



2025 Q1 TREND REPORT

Trend Report | Q1 2025

+ WE BLINKED AND Q1 WAS GONE

Let's be honest—January through March is a bit of a blur. Somewhere between a trade war, making AI action figures and everyone suddenly whispering about "quiet luxury," Q1 vanished. But while the days flew by, the signals didn't slow down. If anything, they became louder and more layered than ever.

This season, we're seeing culture shift into sensory overload—think **tactile aesthetics** you can almost touch, **muted luxury** that still makes a statement, and **horror making an unexpected comeback** as a form of comfort (yes, really). Not to mention, people are overwhelmed by fuzzy grey areas, watching brands take calculated creative risks, and navigating both the playground and puzzle of AI.

While we'd normally ban any kind of "insight" that says chaos is the new normal (because yes, things are always changing), we do still see connective tissue linking it all together. There is a **distinct craving for clarity, a desire to feel more, and a push to be present in a world that often encourages the opposite.**

Welcome to our Q1 wrap-up. From the trends shaping culture and people, to the ones shifting how brands, advertising, and AI show up—this is your guide to what's been happening, why it matters, and how to make sense of it all before Q2 takes off running.



CULTURE



A photograph of three women in white, flowing dresses with metallic armor pieces, posing against a large, textured rock wall. The woman on the left is kneeling, wearing a chainmail hood and a breastplate. The woman in the center is standing, wearing a long, sheer dress with a corset and arm guards. The woman on the right is standing, wearing a strapless dress with a corset and a shoulder guard. The text '+ TACTILE AESTHETIC' is overlaid on the left side of the image.

+ TACTILE AESTHETIC

AN AESTHETIC YOU + CAN FEEL

What is it?

When it comes to look and feel, we're in for a full sensory experience. Lately, it's all about aesthetics that evoke an implied (or even physical) feeling through mixed media, texture, poppy colours, retro theatre, curves and more.

Signals We're Seeing

- Rise in hand-painted décor
- Analog or “organic” elements that emphasize the human touch (like crinkled scrapbook paper or rock)
- Eclectic maximalism, where the mixing and matching of patterns, colours, prints, and textures interact
- Baroque and rococo aesthetic influences

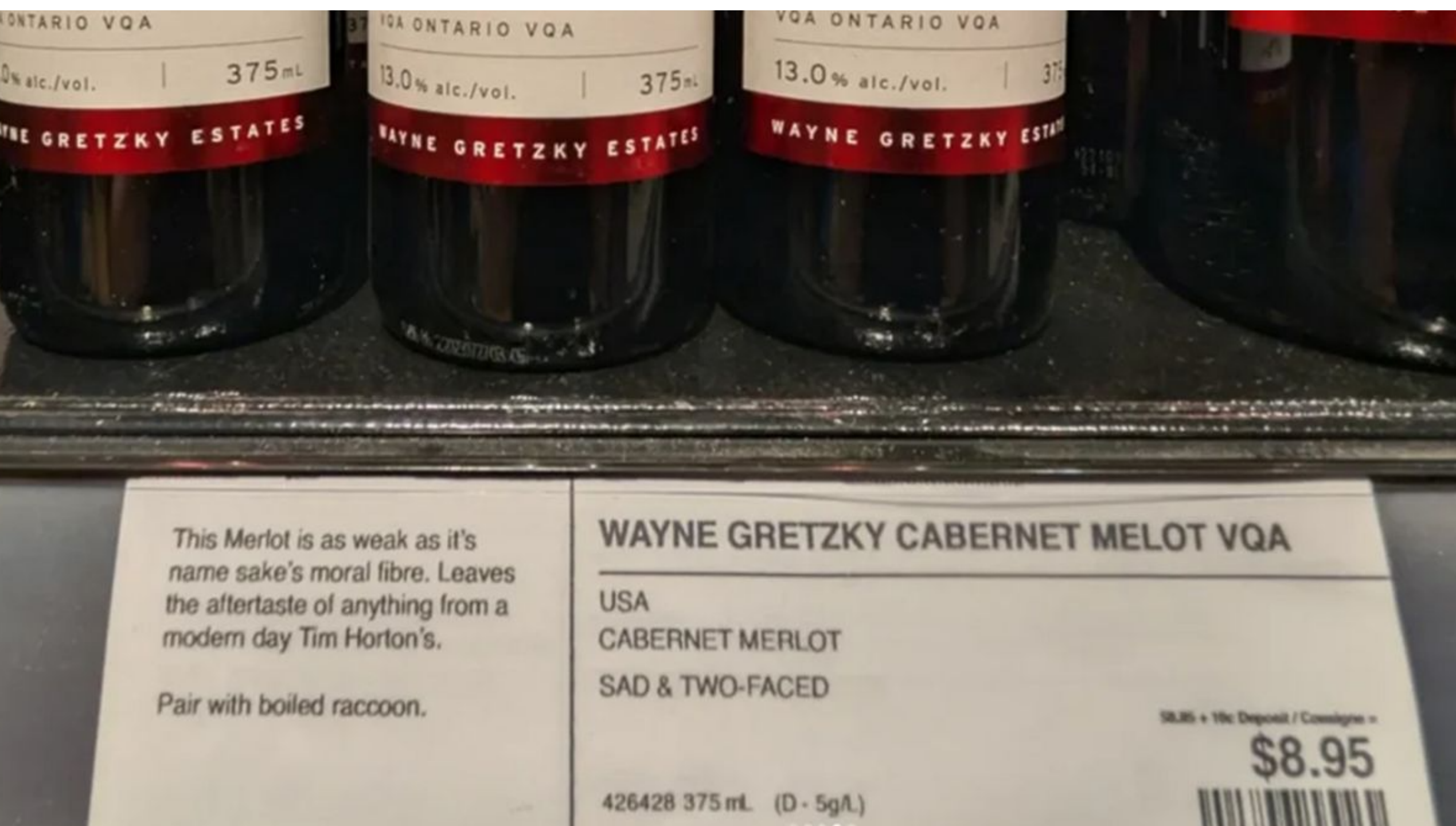
Why It Matters

Calling back to the larger trend of people seeking connection, audiences want visual delights that imprint an experience. The bolder, the better.





+ SHOP CANADIAN



TARIFFS, TRADE AND + TRIALS

What is it?

The trade war episodes change hour by hour, but overall we're seeing a huge change in Canadian sentiment.

Signals We're Seeing

- Brands taking an unapologetically Canadian stance in marketing
- Sense of alignment and unity between Canadian provinces increasing coast to coast, most particularly within Quebec (feeling of "deep emotional attachment to Canada" went from 30% to 45% in Quebec)
- Harsh criticisms of Canadian figures who are seen as sympathetic to Trump, including Wayne Gretzky (whose LCBO wine descriptions were recently photoshopped online to reflect disappointment in the Canadian icon)

Why It Matters

By the time this report is published this may change; the point is when under pressure, our Canadian identity is important to us and shows the ability of people to set aside differences to show a united front. Lean into heritage, responsibly.



+ TRUTH-SEEKING



+ MAKING SENSE OF IT ALL

What is it?

People are fed up not knowing who, where or what to trust. They're caught up in a flurry of rapidly changing situations (from Tiktok bans - yes plural - to tariffs), evolving public rhetoric and more. In the end it's leaving people frustrated and hopeless.

Signals We're Seeing

- Meta ending its fact-checking program on the grounds of getting back to its "roots around free expression"
- Populism on the rise, with examples across the full political spectrum
- Huge surge in search for trending topics like "what is a tariff" both on Google and social
- TikToks of people "screaming in critical thinking"

Why It Matters

People are empowered by their frustrations and will take the narrative into their own hands. It's important to prioritize clear actions and clear communications to rebuild trust and put compassion at the forefront.



+ LUXE REDEFINED



+ WHISPERED WEALTH

What is it?

The element of luxe is evolving into a more muted space. No gaudiness here; instead, we're seeing it come to life in toned down, natural and subtle expressions in fashion, beauty, packaging and more.

Signals We're Seeing

- Mocha Mousse as the Pantone Colour of the Year, inspiring a flurry of neutrals in the fashion, design and beauty worlds (think cognac, cherry red, and more).
- Prioritization of heritage over trendiness (as seen in things like the resurgence of vintage Coach bags or brands like Louis Vuitton scaling back their aesthetic)
- "Corporate girl makeup" trending on social, featuring its muted tones and less is more approach to application

Why It Matters

The expression (or implied expression) of wealth is evolving. On one hand, some tout it as a 'return' to simplicity or craftsmanship. On the other, it makes a stark statement about what lies within the confines of luxury (and what does not) that is worth examining as target audiences continue to be walking enigmas.





+ THE HORROR OF IT ALL



FINDING COMFORT IN + FEAR

What is it?

When chaos and uncertainty swirl around us, we turn to the horror genre to escape it all.

Signals We're Seeing

- The reimaging of the horror classic *Nosferatu* and its take on “atmospheric” horror
- Ryan Coogler’s recent film *Sinners*, blending vampiric storytelling with other genres
- Discussion of body horror (particularly female-centred body horror, like *The Substance*).
- The return of *Black Mirror* in its seventh season

Why It Matters

Spooky doesn’t have to be reserved for Halloween anymore; brands who can find clever ways to tap into their dark side may just provide the right amount of thrill audiences need right now.



+ AUTHENTICITY, EVOLVED



+ GETTING REAL

What is it?

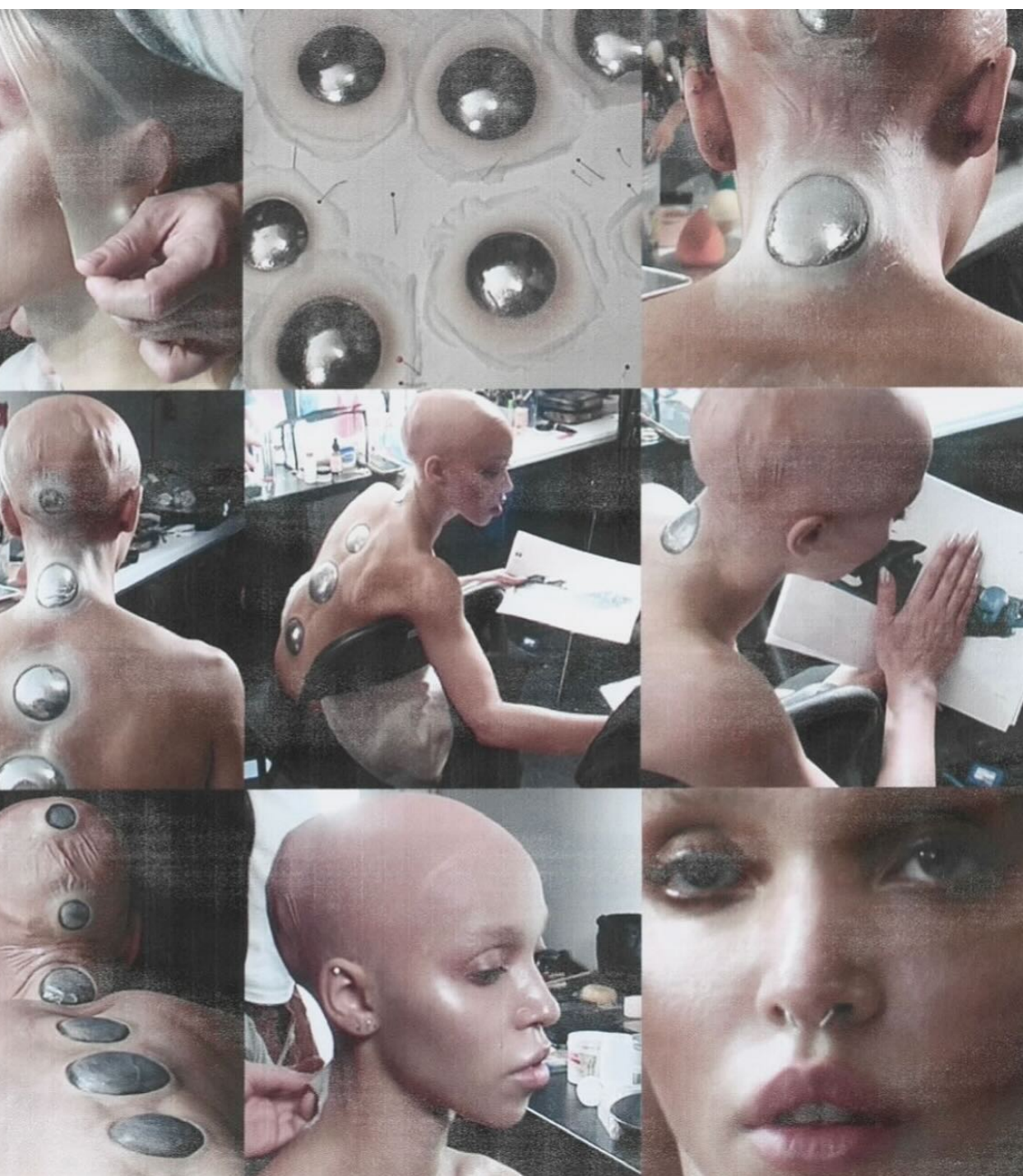
Authenticity is under the microscope. Where in some cases we're connecting by oversharing, there are other cases where those who try too hard to be normal end up being cringe, painful, or at the very worst, inauthentic.

Signals We're Seeing

- TikTok trauma-dump trends like "you're so funny" or the Pepé The King Prawn muppet carousel where users share a long, often traumatic personal story
- Rising popularity of neologisms like "brain rot", "doom scrolling", "aura points", "romantasy", "let them cook", or "this and yap"
- Genre and aesthetic bending present in the latest albums (and subsequent promo materials) by FKA Twigs ("*Eusexua*") and Lady Gaga ("*Mayhem*")
- Backlash to the multitude of brands looking to adopt the "ultra authentic" social media manager tone like Wendy's or Duo Lingo

Why It Matters

Real is subjective. We need to embrace that people exist in a state of flow that can vary greatly from person to person. The point is finding the sweet spot where they feel fully immersed and present.





PEOPLE





+ CONNECTIVE TISSUE



+ LET'S HANG OUT

What is it?

In a continuation of the “IRL Renaissance” we mentioned in our last report, we’re seeing the continued overall shift from virtual to tangible.

Signals We’re Seeing

- Increase in brands that offer curated social experiences that bring strangers together (and highlight the reality of the loneliness epidemic)
- “Wanna grab matcha/coffee” trending sound on TikTok
- Solo dates trend (including social clubs that host art club-themed gatherings, like journaling or vision board-making)
- Extra interest into content with direct connection points like newsletters (think Substack or Letterloop)

Why It Matters

People want to imprint on the physical world. Audiences value the creation of spaces that allow them to sit mindfully within the present. Brands that can enhance peoples’ realities with experiences will set themselves apart.



+ SELF-MASTERY



+ CONSCIOUS WELLNESS

What is it?

People want fewer hacks, more meaningful and lasting results. We're looking inward and we want others to help us do it.

Signals We're Seeing

- Lymphatic Drainage as a trending topic on social; Tiktok videos with millions of views
- The boom around Mel Robbin's "Let Them" theory (and even the subsequent backlash)
- Combo of wearable tech and practices like somatic wellness that help us understand our bodies' physical signals

Why It Matters

Reminder that digital isn't everything for audiences, especially when it comes to their health. Brands that can prove they know there's more to fast pace and band-aid solutions will better find ways to connect.

+ DISCOVERY VS. CURATION

+ CHOOSING YOUR OWN FEED

What is it?

No the algorithm isn't dead. But blind reliance on it is. We want to have a hand again in what we're seeing, how much we're seeing and where we're seeing it.

Examples

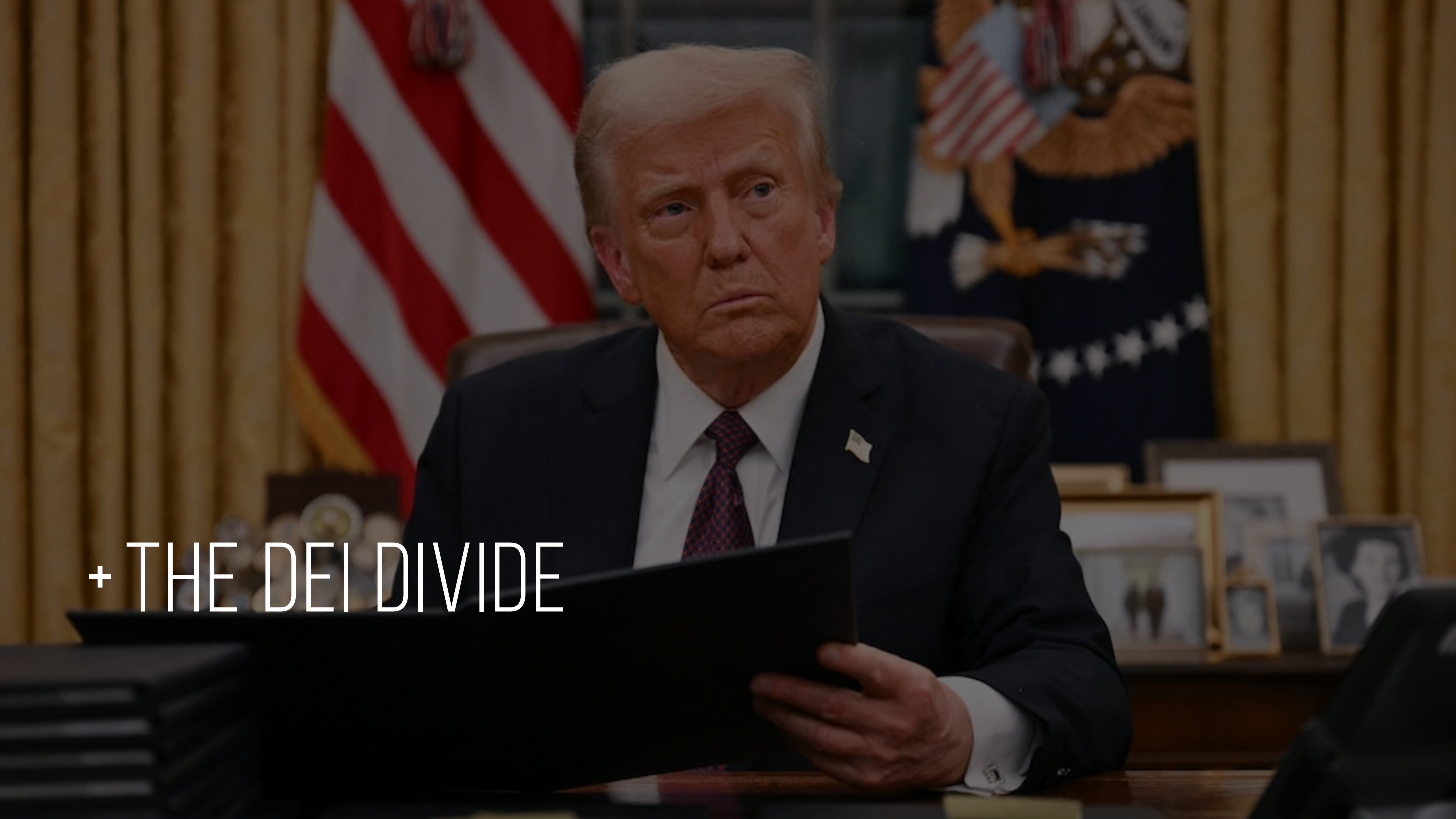
- Discussion around “digital simplicity” and how it suggests creating environments that give us back a sense of ownership around what we consume
- Death to Stock introduced “Moodlinks” where the feature allows users to curate on their own without the algorithm suggesting for them
- Boom around e-ink products and focus friendly tablets, computers and e-readers

Why It Matters

Audiences are catching on to their own scrolling (and they know a pitch-slap when they see one). Brand should seek to build interest with their audiences by giving people back some say in their experience and helping them reconnect with the thrill of an unexpected delivery. Ultimately, it's about making audiences a part of the creative process, not a product of it.

BRANDS + ADVERTISING + SOCIAL





+ THE DEI DIVIDE

+ DEI POLICIES IN FLUX

What is it?

The US's new administration pulled away from DEI initiatives, which has created a chasm in the brand world as brands continue to navigate what their response will (or won't) be.

Signals We're Seeing

- Companies that have rolled back DEI initiatives: McDonald's, Ford, Amazon, Target, Meta, and more.
- Companies that have maintained DEI initiatives: Costco, Sephora, Apple, Pinterest, e.l.f. Beauty, and more.
- Sephora's first international film "Beauty and Belonging", featuring conversations with over 75 Sephora employees and beauty brand founders

Why it Matters

The world is getting more diverse, not less diverse. As such, brands should seek to reflect the communities they serve meaningful ways. This serves as a strong reminder for brands to dig into their values and start internally, so they can best serve externally.



+ FLIPPING THE BRIEF

+ RISKY BUSINESS

What is it?

Brands taking big risks in campaign to intentionally create chaos and ultimately conversation

Examples

- “I Only Wear MAC” Nudes Campaign - challenging the idea that MAC nudes are about blending in, they’re about standing out and “sparking pop-cultural chaos”
- Coors Light “Case of the Mondays” - intentionally misspelling “refreshment” to spark a conversation and creating a whole collection around what it means to have a case of the Mondays and be extra chill about it

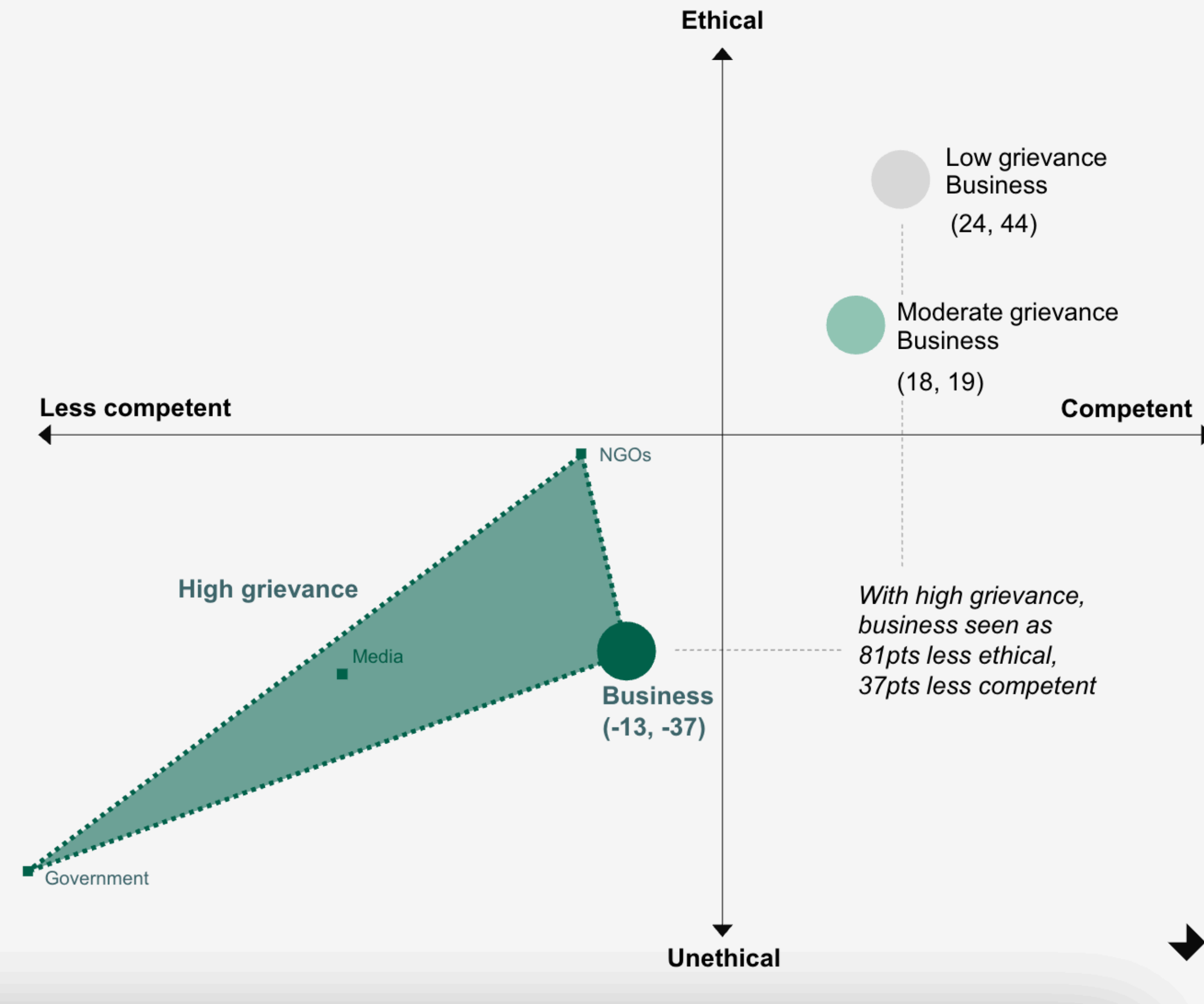
Why It Matters

Similar to when Wendy’s made its mark on the former Twitter for a signature snarky tone, this approach isn’t for every brand. However, it does make a case for reframing the problem and contextualizing the product in a stand-out way. We don’t ever recommend being different for the sake of being different, but there is something to say about looking for angles that aren’t on the typical path. There are many ways to do this, but consider the following:

1. Is the brief in need of a refresh? What has changed in the world around you that necessitates shifting the approach?
2. Ask the questions to your audience that are unexpected (and maybe even initially unrelated). They usually produce the best insights.
3. Observe. If you can’t break out of the typical problem on paper, get out into the world and see what happens. This is helpful to challenge assumptions or test hypotheses.



+ THE BUSINESS OF ANTI-BUSINESS



+ ALL EYES ON BUSINESS

What is it?

Business is stuck between being the aggressor and the saviour in certain circumstances. However, for it to be successful, people are demanding a thorough checks and balances system.

Signals We're Seeing

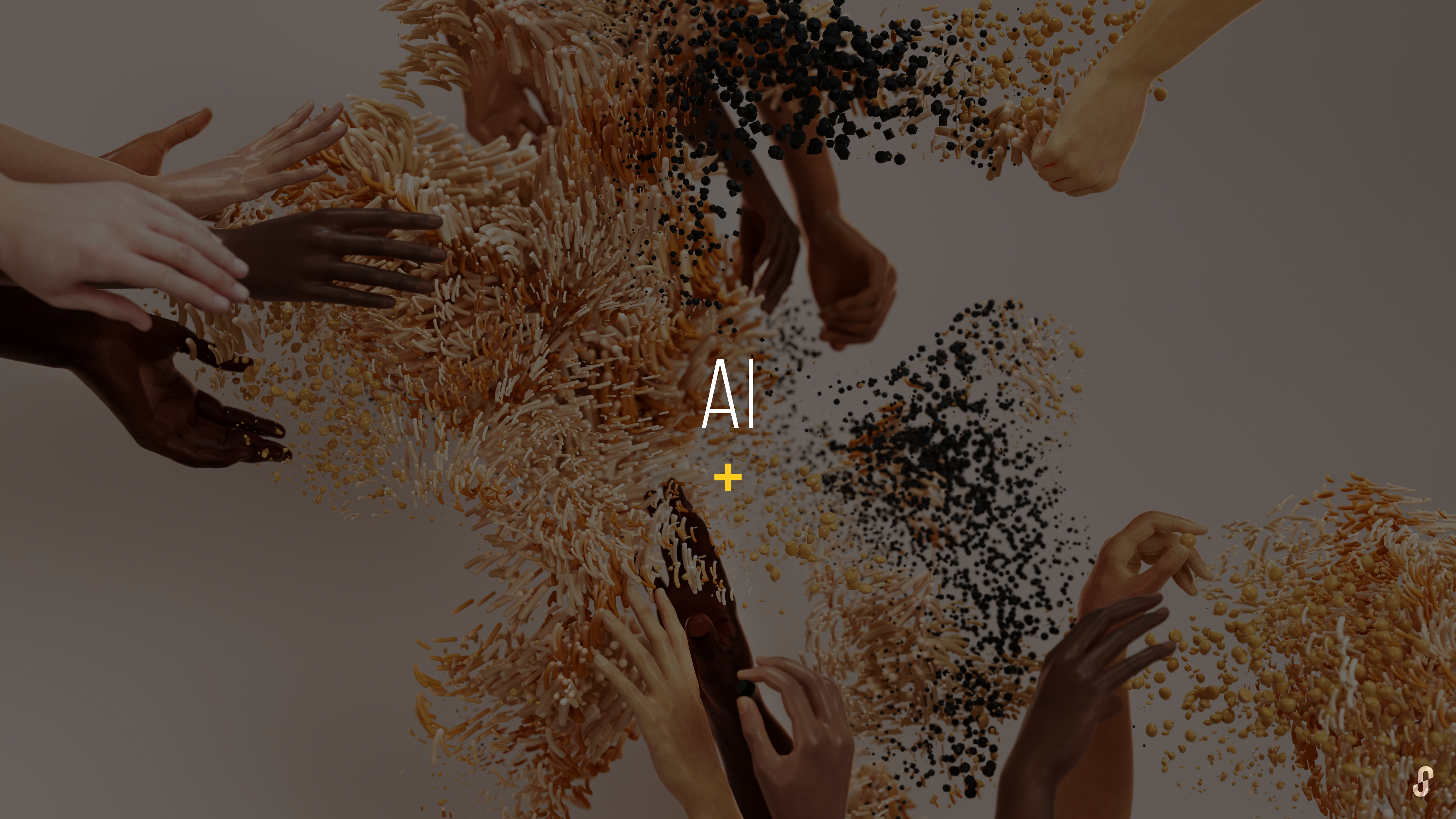
- Overall friction in the conversation of “purpose” and it lacking substance
- Edelman’s recently released Trust Barometer shows how “grievances” erode the trust placed in business to fix things
- Ben and Jerry’s taking a stand for its activism by taking parent company Unilever to court over ousted CEO (at the time this report was drafted)

Why It Matters

You can’t shout about purpose without the data and actions to back it up. Consider how joining forces with other industries helps strengthen your offering.

Edelman 2025 Trust Barometer

“Grievance Undermines Belief in Business Competence and Ethics”



AI

+



+ EFFORTLESS AI

+ EVERYDAY AI

What is it?

Though many of us having started using AI throughout our days, there is still a push for AI to be integrated in a more seamless way.

Examples

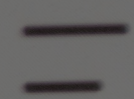
- Expansion of multi-modal AI
- Nudgetech - a set of AI-powered tools that enable personalization at scale and prompt users with communication tips (ultimately to help bridge widening collaboration gaps)
- Google One AI Premium becoming a part of phone plans (IE: Verizon)

Why It Matters

Intentionally organize your AI toolkit so that it feels less of an add-on, more of an integrated part. But do so responsibly. Test often and create clear use cases so your brand knows the role it plays.

4:17

60



New chat



Hi, I'm DeepSeek.

How can I help you today?

+ THE DEEPSEEK OF IT ALL



+ AI SAFETY FIRST

What is it?

Reinforces that we have a long way to go in understanding the potential and impact of AI systems.

Signals We're Seeing

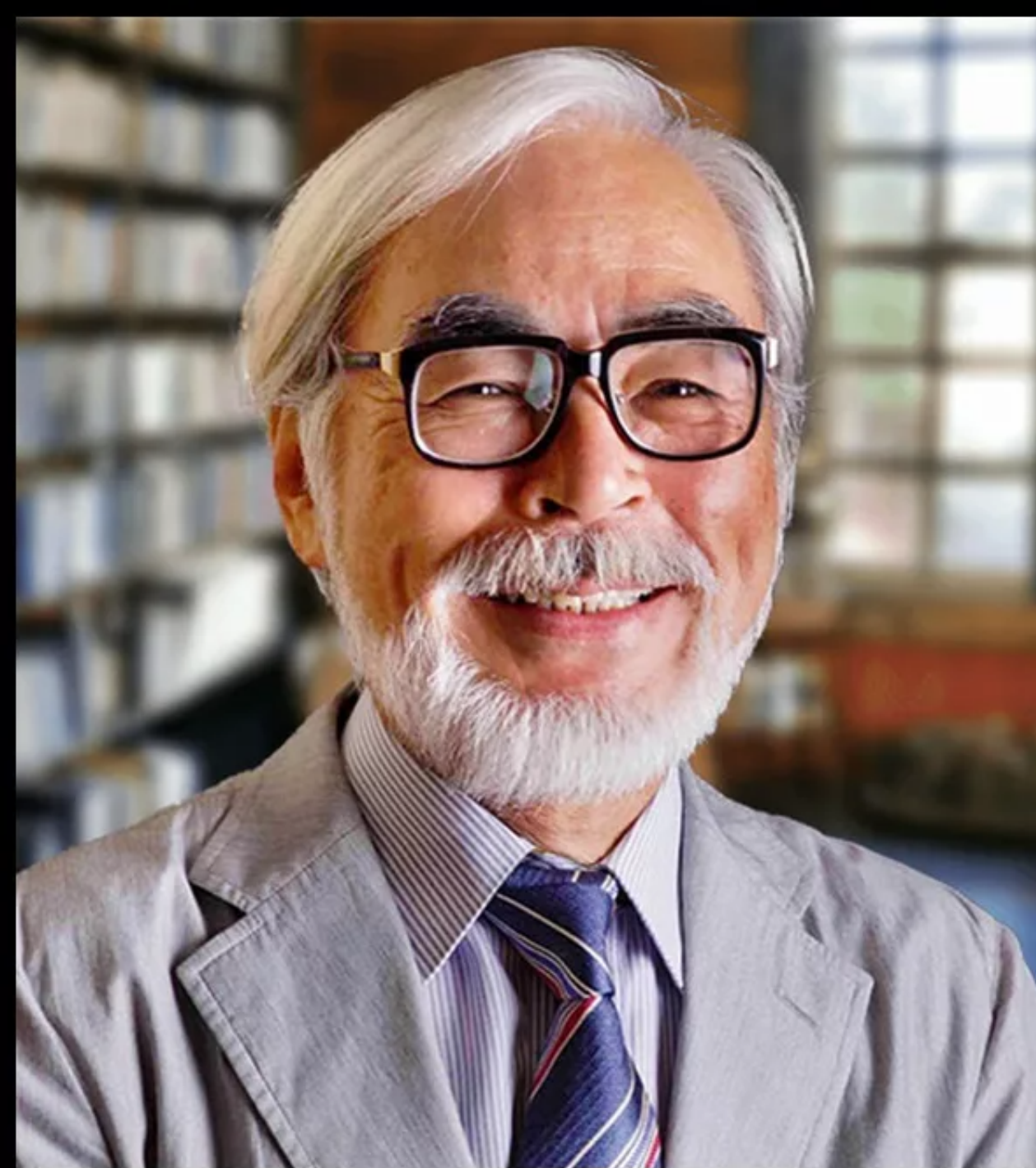
- Cisco and UPen published a report that showed how easy it was to bypass safeguards on DeepSeek and yield illicit or dangerous information
- Despite its impressive start, The Verge reports DeepSeek is getting the “TikTok treatment” as several countries look to restrict or ban the app at different public levels
- Concern around how good AI deepfakes are getting (take a look at OmniHuman-1)

Why It Matters

Understand where your data is coming from and where it's going. AI unlocks so many great ways of ideating and generating, but using it for this means a dedication to understanding the implications and limitations.



+ AI CREATIVE WOES



IT'S ALL FUN AND + GAMES UNTIL...

What is it?

AI creative trends continue to come and go rapidly. However most notably we've seen a real tension between when it's light hearted and when it's gone too far (and is too realistic).

Signals We're Seeing

- Controversy around Studio Ghibli-style AI images and filters being widely circulated
- Despite its impressive start, The Verge reports DeepSeek is getting the "TikTok treatment" as several countries look to restrict or ban the app at different public levels
- Popularity in social trends that leverage AI-generated images such as the action figure trend or the "asking AI to turn my pet into a human" trend

Why It Matters

It's important to establish a line between artistic license and copying clear and established artistic styles (that need credit where credit is due). AI is best used as a complement, but shouldn't be a replacement.

AI-GENERATED IMAGE

MIDDLE-MANAGEMAN





HOW TO GET IN TOUCH + WITH US

Church+State

416-588-3800

hey@churchstate.co

108A-219 Dufferin Street

Toronto, ON, M6K3J1

