文温度、 互动性和可持续性的全新增长阶段。

这些趋势背后,是消费者对情感共鸣和价值认同的更高期待,也促使品牌在"稀缺"与"可及"之间找到新的平衡点。奢侈品,不再只是拥有,更是一种共感与共创的新体验。

Thanks for Reading!

Want to learn more about what we do? Get in touch: bd@1updigital.com.cn

#MORETOCOME#

Contributor

Chief Curator: Christin LU
Editor in Chief: Murphy CHEN
Director of Impact: XiaoXian SHEN
Industry Consultant: Molly YAO,
Jeremy LI, Viola CHEN

About 1UP

Present in Shanghai, Hongzhou and Paris, 1UP digital helps brands of the luxury industry navigate the market by providing them with sustainable digital strategy, result-driven execution plan and most up to date innovations & technologies.

We aim to bridge the gap between premium brands & consumers, and level up brand digital retail system.

Our service scope

We're full service digital agency offering customized solutions to reach the luxury consumers across all channels.

Our vision

We believe in never standing still. For the better, for the extraordinary, for the experiences that go beyond the expected.

We're 1UP, and we are creating the future of digital retail as the industry want it.

Our people&culture

It's all about the team. We're extremely proud that we grouped the most dynamic digital experts in the field spinning from luxury to fashion, from agencies to inhouse brand. We operate in Shanghai, Hongzhou, and Paris with +100 high-level team members. We're young, passionate & diverse!