

# Hello

Alison

Laura



KOKORO

Subscribe  
Emerging trends  
***Always on***



Deep dive  
Defined questions  
***Take action***

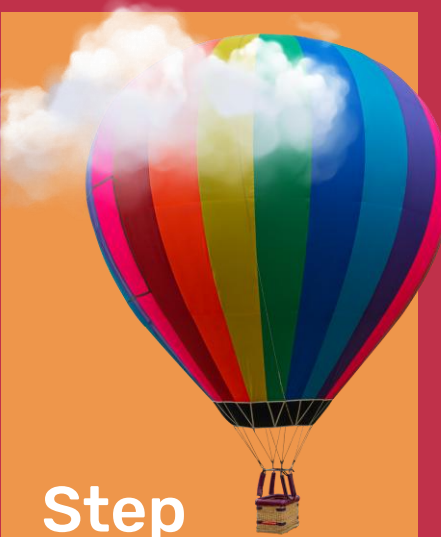
**KOKORO**

# Think forward

Get  
guts



Step  
back



Know  
truth



Chase what  
moves



Find the  
money



Decode  
emotions



Seek out  
friction

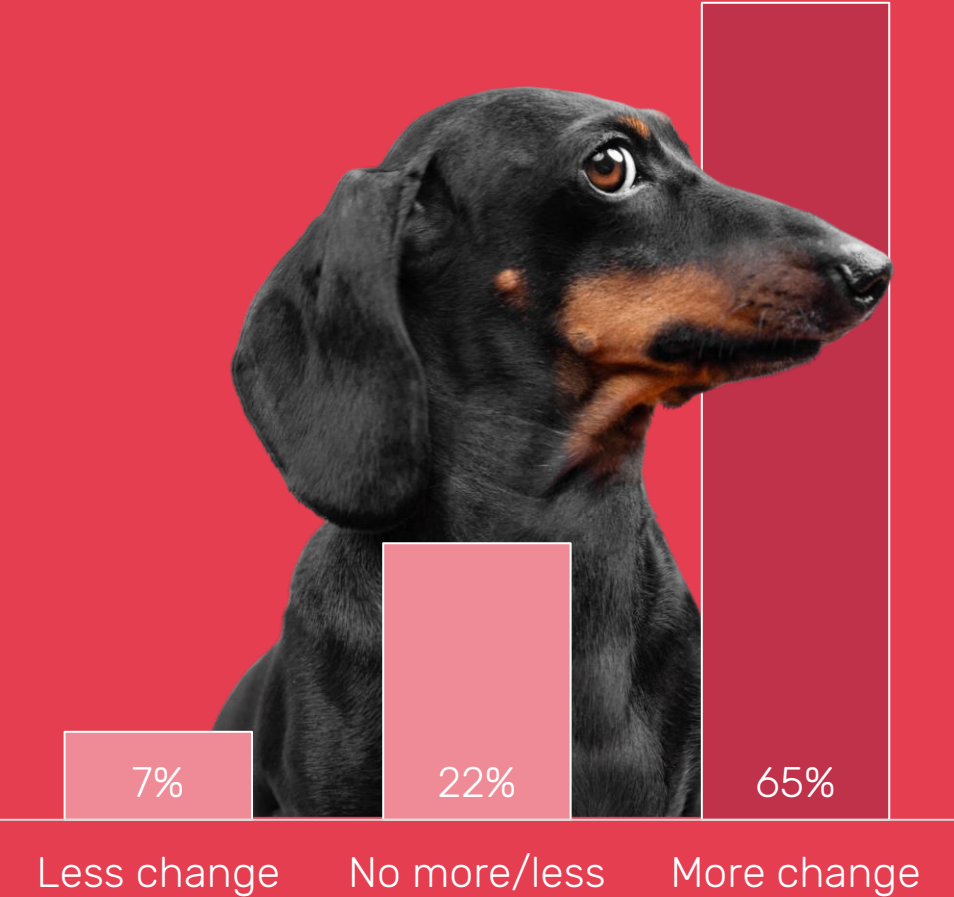


Be  
playful





Amount of change in the world right now



Particularly hard right now

K O K O R O

*Simple*



*Simple*

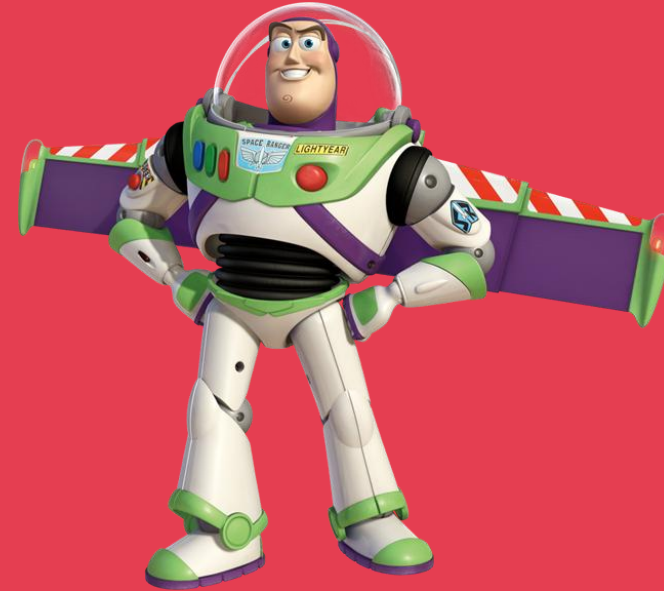
Enjoy the messy middle

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The future belongs to those who see possibilities before they become obvious

**John Sculley**



The most creative people are willing to work in the shadow of uncertainty

**Ed Catmull**

1. Get guts – bold bets inspire action

**K O K O R O**



## Goal

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Insights that inspire - 100 % certainty means you're already late



## How to

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Pair-up

Hold strong views lightly

Let dissent sharpen thinking



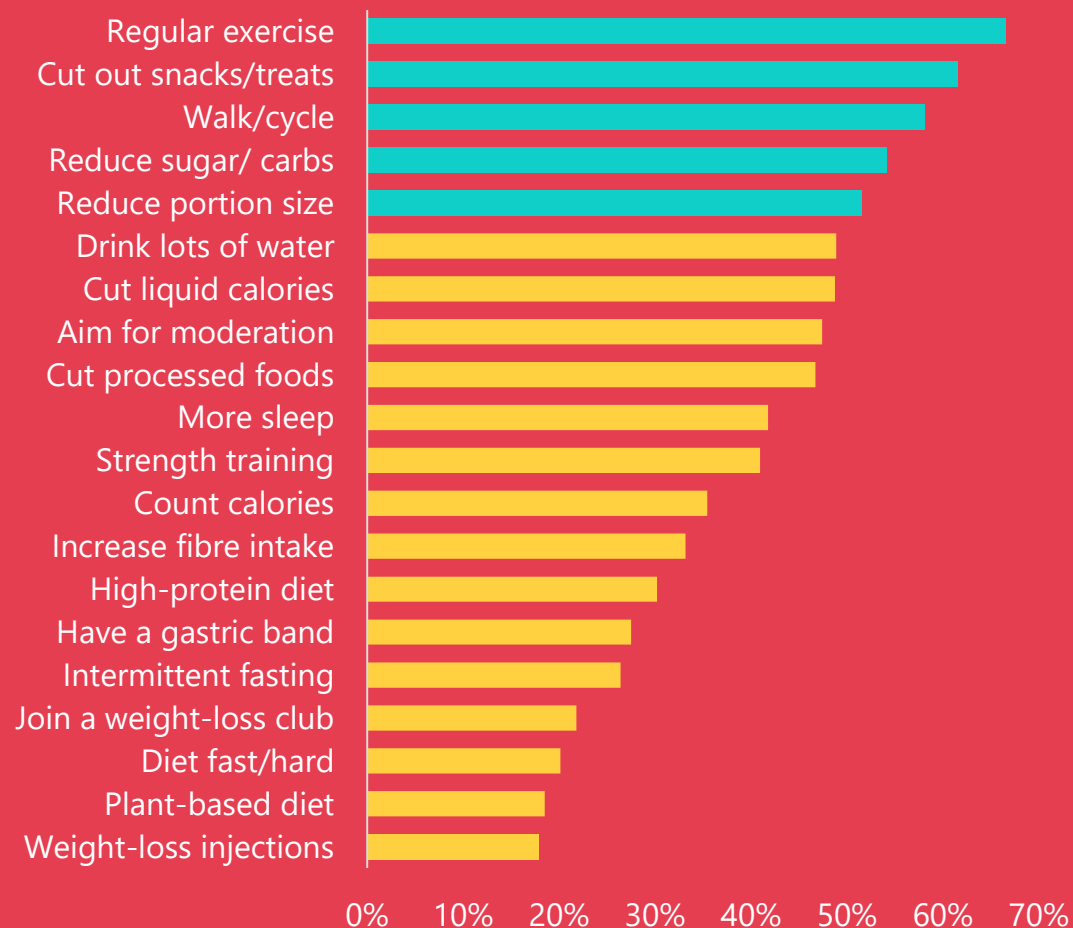
## Outcome

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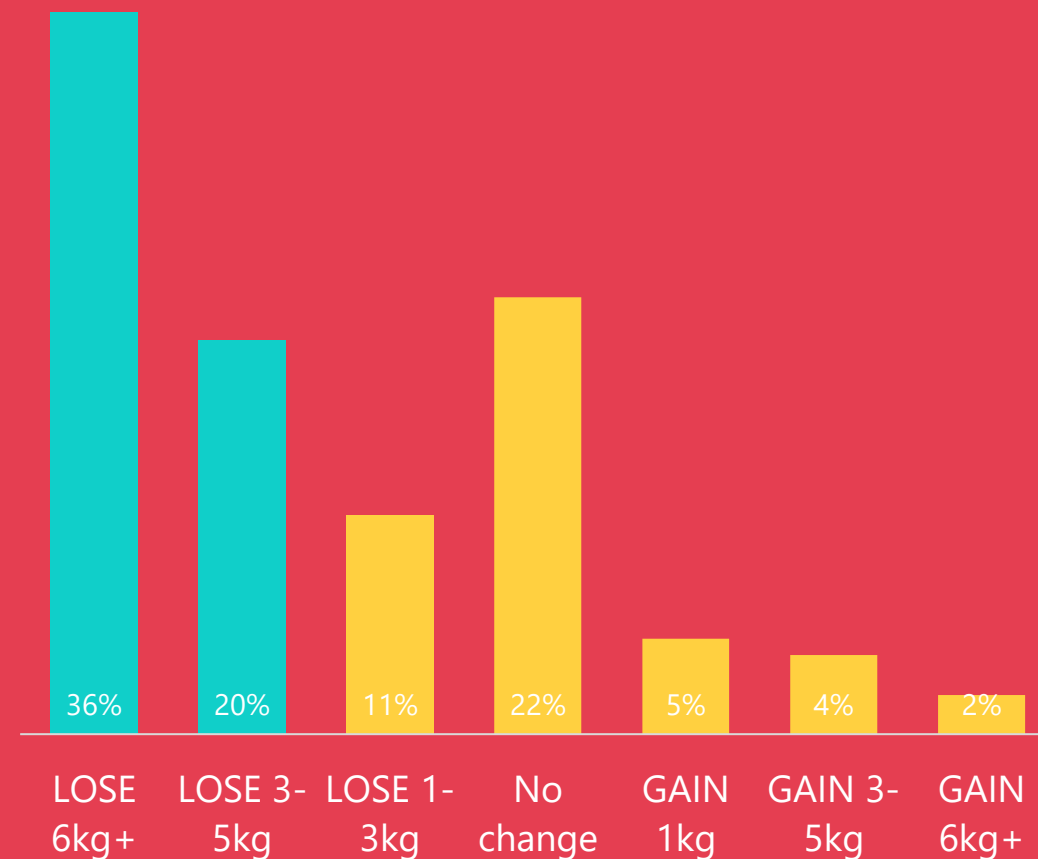
Clear, gutsy call

No fence-sitting

## Weight-loss methods



## Weight-loss ambitions



1. Get guts – bold bets inspire action

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## Goal

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Sure bets that  
survive shocks  
and span  
generations



## How to

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Use context  
question

Cluster insights  
into 3-5  
territories



## Outcome

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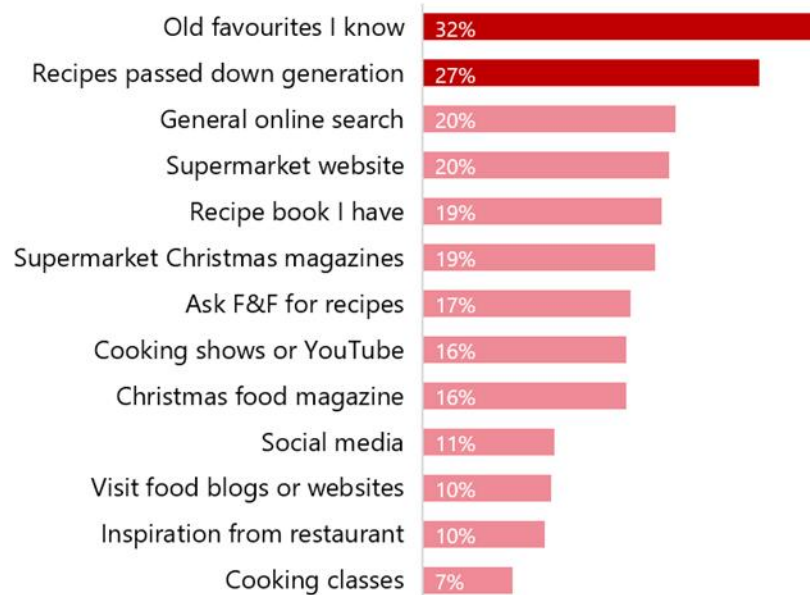
Dream = surface  
big untapped  
spaces

Likely: nail the  
hygiene

# 1 | Christmas is Christmas

Before delving into the nuances of Christmas 2025, let's remember its enduring nature — these will always provide rich territories for brands to play in

## Where do you get your ideas for Christmas?



Kokoro: The Score Survey and Qualitative Interviews  
Base: 2,000 per week  
Q533R

## Muscle memory and ceremony



Treasured memories return, along with the giddy promise of making a few more



Comforting rituals bring with them the joy of 'knowing our place/the game'



Welcome pause in the year to appreciate both what and those who really matter

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## 2. Work out the big truths

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## Goal

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The bigger picture

Obvious  
reframed as  
gems

Stories anyone  
can retel



## How to

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Scan total  
sample first

Check  
co-linearity

Separate  
correlation from  
cause



## Outcome

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Simplicity on the  
far side of  
complexity

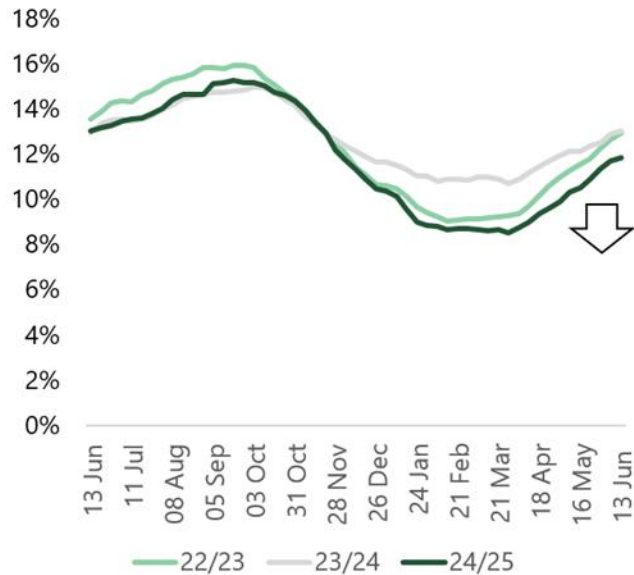
No analysis  
paralysis



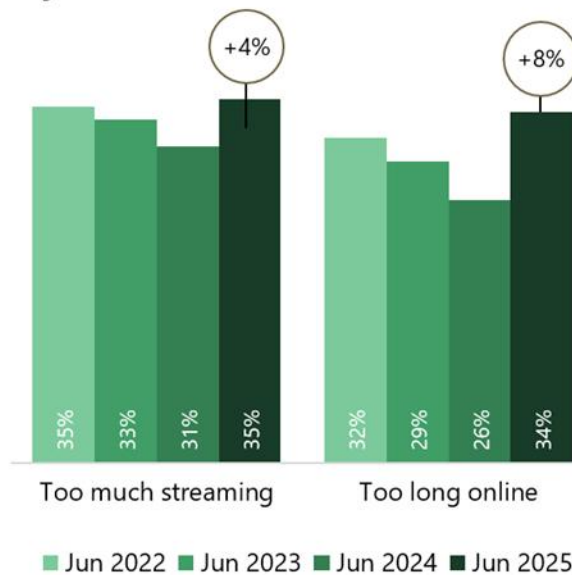
## 4 | Xmas Xtended

Fewer holidays have bolstered savings and annual-leave balances, but dented hit of sense of escapism and, especially, left kids short on wide-eyed wonder

**Been on holidays/weekend away**  
8-week rolling



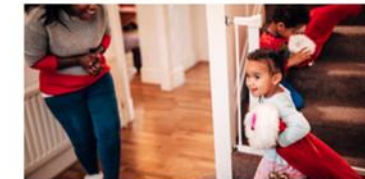
**My kids' bad habits**



**Too much calm, too little curiosity**



Welcome back real magic



Make way for some big memories



Open up to novelty, standout and silliness

Kokoro: The Score Survey and Qualitative Interviews  
Base: 2,000 per week  
Q24A, Q52F, Q130

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# 3. Keep stepping back

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## Goal

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Fresh forces

Mosquito-sized  
shifts with  
outsize impact



## How to

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Blend  
longitudinal qual  
+ quant

Telescope then  
microscope

Use robust  
numbers



## Outcome

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Ride the wave  
early

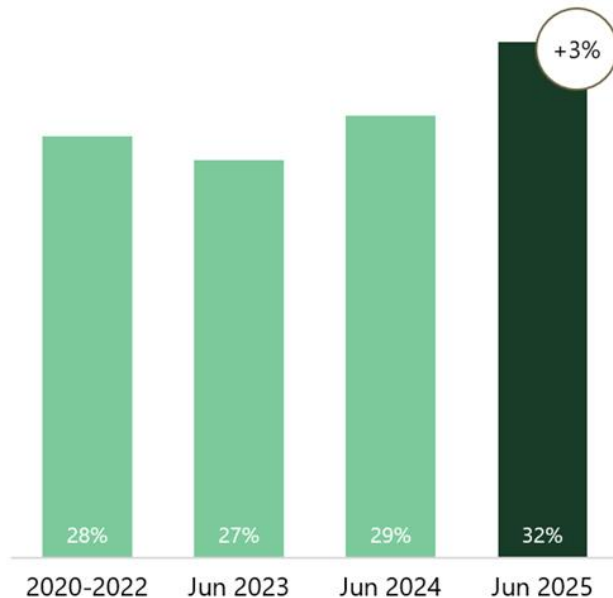
First-mover lift

Momentum  
shots

## 4 | Xmas Xtended

Christmas Day will stand as the ultimate peak of togetherness, merriment and food abundance – with the following days earmarked for collective ‘me-time’

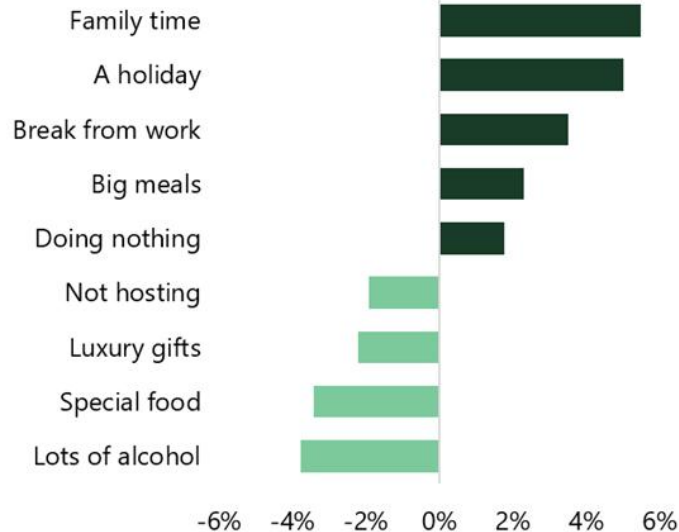
### Christmas is all about Christmas Day



Kokoro: The Score Survey and Qualitative Interviews  
Base: 2,000 per week  
Q64d, Q410e

### YoY shift in what ‘indulgent Xmas’ means

Biggest movers



### The emotional summit

Flit between activity + atmosphere



Big, known rituals



Play possibilities



Surprises



Working together



Solo moments



All 'do own thing'

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## Goal

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The real  
trade-offs -  
budget is finite

See big money



## How to

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Segment

Translate % into  
£

Surface cost  
and deployment  
friction



## Outcome

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Speak C-suite

Land bankable  
opportunities

Sidestep naïvety

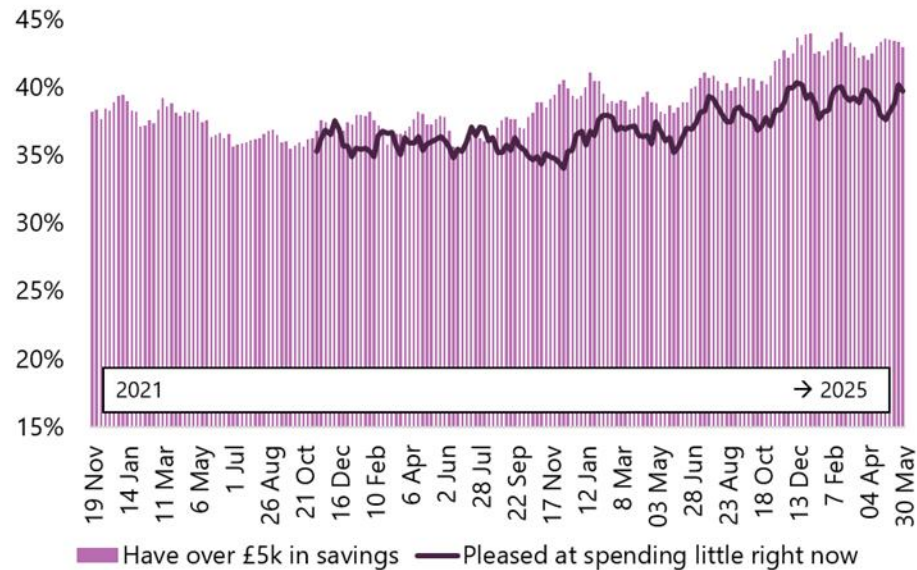


### 3 | Comfort & Joy

Initially blindsided by the cost-of-living crisis, UK consumers have learnt to live prudently – and many now have healthier savings

#### Savings vs view of spending caution

4-week rolling



Kokoro: The Score Survey and Qualitative Interviews  
Base: 2,000 per week  
Q56UK, Q22

#### Steadier ground is satisfying



Sense of achievement from watching saving £s add up and grow



Sense of safety with a visible buffer to protect from storm



Sense of stability from consistently sticking to £-habits

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5. Find the money

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## Goal

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Hidden drivers  
behind  
behaviour



## How to

---

Implicit tests

Longitudinal  
reads

Feeling wheels



## Outcome

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Surface the red  
thread

Sell benefits not  
features

Connect deeply



Feelings win

What are  
they really  
buying?

6. Decode emotions

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Purpose and proof  
of progress/fun



Release! A taste of  
what we've missed



Encouragement to  
fill my own cup first

## 6. Decode emotions

K O K O R O



## Goal

---

Say-do gap

Cake-and-eat-it  
tensions

"Impossible"  
combos



## How to

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Contrast  
attitudes with  
behaviour

Lean into  
contradictions

Stay with  
discomfort



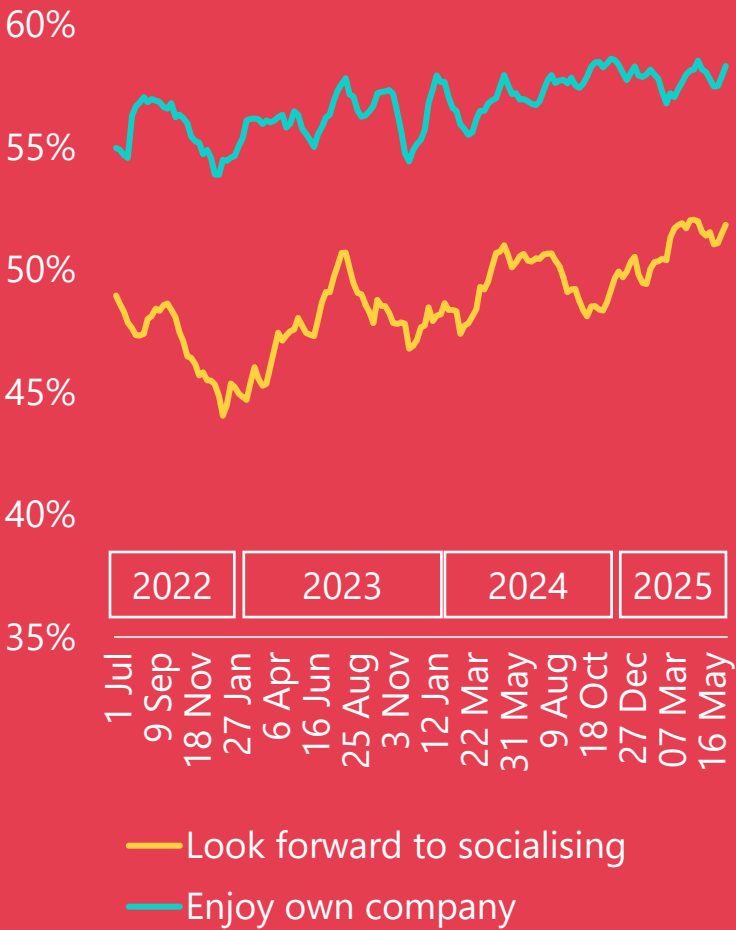
## Outcome

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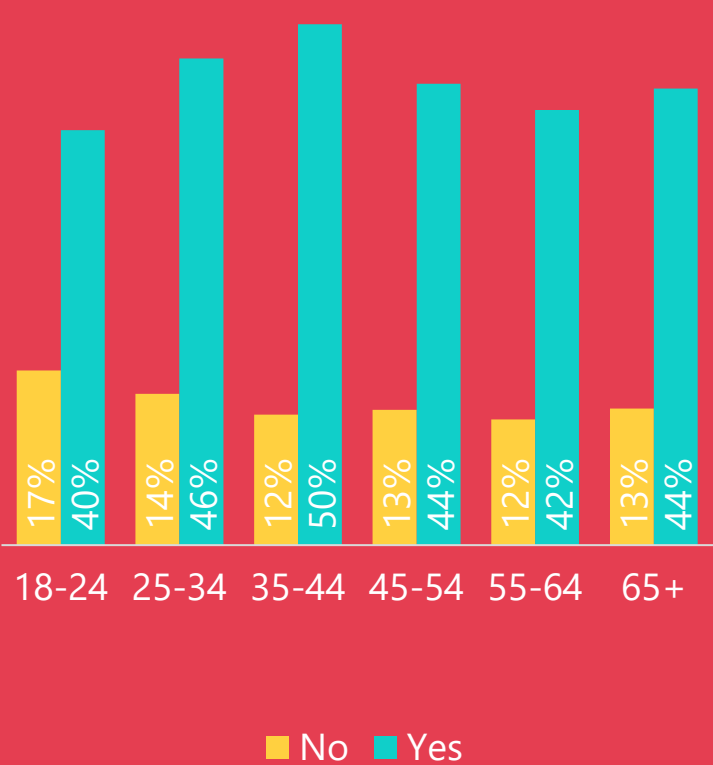
True spaces for  
innovation  
emerge



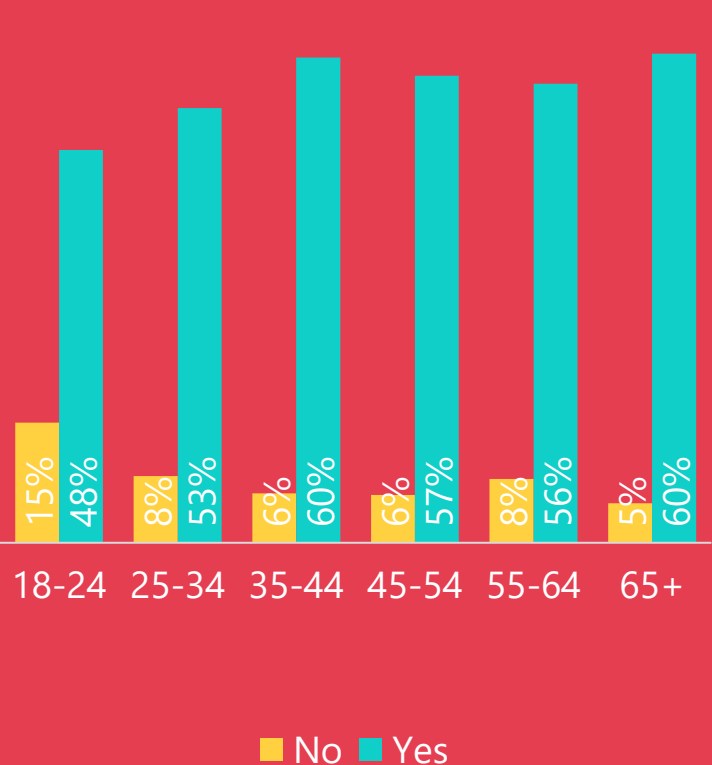
Feelings about life right now



I would like to see my friends in-person more often than I currently do



Ideal Xmas balances time alone and with others



# 6

## Show Face, Save Space

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### Why now?

- A year of social deficit will leave us feeling out of the loop; the year-end will create a natural deadline for checking in

### What's driving it?

- Signalling – showing face proves you still care, without the need to host
- Compromise effect – we land on the middle path: turn up but scale back
- Need for control – brief, local, low-cost gatherings preserve self-rules and routine

This will be a 'cameo Christmas' where high-return appearances keep ties alive, while safeguarding cash, time/energy, calories and me-time





## Goal

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Space where  
ideas can flow



## How to

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Grab a buddy

Ditch screens

Meet  
face-to-face

Embrace mess  
and silence



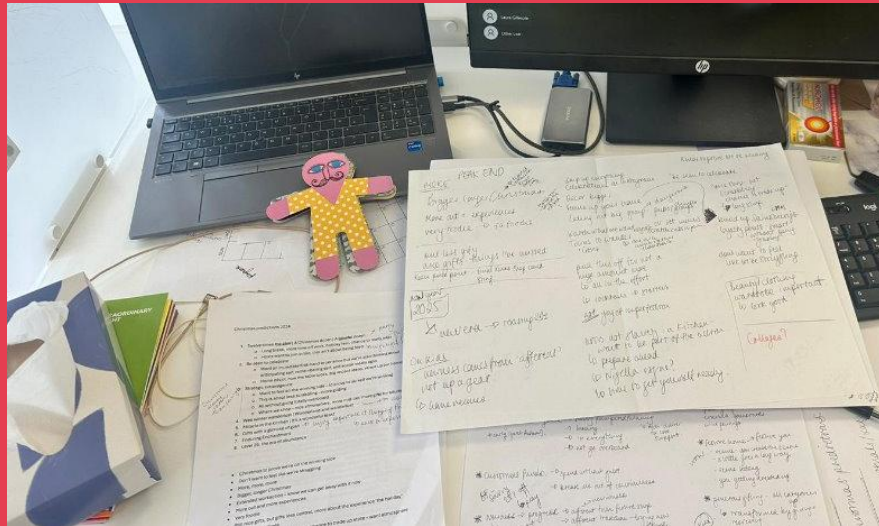
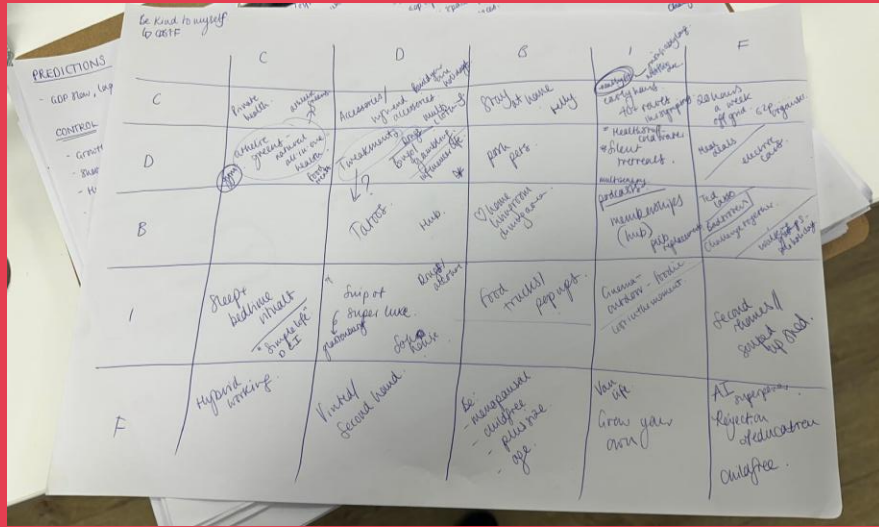
## Outcome

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Richer, more  
rounded  
thinking

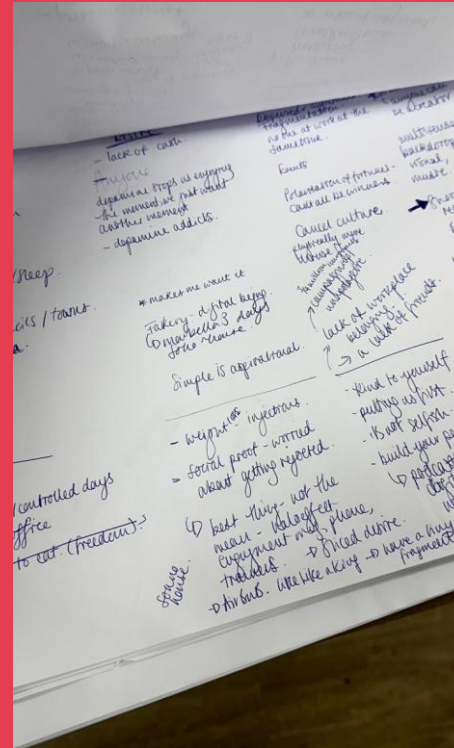
Stories worth  
sharing





# Play is the highest form of research

## Einstein



### #1 Christmas is Christmas

**Why now?**

- As talk of "everything changes" grows louder, Christmas offers reassuring certainty and nudges us towards the tried and tested.

**What's driving it?**

- Status quo bias & nostalgia makes the familiar feel safe.
- Story season - no highs and lows, no uncharted great truths.
- Shared values - in an "angry" world, knowing the rules creates familiarity.

Christmas will automatically be what it has always been - anchored in spare time, abundance, child-orientated wonder, ritual, generosity etc.

### #2 Snow Globe Mode

**Why now?**

- Constant gloom and mourning chains beyond our control - hard times mean we turn to the snow globe.

**What's driving it?**

- Media fatigue - we want a brother from another year.
- Timelessness - playing what we've known makes us feel safe and right.
- A gift for everyone - looking for details to take home with us.

Christmas allows us to take a step further into our world and enjoy the full mental spectrum of what everyone needs.

### 3 Comfort & Joy

**Why now?**

- Increased sense of stability - tempered by residual COVID shock - gives us the confidence to carefully put more in.

**What's driving it?**

- The moderation machine often leads to overindulgence.
- Mental accounting - Christmas funds "let us spend without being asked".
- Shared values - in an "angry" world, knowing the rules creates familiarity.

Nailing Christmas is about deliberate, joy-focused decisions.

Success = answering "what did you get up for?" without either spending guilt or FOMO.

### 4 Xmas Xtended

**Why now?**

- Shared values mean part of the season, and parents feel obliged to pass the baton - otherwise it's a waste.

**What's driving it?**

- Build up time - planning early extends the excitement.
- Pre- and post- - we remember the leads.
- Social upping - ending Christmas with shared values we've "lived it".

Christmas becomes the ultimate "staycation" - Santa magic is a wonder-trip that fuels body and soul, and guarantees that future fun good values into the new year.

### 5 Crew-only Christmas

**Why now?**

- COVID-19 off-being crushes the desire to socialize - and, after years of funerals, we crave the comfort of the house, my love.

**What's driving it?**

- Loss aversion - fear of missing out.
- Shared values - in an "angry" world, knowing the rules creates familiarity.
- Shared values - in an "angry" world, knowing the rules creates familiarity.

Households focus on inner circle and a co-created Christmas - hosts all at capacity, maximizing effort and slipping in surprises that lift the mood.

### 6 Show Face, Save Space

**Why now?**

- A year of social deficit will leave us craving out of the house, but parents feel obliged to pass the baton - otherwise it's a waste.

**What's driving it?**

- Signaling - showing face proves you still care, without the need to host.
- Compromise effect - we look on the upside and turn up but not too loud.
- Shared values - in an "angry" world, knowing the rules creates familiarity.

This will be a "show" Christmas, where high-return appearances keep the stress, while safeguarding cash, time, energy, calories and the time.

### 7 Keepers not clutter

**Why now?**

- We're looking for the emotional pay-off of giving and receiving, but with a shrinkage sense of value for money.

**What's driving it?**

- Learned preference (having had) and longing for indulgence - "long without" amplifies the reward, want a I can't believe it.

We'll upgrade festive spending for those they care about - striving for gifts that balance practicality with a wow factor - whilst still keeping things low-key for more distant contacts.

### 8 Smile, it's Christmas

**Why now?**

- Algorithmic platforms continue to reward spectacle after a lot of post-figuring, we miss a subtle, well-earned moment.

**What's driving it?**

- Bandwagon effect - it's just what everyone else is doing.
- Memories - posting turns the moment into something which defines the whole.

We won't be able to resist a year of share-worthy, feel-good content - a curated slice of our Christmas to broadcast to friends and followers.

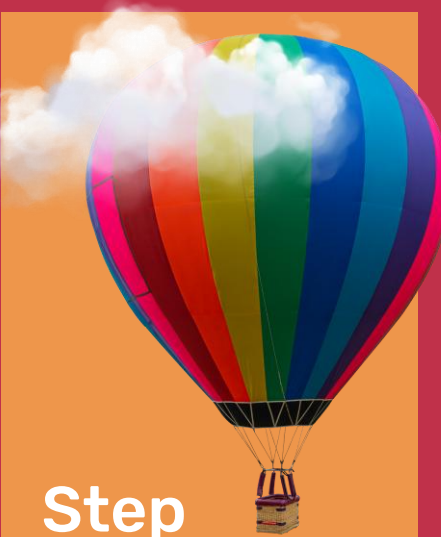


# Think forward

Get  
guts



Step  
back



Know  
truth



Chase what  
moves



Find the  
money



Decode  
emotions



Seek out  
friction



Be  
playful



plug in

K O K O R O