

A woman with dark hair and a pink hair clip is looking at a tablet in a clothing store. She is wearing a purple top and white pants. The background is filled with various colorful garments hanging on racks.

Unfolding AI: New worlds of fashion

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Humankind is experiencing the fourth industrial revolution. As the lines continue to blur between the physical and digital worlds, artificial intelligence (AI) is leaping the chasm between being used by innovators and early adopters to being accessible to the majority. AI is expected to transform most industries, with an expected market growth of \$376 billion by 2028, according to analytics firm Globaldata. Creative industries including entertainment, fashion and marketing are most likely to feel the impact of AI first, says the *MIT Technology Review*. Consultancy McKinsey estimates that in the next three to five years generative AI could potentially add \$150 billion, or even up to \$275 billion, to the apparel, fashion, and luxury sectors' operating profits. Technology is already normalised in the shopping behaviours of fashion and luxury consumers; 88 per cent of luxury fashion consumers have used at least five tech and digital platforms when shopping in the last 12 months, according to *Vogue Business* data, demonstrating that this is likely to be receptive to innovations in AI.

The *Vogue Business* and Google study, which surveyed 2,976 luxury fashion consumers (those spending at least \$1,000 on luxury fashion within the year, or \$500 on a single designer fashion item) across the US, UK, Italy and France, sought to investigate how the introduction of AI tools impacts both

the perception and purchase intent of shoppers. The survey found that the incorporation of AI enhancements by brands has the potential to significantly boost spend, with personalisation, sustainable development and innovative design among the biggest opportunities for increasing spend.

Citizens of a brave new world: Meet the three key luxury fashion consumer segments

Across all consumers, authenticity is highlighted as a key emotional driver, both in terms of the attachment to a perceived authentic brand (38 per cent) and the authentication of products (42 per cent). Beyond authenticity, human elements such as expertise and knowledge (39 per cent), and love for a brand's designer(s) (42 per cent) rank as the most important factors in purchasing decisions, while unique and exclusive design is key for 37 per cent of luxury consumers. While just 19 per cent of luxury consumers think a brand championing its designers is important, over a third of this group (35 per cent) would be willing to spend 30 per cent or more on a brand with that attribute.

Despite the consistency in some of these expectations across all luxury consumers, there are three distinct consumer mindsets identified by the research, each with their own specific priorities in buying behaviour: purists,

By diving into the unique values of these three key groups and the beliefs that unify them, brands can better understand how AI can impact brand perception and consumer behaviour for each group, and at which points in the purchasing journey, as well as identify new opportunities for using AI in the future. Purists prioritise authenticity,

craftsmanship and the pursuit of refined garments. Expressionists seek to stand out by maximising their individual style and selecting brands that represent a *joie de vivre*. Activists are drawn to brands that align to their values, particularly when it comes to social impact.



Exhibit 1	Purists	Activists	Expressionists
Age	The older group 50 per cent aged over 35	The younger group 66 per cent under 35	The millennial group 55 per cent aged 25-44
Spend on luxury fashion	46 per cent spent over \$3,000 on luxury fashion in the past 12 months. Purchase the lowest volumes across all categories, but most likely (89 per cent of all purists) to have purchased accessories	56 per cent spent over \$3,000 on luxury fashion in the past 12 months. Purchase highest volumes of accessories, jewellery and watches (87 per cent of all activists) and most likely group to purchase bags and jewellery (76 per cent)	44 per cent spent over \$3,000 on luxury fashion in the past 12 months. Group most likely to purchase apparel and shoes (96 per cent of all expressionists), as well as purchasing these categories in higher volumes
Top purchase drivers	Durable products	High quality	Fits with wardrobe and style
Top values	Authenticity	Sustainable and social responsibility	Self-expression
Willingness to spend more on values	51 per cent willing to spend at least 20 per cent more on an authentic brand	53 per cent willing to spend at least 20 per cent more on a sustainable brand	53 per cent willing to spend at least 20 per cent more on brands that allow them to express themselves
Average willingness to pay at least 20 per cent more for a brand because it uses AI	26 per cent of all purists	35 per cent of all activists	29 per cent of all expressionists
More likely to spend more on...	Personalisation 28 per cent would spend at least 20 per cent more if the use of AI for product personalisation was offered. Potential to drive revenue up by 17 per cent when incentivised with personalised deals	Sustainability 36 per cent would spend at least 20 per cent more if a brand was using AI for sustainable fabrics development	Unique or improved design 30 per cent would spend at least 20 per cent more if the brand was using AI for better design
% of group excited about AI (in the next 1-3 years)	62 per cent of all purists	72 per cent of all activists	67 per cent of all expressionists
Likelihood to purchase from a brand using AI in the future	64 per cent of all purists	77 per cent of all activists	66 per cent of all expressionists
Thoughts on AI	AI helps people do their jobs better	Synergy between AI and designers will improve sustainability	AI will complement the work of designers

What about when AI is part of the purchase journey? And how could this new technology impact the perception of luxury brands? From the survey, of the respondents primarily driven by quality, 62 per cent were excited about brands using AI in the next few years, and 64 per cent would actually purchase from brands using AI.

Luxury brands, therefore, face a challenge: how to leverage the potential of digital tools without undermining their core value proposition. However, far from

undermining consumer perception of premiumness, the data reveals unique opportunities for luxury brands to enhance this by using AI to improve things like marketing communications and storytelling to resonate these three groups (Exhibit 2).

Purists are connoisseurs of tradition. They show the highest interest in investment pieces such as luxury handbags and watches, with 36 per cent purchasing a bag priced over \$500 in the last year and nearly one-third (31 per cent) purchasing a luxury

timepiece priced over \$500. They cite authenticity as their top priority (46 per cent), with heritage and brand story also key factors in purchasing. They show a willingness for AI to be used to generate marketing communications, with 38 per cent stating that it would improve their attitude towards the brand.

Activists are conscious consumers. They tend to be Gen Z and younger millennials, with 66 per cent aged 18-34. Their top priority is the values of the brand, specifically sustainability and social responsibility (79 per cent),

and diversity, equity and inclusion (76 per cent). Across the board, they are excited about the many benefits of AI, with a high level of trust in companies using AI (28 per cent) and optimism about the potential of the technology to create more sustainable garments (31 per cent). A quarter say that the use of AI by brands to create personalised experiences would make them more loyal. AI, therefore, becomes a valuable tool for retaining this group.



Expressionists want to stand out from the crowd, and three-quarters of this cohort will spend an extra 10-50 per cent or more for an item that helps them achieve this. Not necessarily defined by age, they have a clear sense of personal style with 80 per cent stating that they value brands that allow them to express themselves. Most of this group (82 per cent) would be willing to pay more for brands that create exciting and engaging marketing materials using generative AI.

The new data demonstrates that, when it comes to the design process, consumers are happy for handcrafted techniques and advanced digital technology to coexist. Despite 69 per cent of respondents preferring to buy from a brand whose garments are created by designers, 56 per cent welcome brands that use AI to create more unique designs. This suggests that a large cross-section of respondents see the benefit of generative AI being used within the design process, as long as the human touch is present with designers initiating the workflow. In fact, 50 per cent think AI improves brand craftsmanship and 53 per cent believe that AI makes designers more forward-thinking.

Exploring new horizons: The potential of generative AI

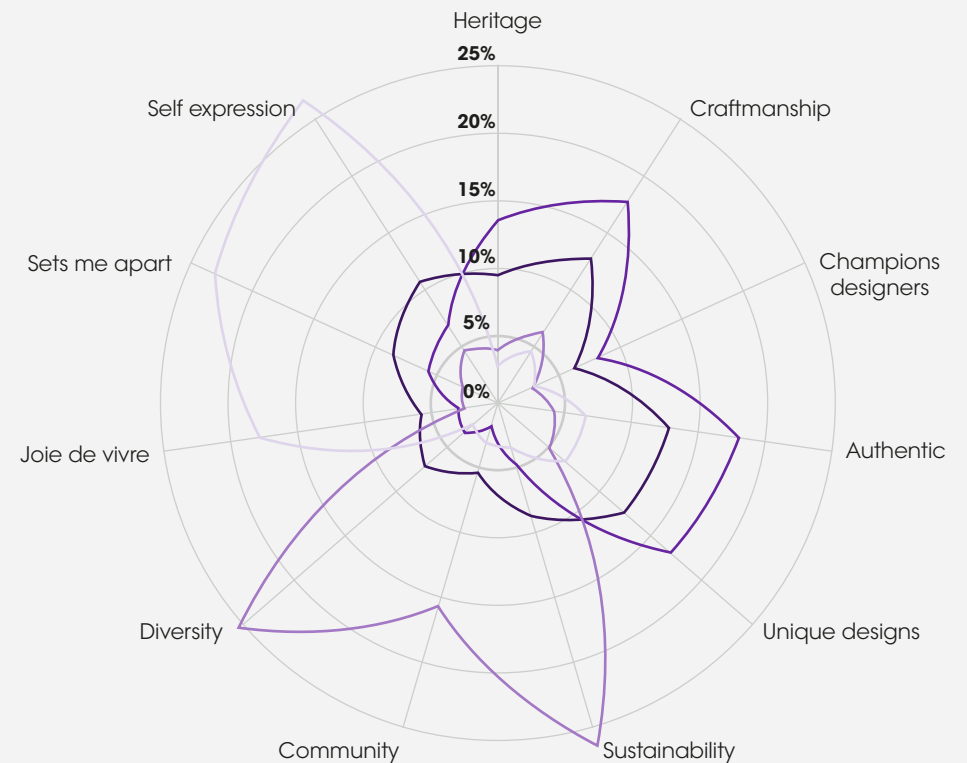
The new wave of generative AI is expected to be transformative, with

significant societal change at the scale of the agricultural or industrial revolution. The first wave of AI has given rise to the ability to generate preferred assortments of products or content to aid discovery; reduce laborious tasks for workers; and shorten pathways to purchases for consumers. Consumers are already familiar with personalised recommendation engines used by entertainment platforms such as YouTube, retailers such as Macy's, and [Google search engine rankings](#). These rankings and preferences marked a seismic shift in the way that consumers engage in product discovery and they already appreciate the benefits, seeing value in personalised recommendations in-store (39 per cent) and online (35 per cent), as well as personalised deals and offers (38 per cent). User acceptance of technology is fundamentally based on two factors: perceived usefulness, and perceived ease of use. As perceived ease of use grows, so does a wider understanding of the technology's usefulness, both personally and in commerce, which fuels desire and tips over into active use.

AI is already present at a variety of touchpoints in the customer's journey. AI-powered visual searches such as Google Lens are the most used digital tools, with 46 per cent of respondents stating they have used this type of AI tool to shop. Interestingly, this

Exhibit 2: Consumer mindsets differ in the values placed on luxury fashion

■ Total respondents ■ Purists ■ Activists ■ Expressionists



Assigned value based on preferences indicated by segments

DATA SOURCE: VOGUE BUSINESS

increases to 52 per cent for the highest spenders, the group spending over \$2,000 on fashion and luxury purchases in the last six months. The perceived usefulness of searching for luxury fashion items, combined with the ease of functionality, free accessibility and user-friendly interfaces, leads to high acceptance.

Google searches for “generative AI” have been growing steadily since the start of 2023, climbing exponentially from May onwards as new consumer-

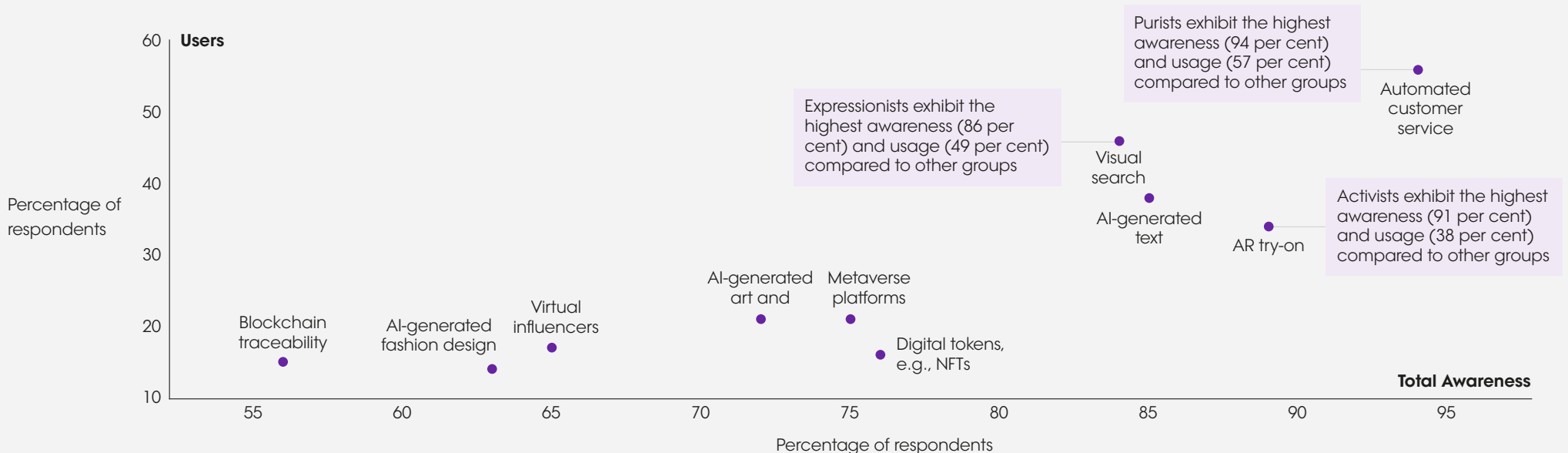
facing tools became accessible to an international audience. Text-based platforms such as Google Bard, a powerful large language model based on the company’s PaLM2 technology alongside other conversational chatbots have been used by over a third (38 per cent) of respondents. Another area where Google has been investing is art and image platforms. These have caught the public’s attention, with over a fifth (72 per cent) of respondents exhibiting awareness of the technology and AI-generative

fashion design tools already on the radar of 63 per cent. Awareness is quickly converting into curiosity — AI-generated fashion design, art and design, and augmented reality try-on all see the highest level of interest from consumers in the survey who are non-users, with a third of them expressing an interest in each technology.

When it comes to AR try-on, activists exhibit both the highest awareness and the highest usage compared to other groups, indicating that this tool could

appeal more to consumers driven by sustainability, given that improved accuracy in fit has the potential to reduce returns and the emissions associated with them (Exhibit 3). In 2020 Google pioneered AR search with Burberry, allowing consumers to explore iconic Burberry products and place them at scale in their own environment, helping them move seamlessly through the customer journey from discovery to engagement.

Exhibit 3: As awareness of AI rises, so does usage, but different consumer groups prioritise different tools



May/June 2023, n = 2976

DATA SOURCE: VOGUE BUSINESS

Blockchain technology scores the lowest level of awareness, with 44 per cent of respondents totally unaware of it and only 20 per cent saying they have so far found it useful (Exhibit 3). The tech has so far been helpful for brands as a tracking system, allowing them to store information about their supply chain, trace product journeys and guarantee authenticity for consumers. An example is [Aura](#), the non-profit consortium comprising LVMH, Prada Group, Cartier, the OTB Group and Mercedes-Benz which guarantees the provenance of an item for the customer, improving the

buying and selling process, as well as offering supply chain transparency. Expressionists are marginally more aware of blockchain tools than other groups, but all three groups are reluctant to engage with the technology. Considering that blockchain technology addresses the authentication of products, which 42 per cent of all respondents cited as their most important consideration factor when shopping, there is an opportunity for brands to meet unfulfilled needs by making blockchain-based (or other traceability) tools more accessible and intuitive.

AI has a role to play in delivering against customer experience expectations too. Automated customer service saw the highest recognition, with 94 per cent of all respondents aware of this technology and over half of them actively using it (Exhibit 3). However, purists were both the most aware (94 per cent) and the most active users (57 per cent), which aligns with the fact that they prioritise more traditional factors in their purchasing decisions and value practical improvement in their purchase journey at familiar touchpoints. At the luxury end of the market especially, purists welcome the use of AI tools to provide an

elevated customer experience, such as AI-driven clienteling.

Meanwhile, NFTs as proof-of-attendance (POAPs) from brand community-driven events (both real or in the metaverse) or for use in digital fashion sales saw a much lower number of respondents (23 per cent) saying they found them useful in the context of offering exclusive benefits. And yet, brands like Roksanda have still managed to generate considerable excitement using NFTs, for example by [minting a digital demi-couture gown NFT in GBP](#) for the first time during its Autumn/Winter 2022 show.



Out of this world — or in it? New approaches to production

Generative AI in the hands of top creatives leads to powerful content that entertains, surprises and delights consumers, generating social media virality, engagement and positive word of mouth endorsement. AI is fast becoming a legitimised art form, with luxury fashion as the vehicle. Examples include the cult artist [Str4ngeThing](#), whose work with AI manifests streetwear in the Renaissance period. Back in 2016, Google spearheaded the move into avant-garde AI fashion design with the [Project Muze](#) activation in partnership with European online retailer Zalando. The experiment demonstrated how a fusion of trend data and garment preferences from over 600 fashion experts could generate new designs from user's personality-based prompts.

Time is arguably the most valuable resource for many fashion businesses and here AI has the potential to accelerate processes at all stages of the product cycle. At the design stage, AI assists in turning quick sketches into high-fidelity drawings, prompts into moodboards and descriptions into 3D models. While AI can be used to improve search results for shoppers, using AI to catalogue designs means designers could step into a brand's archive and generate new variations on looks to play with. The utility moves beyond design

and into production; text-based AI can even speed up information-based research processes to help with factory negotiations.

The solutions offered by generative AI tools are myriad. Marketing teams can discover meaningful new insights into their customer data, public relations teams can track consumer sentiment and reputation online. They can generate time-saving outlines for features or press releases, and clean, short-form copy for social media posts and product descriptions. Retail store operators can optimise unit layouts, identify staffing allocations, and use the technology to scan real-time video data for theft detection. AI-powered document analysis and letter writing can even automate more mundane and repetitive admin tasks that are often prone to human error, freeing up time for more creative or stimulating pursuits.

Google's PaLM API is a simple entry point for Google's large language models. The new tool [MakerSuite](#) is designed to simplify workflow, iterating prompts, augmenting a dataset with synthetic data, and easily tuning custom models. The company is guided by strong ethical [principles](#) that include developing the technology to benefit society; implementing safety testing; accountability; and avoiding bias while upholding privacy and high standards of scientific excellence.

Key stats

50 per cent

of respondents think AI improves a brand's craftsmanship

53 per cent

of respondents think AI makes designers more forward-thinking



DATA SOURCE: VOGUE BUSINESS

Allies in a purpose-driven world: Towards a sustainable future

Overall, Gen Z and millennial consumers are particularly tuned in to how much a brand focuses on sustainability and social responsibility, cited as the most important factor for 31 per cent of 18 to 24-year-olds and 28 per cent of 25 to 34-year-olds (compared to 23 per cent of 35

to 64-year-olds). While sustainability emerges as the most important value for activists, with 53 per cent of the cohort willing to spend 20 per cent or more on a brand that focuses on sustainability and social responsibility.

A shift towards slow fashion also beckons AI support in improving sustainability. Nearly a third (31 per cent) of the consumers surveyed are prepared

to pay 20 per cent or more for more sustainably designed garments. This figure rises to 36 per cent for the activist group, indicating that they are willing to spend more on brands using AI to align with their values. Over half (51 per cent) of respondents were driven by durability when choosing a brand, and, combined with classic, enduring styles (which 50 per cent are most drawn to), prolongs the life of a garment and helps reduce

landfill. Interestingly, activists appear to adopt a “buy less, buy better” mantra, by making fewer purchases but spending more when they do. Over a quarter of activists (26 per cent) spent in excess of \$5,000 on luxury fashion in the past year. Significantly, 72 per cent spent over \$2,000, far exceeding the other consumer groups at 65 per cent and 67 per cent for purists and expressionists respectively.

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Exhibit 4: Economics of AI in sustainability



87%
of activists

willing to spend between
5 and 50 per cent more
on sustainable fabrics
designed with AI



20% potential
revenue uplift

Elevating brand equity: The currency of conversion

The power of AI to create meaningful brand value is not limited to its role in elevating social values. Other principles, such as personalisation and loyalty, are crucial in establishing strong, enduring relationships with luxury shoppers. Once again, these brand attributes appeal more to activists than other shoppers, with this group being the most likely to be loyal to a brand using AI for personalisation.

Step 1: Short-term gains in personalisation

One of the major themes that the data uncovered is the value that Gen Z and millennial luxury consumers place on all forms of personalisation. Investment in this area can offer short-term gains. Nearly half of consumers (47 per cent) say they would be prepared to spend up to 20 per cent more on in-store personalised shopping, while a third of those questioned (33 per cent) say they would be willing to pay up to 10 per cent more.

The results suggested that up to 40 per cent of respondents would be willing to spend up to 20 per cent more when receiving personalised advertisements, with a small percentage (7 per cent) indicating they would pay up to 50 per cent or more, highlighting the

power of data and AI in delivering this. These top-tier clients call for special attention, both online and offline.

In store, this translates as exclusive shopping experiences, with familiar sales associates or tailors knowing the style preferences, values and fit measurements of their patron. A similar feeling can be achieved with AI to create bespoke shopping experiences. Overall, 61 per cent of all respondents agree that they would like to receive more personalised recommendations that are automatically generated using their preferences and shopping history. Purists as a group are more engaged than the other consumer groups, with practical solutions offered by AI such as personalised deals (37 per cent) and recommendations (62 per cent). They have the potential to add, collectively, up to 17 per cent more revenue when offered personalised deals generated by AI.

Incentivising consumers increases their motivation to purchase with 35 per cent of all consumers saying personalised deals or offers would motivate them and 32 per cent saying the same for personalised recommendations online (Exhibit 5). The convenience of shoppable media such as advertising on social platforms combined with a trigger such as the use of an authentic influencer strategy, or limited-edition collections has the potential to convert interest more easily into sales.

Exhibit 5: Top three purchase motivations driven by AI

What aspects of AI would push you to buy a luxury brand?

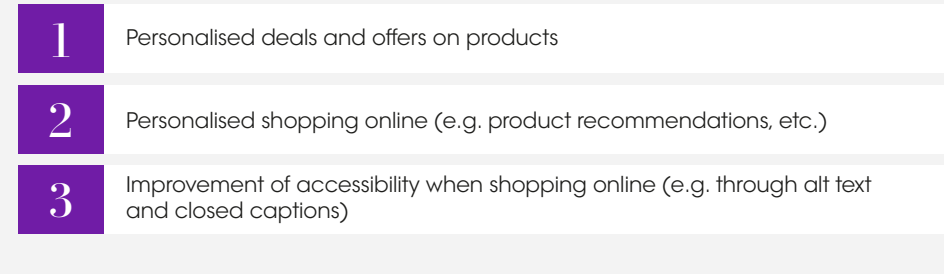


Exhibit 6: Economics of AI in personalisation



DATA SOURCE: VOGUE BUSINESS

**Step 2:
Long-term gains in brand building**

The essence of a strong brand identity is differentiation and the last thing that AI-generated designs should feel is generic. The majority of consumers (69 per cent) are happy to pay up to 50 per cent more for a brand that uses generative AI for product personalisation. And, 56 per cent of respondents agree they would welcome brands using AI to create more unique designs, with 68 per cent stating they would spend up to 50 per cent more for a brand delivering

on this. Willingness to spend more on a brand due to its use of AI is driven largely by activists who are generally the group most engaged with AI.

Overall, more than a third of all luxury fashion consumers surveyed (37 per cent) yearn for unique and exclusive designs. However, the same proportion (37 per cent) are totally unaware of AI-generated design. This reveals an opportunity for brands to use AI tools to not only improve the originality of product design and create newness, but also the potential for more storytelling around how AI is being used

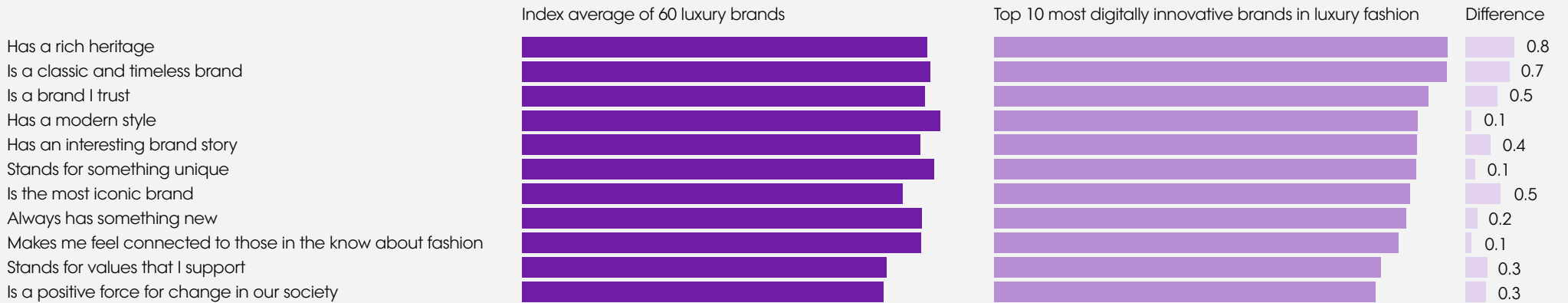
to enhance uniqueness and exclusivity to meet that demand.

Brand loyalty is an outcome of brand equity, and there are opportunities to build a community around this. The idea of connection is important, with nearly all customers surveyed (96 per cent) saying they would be willing to spend more for a brand that allows them to feel part of a community. Activists are the group most interested in community, with nearly half (47 per cent) citing this as an important value. While adoption of NFTs has slowed in recent months, their utility in building community and loyalty

is proven, with the assets being used to fuel loyalty programmes (e.g. as rewards or the key to rewards) or as POAPs (proof-of-attendance protocols) from exclusive events for the brand's community, that also instigate post-event engagement. To encourage adoption, brands utilising NFTs should educate consumers about their usefulness and make them easy to use and engage with. Furthermore, customer retention can be cultivated with AI data-driven loyalty programmes and targeted benefits, and employed to track customer satisfaction.

Exhibit 7: Digitally innovative brands considered more iconic and interesting

Average score out of 10 on different brand attributes. Consumers were asked to rate the degree to which they think each brand matched the following



April/May 2023, n = 5,886 luxury consumers globally

**Borderless creativity:
New market opportunities**

For consumers, the expectation of engaging with brands that use AI is no longer a distant dream, but a fast-approaching reality. The overall feeling is positive, with 60 per cent of consumers willing to engage more with luxury

brands using AI over the next one to three years.

Consumers expect to see improvements across the board. Almost a third (31 per cent) of activists believe AI will complement the work of designers in improving design — the same number as those who think the synergy between

AI and designers will lead to improved sustainability. Meanwhile, 27 per cent of the most traditional group, the purists, believe AI will enhance human creativity. This suggests that, far from being resistant to AI, most luxury fashion consumers are open-minded to using tools that incorporate AI to improve their products and experiences. As a group

that welcomes novelty and innovation, it's the perfect category in which the improvements offered by AI can be applied. Interestingly, it is the highest spenders who are the most excited (74 per cent) when compared to 49 per cent and 62 per cent of light and medium spenders respectively.

Light spenders

Shoppers spending between \$500 and \$1,499 on luxury fashion per year

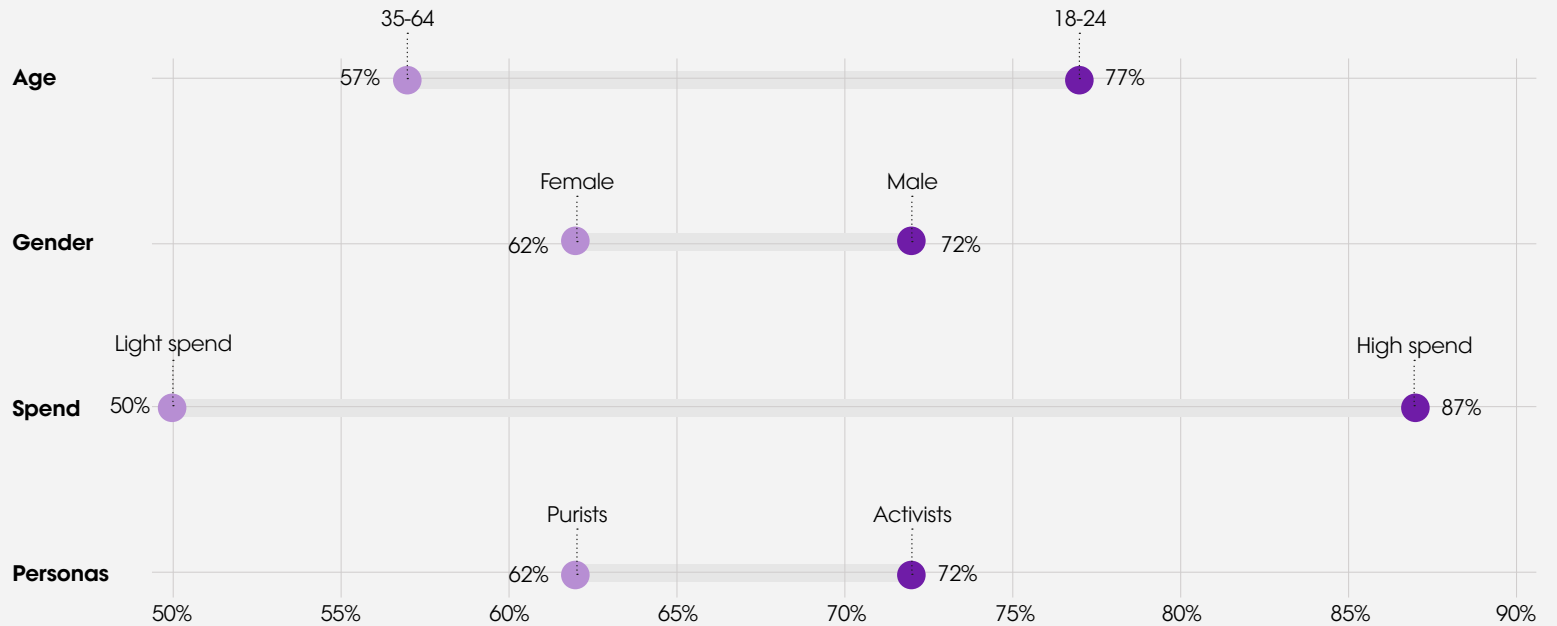
Medium spenders

Shoppers spending between \$1,500 and \$2,999 on luxury fashion per year

High spenders

Shoppers spending more than \$3,000 on luxury fashion per year

Exhibit 8: Excitement for AI in the next one to three years



May/June 2023, n = 2,976

DATA SOURCE: VOGUE BUSINESS

The research reveals several types of consumers who are more excited about AI's impact on luxury fashion, and there is also a correlation between the highest spenders and the most excited. There are three markets where brands can test these tools faster. Geographically, Italy sees the most excitement for luxury brands using AI (74 per cent compared to the global average of 66 per cent). Perhaps unsurprisingly, in terms of age, it is the youngest consumers (18-24) who are the most excited age group — this includes the activists, who are already experimenting with generative AI, although it is younger millennials (25-34) who are currently the highest users. Across all age groups, the data show that 57 per cent or more are excited about the potential of the technology. And, in terms of gender, male consumers are more excited (72 per cent) than female consumers (62 per cent). This indicates that storytelling in marketing communications around the implementation of AI could encourage the male luxury shopper more, which is a group that also typically spends more per transaction, too.

Communication is key, and there is an opportunity for writers of marketing copy to use generative text tools such as Google Bard to improve storytelling around how AI is being used to improve design features and product sustainability, and to create better, more

meaningful experiences for consumers. Since storytelling around heritage and craftsmanship is still paramount, brands should lean on these tools to accelerate and add potency to messages about these developments. Over a third (39 per cent) of respondents are keen to see AI employed more in communicating the heritage and story of a brand — attributes that correlate strongly with purchase intent when done well, as data in the [Vogue Business Index](#) shows.

The fashion and luxury industry continues to be defined by parameters of quality, craftsmanship and authenticity. The challenge is to balance heritage with novelty and newness. AI has the power to complement and enhance these attributes that are already the biggest conventional drivers of luxury purchases. Consumers are becoming hungry for brands that use AI to enhance their products or experiences. And, when consumers understand the tangible benefits, such as improved design, exclusivity, personalisation or sustainability, they're willing to pay significantly more for the product. This will have a palpable effect on brands' topline performance. The highest spenders are also the most excited, meaning this is an audience that is ready to experience the benefits of AI in their fashion purchases.

Quick wins with AI include using it to

improve personalised recommendations and customer service. These aren't necessarily elements that consumers are willing to pay as much more for. They can, however, free up resources allowing for a focus on more creative tasks, helping to streamline efficiency. AI's time-saving potential in terms of repetitive tasks will delight consumers and employees alike.

With the wealth of new digital tools available, brands can pick and choose solutions that best suit the needs of their customers and their resources. As we advance into this exciting new technological era and consumer perception of generative AI moves from the realm of science fiction to everyday reality, it is sure to capture the imagination.



Key recommendations: Leveraging AI to activate purists, activists and expressionists

Persuading Purists

AI-driven personalisation is taken as a given, with personalised recommendation engines already commonplace, yet personalisation remains a key way for brands to increase revenue, maximise profits and reward consumers with custom deals, driving brand equity. Personalised shopping and deals increase purchase motivation across all consumer types, with purists seeing particularly high spend when offered these features. With this consumer group making up 68 per cent of consumers, personalisation becomes key to widespread adoption, and it's this use case for AI that brands should tackle first.

Appealing to Activists

AI offers opportunities to build brand identity and a value system that consumers want to buy into, driving consumer loyalty. Most notably, brands can tap into values such as sustainability and community building to achieve an emotional connection with consumers. Sustainable

development in particular requires work along the supply chain to implement new production processes and materials, yet with the activist consumer group there are potential retail price gains of 20 per cent for AI-designed sustainable fabrics (compared to if a brand was not engaging with AI in this way) the return on this investment is clear.

Enchanting Expressionists

Across all consumer mindset groups, curiosity for the creative use of AI in the design process and across marketing materials is high, with innovative brands seen as more iconic and interesting. Expressionists are highly engaged with AI in the design process, yet opportunities exist across the other groups too. AI holds the power to amplify creative storytelling around key purchase drivers such as heritage and craftsmanship, which align closely to purists' traditional view of luxury fashion.

