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Trends & Inspiration
Q1 2025

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Q1 Study: Topics

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

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Food & Beverage

Food & Beverage Overview

Four consumer personas will rise to present the biggest areas of opportunity for new food & beverage development. The following pages highlight their needs, wants, desires and where to innovate to meet these demands.



The Privacy Keepers

Cut through the sea of sameness and deliver a renewed sense of discovery, delight and belonging.



The Conventionalists

Focus on rustic, unfussy and unprocessed food and drink. Encourage a return to slower, more traditional experiences.



The New Independent

Champion the alternative and lean on tech to deliver future innovations.



The Energizers

Redefine play and push into the unserious, silly and subversive as a coping mechanism for boredom and global strife.

Food & Beverage Trends

The Privacy Keeper Strategy

Push culinary discovery beyond the familiar, globalized dishes that have long served as an introduction to international cuisines. Draw on eats and sips rising from regions that make sense for your audience. Attempt to design to evoke memories, whether real or imagined, to deliver an emotional connection to food and drink.

The Privacy Keeper Trends

Secret styles

The allure of discovering ‘insider’ drinks and dishes will drive lesser-known styles, pours and preps. Inspired by Czech mlíkos, a pour style where lagers are dispensed with several inches of foam, innovators across the US are offering “milk pours.”

Full flexibility

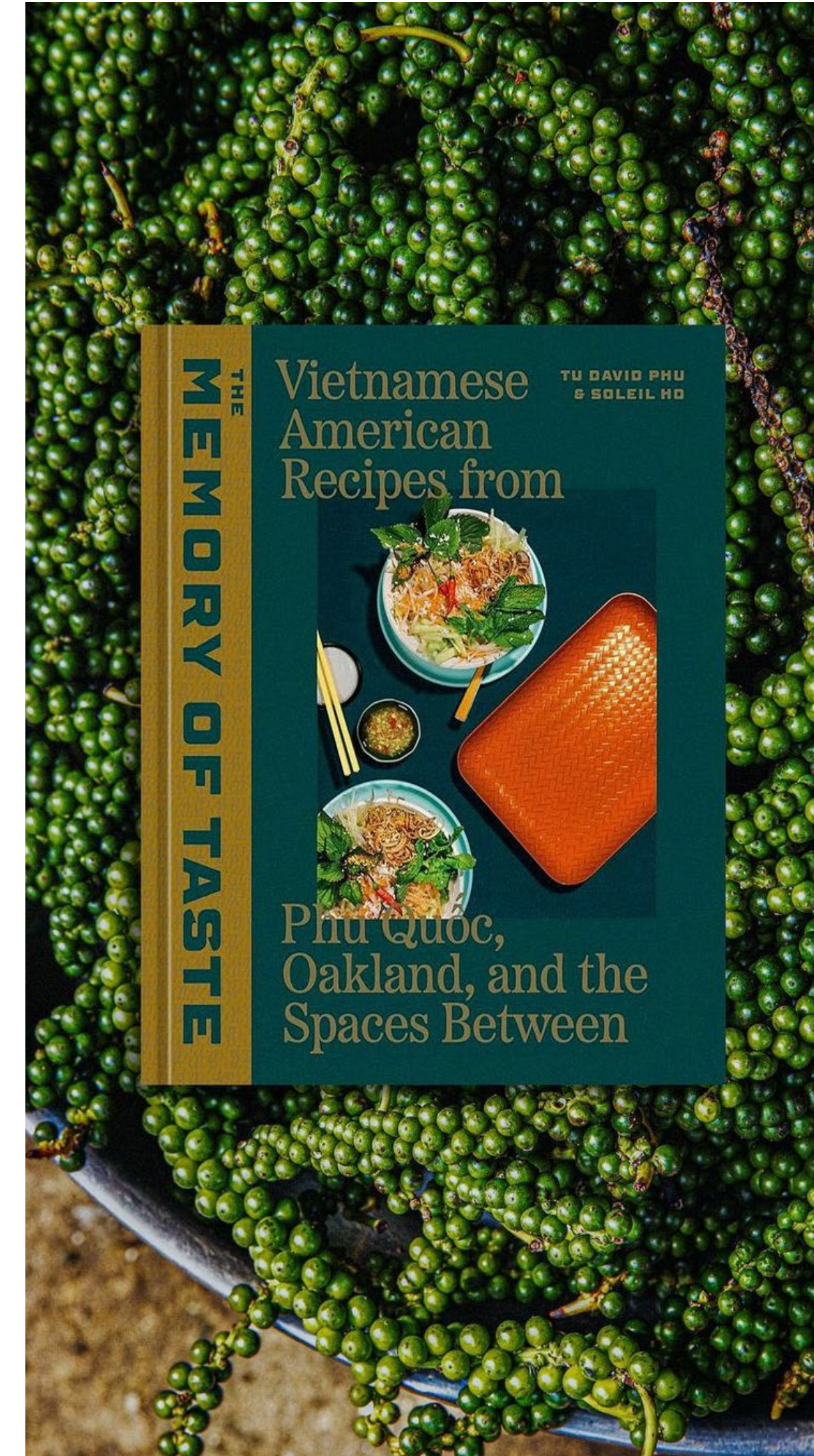
The desire for individuality will rise, including customized tea, coffee and soft drinks. As demographics shift and tastes diversify, innovators will expand caffeine and flavor combinations. LA-based Korean cafe Bodega Parks harnesses misugaru, a popular Korean roasted grain used in drinks for its comforting, nutty flavor. Its Misugaru Black Sesame drink can be caffeinated with espresso or served decaf. It tops both with black sesame crema.

Soft power fandoms

Rising cultural influences from Mexico, Brazil, Korea, Thailand, China or India will connect consumers to unique food and drink less known outside these regions. K-pop star Rosé and US musician Bruno Mars’ chart-topping single APT, inspired by a Korean drinking game, has introduced global audiences to soju.

Food as memory

Innovators will draw on memories, whether real, collective or imagined, for emotionally evocative food and drink.



Food & Beverage Trends

The Conventionalists Strategy

Focus on clean ingredients and products with minimal processing. Be transparent about those that are processed. Meet the need for nature-led products by drawing on everything from climate hero ingredients that benefit both planet and people to regenerative practices and support for small-batch providers.

The Conventionalists Trends

Non-toxic lifestyles

Rising health concerns about UPFs and potentially harmful ingredients will drive innovators to reformulate. In the US, 85% of consumers want to avoid UPFs but feel overwhelmed and unsupported (Non-GMO Project, 2025).

Borrowed comfort

Innovators will harness global comfort foods. Follow rising cuisine trends and look to soups like Mexican pozole, ajiaco from Colombia and Peru, Brazilian caldo or Indonesian chicken soto ayam, or warming bowls like Japanese ramen or Korean bibimbap.

Rugged and raw

Minimal intervention food and drink with ingredients in their 'natural state' have a rising health halo. Lineage Provisions' (US) Ancestral Blend Meat Sticks are free from preservatives, sugar, additives or filler and use regenerative, grass-fed, hormone- and antibiotic-free beef, sea salt and organic vinegar.

Fresh convenience

Elevating on-the-go and same-day dinners beyond processed foods, innovators will refresh ready-to-eat meals, easy cooking components and snacks with an emphasis on made-from-scratch elements, bold natural flavors and fresh, sustainable, whole food ingredients.



Food & Beverage Trends

The New Independents Strategy

With a rebellious, self-sufficient and alternative side, this segment pushes for change and demands truth, transparency and inclusive new solutions for a changing, polarizing world. They support brands and businesses forging new narratives in food and drink, from helping to solve health or environmental issues to increasing inclusivity and representation.

The New Independents Trends

Tech-led products

Use technology to help solve health or sustainable issues at scale while still delivering on flavor, performance and price, from sugar or fat replacements to hybrids that combine animal protein and plant-based ingredients. Rather than subscribing to strict labels like vegan or vegetarian, New Independents flex to choose the solutions that fit their lifestyles.

Hybrid solutions

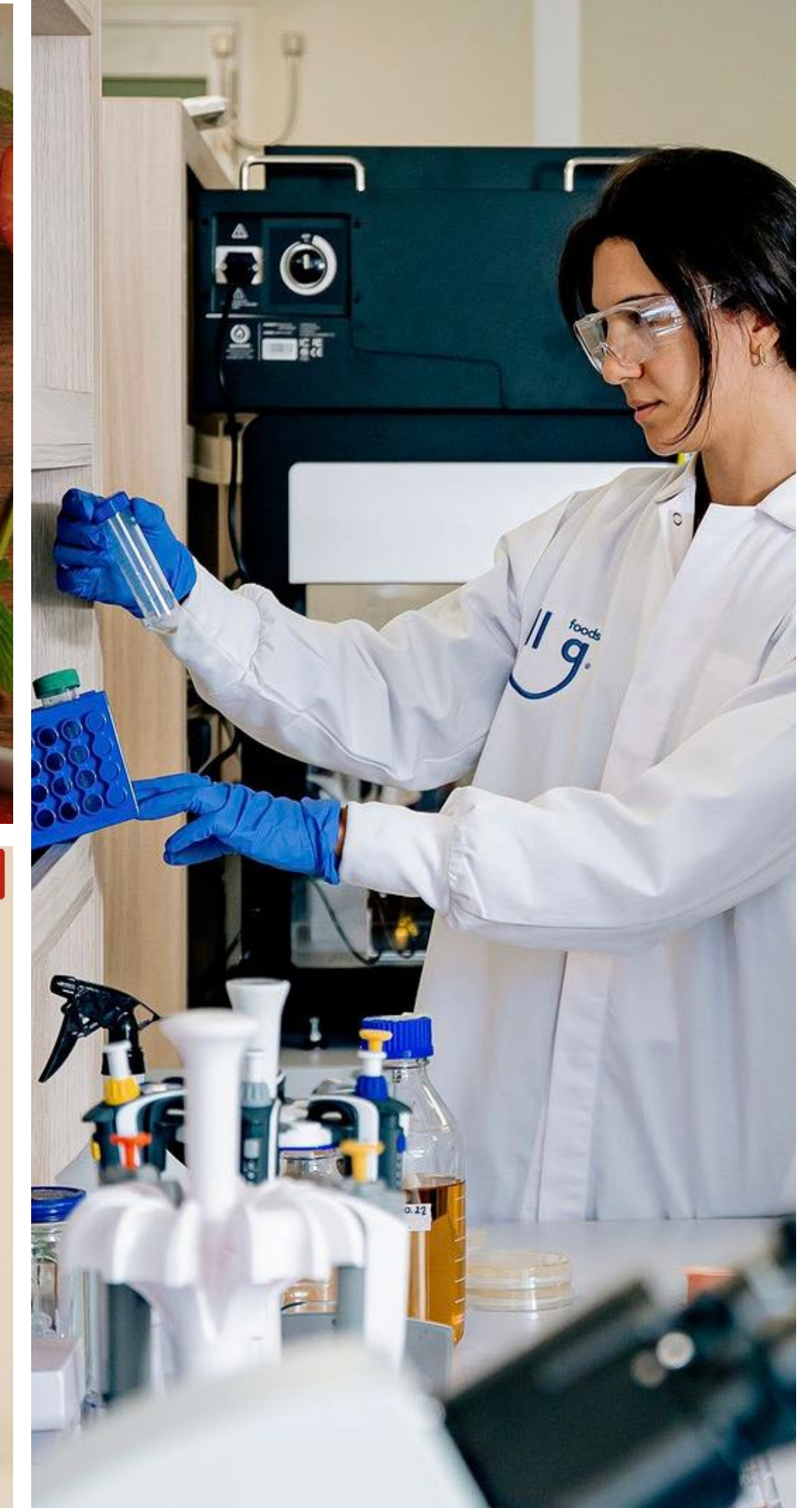
Canada's *The Better Butchers* adds cultivated beef fat to its fermented mycelium mince to enhance the taste, texture and functional properties, including the melting point, of the beef alternative. While the product is not strictly vegan or vegetarian, the addition of lab-grown fat alleviates animal welfare and sustainability issues while delivering flavor and performance.

Better bitter

Consumer palates have evolved to embrace bitter flavors in drinks, from hoppy IPAs to Aperol spritzes and turmeric golden lattes. Looking to cut sugar, innovators will bring the flavor into snacks and meals, finding inspiration in Chinese, Korean and Mexican cuisine.

The Me Diet

Design health and wellness solutions for individual needs and circumstances, including those that adapt to culture, mood and natural cycles.



Food & Beverage Trends

The Energizers Strategy

This group embraces silly, unserious, subversive humor and creativity to alleviate boredom and detract from the polycrisis. Younger consumers will adopt a ‘the funnier, the better’ motto, while older ones will redefine kidult, continuing to draw on nostalgia but demanding more playfulness. However, they still demand products that speak to their values, including radical inclusion and community connection.

The Energizers Trends

Uncommon products

Evolve playful food and drink to focus on silly and unserious elements. This can include everything from the format to fusions, high-low combinations, flavor twists and textural intrigue.

Irreverent humor

US chef and food influencer Molly Baz leans into humor with Ayoh!, a flavorful mayo line to put an end to “dry ass sandwiches”. The majority (80%) of global consumers are more likely to repurchase something if the brand is funny (Oracle, 2023).

Childhood memories

Draw on childlike wonder to evolve kidult offerings. California’s Shuggies, a pizza and natural wine bar with a maximalist funhouse vibe, hosts adult pizza parties, while Colorado-based The Post Chicken & Beer’s Adult Happy Meal includes its signature crispy fried chicken sandwich, a side dish, a drink and branded sticker sheet with drink koozie as “toys.”

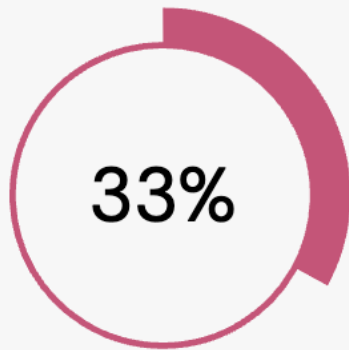
Ready-to-eat cocktails

Innovators will treat texture as an active ingredient to create playful edible cocktails, including whips, frozen solid sips and bursting alcohol boba.



Food & Beverage Statistics

A third of global consumers think brands jumping on viral trends is embarrassing

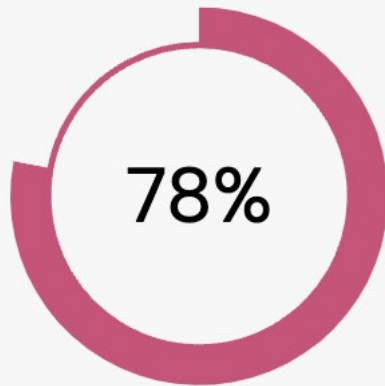


WGSN.com



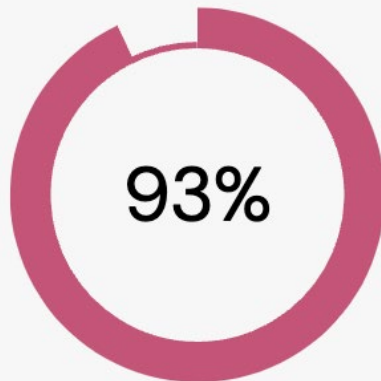
93% believe it's important for brands to keep up with online culture. They value authenticity and relatability, driving opportunities for original, human-centric products or personalized innovation. (Sprout Social, 2025)

Nearly eight in 10 global consumers say the world is changing too quickly



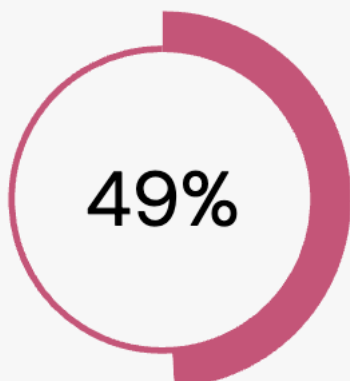
A rising sense of anxiety in the current polycrisis outlines the need for brands to innovate to help consumers slow down and prioritize themselves. (GlobeScan, 2024)

The majority of global consumers say brands need to do more to combat misinformation



Actively listen to conversations about your brand, industry and communities to determine when and how to respond and correct falsehoods. (Sprout Social, 2025)

Almost half of consumers globally are likely to buy from brands that bring them a sense of joy



Joy is becoming more important for consumers and 45% also said that they would engage with brands that surprise and delight them. (VML, 2024)

Luxury Retail & Hospitality

Luxury Retail & Hospitality Overview



Consumer



Packaging



Wellness



Travel

Luxury Retail & Hospitality Consumer

Luxury consumer behavior

Despite the rapid projected growth of online luxury, consumers will continue to prefer making big purchases in physical stores. Recognize the tendency for consumers to research these products online before purchasing, instilling confidence through digital content and reassuring luxury shoppers seeking social proof.



Need to know

Luxury consumers are making increasingly mindful purchasing decisions, and they are placing significant value on in-store shopping experiences as well as resale channels.

Key strategies

Make in-store experiences memorable

There is a growing consumer affinity for luxury experiences, leaning into hospitality and culinary activations to help shoppers feel immersed within your brand's world.

Appeal to younger consumers

Gen Z and Millennials as the most frequent buyers of luxury goods, and drive affinity with them through a focus on community and IRL experiences.

Appeal to younger consumers

Position resale as a chance for luxury shoppers to build their archives through unique finds while also reducing their environmental impact.

Luxury accessories are the fastest growing category in the US
Share of respondents who regularly purchased luxury accessories

▲ +5ppt

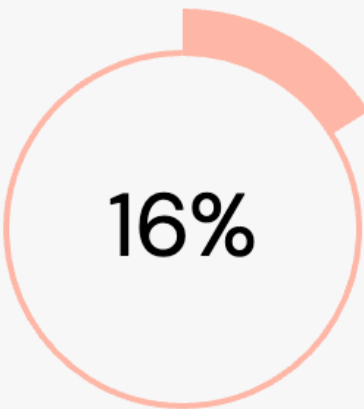
Luxury Retail & Hospitality Consumer

Consumer willingness to invest in luxury varies by product category

Consumers are most willing to invest in luxury products within fashion-related categories such as clothing and shoes. Recognize consumer willingness to splurge when it comes to experiential categories such as food and drink, allocating store space to dining experiences that help shoppers better understand your brand through storytelling.

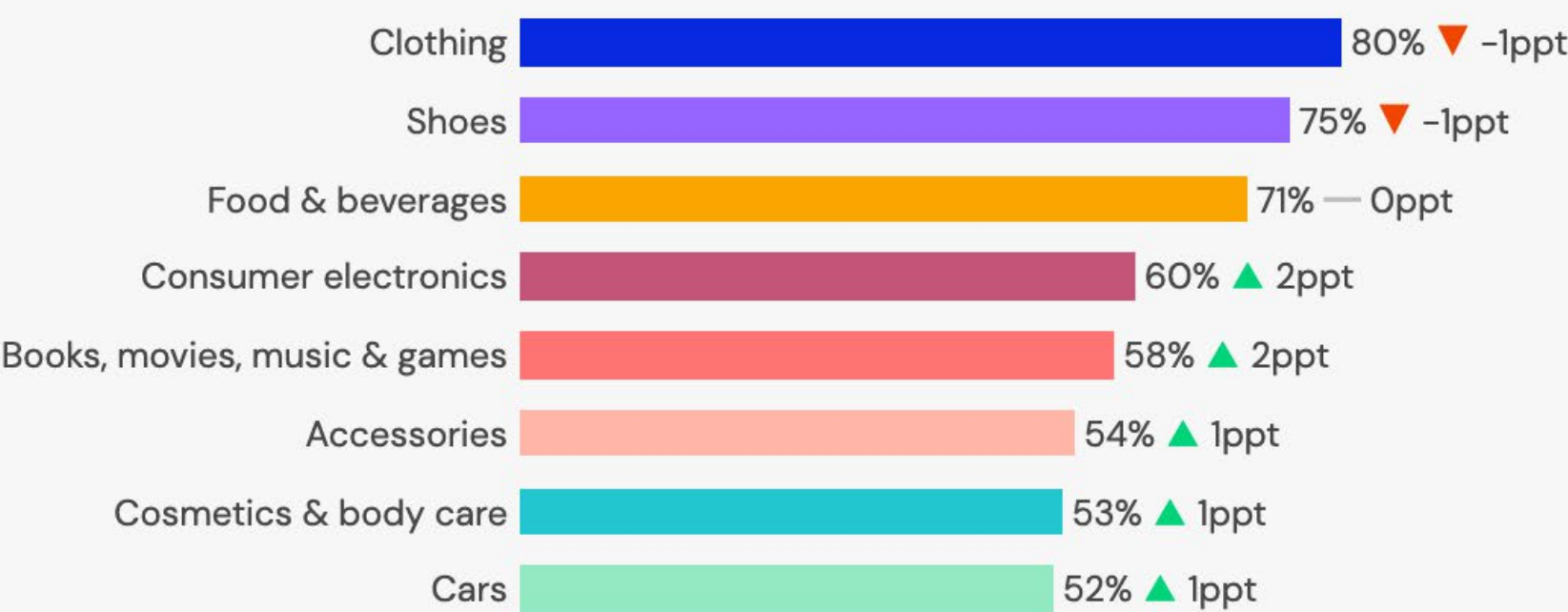
Stores account for the majority of global luxury sales

Share of luxury goods expected to be purchased online by 2029



Consumers are most willing to invest in luxury within fashion-related categories

Share of global respondents who have purchased luxury goods within various categories

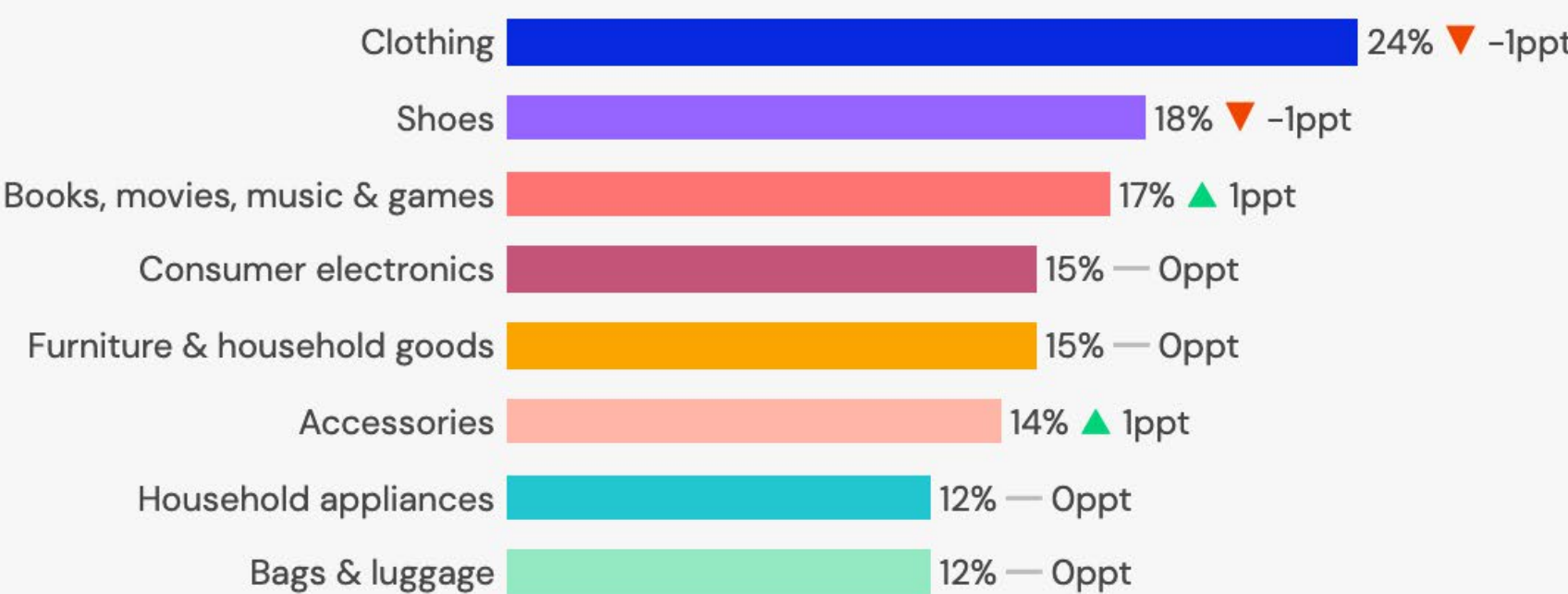


Share of respondents

WGSN.com

Luxury consumers are embracing secondhand fashion

Share of global luxury consumers who have purchased pre-loved goods across various categories



Share of respondents

WGSN.com

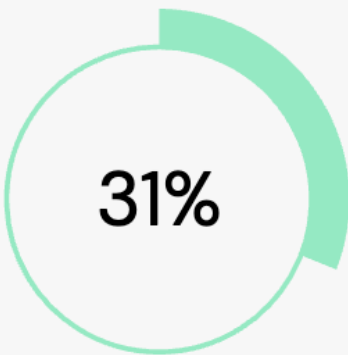
Luxury Retail & Hospitality Consumer

The future luxury goods market

The global luxury sector is poised to endure continued macroeconomic volatility amid persistent geopolitical trade tensions and the ongoing cost-of-living crisis, which affects aspirational shoppers. To stay competitive, brands must entice clients with exclusive money-can’t-buy experiences.

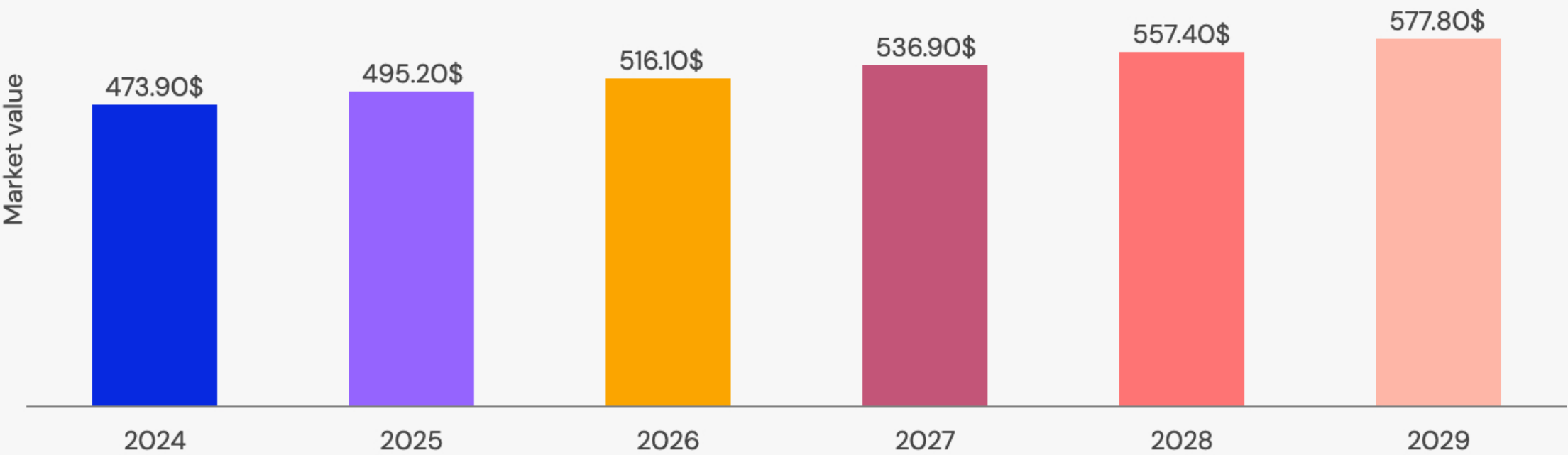
Luxury brands need to attract Gen Z and Millennials as younger generations are forecast to account for 80% of global luxury purchases by 2030. Win their loyalty through authentic social campaigns and virtual worlds that blend world-building and phygital retail strategies.

Luxury consumers are engaging with brands online
Share of luxury consumers who are engaging with or following company accounts on social media



The global luxury goods market is projected to exceed \$500bn by 2026

Market value (USD billion)



WGSN.com

Health and fitness is front of mind for luxury consumers

Consumer interest in various hobbies



Share of respondents

WGSN.com

Luxury Retail & Hospitality Packaging

Shift to paper

The strong trend towards paper-based packaging has continued with a growing number of high-end luxury brands embracing this direction to boost the sustainability of their packaging.

- This trend is being driven globally by both increasing legislation and consumer sentiment (Source Green). From IPSOS' latest global survey, 85% of respondents want “unnecessary, avoidable and harmful” single-use plastics to be banned worldwide via a Global Plastics Treaty (Packaging Europe).
- This approach is backed by consumers, with a new global survey of 10,000 people across 16 countries showing 56% are actively taking steps to increase their use of paper packaging (Packaging News South Africa).
- 100% paper-based gift boxes continue to be one of the most notable luxury trends, with plastic inserts and magnets being eliminated to make recycling straightforward.
- Advances in paper-pulp manufacturing are offering enhanced levels of luxury finish, as demonstrated by the Hennessy Traveller pack, designed by Bulletproof in London and manufactured by Pusterla (Spain). This pack cleverly combines a sustainable 100% paper bottle casing with a keepsake leather travel tag.
- Technology advancements are also allowing plastic-free smart packaging, with Toppan (Japan) exhibiting its paper NFC tag that is fully recyclable in existing paper waste streams.
- Paperization is also starting to take hold in beauty sampling packaging. Adhespack (Brazil) debuted its Blistapaper sampling packaging for cosmetics, aiming to replace hard-to-recycle flexible plastic or mixed material alternatives which make most sampling packaging unsustainable.



Luxury Retail & Hospitality Packaging

Made from waste

In addition to the trend towards incorporating higher percentages of post-consumer recycled materials in glass, plastic and metal packaging, a growing number of manufacturers have introduced sustainable materials that use waste as raw material, reflecting the increasing focus on a circular economy for packaging.

- French closure manufacturer Diam Bouchage was particularly notable for its Element range. The company collaborates with spirits manufacturers to create closures from the waste materials of their distillation processes. These organic materials are combined with a plant-based binder to create a truly circular material with a compelling story for the brand, a premium natural aesthetic and a subtle scent of the original product.
- Turkish materials company Susmata debuted its Wastea plant leather made from tea manufacturing waste. Turkey is the world's fourth-largest tea producer, providing a wealth of locally available Class 4 waste which cannot be used for animal feed due to its high caffeine content. The resulting material is a sumptuously soft, high-end leather suitable for a range of luxury packaging applications.
- Papers made from waste are also a strong trend. UK manufacturer James Cropper highlighted its range of six luxury papers upcycled from used coffee cups and denim offcuts. Another UK firm, Winter & Company, is expanding its paper range to include ocean plastics. Chinese manufacturer Cloud Beauty also showcased its luxury papers and cards made from sugarcane byproducts.



Luxury Retail & Hospitality Packaging

Aesthetic minimalism

A trend towards visual calmness is an increasingly higher priority for brands, opting for tone-on-tone designs or using embossment or engraving to discreetly decorate their packaging.

- This aesthetic has a dual significance – it offers a calming glimmer to consumers while creating a more natural appearance.
- The minimalist trend reduces the number of materials used in construction and the amount of added decorations which can make the packaging easier to recycle at the end of its life.
- Maison Margiela's Replica keepsake lacquered wooden gift box set the standard for luxurious minimalism. Designed by KDESIGN and produced by GPA Global (China), the sleek white soft touch matte box features only a subtle debossed branding on the leather interior.
- Korean beauty brand Sulwasoo taps this aesthetic with its Ultimate S Cream refillable jar. The packaging draws its inspiration from traditional Korean moon jars which have a deep cultural significance in the country. It is decorated with a porcelain effect lacquer to give a matte, tactile finish and features subtle tone-on-tone debossed branding.
- Domaine des Hauts Glaces' (France) spirits packaging cleverly incorporates the mountain heritage of the brand into the punt of the bottle with the branding embossed into the glass.
- Diptyque (France) also takes a less is more approach to their fragrance packaging, embossing its branding roundel into the glass bottle with a simple single-colour print to denote the variant name.



Luxury Retail & Hospitality Wellness

Luxury Wellness

Premium wellness-focused food and drink is rising as some consumers carve out spend for health and indulgence. Following is a forecast the areas of greatest opportunity including longevity, beauty from within and recovery care



Need to know

Consumers will increasingly prioritize self-care, seeking high-end, personalized health solutions offering tangible physical and mental benefits.

Opportunity

The \$1.8 trillion global consumer wellness market, growing 5-10% per year in the US, is fuelled by rising demand for holistic health experiences that blend luxury and convenience as people invest more in premium products that enhance their wellbeing and lifestyle (McKinsey). In China, the rise of 'lazy health' among Gen Z is marked by increasing wellness purchases and nutritional supplements (The Straits Times). This generation will seek premium solutions that fit seamlessly into their lifestyles, emphasising high-quality, effortless self-care as a status symbol.

Global searches for luxury wellness YoY

▲ +21ppt

Luxury Retail & Hospitality Wellness

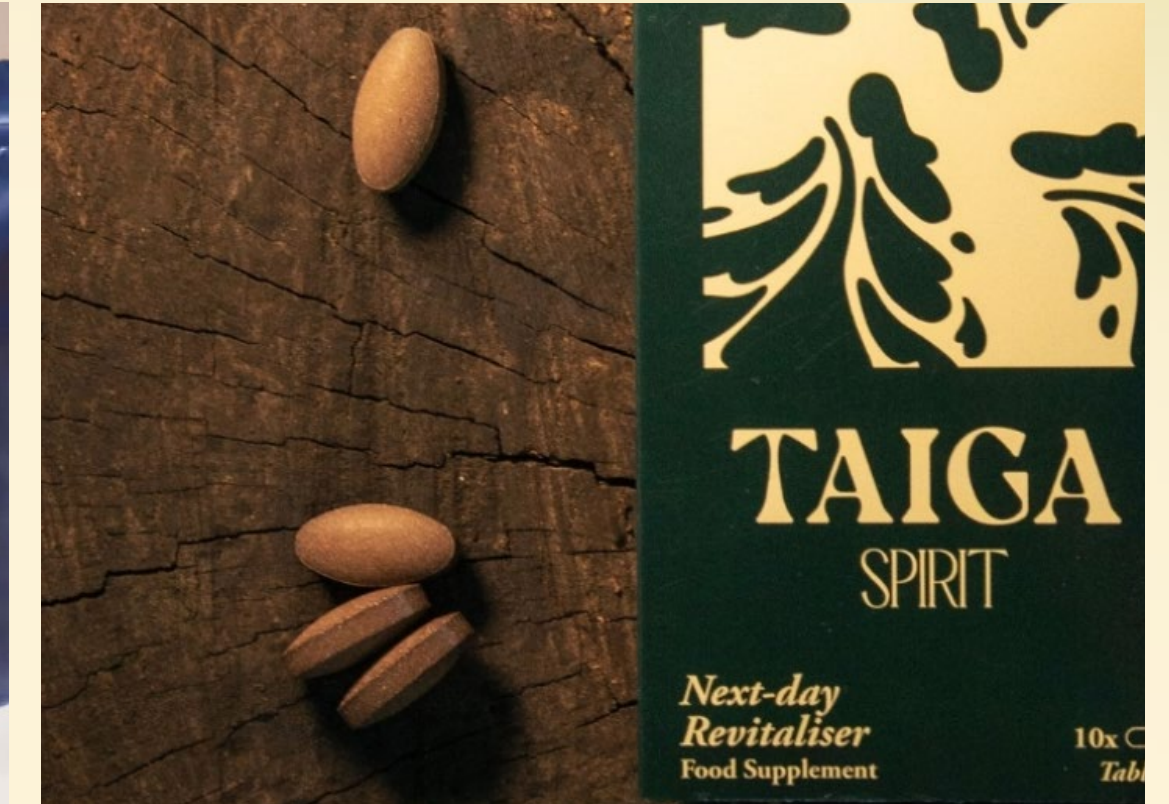
Recovery care

Create products to help the body recover after physical, mental or physiological stress.

- Deliver inclusive solutions to restore balance for health and wellness concerns. Support post-workout performance for everyone, not just athletes, as well as postpartum care, immune recovery, sleep and stress recovery and hangover recovery.
- Look to emerging adaptogens, including shilajit, gynostemma and rhodiola rosea, to target immunity, stress and fatigue.
- Alcohol recovery will be positioned as an indulgent self-care ritual. Innovate with playful, judgement-free products targeting hydration and alleviating 'hangxiety.'
- Lead with inclusive product development. Chinese postpartum confinement, or zuo yue zi, is growing in the West. The postnatal facilities market is estimated to reach \$18.8bn by 2029, aligning with consumer demand for high-end, restorative care (Bloomberg).

Key Categories

- **Drinks:** upgrade protein drinks to deliver a more luxurious experience with premium ingredients and sophisticated packaging.
- **Ingredients:** explore ingredients used in TCM, such as ginger, sesame oil, red dates and goji berries.
- **Packaging:** design sleek, high-end packaging with minimalist aesthetics and high-quality, sustainable materials.



Luxury Retail & Hospitality Wellness

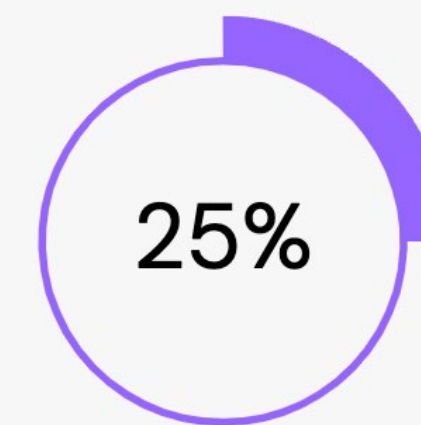
Longevity

Design to extend healthspans with food, drink and supplements that support longevity across demographics.

- Expand product development beyond older demographics as more consumers consider longevity. Over the past year, around 70% of UK and US consumers, and 85% in China, have increased purchases of healthy ageing and longevity products or services (McKinsey).
- Appeal to younger consumers looking to invest in their wellbeing by playing with flavors, textures and formats, such as condiments, sparkling beverages, elixirs, candies, chocolates and snacks.
- Fuse longevity with related preventative health concerns like immunity, cardiovascular health, bone health and skin health.

Key Categories

- **Supplements and snacks:** support brain development for younger generations with clean ingredient products.
- **Meals:** deliver premium meals and savoury snacks inspired by Blue Zone regions. Center recipes around vegetables, legumes, beans and nuts.



of consumers in China, US & UK take
supplements for healthy ageing

Luxury Retail & Hospitality Wellness

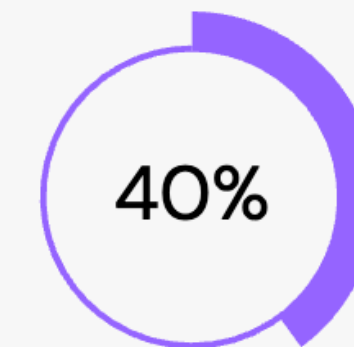
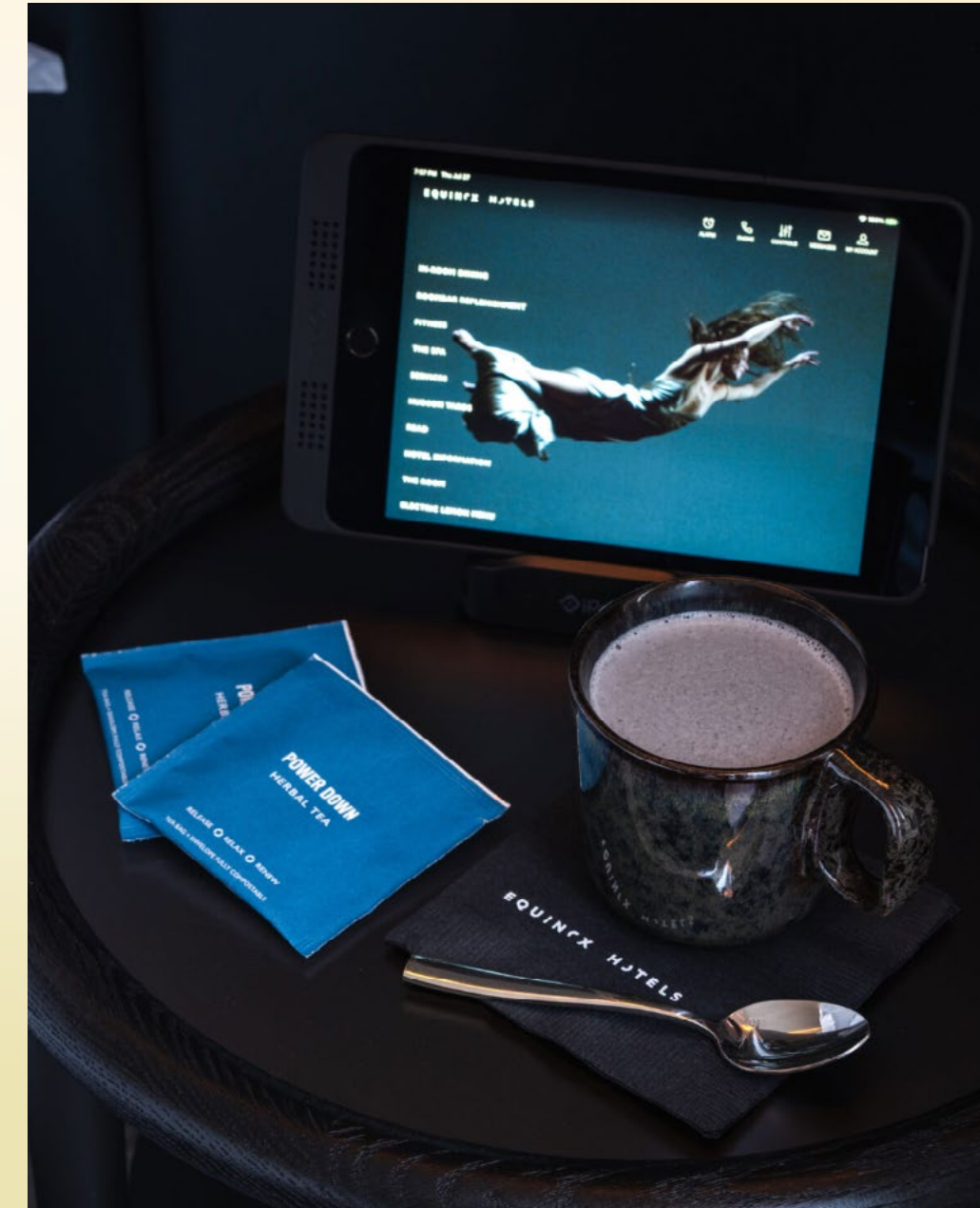
Sleep wellness

Invest in soothing products that consumers can seamlessly integrate into their daily rituals.

- Design for nocturnal living as nightlife and wellness cultures merge, resulting in more mindful food and drink offerings.
- As sleep tourism continues to gain popularity, revamp menus and mini-bar offerings for hotel chains and create travel products that consumers can take with them.
- Draw on rising formats for sleep products. In conversations around adaptogens for sleep, drinks, supplements, meals and sweet treats are the leading formats for sleep support.
- Support children's sleep with easy-to-consume formats of supplements or vitamins that make bedtime routines simpler and more enjoyable.

Key Categories

- **Ingredients:** use natural ingredients such as passionflower, skullcap, chamomile and lavender or adaptogens such as valerian root, gotu kola and shilajit.
- **Snacks:** offer luxurious textures, such as creamy, rich and velvety, for indulgence and comfort.
- **Packaging:** create mindful packaging using soothing colours and surface embossment for a luxurious feel that users can incorporate into their bedtime routine.



of global Gen Z and Millennials are turning to functional foods for better sleep

Luxury Retail & Hospitality Travel

Travel has emerged as one of the key priorities for luxury consumers, with a greater population of high-income earners saying travel has become even more important to them since the pandemic. With young affluent customers increasingly driving the industry forward, hospitality spaces are redefining the luxury experience to meet shifting expectations.



Luxury Retail & Hospitality Travel

With bleisure travel and digital nomad lifestyles on the rise, consumers are looking to new retail formats that meet them where they are, and that make getting there part of the experience.

- Position yourself as an experiential lifestyle brand by embedding your brand universe into travelling formats such as trains, planes and cruise ships, meeting customers where they are and capturing the spend of wealthy holidaymakers.
- Look to the expansion of global train travel, which is breaking out with new luxury services across retail, food and drink, and wellness.
- Embed luxury retail offerings on board cruise ships, connecting with leisurely passengers who are rich in both time and money. The cruise industry is set to grow at a CAGR of 7.9% to reach \$16.7bn by 2031, while 85% of those who have cruised before will sail again, making the format perfect for offering branded experiences that harness long-term loyalty.
- Curate retail offerings to fit the needs of each voyage. Look to Scenic Luxury Cruises, which offers weather-optimized products including all-weather binoculars and waterproof clothing for its polar voyages, and locally-made artisanal products for warm-water voyages.
- Meet adventurers and outdoor enthusiasts via travelling, nomadic retail concepts in far-flung locations.

Bleisure, or ‘blended travel,’ is a combination of business and leisure, and is a growing trend in travel. It can refer to both a travel style and a way of working.



French luxury house Dior launched a spa cruise onboard a boat down the River Seine for summer 2023, offering tailor-made treatment programs alongside other luxury wellness services.

Luxury Retail & Hospitality Travel

Place your brand in the right locations for sports-driven travel, and explore entertainment and cross-industry collaborations.

- Cater to sports-driven travel via nomadic and travelling retail formats and campaigns. Consider popups at popular local and international ski resorts, coastal towns and camping sites. Chinese winter sports enthusiasts are flocking to ski resorts in Austria, Switzerland and France, while car camping, or chabak in Korean, is going viral in South Korea.
- Lean into the audio opportunity with branded podcasts or playlists as a travel-friendly communication format, especially for car rides and camping and fishing enthusiasts. Encourage exploration with educational content and amplify the voices of enthusiasts and pro-athletes.
- Use localized cross-industry collaborations to inject new life into lifestyle and product extensions, especially coffee table books that inspire exploration and travel, sports and outdoor accessories, and co-branded bundles with beauty and fashion brands. Camping and hiking-friendly food and drink partnerships are also key new opportunities here



Tapping into China's winter sports boom, e-commerce platform Tmall partnered with The North Face to host the North Face Mountain Festival at the Vanke Songhua Lake Ski Resort. This evolved from a camping and climbing activation that took place in the summer edition of the festival, held in the mountain resort town of Yangshuo.

Luxury Retail & Hospitality Travel

Luxury hospitality brands are collaborating with lifestyle-adjacent sectors in order to expand their universes. In this new era, fashion brands and designers are taking a low-key approach to impart their style on spaces, favouring a curated aesthetic layered with personality and narrative. This is about creating an ambiance rather than a social media moment.



Rocco Forte Hotels leaned on designer Paul Smith for the interior of an exclusive suite at Brown's Hotel, London. A gallery wall displays a curation of hand-picked fine artworks and photography, while design tomes – personally selected by Smith – are stacked on the coffee table. Each element is shoppable – from the sofa, a collaboration with DePadora, to the Anglepoise lamps. The designer's signature use of joyful color and stripes is peppered throughout the warm and eclectic space.



Missoni has reimaged the ultra-luxury beach club at the One&Only Reethi Rah in the Maldives, in its signature style. Furniture and fabrics feature an exclusive iteration of the brand's zigzag pattern in shades of turquoise, azure, white and green – the colors of the Indian Ocean. The instantly recognizable pattern is used on loungers, parasols, towels and cabanas.



Famed footwear designer Christian Louboutin has developed the interiors for Hotel Vermelho in Portugal, where he has employed his rich eye for detail and appreciation for heritage. Louboutin personally sourced or commissioned all of the art, antiques and furniture to create a multi-textural moodboard of North African-meets-European style. The designer's signature red is used as a sophisticated accent rather than a branding signpost.

Holiday

Holiday Overview

Christmas continues to be the most searched keyword on trend sites throughout the year.

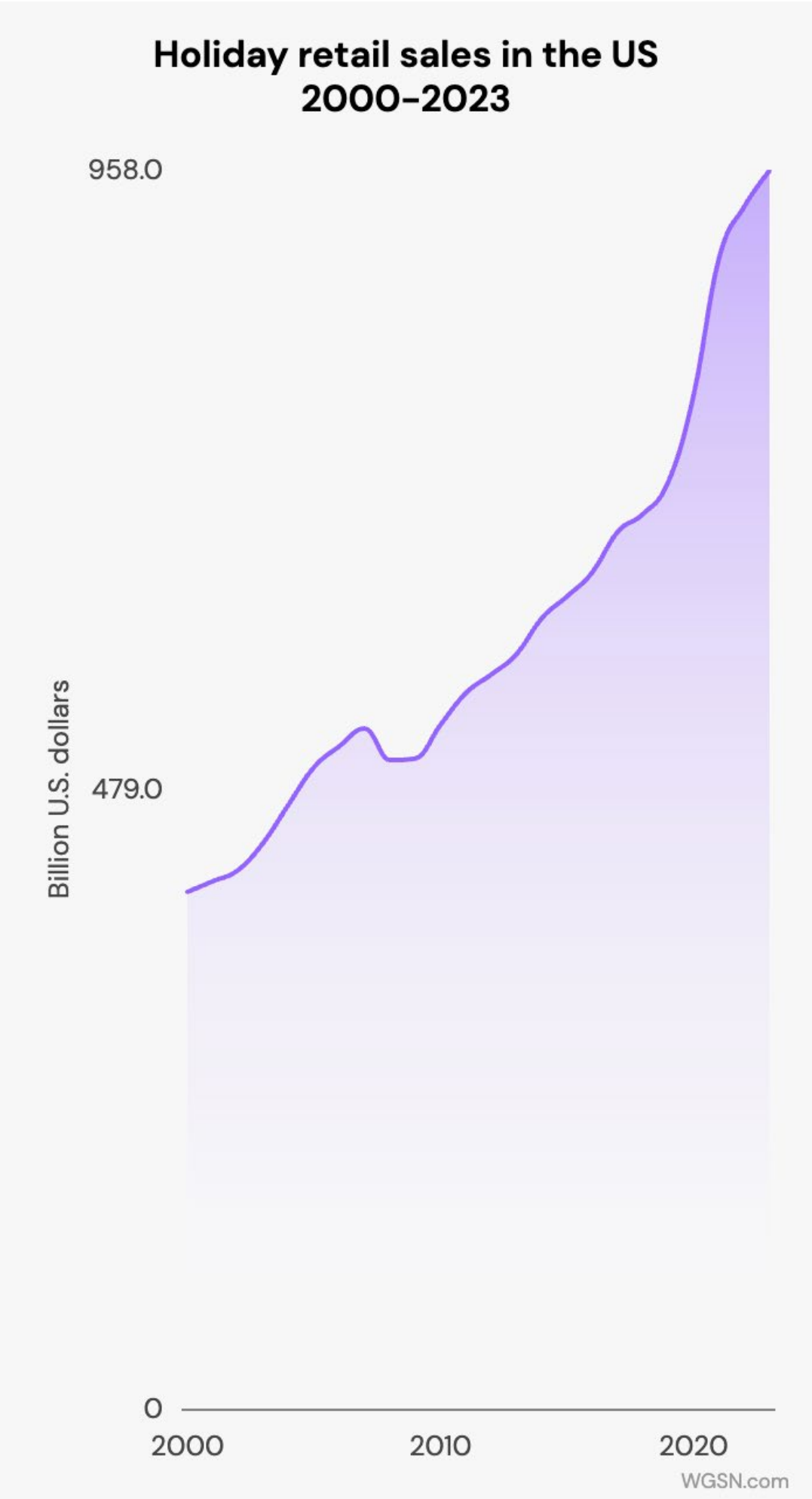
With consumers interacting with Holiday social content earlier and being more strategic with their purchases, this report provides data-driven confirmations for range-building in 2025 and beyond.

Key areas of opportunity

Materials, finishes, aesthetics, themes, and key icons. Merchandising and marketing opportunities are identified across **tabletop, home decor, gifting** and **crafts**.

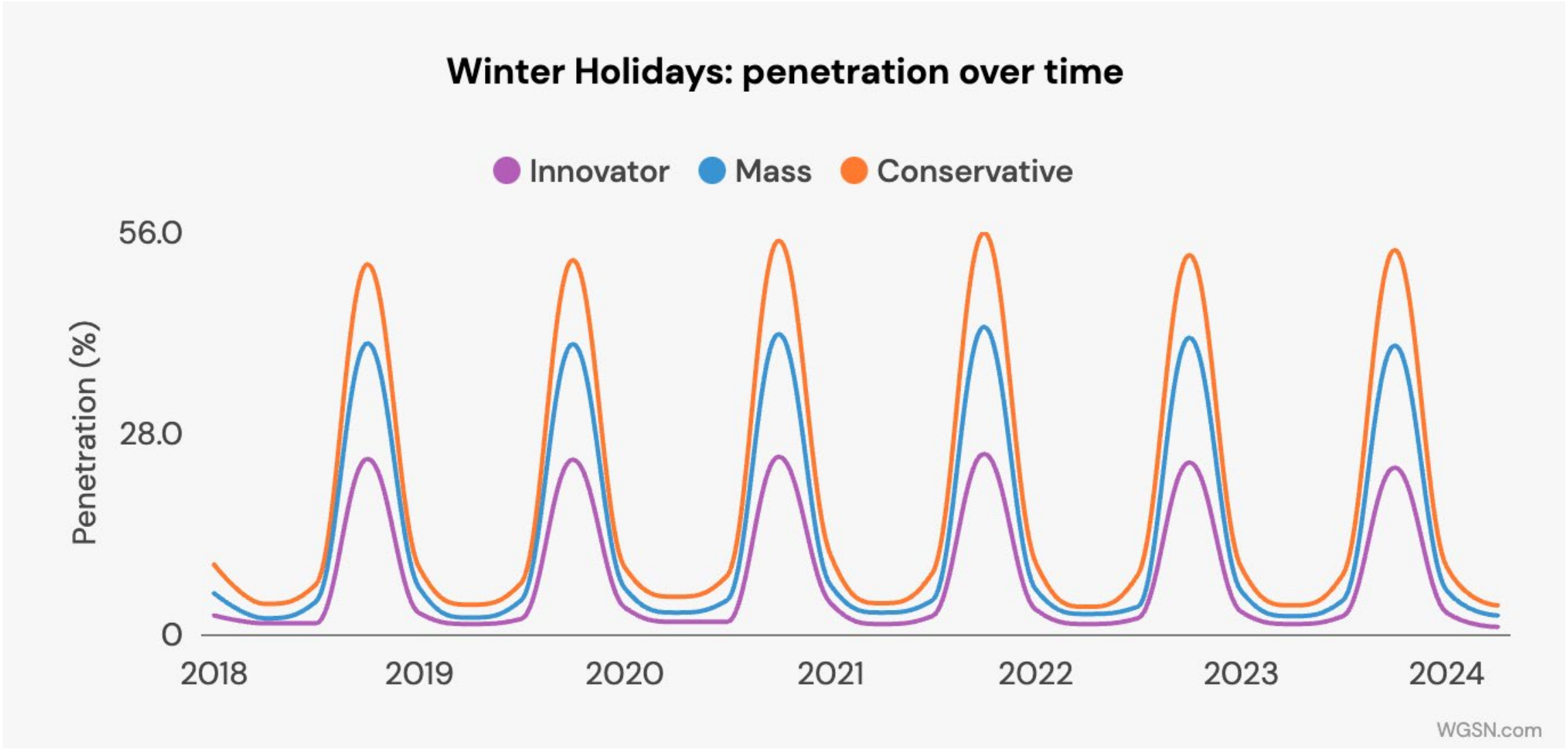


Holiday Social Media



Because “Budget friendly” is a rising priority for consumers, with an overall penetration of 1.9%, up +0.7ppt YoY in 2023, it is especially important that we focus on **affordable materials, craft/DIY consumerism, sustainability** and **recyclability**.

Christmas and Winter Holiday conversations continue to be driven by Conservative audiences, followed by Mass, then Innovator.



While Innovators showed the fastest growth in keywords relating to hosting/parties (+1.4ppt YoY), Conservatives still have the highest interest, with a share of 21.6%

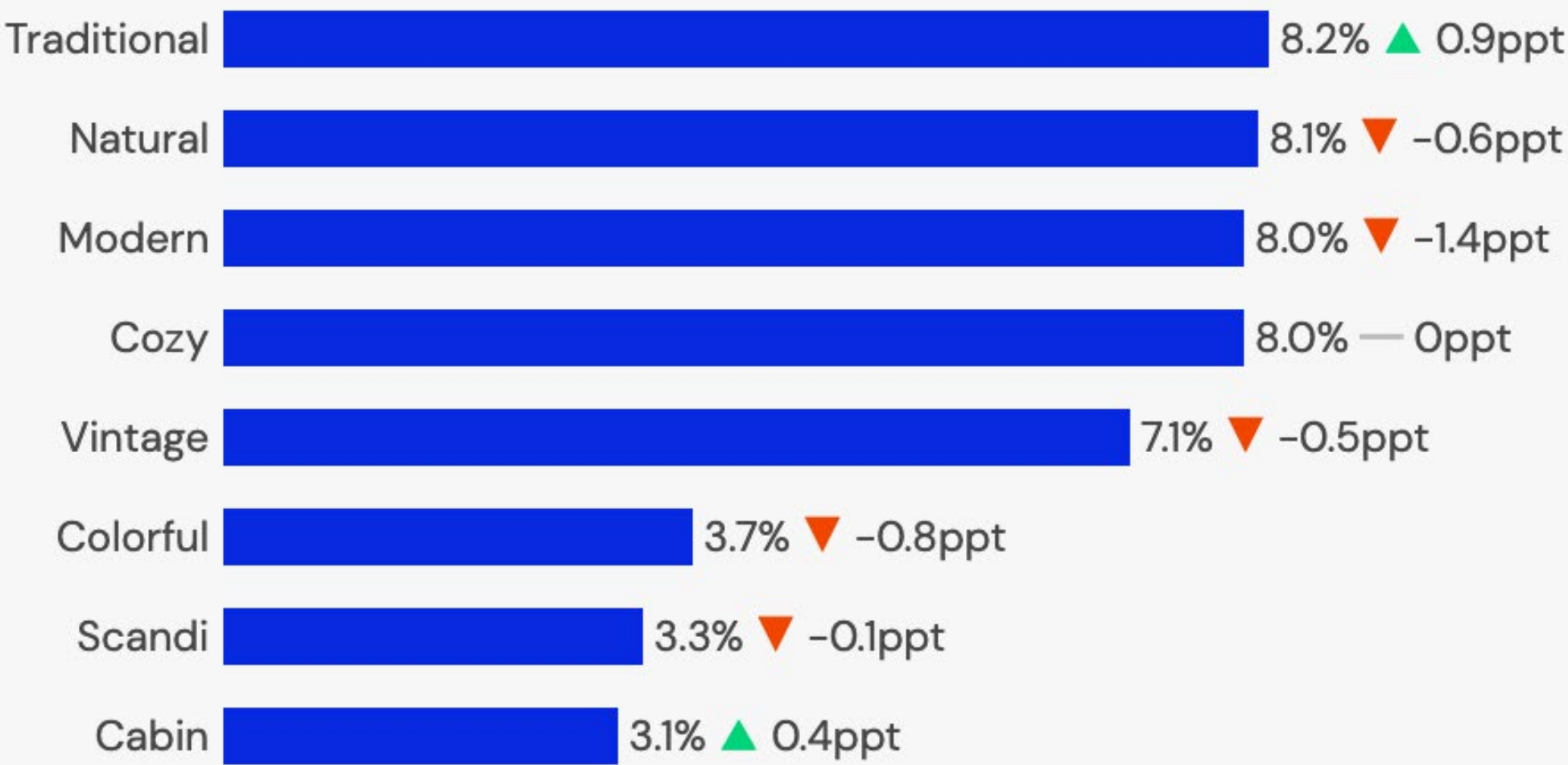
Holiday Social Media

Christmas and Winter Holiday conversations continue to be driven by Conservative audiences, followed by Mass, then Innovator.

- Conversations start slowly in September with an average MoM increase of +3ppt, followed by +8.7ppt in October, +20.4ppt in November and +29.4ppt in December (2018-2024). On TikTok, some Holiday hashtags have already seen early growth as of August 2024.
- Conservatives have the highest interest in wreaths and candles within decor (17.5% and 17.2%), as well as home fragrance and stockings within gifting (20.5% and 10.9%).
- Mass audiences are the most interested in ornaments, with a 14.7% share and an increase of +2.9ppt YoY. They have also seen the fastest growth in interest for Holiday crafts, with a rise of +2.8ppt YoY.
- Innovators are most interested in artisanal products, with the top mentions and growth for the term (7% share, +3.6ppt YoY). They are also the most interested in ceramics, with a 7.5% share.
- While Innovators showed the fastest growth in keywords relating to hosting/ parties (+1.4ppt YoY), Conservatives still have the highest interest, with a share of 21.6%.



Top Themes and Aesthetics



Share within winter holidays (%)

Holiday Themes

Develop key themes and aesthetics using icon, material and craft updates to shift the narrative.



Cabin Folk

Cabin and folk-inspired aesthetics had smaller penetrations but strong growth, up +0.4ppt and +0.6ppt, respectively.

Invest in folk-inspired prints with rustic #Cabincore finishes to combine two rising aesthetics for a fresh look.



Artisanal Natural

Natural aesthetics was the second top performer in 2023, with a social penetration of 8.1%.

Expand on artisanal crafted ranges and rustic, foraged looks. Wood, paper and woven fibers are key.



Vintage Opulence

Vintage Holiday aesthetics had a penetration of 7.1% in 2023, just below top performers. As of September 2024, TikTok videos tagged #VintageChristmas had amassed 200.4m views globally.

Offer accents across different eras to allow for unique styling. Mix fabrics with #Metalwork.



Cozy Softness

The cozy aesthetic has a social penetration of 8% and flat growth. TikTok videos tagged #CozyChristmas have amassed 927.9m views globally, as of September 2024.

Use natural-toned faux furs, knits and velvet to add warmth, plush tactility and soft touches to ranges.



Traditional Heritage

Traditional Holiday aesthetics was the top performer at 8.2%, also seeing the largest growth with +0.9ppt YoY.

Update perennial ranges via buildable tabletop collections with heirloom appeal, complemented by kitsch novelty accents.

Holiday Color

Intense Rust (LT)

Antique Gold (M)

Unbleached Cotton (LT)

Deep Emerald (A)

Galactic Lilac (A)

Italian Clay (LT)

Crimson (LT)

Chartreuse (S)

Electric Indigo (A)

Future Dusk (A)



(S) Seasonal color | (A) Annual color | (LT) Long-term color | (*) Key color

Holiday Hero Icons

Reinvigorate products and themes by incorporating trending key icons in the different styles.

- The key icons with the highest social penetration remain relatively similar across top product categories, allowing for printed and novelty-shaped usage.
- Prioritize key icons that will have flexible application across other Holidays as well as winter displays.
- While many of these key icons have perennial updates and appeal, #Mushrooms transcend everyday applications to have strong social penetration in Holiday conversations.



Holiday Hero Icons

Lasting retro aesthetics will evolve in 2025 and beyond with a rising expansion of quaint, nostalgic narratives and protection of core midcentury modern influences, highlighting two priorities for vintage Holiday themes proven key across seasonal events.

Christmas Classics

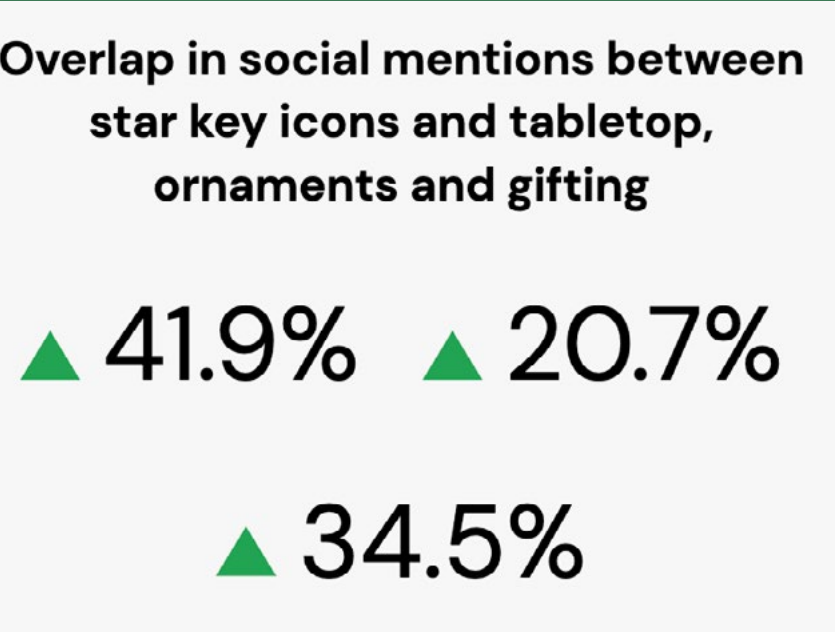
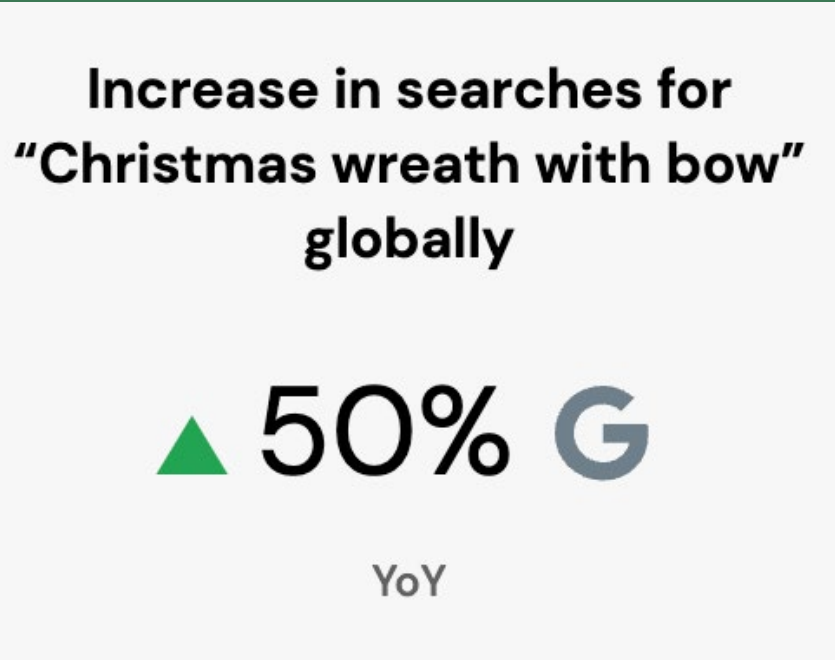
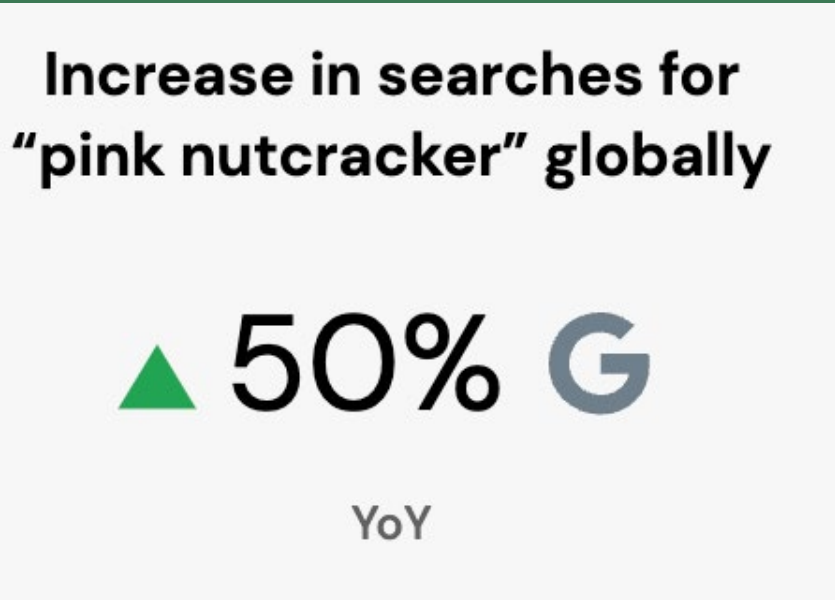
Drive newness by introducing designs with slightly modern twists that refresh retro narratives. Play into the rise of non-traditional color palettes, from trending pink to more acidic brights.

Trees and Wreaths

Holiday trees continue to shift towards minimalist yet tactile forms, while wreaths explore lushness with traditional vibes.

Stars and Snowflakes

Get intricate with detailed lines and broader celestial themes.





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