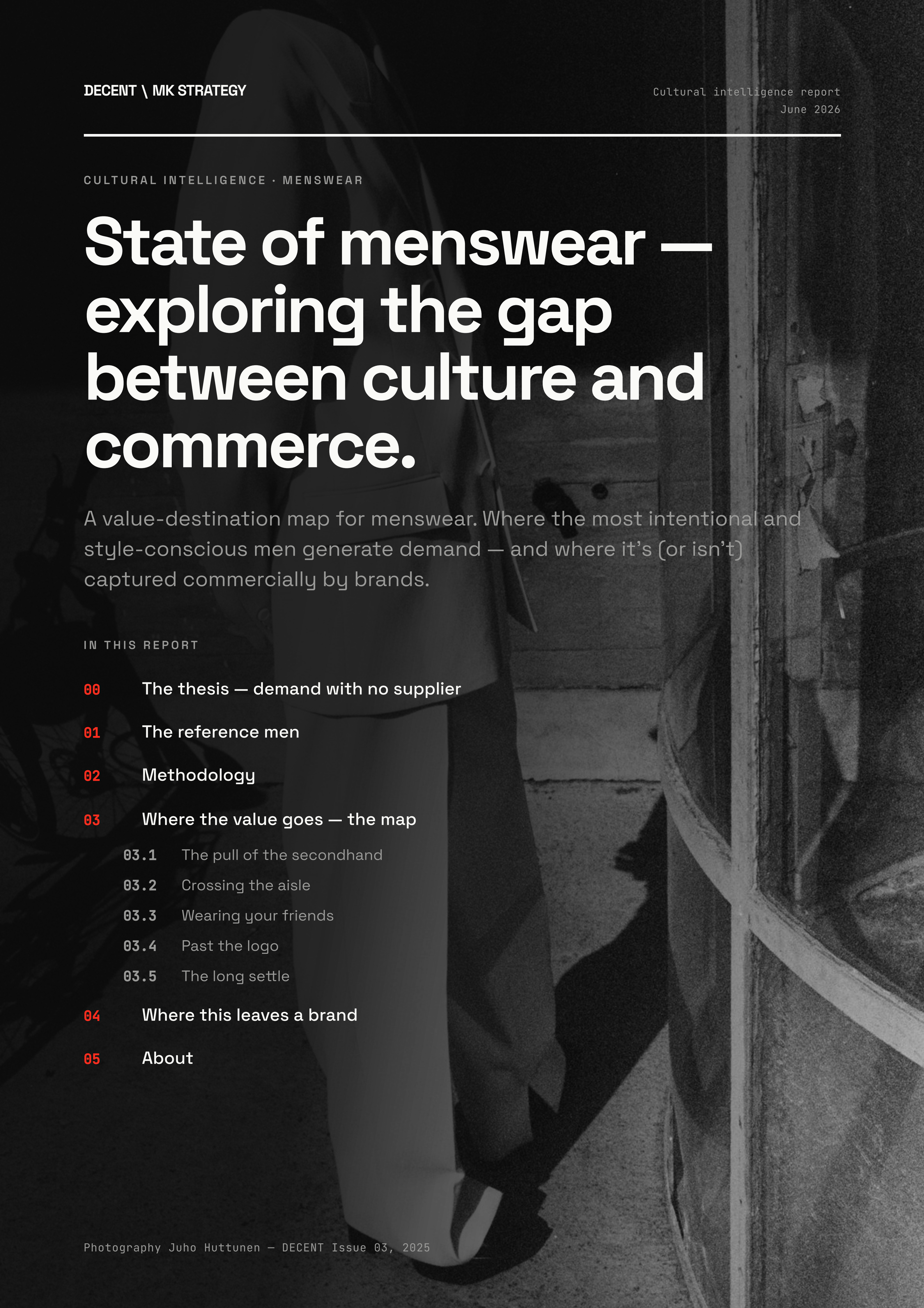


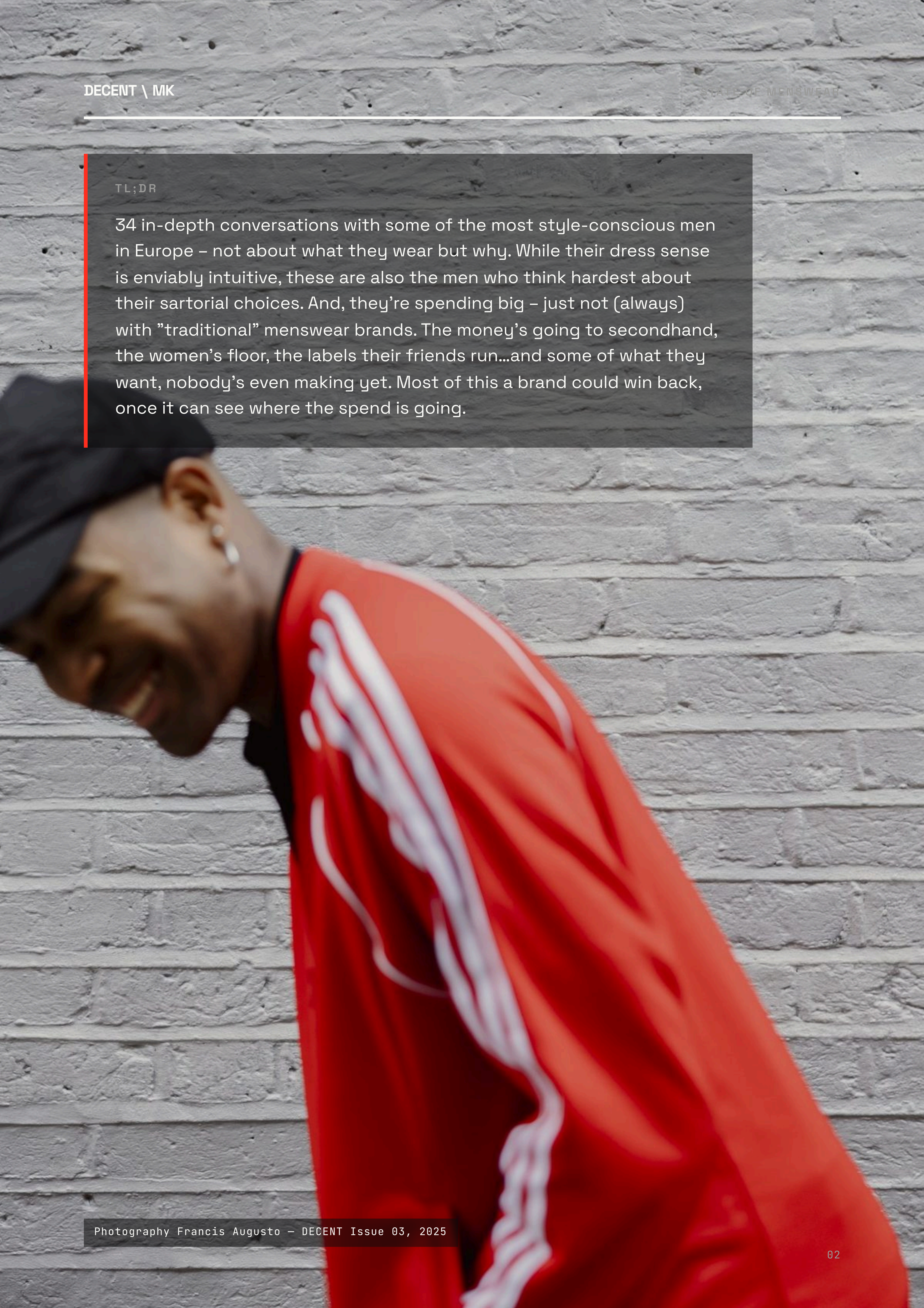
CULTURAL INTELLIGENCE · MENSWEAR

State of menswear — exploring the gap between culture and commerce.

A value-destination map for menswear. Where the most intentional and style-conscious men generate demand — and where it's (or isn't) captured commercially by brands.

IN THIS REPORT

Photography Juho Huttunen — DECENT Issue 03, 2025



TL;DR

34 in-depth conversations with some of the most style-conscious men in Europe – not about what they wear but why. While their dress sense is enviably intuitive, these are also the men who think hardest about their sartorial choices. And, they're spending big – just not (always) with "traditional" menswear brands. The money's going to secondhand, the women's floor, the labels their friends run...and some of what they want, nobody's even making yet. Most of this a brand could win back, once it can see where the spend is going.

Photography Francis Augusto — DECENT Issue 03, 2025

00 The thesis — demand with no supplier

Menswear, long seen as the stale, rule-obsessed corner of fashion, feels like it's at the start of something new. At the same time, ideas of luxury and 'worth' are shifting fast, masculinity is loosening (or tightening, depending on which continent you're on), and influence has stopped travelling cleanly top-down, and is now probably floating somewhere between algorithms, humans and an army of AI-agents being built as we speak.

This report explores the category through a specific group of men, looking at what they do with their clothes and why: the emotions and motivations underneath. It locates where these men generate cultural value, then takes that value a step further — into where it does, and doesn't, convert into commercial edge for a brand.

One pattern runs under most of the findings. The taste these men confer often turns into real, high-conviction spending, and a lot of that spend currently lands somewhere other than a menswear brand. Some goes to archive sales, Vinted and the womenswear rail, some to friends running small labels. (And let's not even get into the Japanese denim conversation…) Some of it isn't being spent at all, because the thing they describe wanting doesn't quite exist yet.

None of this is one-off. It is a single application of a repeatable method: investigating the cultural value that's generated in/around the category, then following where it converts into commercial value a brand can keep and compound – and identifying where it leaks. What follows is that method applied in a menswear context.

> **A cultural indicator, designed to sharpen commercial conversations rather than replace the brand's own analysis.**

01 The reference men

The thirty-four men (and masculine-presenting people) in this study are designers, DJs, models, stylists and artists — from a member of Fontaines D.C. to the kind of man who spends an unfair amount of time thinking about his wardrobe. They were chosen editorially, for their conviction and individuality, as the subjects of DECENT magazine.

Because these men think about clothes harder than almost anyone, they are extremely attuned to what menswear offers and what it holds back – and act on it loud enough so that the rest of us can see it, too.

The tired word for them is tastemakers, and it undersells the job. They both read the collective mood and fix what it means. They register what's in the air and decide what it stands for at the same time. That's the dimension "tastemaker" flattens.

> THE MAIN CAVEAT
>
> **It's a small sample, and a deliberately deep one, closer to a set of long conversations about why these men dress the way they do than to a survey. That's its value and its limit. It goes deep on the psychology and the culture, but makes no claim to mass-market representativeness.**

Camille Hattu · DECENT Issue 03, 2025

02 Methodology

The findings draw on two sources. DECENT Issue 03, published in 2025, contributed 26 of the interviews, conducted in London, Paris, Berlin, Amsterdam and Helsinki, long-form conversations about personal style, carried out editorially with no brand brief. A further eight were conducted in 2026, in Tokyo, London, Helsinki and Antwerp, to test and extend the patterns from the first set.

SOURCES	DECENT Issue 03, 2025 + 2026 supplementary
SAMPLE	n = 34, qualitative, scene-based
MARKETS	London, Paris, Berlin, Amsterdam, Helsinki, Tokyo, Antwerp

Every pull quote and image in this report is drawn from either DECENT Issue 03, 2025, or the supplementary interviews, 2026. Provenance is carried on each as a matter of record.

The five destinations

Five places where the meaning these men make turns into spending — and where, in menswear as it's currently built, that spending tends to go instead.

01 **The pull of the secondhand** — the resale a brand never sees

02 **Crossing the aisle** — the sale booked to the wrong floor

03 **Wearing your friends** — loyalty no campaign can buy

04 **Past the logo** — margin given away at the till

05 **The long settle** — the best customer, misread as lapsing

03.1 The pull of the secondhand

These men go secondhand for character they can make their own — and a brand usually loses them in how it presents the range, long before the product itself is the problem.

A good share of what these men spend never reaches a brand at all. It goes to vintage stalls and resale apps. The obvious lever is to run that market yourself — a brand-owned resale or buy-back line catches some of the spend directly — but it treats the symptom, not the pull. What these men are really after is character they can make their own, and a secondhand piece carries it: it has lived a life, and it has lost its instructions, so they can make it mean what they like. New product rarely reaches them that free, and what gets in the way is usually the presentation around it.

> "The thrift store gave me permission to be weird in the way the mall never could."
>
> DUSTY BRANDT HOWARD · DECENT ISSUE 03, 2025

A brand's presentation tends to err one of two ways. It over-authors, styling a piece onto one particular man until it reads as his alone, the meaning settled before the buyer gets a say. Or it under-communicates, flattening a characterful piece into an anonymous grid with its story stripped out. Secondhand sits in the gap both leave: character that's legible, meaning still open.

> "The stories behind the clothes are often the reason I buy them. It's more than fashion, it's history."
>
> CHRIS BOGAERT · DECENT ISSUE 03, 2025

The brands that win any of this back communicate the character, then get out of the way. They lead with provenance and story rather than a styled life to copy, present a piece as a starting point the buyer finishes, and put a knowledgeable human voice back where most have left an algorithm. Price gets talked about honestly — what a piece is worth to the man who'll own it, not where it sits on a ladder. None of this touches the product; it changes what a brand says about it, and how much room it leaves the buyer to make it his.

> "It's not an algorithm or 'Amazon recommends' — it's people."
>
> BEN GOLIK · DECENT ISSUE 03, 2025

CULTURE → COMMERCE

These men go secondhand for character they can make their own, and for wear that new product can't fake. A brand can own that second life itself, instead of handing the resale to someone else. Where it can't, what's left is how the piece is shown.

> When these men choose a worn piece over yours, is it the age — or the way you've shown it?
>
> Could you present a piece the way secondhand does, clear to read and open for him to finish, without deciding what it means first?


Photography Flo Herzing — DECENT Issue 03, 2025

03.2 Crossing the aisle

These men cross to womenswear mostly for fit, not a statement about gender — they have stopped sorting clothes by gender, and the category that still does keeps losing them.

Some of this money doesn't even leave the building. It crosses to the womenswear floor. The cultural shift around gender in dress is real, but the buying behind it is practical. Menswear's patterns are drawn around an old idea of what a man wants — room and cover — while the closer, shape-showing cuts these men want sit on the women's floor, so that's where they go. The exception is the brand that makes gender-play its whole identity — Gucci under Alessandro Michele — but that's authored on purpose, not why most of these men cross.

> "I buy a lot of women's clothes because the cuts suit my shape better. Everyone thinks I get my jackets cropped, but they're mostly just women's jackets."

GOYA GUMBANI · DECENT ISSUE 03, 2025

The brands that win here treat the line between the floors as porous: cuts that sell across it get carried into menswear and graded for the men actually buying them, and a man buys from any rail without a remark. Little of it needs new product, which makes it one of the cheapest destinations here to act on. The bigger prize sits further out. Most of these men are served fully by neither floor — they want the women's cut and the men's pockets at once — and a range built around how a garment fits a body, not which department it's filed under, would hold a customer who currently splits his spend across two and compromises on both.

There's a catch, and it's why most brands never get here: in their data the crossing man simply disappears. He's logged as a womenswear sale, not as menswear demand the range failed to meet, so the gap never shows up. A brand can lose him twice — even when he crosses ready to spend, the grading is built for another body and the piece turns him away at the mirror. You can't act on a customer you've structured yourself not to see.

> "I don't care if it's men's, women's, kids' or dogs' — if it fits, I'm buying it."

VESA PERÄKYLÄ · SUPPLEMENTARY INTERVIEWS, 2026

CULTURE → COMMERCE

These men are past reading the gender-fluidity as a statement, so a brand still treating it as one is often misinterpreting its customers. And because the data logs him as a womenswear sale, the menswear demand never reaches the range. That's an attribution gap more than a taste one.

> Can your data tell a man crossing for fit from a womenswear customer, and how much menswear demand are you booking as women's sales?
>
> Could your menswear meet a man who's stopped sorting clothes by gender, without making an event of it?

03.3 Wearing your friends

The labels these men stay loyal to are ones they helped make — and a hand in the making is a bond no product can buy.

Some of the money never leaves the scene. It goes to labels run by friends — clothes these men have often had a hand in making before they ever buy them. A person doesn't walk away from something they helped build.

> "VAIN [is] a label started by a few dear friends of mine. I occasionally model for them, and their style has inspired my music, and vice versa."
>
> GLAYDEN · DECENT ISSUE 03, 2025

A competing offer can't reach a bond made that way. A rival might beat the label on cut or price, but it had no hand in the making, so there's nothing for it to undercut. It's also why the scene is merciless about brands arriving with a community campaign — that loyalty was earned by doing the work together, and a seeding programme or a partnership in a press release reads as a shortcut around it.

> "Fashion has definitely embraced [community] for marketing purposes. Me? I wear my friends."
>
> SÉGA KANOUTÉ · DECENT ISSUE 03, 2025

The brands that earn a place here give the scene a real hand in the making — commissioning the work, co-designing with it, hiring from it into the rooms where decisions happen, crediting it rather than borrowing its faces for a campaign. Done that way, people defend the brand the way they defend something they own, because in a sense they do. It's slow, and it can't be faked or bought. But a brand that lets enough people build it stops borrowing other scenes and starts becoming one. That is the difference between a brand people are paid to wear and a brand they had a part in.

> "It's about finding a community… who give you a sense of belonging. It's not just about wearing the same clothes."
>
> DEIJUVHS · DECENT ISSUE 03, 2025

CULTURE → COMMERCE

This loyalty comes from having a hand in the thing, so a brand can't buy in, only be built — and renting the scene's proximity for a season buys loyalty that walks when the budget stops. The hand they'll give isn't only in the clothes — it's in what the brand makes, shows and stands for.

> Do you know how much of your loyalty is rented, and gone when you stop paying?
>
> Does the scene have a real stake in what you make, show or stand for, or only lend you its image?

Photography Rasmus Purola — DECENT Issue 03, 2025

03.4 Past the logo

As the logo stops holding the premium, the only thing that keeps the price is a point of view in the product — recognisable with the label cut off.

This destination behaves differently. The sale still happens. What gets conceded is the margin on it. For a long time the label held the premium on its own. With these men it no longer does. They rank a high-street piece next to a designer one by eye, not by name, and as resale publishes what holds value and logo-deference fades, the habit travels outward from these men to the broader market. What holds price now is a point of view in the product itself, recognisable with the label cut off. A piece that has one sits outside like-for-like comparison and keeps its price; a piece assembled from the season's references is interchangeable, and interchangeable things are bought on price. The discount is rarely a pricing decision. It's the late bill for one taken earlier, in the studio.

> "Half the stuff I wear is Mugler, half is ASOS, half Dior, half high street."
>
> CANER DAYWOOD · DECENT ISSUE 03, 2025

There is an opening in this for brands without logo power, which is most of them. As the label matters less, a high-street name can compete with a designer one, but only by putting a genuine point of view into the product rather than onto a label. Japan has done exactly this for decades: Yohji Yamamoto, Rei Kawakubo and their lineage built recognition into cut and proportion — art-led but restrained, identifiable with no logo at all. The distinctiveness lives in the garment, which is why it holds price and loyalty without raising its voice.

> "If you saw their silhouette, would you recognise them? If yes, then you've nailed it."
>
> MUNYA CHAWAWA · DECENT ISSUE 03, 2025

It shows up, in the end, as a single number, how often a brand has to discount to sell.

CULTURE → COMMERCE

Because these men judge by eye, the logo no longer holds the premium — so a brand whose distinctiveness lived in the mark, not the product, marks down to sell, paying in margin for a point of view it never built.

> Do you know how much of your premium rests on the logo, and what your markdown rate is really paying for?
>
> With the label cut off, is there enough point of view in the product for a customer to know it's yours and pay for it?

03.5 The long settle

These men lock onto a style when a life change settles who they are — and whatever they adopt at that moment gets re-bought for years.

This is the one place the value isn't going elsewhere. It's simply unmet. At some point — a new creative era, a move, a break-up — these men stop experimenting and settle. When a man's sense of who he is resolves, clothing changes job: it stops searching for a self and starts confirming the one he's found, and what he adopts becomes a default he keeps for years. It's the highest-value moment in his buying life, and the stickiest loyalty a brand can hold.

> "My style has muted as my confidence has grown."
>
> JOHNNY JANE · DECENT ISSUE 03, 2025

This is also where menswear tends to spend its marketing in the wrong place, chasing the man who already "knows himself" (we've all seen the ads…) — the settled, confident customer but also the hardest to convert. His defaults are already set. The man worth reaching is the one still working it out, mid-change, before the default locks. Catch him then and the brand becomes the default he keeps; reach him after, and you're asking him to rebuild himself to fit you.

> "There's a superpower in being able to resist the urge to cop the latest trend, and instead buy the next iteration of what makes you, you."
>
> KEKE MAHLELEBE · DECENT ISSUE 03, 2025

What they settle onto tends to be pieces they mean to keep, and menswear has a favourite word for that instinct — timeless — which is exactly the wrong one. 'Timeless' isn't appealing; 'enduring' is. A timeless design only resists dating; an enduring one earns its value through years of wear, where no competitor can copy or discount it. The brands that win here sell the conditions for that — cloth that ages well and repair as a service — and take their revenue in the years after the sale. There's a trap, though: when a man's buying narrows, a brand's data reads him as lapsing and pulls back, discontinuing the very pieces he was settling on and firing its best customer the moment it had won him. Of the five, this is the destination still going unclaimed.

CULTURE → COMMERCE

A man locks onto what he wears when a life change resettles him, then re-buys it for years — the highest lifetime value in the category, and it sits with the man mid-change, not the settled one most spend chases. Because his narrowing reads as churn, the brand retires the very pieces he was about to commit to.

> Do you know whether a customer whose buying narrows is churning or settling, and which one your data writes off?
>
> Is your brand reaching the man mid-change, while his defaults are still open, or only the one who's already decided?

Photography Kent Andreassen — DECENT Issue 03, 2025

04 Where this leaves a brand

These men and the culture around them generate demand — high-conviction, already in motion. Some of it slips past before a brand recognises it, holds it, or makes the part that doesn't exist yet — the man crossing for fit who books as a womenswear sale, the narrowing that reads as churn when it's really a man settling. And in the labels run by friends, value that can only be earned, never bought.

A note on where the fix is located. Read fast, these look like operational problems: a data gap, a markdown, a target that keeps missing... They're not. The womenswear shopper disappears because the range was cut to only cater for the traditional menswear silhouettes. Brands discount because there's nothing in the product to hold the price once the label's off (this is partly why Japanese brands are often gathering cult-like followings amongst menswear enthusiasts). And brands keep aiming their marketing at the man who already "knows himself" – the confident, settled one with a chiselled chin from the ads – when the man worth reaching is still working it out, mid-change. Selling him the finished version of himself is a Madison Avenue era aspirational advertising relic. All of it shows up at the till, but the decision behind it was made earlier, and higher up. So, ultimately, the fix isn't a better dashboard or forever-optimising the CRM, but rather knowing who the brand is itself, who it's for – and whether the money is going that direction.

> The brands that capture it don't chase these men. They become more sharply themselves, which is what drew them in the first place.

That is the work — turning the cultural value these men generate into commercial value a brand keeps, read as a repeatable system, not a one-off hunch. This report is the culture side of it. The other sits inside the brand, in the range, attribution and pricing calls these findings point at, and is best reached the way these men were — by interview.

THE CONVERSATION

The questions under each chapter are where it starts.

05 · ABOUT

Maria Kivimaa — Brand & Cultural Intelligence Strategist.

Maria Kivimaa

London-based. Finnish-made. 15+ years working where culture and commercial strategy collide.

I help brands make sense of what's shifting in culture and turn that into something commercially useful: a positioning, a platform, a new audience segment, a brief that actually works.

I also founded ALVAR, a Finnish design, fashion and culture print magazine in London (2013–2016), and DECENT, a print magazine on menswear and gender identity stocked across Europe.

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Photography Juho Huttunen — DECENT Issue 03, 2025