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The Power of Emotions

Trends & Inspiration
Q4 2025

Louis Vuitton/@superfuture

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Introduction

The following sections on trends, insights, and strategy have been curated to represent Imagine Studio's collective thought leadership regarding future customer and client needs.



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- How Brands Win with Emotion
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The Power of Emotions

In the evolving world of retail, out-of-home activations, and collectibles, brands are learning that it's not just about creating engaging experiences—it's about creating memorable ones. While a moment of delight might capture attention, it doesn't always translate into lasting impact. That's why understanding the psychology behind memory, anticipation, and emotional engagement is more important than ever.

Research shows that the emotional high we get from seeking, the dopamine-driven anticipation of a reward, is often stronger than the pleasure of actually receiving it. This insight is especially relevant in collectible culture and experiential retail, where the thrill of the hunt can be more powerful than the find itself.



The Louis Vuitton x Murakami pop-ups across London, Milan, Singapore and Tokyo leverage joyful color immersions in orange and green to energize and uplift shoppers.

@LouisVuitton

The Power of Emotions

Need to know:

Emotions shape consumers' perceptions and evaluations of products and brands, directly influencing purchasing decisions and brand affiliation. In this report, we unpack key concepts around how emotions work in consumer behavior and how to harness emotional intelligence for brand relevance, transformation and growth.

Opportunities:

Gallup research found that about 70% of consumer decisions are driven by emotional factors, while only 30% are based on rational considerations, and studies by Greenbook found that 86% of consumers' buying choices are shaped by an average of 10 emotional needs.

Mapping consumer emotions is an opportunity to authentically align with evolving cultural values, needs and aspirations, ensuring you deliver products, experiences and messages that deeply resonate with your audiences, both globally and locally. Ultimately, this can drive trust, loyalty and brand love. A study by Harvard Business Review found that customers who are emotionally connected to a brand are 52% more valuable than others, with connection driving purchase frequency and recommendations.

Proof Points:

Percentage of consumer decisions driven by emotions



70%

By contrast, the same research found only 30% are based on rational factors

WGSN.com

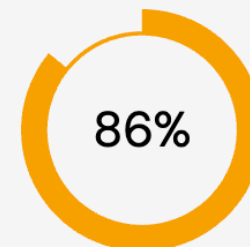
“

“In finance, we sometimes think of ‘fear’ as a fuzzy, emotional concept – not as a hard economic data point. But that is what it is. Fear is as important and actionable a metric as GDP.”

Larry Fink, Chairman and CEO, BlackRock

WGSN.com

Buying choices shaped by an average of 10 emotional needs



86%

WGSN.com

“

“Emotion is as important as reason in guiding our thoughts and decisions”

Leonard Mlodinow, author of Emotional: How Feelings Shape Our Thinking

WGSN.com



88% of consumers

want brand experiences that bring joy and make them smile.



Positive emotions

like joy, awe, and belonging are especially effective at creating “glimmers”—micro-moments of happiness that drive memory and loyalty.



57% of consumers

globally want to see, touch, and feel products before buying, highlighting the importance of sensory-driven emotional connections.

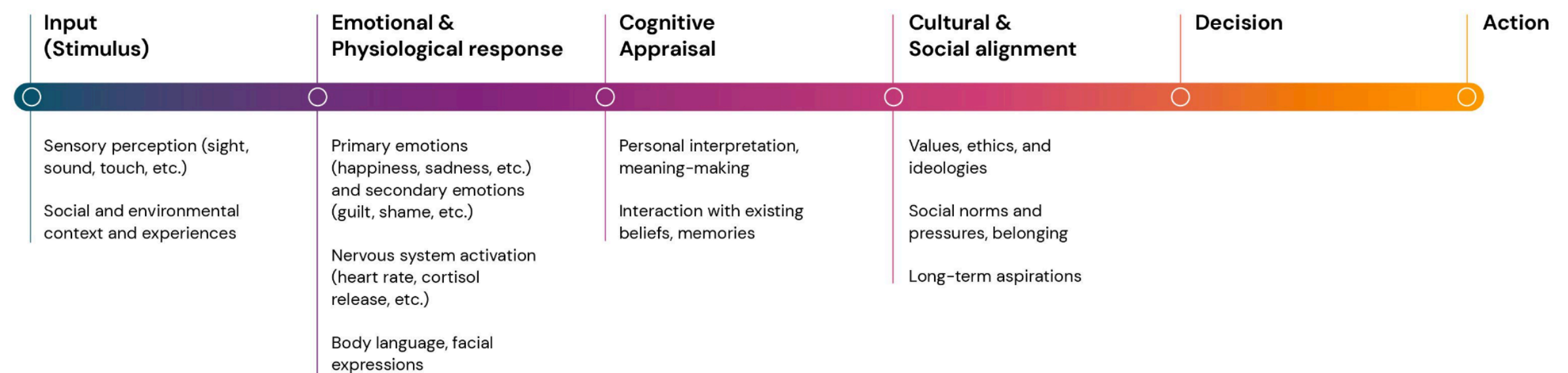
The Power of Emotions

How Brands Win with Emotion:

- **Drives Purchase Decisions**
Emotional resonance increases purchase frequency and recommendations. Customers emotionally connected to a brand are 52% more valuable.
- **Builds Loyalty & Brand Love**
Emotional connections foster long-term loyalty and advocacy, making consumers less price-sensitive. Emotional connection drives repeat visits and brand preference.
- **Enhances Experience**
Positive emotions like joy, awe, and belonging turn shopping into an escape, not just a transaction. 49% of global consumers shop from brands that elicit joy, vs. 26% for brands that just sell.
- **Supports Wellbeing**
Retail can offer “glimmers”—micro-moments of joy or comfort—helping consumers cope with stress. Consumers seek brands that help them feel better, not just buy better.
- **Enables Personalization**
Mapping and responding to emotional needs allows for more meaningful, tailored experiences. Emotional segmentation is a key strategy for future retail.
- **Builds Trust & Authenticity**
Brands that show empathy, transparency, and emotional intelligence are more likely to earn trust. Authentic emotional engagement is essential for long-term bonds.

The Journey of Consumer Behavior:

This infographic highlights the direct connection between consumer emotions and actions. Grounded in behavioral and marketing science, it maps the consumer journey from encountering a brand input (stimulus), which triggers an emotional response (primary or secondary emotions), to cognitive appraisal and cultural alignment, ultimately shaping decisions and actions such as purchasing a product or recommending a brand.



The Power of Emotions



1. Anticipation or pre-engagement

This is where the magic happens: a carefully crafted moment of intrigue that ignites customer curiosity. By building anticipation, you tap into the brain's reward system, releasing dopamine and creating an emotional investment before the prize is even delivered.

Emotion family:

Curiosity, excitement, hope, desire.

2. Immersion or engagement

The in-store experience, rich with tactile and sensory engagement, forges a deep emotional bond with the shopper. The goal is to make them feel connected and confident, leading to the desired response: "This is fun, I love being here."

Emotion family:

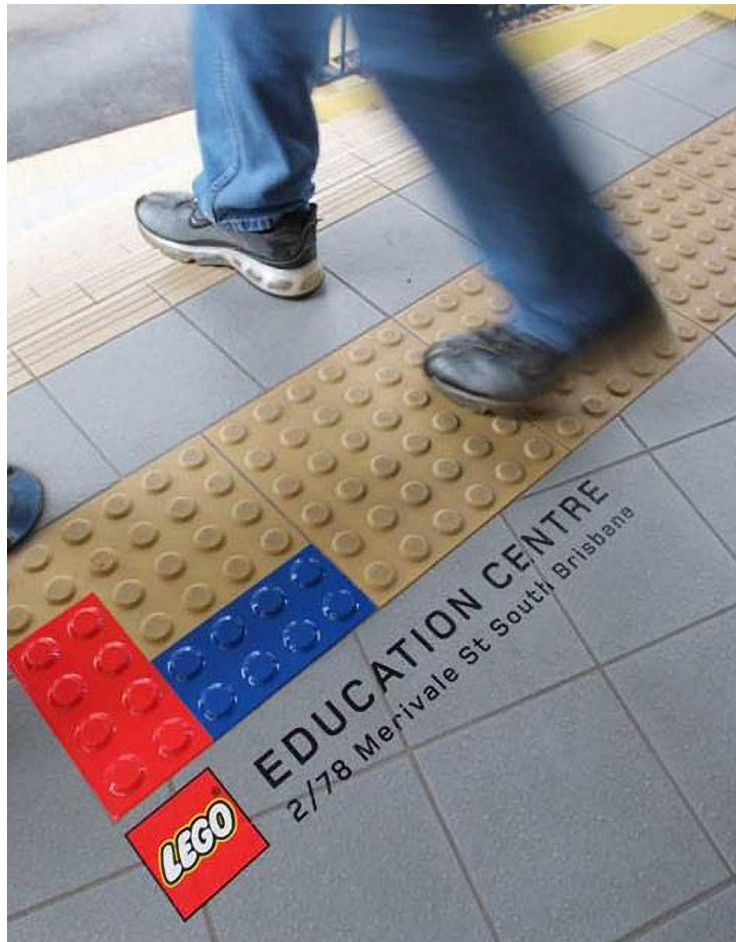
Joy, trust, empowerment, belonging.

3. After-glow or post-engagement

When the purchase or experience imprints as emotional memory. The shopper reflects and evaluates the experience and how it made them feel seen, delighted or inspired.

Emotion family:

Curiosity, excitement, hope, desire.



1. Anticipation

“The spark of imagination”—dopamine-fueled anticipation with a curiosity + reward expectation.



2. Immersion

Hands-on immersion releasing serotonin + oxytocin from creativity, mastery, and shared fun. “I’m a part of this is a creative world”.



3. After-glow

Post engagement-memories, accomplishments, and belonging. Endorphine release and emotional imprint. “I built that!”

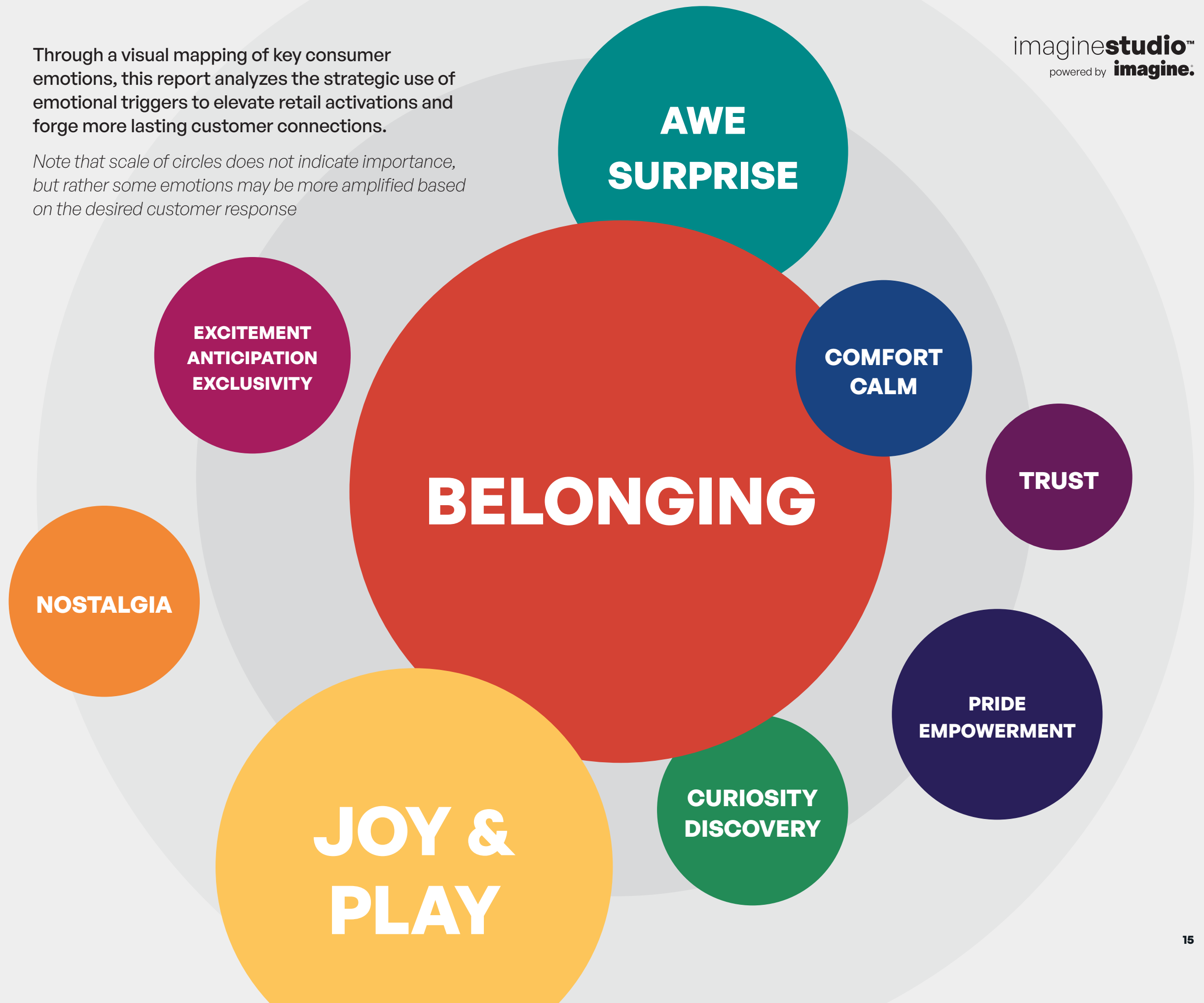
The Power of Emotions

Key Emotions to Employ:

Emotion	Why it Matters	Strategic Approach
Joy/Playfulness	Drives positive brand recall, repeat visits, and social sharing. Encourages exploration, creativity, and engagement; appeals to all ages	Playful pop-ups, retail-tainment, immersive/sensorial experiences, surprise-and-delight moments, dopamine brights gamified retail, interactive playscapes, collectible merch
Nostalgia	Fosters comfort, belonging, and emotional safety, especially in uncertain times	Retro design, throwback campaigns, heritage storytelling
Belonging	Builds community, loyalty, and advocacy; combats loneliness and isolation	Co-creation, brand collaboration, fandom activations, community events, theatrical or live events, third spaces.
Awe/Surprise	Creates memorable, shareable moments and cuts through digital fatigue	Multi-sensory installations, AR/VR activations, unexpected collaborations, stunt boards
Comfort/Calm	Addresses stress, anxiety, and burnout; supports wellbeing	Wellness spaces, soft textures, calming scents
Pride/Empowerment	Inspires advocacy and identity alignment, especially among Gen Z and Millennials	Purpose-driven campaigns, inclusive storytelling
Curiosity/Discovery	Turns a task into an adventure, extending dwell time, and creating attachment through surprise and exploration	Retail as a journey of discovery with surprise, storytelling and sensory cues to spark curiosity and reward shoppers for exploration
Trust	Essential for long-term loyalty and brand love, especially amid low consumer trust	Transparent communication, ethical data use
Excitement, Anticipation, Exclusivity	Drives FOMO, desirability, and a sense of being “in the know”; creates memorable, shareable moments	Trading cards, collectibles, blind boxes

Through a visual mapping of key consumer emotions, this report analyzes the strategic use of emotional triggers to elevate retail activations and forge more lasting customer connections.

Note that scale of circles does not indicate importance, but rather some emotions may be more amplified based on the desired customer response



The Power of Emotions

Key Insight:

*In retail psychology, **the most powerful emotion** isn't happiness or excitement — it's **belonging**.*

While joy is arguably the most immediate and contagious emotion in retail — it's not necessarily the most enduring. Joy is visceral and instant and it triggers dopamine — the brain's "reward chemical" — giving shoppers a hit of excitement. It drives impulse, exploration, and share-ability. Joy flourishes when we anchor it to meaning and connection. However, without a deeper foundation, it is merely a sweet, fleeting moment.

Belonging activates oxytocin, the "bonding hormone" — associated with trust, identity, and long-term loyalty. It creates continuity beyond the store visit. People return not just for the product, but for how the brand makes them feel part of something. It integrates joy but also deepens it — **belonging is joy with memory**.

While **Joy** is the most effective emotion for immediate engagement and brand preference, **belonging** is more powerful for long-term loyalty, advocacy, and resilience—making it the foundation for enduring brand affinity.

While many brand archetypes can foster a sense of belonging, the following three examples demonstrate how brands leverage this feeling to build deep customer loyalty.

1. Tribe: Shared Ambition

Shared ambition and achievement:
Nike, Vans, Peloton



A shoebox pop-up in Shanghai to celebrate **Nike's Air Max Day**, an event designed to engage sneaker lovers with the history of the iconic Air Max line through interactive and innovative projects.

Photo Credit: Rosie Lee

2. Community: Shared Creation

Co-creation and shared play:
Lego, Nintendo, Minecraft, Roblox

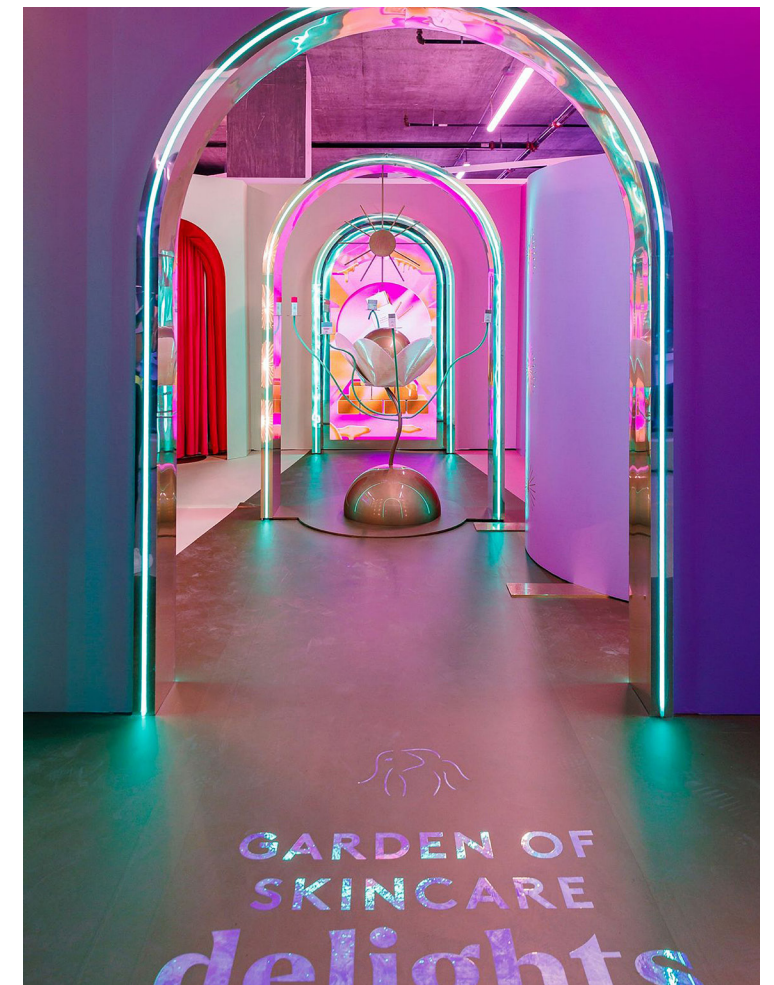


Nintendo brand activation at New York's Rockefeller Center, serving as the backdrop for a "Super Mario Superfan" contest to promote the launch of Super Nintendo World in Japan.

Photo Credit: Loki Box Design

3. Values: Shared Expression

Confidence and self-expression:
Sephora, Glossier, Fenty Beauty



SEPHORA House of Beauty combines a live, ticketed experience in New York City with a virtual one.

Photo Credit: Sephora

Strategies in Action

Experiential Retail Out-of-Home Collectibles

The power of emotions

Experiential Retail

Sensory and immersive experiences are deeply tied to emotions because they engage multiple senses—sight, sound, touch, smell, and even taste—to create memorable, emotionally resonant moments that go far beyond traditional visual or transactional brand interactions. This multi-sensory approach is proven to drive stronger emotional connections, increase brand attachment, and influence purchasing decisions.

A dazzling rainbow flows down from the ceiling, enveloping diners in vibrant colors and refractive forms, creating an immersive dream-like atmosphere at **Red Eye Bono** restaurant in Beijing

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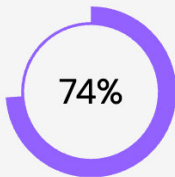
Experiential Retail

Proof Points:

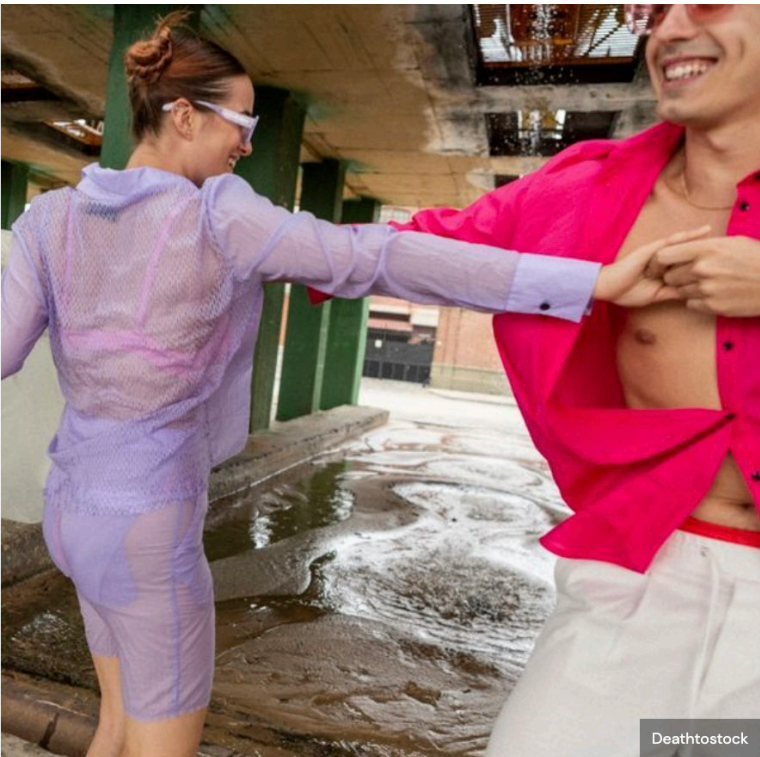
Amid consumer stress, shopping is evolving into an emotional escape. Retailers are creating joyful, “dopamine-fueled destinations” with playful designs and gamified experiences to boost dwell time and engagement. This shift towards “emotioneering” is strategic:

a 2023 VML report found consumers are significantly more likely to buy from brands that evoke joy or delight. As a result, custom experiences and mood-lifting interiors are now critical for building shopper loyalty and community.

Percentage of global consumers who say stores should offer more than products and strive to entertain and engage shoppers

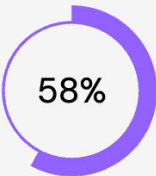


In addition, 79% say shopping should be a multi-sensory experience (VML)



In a 2024 survey, almost six in 10 Australians and New Zealanders said playful or humorous brands make them feel better about a company (TRA)

Percentage of US Gen Z who say they are emotional spenders



These shoppers will best connect with products and experiences designed to evoke specific moods, memories or sensations (Credit Karma)

Blend Retail with Entertainment (“Retail-tainment”)

Retail-tainment blends retail with entertainment—using immersive, playful, and often multi-sensory experiences to drive engagement, dwell time, and emotional connection. This approach is increasingly critical as consumers, especially Gen Z and Millennials, seek out shopping environments that offer more than just products—prioritizing fun, discovery, and community.

86% of US Gen Z say they overspend on events, with 27% driven by FOMO and sentimental value.

73% of global consumers think brands should make more effort to “wow” them with their marketing, and 75% think brands should make more effort to be entertaining.

39% of US marketers said brand experiences were the most effective tactic during the 2023 Holiday season.

Cross-Industry and Brand Collaborations

Brand collaborations create memorable, shareable experiences, such as immersive pop-ups and limited-edition products, by combining different brand worlds. This taps into customer emotions like nostalgia and belonging, strengthening community and brand loyalty. Ultimately, these strategic partnerships expand market reach and relevance by introducing each brand to the other’s audience and cultural touchpoints.

Cross-industry collaborations will be an essential ingredient for building retail penetration and fandom amid this shift.

Collaborations with culturally relevant partners (e.g., food, drink, entertainment) create buzz, drive social capital, and foster emotional connections—especially among Gen Z and Millennials.

Sensory and Immersive Retail

Sensory and immersive retail is a core strategy in experiential retail. This approach transforms stores into emotionally engaging, multi-sensory environments that drive engagement, dwell time, and brand loyalty—key differentiators as consumers seek more than just products from physical retail.

82% of consumers expect as many of their senses as possible to be engaged when experiencing something new.

57% of global consumers want to see, touch, and feel products before buying.

Retailers are leveraging multi-sensory, customizable, and mood-lifting environments that prioritize joy and social interaction over mere transactions.

Experiential Retail

Retail-tainment: WcDonald's

The WcDonald's campaign is a leading example of retail-tainment, blending immersive, entertainment-driven experiences with retail to drive engagement, fandom, and emotional connection. Here's how the strategy works:

World-building: Recreating the WcDonald's universe with themed decor, packaging, and a limited-edition Savory Chili WcDonald's Sauce.

Transmedia storytelling: Releasing a manga series and four-episode anime to deepen the narrative and engage fans.

Fandom appeal: Tapping into meta-humor and Gen Z culture to create viral buzz.

Immersive experiences: Using 360-degree and tabletop projections in select restaurants to transform them into entertainment destinations.

Collectibles: Driving urgency with limited-edition items and merchandise.





McDonald's harnessed meta-humor in a parody of its brand as part of the WcDonald's campaign. An immersive dining experience recreated a spoof of how McDonald's is portrayed in many anime and manga series. The fast-food chain also released a weekly manga series and four-episode anime.



CURIOSITY
DISCOVERY

JOY &
PLAY

BELONGING

Experiential Retail

Brand Collaboration & Limited-Time Experiences: Louis Vuitton x Murakami

The Louis Vuitton x Murakami pop-ups demonstrate how retail spaces are evolving into immersive, entertainment-driven experiences. Through bold color immersion and artistic design, the spaces offer more than just shopping—they invite emotional engagement, social sharing, and longer dwell time, turning the retail experience into a mood-enhancing journey.

Rather than feeling like a traditional store, the space functions more like a cultural destination—blending art, fashion, and mood-enhancing design. This taps into consumers' desire for discovery, creativity, and shareable moments, especially among Gen Z and Millennials who increasingly seek out shopping environments that feel expressive, social, and fun.



JOY &
OPTIMISM

NOSTALGIA

BELONGING



Louis Vuitton x Murakami's playful art-as-entertainment retail pop-up in New York City featured a purple vending machine with collectible gifts, accessible to visitors after they made a purchase.

@LouisVuitton

Experiential Retail

Immersive: POP Mart

A standout example of a sensory-charged, immersive retail environment is the new flagship store by **POP MART at Bangkok's ICONSIAM**. This activation transforms the Chinese toy maker's fantasy worlds and characters into a life-sized playground for fans, using psychedelic color play and theatrical props. The space is designed to fully immerse visitors in the brand's universe, blending visual spectacle with interactive, tactile experiences that encourage exploration and play.

This approach is especially effective for Gen Alpha and Gen Z, who value physical interaction, personalization, and social connection in retail environments. The result is a retail destination that goes beyond shopping, fostering emotional engagement, community, and brand loyalty through multi-sensory design and experiential storytelling.





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POP MART's new flagship store in Bangkok's ICONSIAM utilizes sensory-charged colors and theatrical props to transform the Chinese toy maker's fantasy worlds and characters, including Labubu, into a life-sized playground for fans.



NOSTALGIA

CURIOSITY
DISCOVERY

COMFORT

BELONGING

JOY &
OPTIMISM

Experiential Retail

Immersive Retail: Holland & Barrett

Holland & Barrett's new 'experience store' reimagines physical retail as a space for well-being and lifestyle engagement. By offering wellness activities like yoga and Pilates, the brand shifts its retail environment from transactional to transformational. Giving visitors a reason to stay, interact, and return also encourages participation over-purchasing.

This approach reflects growing consumer demand for spaces that support personal health, community, and emotional connection. The store becomes more than a destination, fostering emotional engagement, longer dwell time, and deeper brand loyalty through holistic, experience-led shopping.

a has opened its first 'experience store' as part of a £70m investment to transform its locations and services. It's the brand's largest store to date, featuring a wellbeing studio.



COMFORT

TRUST

JOY &
PLAY



TRUSTED FOR WELLNESS
H&B
SINCE 1870

*How you
feeling?*

Holland & Barrett

Wellness Studio

The power of emotions

Out-of-Home

Temporary spaces are a great opportunity to engage with Gen Z and Millennial consumers and immerse visitors in your brand's world in a way that doesn't feel forced. From social hangouts to one-off exclusives, temporary spaces are all about enticing customers to experience your brand without too much product pushing. Think outside the box to offer spaces that signify and represent more than just products on display.

Jellycat creates highly immersive, sensory, and interactive experiences that turn purchasing a plush toy into a personalized, shareable event. By treating the transaction as a performance, Jellycat fosters a deep emotional connection and a sense of exclusivity that engages customers of all ages.

Out-of-Home

Action & Proof Points:

Out-of-home (OOH) experiences is a rapidly evolving space where brands use immersive, multi-sensory, and interactive formats to forge deeper emotional connections with consumers. This matters because, as digital fatigue rises and consumers seek real-world

connection, OOH is uniquely positioned to deliver memorable, emotionally resonant moments that drive engagement, recall, and action.

1

Adopt a ‘vuja de’ mindset*

Explore the OOH medium from new perspectives. Experiment with tech like 3D that results in new creative outputs to capture consumer attention

*A “vuja de” mindset is the opposite of “déjà vu” and involves looking at a familiar situation with fresh eyes to gain new insights and spark creativity.

2

Location is key

Give careful consideration to the placement of OOH ads. Ensure campaigns are near points of sale to effectively lure passers by in store

3

Be mindful of the environmental impact

Examine the sustainable effect of OOH ads. Recycle props and experiment with energy-saving digital solutions that ensure minimal environmental impact

4

Experiment with interactive formats

Leverage gamification to launch interactive campaigns that involve passersby and have the ability to capture consumer data for retargeting

Stunt Boards

Advanced Out-of-Home (OOH) campaigns that utilize 3D and interactive formats achieve significantly higher ad recall and engagement compared to traditional channels. By incorporating multi-sensory elements like touch and scent, these campaigns create immersive, mood-altering experiences that drive both in-store visits and increased sales. The resulting emotional resonance—evoking surprise, awe, or joy—builds stronger, more memorable brand connections and long-term brand equity.

3D OOH delivers 47% ad recall rates, surpassing mobile (35%) and TV (22%).

Gamification in OOH can lead to a 100–150% increase in engagement; 88% of marketers see it as a key differentiator.

Sensory OOH drives 9 out of 10 global shoppers back in store; scent marketing can increase sales by 11% and satisfaction by 20%.

Theater & Live Events

Theatrical and participatory formats, which often include collaborations between retail, entertainment, and cultural brands, drive emotional responses like joy and nostalgia. As a result, consumers are willing to spend more on these experiences. This strategy increases social media sharing, fosters long-term brand loyalty, and delivers strong commercial results, especially with Gen Z and Millennials.

90% of superfans in the US engage with their favorite artists by attending live performances.

54% of US consumers would rather receive a ticket to a live experience than a physical gift, highlighting the value placed on memorable, emotional events over products.

Brands like Hallmark and Jellycat are creating theatrical pop-ups and live retail experiences (e.g., themed food, movie marathons, interactive performances) that drive footfall, dwell time, and social sharing.

Third Spaces

By shifting focus from pure product sales to creating “emotional third spaces” that offer entertainment, multi-sensory experiences, and social connection, retailers can significantly increase dwell time and drive higher sales. Offering restorative or playful environments, such as workshops and lounges, fosters stronger customer loyalty and repeat visits by catering to wellbeing and social needs. This approach involves mood-led design and personalization to create memorable, emotion-evoking experiences.

74% of global consumers say stores should offer more than products and strive to entertain and engage shoppers.

58% of US Gen Z shoppers identify as emotional spenders, best connecting with experiences designed to evoke specific moods, memories, or sensations.

Out-of-Home

Stunt Boards: Nike

Nike Japan celebrated Nike Air Max Day with its first-ever 3D Digital Out-of-Home (DOOH) campaign at Tokyo’s Shinjuku station. This activation was created in-house and in partnership with creative collective CEKAI. The campaign filled a three-story 4K display with a series of Nike Air Max “unboxing” videos, showcasing different Air Max designs brought to life for passersby.

This campaign is highlighted as a key example of how 3D DOOH can inspire curiosity and awe, helping brands stand out and engage consumers who might otherwise be distracted by their phones while in transit. The use of storytelling and visually striking content is emphasized as critical for maintaining impact as the 3D DOOH space becomes more crowded and consumers become more accustomed to the technology.

Nike Air Max Day (Japan):
The visually immersive content was designed to capture attention and create a sense of awe and curiosity among commuters, leveraging the power of 3D DOOH to break through the noise of a busy urban environment.

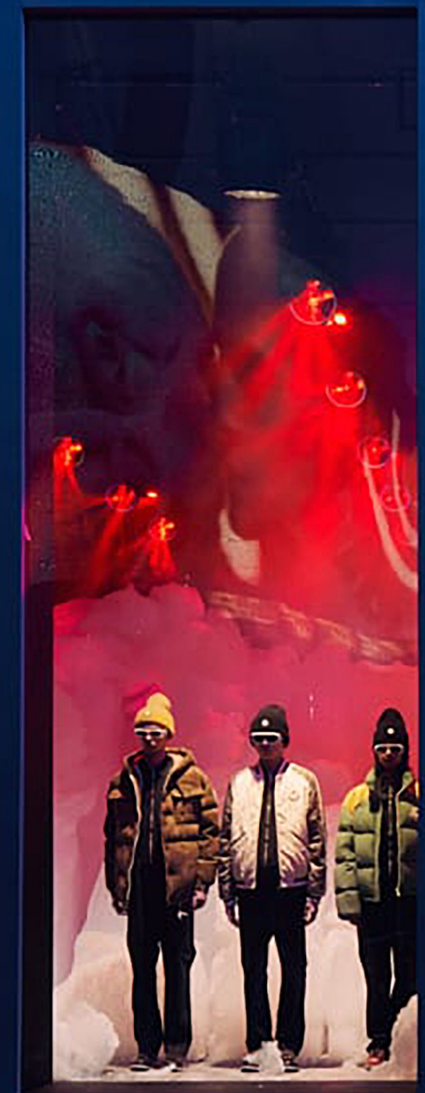




Out-of-Home

Theater & Live Events: Moncler's The Art of Genius

Over 10,000 visitors were welcomed inside the vast Olympia London in Kensington for **Moncler's "The Art of Genius"** collaborative event held during London Fashion Week in 2023. The event featured immersive installations, runways, and performances, bringing together communities from music, art, and fashion. Moncler used the event to introduce its 2023 roster of "Genius co-creators," which included names like Pharrell Williams, Jay-Z, Palm Angels, Adidas Originals, and Alicia Keys. The Moncler Genius platform, which began in 2018, is a creative initiative focused on co-creation and imagination among various artistic fields.



The Art of Genius collaboration with **"The Art of Lightness" by Palm Angels** drew in visitors with its floor-to-ceiling windows showing a foam party within. Illuminated with red and blue lights, the foam looked cloud-like from the exterior.



Musings on emotional connection served as a starting point for **“The Art of Love” by FRGMT.** Within a circular structure, guests peered and leaned in through windows, overlooking a cozy space full of fuzzy furniture, models in houndstooth coats and capes, and adorable robots deemed “LOVOTS.”



**AWE
SURPRISE**

**JOY &
PLAY**

**EXCITEMENT
EXCLUSIVITY**

**CURIOSITY
DISCOVERY**

BELONGING

Out-of-Home

Theater & Live Events: Moncler’s The Art of Genius



The Art of Genius:
“The Art of Imagination” by Mercedes-Benz



The Art of Genius:
“The Art of Terrain” by Pharrell Williams

The Art of Genius:
“The Art of Design” by Rick Owens



Out-of-Home

Third Spaces: Neobio

The “**Dream City**” atrium inside Shenzhen’s **Neobio** shopping center reimagines retail as a shared experience. Designed as a playful, exploratory zone for children, it transforms the mall into a multi-generational destination.

By creating a space that prioritizes experience over transaction, Neobio taps into emotional drivers like comfort, curiosity, and connection. Parents are more likely to linger and shop when their children are entertained in a safe, imaginative setting—turning the mall into a place of shared value and positive association, rather than just a retail venue.

An atrium inside the **Neobio** shopping center in Shenzhen, China, was designed by X+Living as a “dream city” where children can explore while their parents shop and relax.



CURIOSITY
DISCOVERY

COMFORT

JOY &
OPTIMISM

BELONGING



Out-of-Home

Third Spaces: Vans

Vans created a standout activation at Primavera Sound Buenos Aires by transforming its festival presence into a sneaker-shaped pop-up, making it a striking and interactive landmark. Rather than opting for a standard booth, Vans designed a space where festival goers could participate in tote bag customization workshops, blending brand expression with hands-on creativity. This approach encouraged active participation and social sharing, deepening brand engagement and ensuring Vans became an organic part of the festival landscape.

The sneaker-shaped pop-up was not just a retail space but also served as a hub for creativity and community, reinforcing Vans' identity as a brand rooted in self-expression and experiential culture. By integrating interactive workshops and a visually impactful structure, Vans successfully elevated its festival activation beyond traditional retail, making it a memorable part of the Primavera Sound experience in Buenos Aires.





Vans seamlessly integrated retail into Primavera Sound Buenos Aires by offering festival goers hands-on tote bag customization workshops.

The power of emotions

Collectibles

The “collectibles economy” refers to the rapidly growing market and cultural movement where consumers—especially Gen Z, Millennials, and “kidults”—actively seek, purchase, trade, and display collectible items across categories like toys, trading cards, art, fashion, beauty, music, and even luxury goods. This economy is driven by emotional value, nostalgia, fandom and the desire for self-expression, status, and community, rather than just financial investment or utility.



The Casetify x Sonny Angel collaboration is a smart application of marketing psychology, especially in how it resonates with Gen Z collectors. By using blind box marketing, the partnership taps into the thrill of surprise and gamification, turning the act of purchasing into an emotionally engaging experience.

Collectibles

Proof Points:

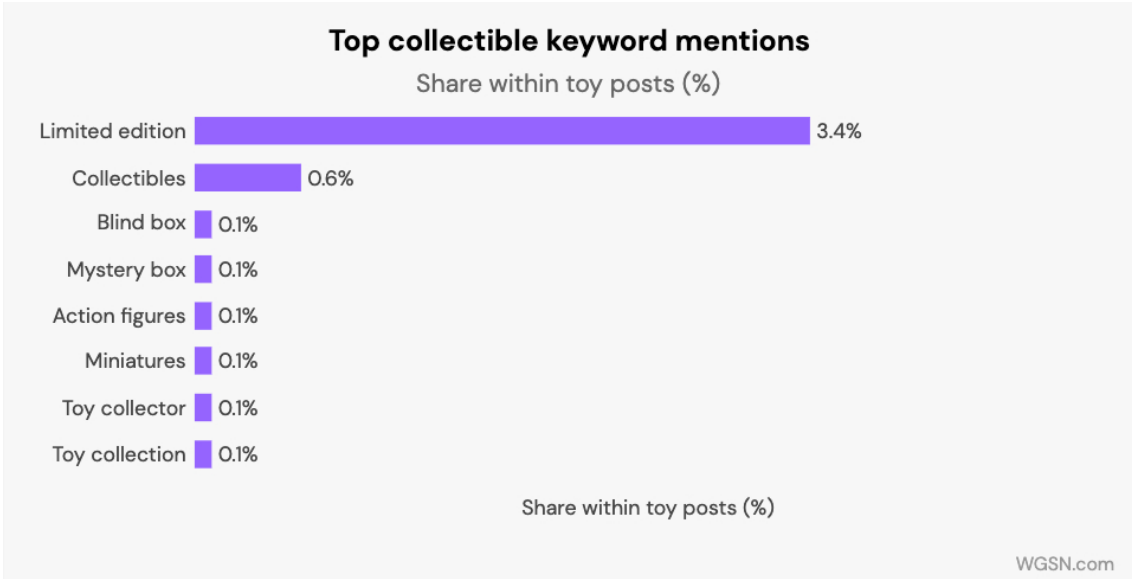
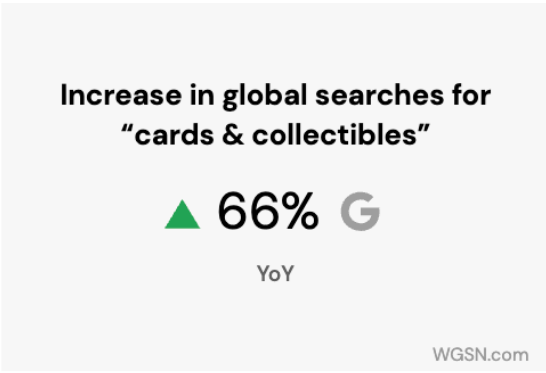
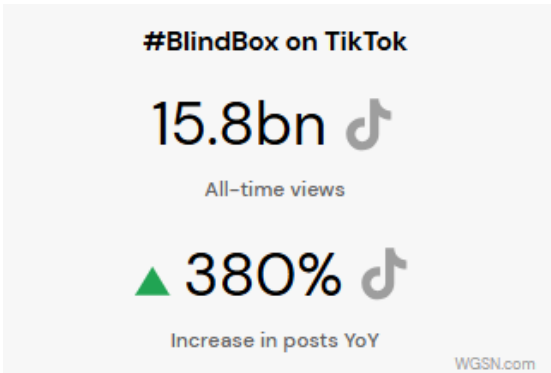
From blind boxes to high-end action figures, collectible toys and games are constantly evolving to meet the interests of kids and the #Kidult cohort.

#CollectibleToys increased by 635% YoY, highlighting a growing interest in collectible items for younger generations (TikTok).

#LicensingCollabs increased by 158% on WGSN’s Interiors Feed, spotlighting the importance of prioritizing licensing partnerships to expand market reach.

Kidults account for 25% of toy sales annually in the US, amounting to around \$9bn (NPD Group/Circana/TheStreet). In addition, #Kidult increased by 49% YoY on WGSN’s Interiors Feed. Appeal to this cohort with revamps of iconic toys and games that harness the power of nostalgia.

The kidult market presents an opportunity for brands to capitalize on nostalgic franchises from the 1980s through to the 2000s, which appeal to Millennial and Gen Z audiences as well as kids.



Strategic Collectibles: A New Approach to Deepen Customer Engagement

Marketers are leveraging collectible items to deepen customer engagement by combining surprise, fandom, and nostalgia. This is particularly effective with “blind boxes,” or mystery purchases, which use gamification to create excitement and encourage repeat buying. This strategy prompts consumers to share their unboxing experiences on social media, which in turn helps form micro-communities where fans can trade, connect, and build a sense of belonging. The appeal is often amplified by licensing popular intellectual property, tapping into existing fan bases and increasing the desirability of the items. Some brands are taking this a step further by creating physical-digital hybrid models that merge tangible collectibles with digital experiences like NFTs, offering an immersive, cross-platform experience.

In this report we will focus on 3 types:

Collectibles

Items designed to be collected, often as part of a series (e.g., figurines, cards, toys, charms, art prints).

Trade-ables

Collectibles specifically intended for trading or swapping, such as trading cards, pins, or mini-figures.

Blind Boxes

A type of collectible where the specific item inside is unknown until opened, adding an element of surprise and gamification.

Collectibles

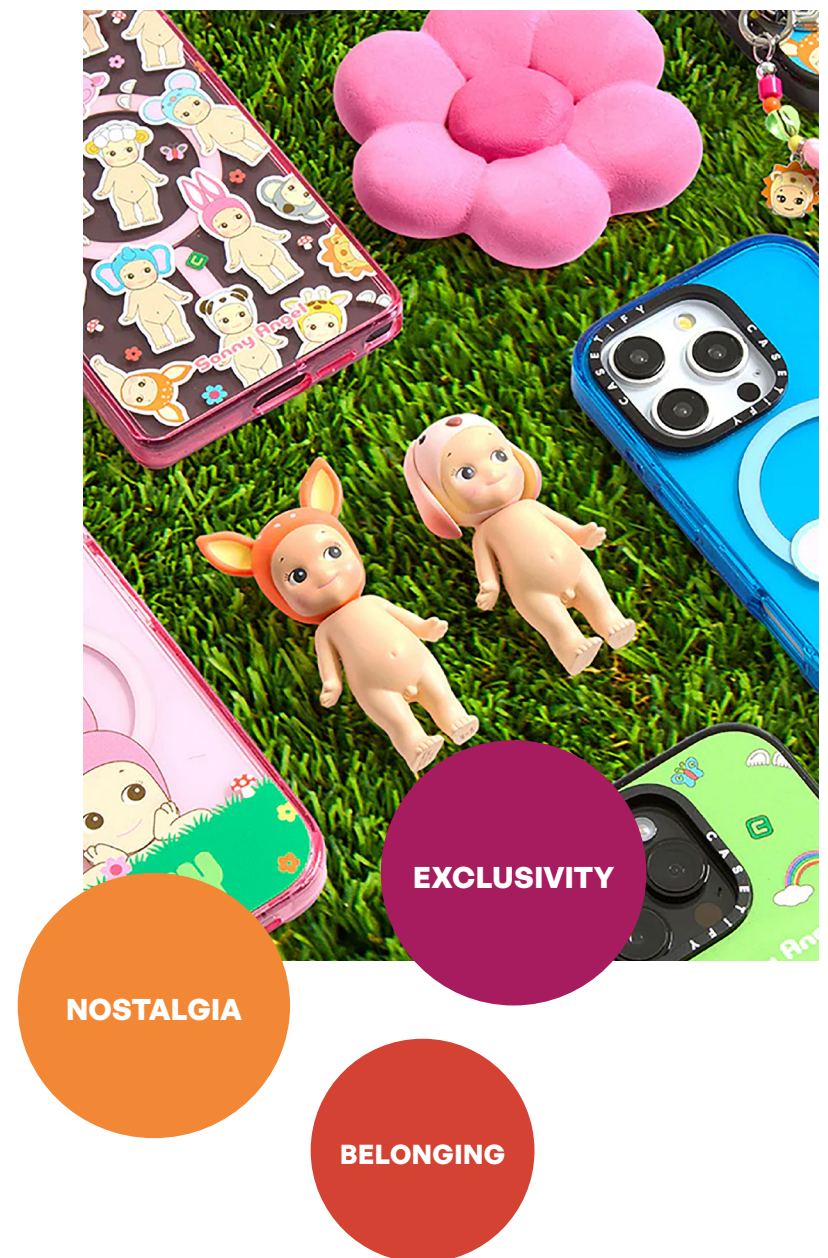
Collectibles: Casetify x Sonny Angel

The **Casetify x Sonny Angel** collaboration shows how collectible culture is evolving beyond traditional formats. By using blind box marketing, the partnership taps into the thrill of surprise and gamification, turning the act of purchasing into an emotionally engaging experience. This strategy heightens anticipation and encourages repeat purchases.

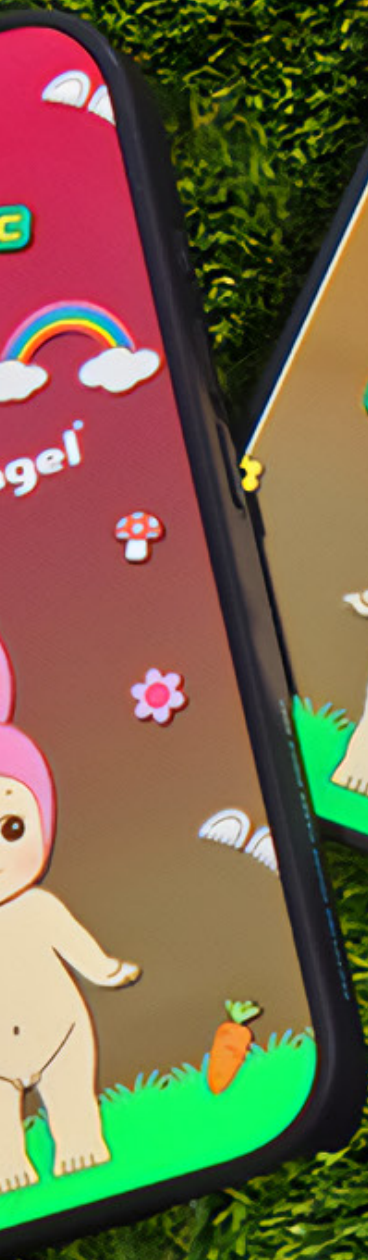
Additionally, the collaboration appeals to Gen Z's desire for self-expression through physical collectibles. These phone cases aren't just functional—they're status symbols that reflect personal taste and cultural awareness. The physicality of the product also counters digital fatigue, offering a tangible way to showcase identity.

Finally, by embedding sentimental value into the collectible experience, the partnership encourages more mindful and sustainable consumption. It's not just about owning a product—it's about curating a meaningful collection that reflects values, memories, and aesthetic preferences.

Sonny Angel meets **CASETIFY** in the 2025 Wild Haven collection — where minifigures inspire dreamy, animal-filled designs on must-have phone cases.



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Collectibles

Trade-ables: Pokémon

Collectible culture—especially in trading cards like Pokémon—is deeply rooted in the emotional triggers of scarcity, personalization, and the thrill of discovery. Cards are valued not just by rarity or age, but by strategic relevance and demand, which creates a dynamic market where even lower-rarity items can hold high emotional and monetary value. This unpredictability fuels FOMO and encourages continuous engagement.

Games like Pokémon TCG Pocket build on this by emphasizing pack-opening experiences, collection pride, and strategic simplicity. These elements tap into dopamine-driven reward systems, making collecting feel both exciting and meaningful. Protective sleeves and personalized memorabilia further reinforce the emotional investment, turning each card into a cherished item rather than just a game piece.

Together, these strategies create a powerful feedback loop of ownership, identity, and social connection, driving both brand loyalty and long-term engagement.



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Pokémon **STORE**



Japanese **Pokemon** store with shelves full of yellow Pikachu plushies of the manga, anime and video game “Pocket Monsters” in the Character Street of Tokyo Station – Tokyo, Harijuku



EXCLUSIVITY

NOSTALGIA

JOY &
PLAY

BELONGING

Collectibles

Blind Boxes: Pop Mart

Labubu's explosive rise reflects a new era in collectible culture, where emotional branding, scarcity, and digital virality converge. Originally created by artist Kasing Lung and popularized through Pop Mart's blind-box format, Labubu taps into the thrill of surprise, turning each purchase into a gamified experience. Limited drops, rare "chase" figures, and high resale value fuel repeat engagement and community-driven trading.

The rarity and expressive design of Labubu figures evoke a sense of individuality and nostalgia, resonating with Gen Z's desire to own items that feel meaningful and unique.

Celebrity endorsements and viral content amplify this emotional bond, transforming Labubu into more than a toy—it becomes a symbol of taste, belonging, and identity. Fans don't just collect Labubu; they share stories, trade pieces, and build communities around it. This emotional engagement is what turns a niche collectible into a cultural icon.

For its July 2025 **Crybaby Playground** pop-up in Hong Kong, Pop Mart introduced playful experiences such as interactive character installations and photo booths.







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