



Treat Culture **2025** **& THE FUTURE** **OF PLEASURE**

*Understanding the Next
Decade of Indulgence*





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Introduction

A decade of treating ourselves

'LITTLE TREATS' CHANGED THE WORLD. WHAT'S NEXT?

Were you talking about 'little treats' last year? You'd be in good company.

A good amount of digital ink has been spilled on pearl-clutching headlines covering young people's ability to keep splurging on expensive coffees and similar little luxuries in a challenging economic environment – so-called 'Treat Culture' in action. At the same time, the idea that having a 'little treat' is the only feasible way to get through a single day of miserable adult life continues to be a resonant enough observation that, with each month, a new version of the 'little treat meme' is seemingly born into the virtual world. But as the internet trend cycle keeps on cycling, is our current obsession with 'little treats' destined for the dustbin of viral history? Or is there something deeper to be found in it's meme-y depths? Well – spoiler alert – it's the latter. Because in 2025 we don't just laugh about treat culture, we *live* in a treat culture and this report is dedicated to exploring what that means.



Susie Hogarth

Head of Cultural Strategy

Method & Scope

This report draws on a rigorous analysis of hundreds of cultural texts, images, & data points using a blend of trend analysis and semiotic techniques.

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**WHAT IS
TREAT
CULTURE?**

WHAT IS
TREAT
CULTURE?

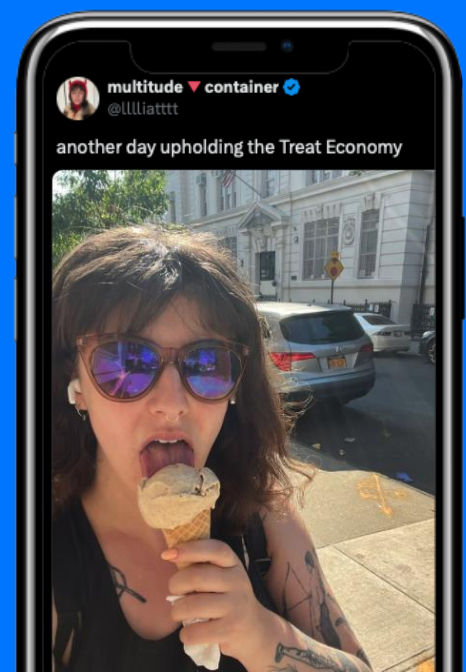
Treat

(noun) an event or item that is *out of the ordinary* and gives pleasure



Treat *culture*

(noun) a set of shared behaviours and beliefs built on the core value that events or items that give pleasure are an ordinary part of life, for anyone, at any time



Treat *culture*

Treat Culture describes a relationship to pleasure that has come to define consumption in the social media age. Treat Culture prioritises pleasure, comfort, excitement, and status, frequently, in everyday life.

In a Treat Culture, the extraordinary is ordinary, small treats are necessities and even the most mundane moments are opportunities for luxury, novelty, and self-expression.

For Gen Z, who came of age in a booming Attention Economy and precarious financial reality, Treat Culture isn't just a trend, it's arguably a rational, reasonable response to an increasingly unstable and unrewarding world.



“We have this expectation that people should move up in the ladder of life but there isn't a cost-effective way for young people to do that. If you're trying to have a ‘beginner mode’ in life – starter home, starter car, starter jobs, it's extraordinarily expensive. So you end up with this extension of youth.”



Kyla Scanlon
Financial Content
Creator & Educator

Treat culture is characterised by three key things...



OBJECTS

The rise of little luxuries

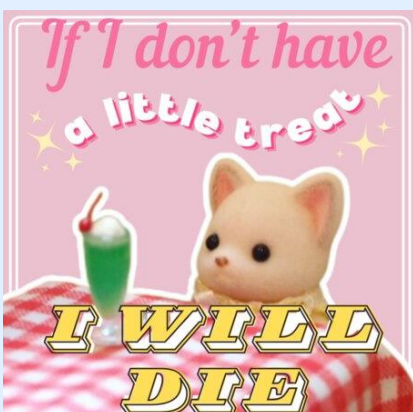
From premium groceries, through to entry-price luxury goods, products that add a moment of specialness, delight and status to otherwise normal routines continue to grow in popularity, even as people cut back on essentials in times of financial strife.



RITUALS

The aestheticisation of the everyday

On the perma-stage of social media, making things visually pleasing has become a powerful form of cultural capital. Previously mundane micro-moments throughout the day - like filling the fridge or commuting to work - transform in a Treat Culture into canvases for delight, self expression and status.



SYMBOLS

Memes celebrating the right to treat

Dotted over the internet in their thousands, 'little treat' memes reinforce the idea of small indulgences as an inalienable right, framing them as essential coping mechanisms in an overwhelming world.





**WHAT
CREATED
TREAT
CULTURE?**

WHAT CREATED TREAT CULTURE?

What created Treat Culture?

Financial gloom, social media impulsivity and the growth of the wellness industry have given rise to a world in which we can't *not* give in to our needs for comfort, delight and stimulation and status at any moment.

Wellness → **Has reframed pleasure & indulgence as self care in a stressful world**

Mobile Banking → **Has made spending easy, instant and social**

Economic Stagnation → **Has made small status symbols more attainable than big milestones**

Social Media → **Has made the whole day feel like a moment for performance and sharing**

Smart Phones → **Have turned us into dopamine-addicted pleasure seekers**



WHAT CREATED TREAT CULTURE?

Treat Culture: A brief history

Against a backdrop of political and economic instability, social commerce and growing wellness trends, a playful but nihilistic mindset of “*f*ck it, I deserve it*” emerged in culture (and in spending)

ORIGINS (2010 – 2015)

In the wake of the financial crisis, economic optimism dwindled in parallel to the growth of distrust in governments. As social media gained cultural and political power, a new “f-it” mindset* was captured in new treat memes in Parks & Rec and on Reddit. Economists found that women 18-40 spent more on makeup while cutting back elsewhere, in a classic example of the ‘lipstick effect’ reemerged [BLS]



GROWTH (2016 – 2020)

As Trump and Brexit fuel widespread disillusionment, activism flourishes across digital spaces, and Little Treat memes evolve into both coping mechanism and critique - mocking burnout culture, late capitalism, and ironically celebrating self-care as survival. As disposable income tightened, spending on small luxuries surged; LVMH’s ‘little luxuries’ category grew almost twice as fast as the company overall in 2016, up 9.7% [LVMH]

“Trust is the most expensive commodity in the world, and we’ve outsourced it to brands. That’s why people are going out there and saying ‘I’m just going to buy this so I can feel something again’”



Kyla Scanlon Financial Content Creator & Educator (Talking to Firefish)

NORMALISATION (2016 – 2020)

As Covid lockdowns confined people to their homes, the desire for cosiness and controlled daily pleasures intensified, making small indulgences feel essential. TikTok’s rise fuelled a hypervisual, hyperdynamic culture where Little Treat memes shed their satire, becoming sincere expressions of a new attitude to consumption. Treat Culture was now the norm, woven into daily life. Even amid economic uncertainty, U.S. consumers turned to premium groceries - alcohol, specialty coffee, meal kits, and spices, prioritising small luxuries as everyday comforts. [Circana]



Georgia Parke
@nationalparke

americans can have a little health care, as a treat

04:08 AM · 16 Dec 2019

Reply Retweet Favorite



WHAT CREATED TREAT CULTURE?

✓ TODAY (2025)

In 2025 Treat Culture has reached maturity

Arriving in 2025, Treat Culture has reached full saturation. The forces that once fuelled its growth; economic instability, social media hypervisibility, and the prioritization of mental well-being, haven't faded. If anything, they've intensified.

And so, for Gen Z and Gen Alpha, the memeified logic of Little Treats has become second nature, influencing their relationship to food, status, luxury and pleasure.

It has created a generational indulgence divide. According to a global study of over 15,000 consumers by Alix Partners, released in December 2024, consumers are universally planning on cutting back discretionary spend in 2025, apart from Gen Z, who intend to spend more [Alix Partners]

"There's a level of discretionary spend that people would normally allocate towards a home. But because homes are so out of reach, especially in the UK, they're embracing what some people are calling financial nihilism. Spending more on designer goods, spending more on luxury items, spending more on vacations. From their perspective, what's the point of saving?"



Kyla Scanlon Financial Content Creator & Educator
(Talking to Firefish)

Treat Culture 2025 in numbers

PREMIUM INCREASE

+14.6% increase in premium own-label supermarket products (UK) (home.barclays)

SPENDING DOUBLE

Gen Z spends nearly double the UK average on eating out (16% of income) (home.barclays)

GROWING 3X FASTER

20% of global luxury sales now come from Gen Z, spending growing 3x faster than older generations (statista.com, retailboss.co, ons.gov.uk)





**WHAT
DEFINES
TODAY'S
TREATING
MINDSET?**

WHAT DEFINES TODAY'S TREATING MINDSET?

Today's treating mindset is defined by four key beliefs

Over the past decade, Treat Culture has shaped how young people think about pleasure, consumption, and indulgence. These aren't just trends, they are deep-seated mindsets that are set to maintain their influence on spending, decision-making, and self-expression, over the next decade.

01



In treat culture
**WE MAXIMISE
THE MOMENT**

Every experience should
be optimised for pleasure

02



In treat culture
**INDULGENCE
IS CONTROLLED**

Pleasure is curated, not chaotic

03



In treat culture
**SNACKS ARE
ENTERTAINMENT
& FOOD IS STATUS**

What you eat is a statement

04



In treat culture
**EVERYONE
IS ENTITLED
TO LUXURY**

Luxury is a right, not a privilege



01

In treat culture

WE MAXIMISE THE MOMENT

Millennials and their elders grew up in a world of delayed gratification, where patience was met with reward. Shops closed on Sundays, TV followed rigid schedules, and adult financial stability felt attainable (in theory). But Gens Z and Alpha, born into an on-demand digital environment, have come to expect instant access to entertainment, connection, and commerce, while simultaneously feeling shut out of traditional economic milestones.

The result? A 'hedonistic present' mindset, where treating becomes a daily necessity in a world where the future is deeply uncertain.



Everyday is a gift

Hauling, scrolling, unboxing: In 2025, the treating mindset has turned the expectation of continuous micro-delights into a cultural and commercial norm



John Lewis' £195 luxury beauty advent calendar sold out twice in 2024

Year-round self gifting grows via luxury box sets

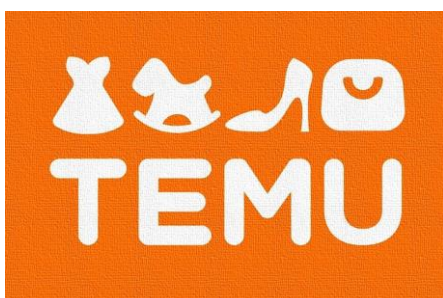
Nothing captures the 'maximise the moment' mindset of Treat Culture quite like the luxury advent calendar boom. Previously reserved for holiday countdowns and cheap chocolates, advent calendars now span everything from premium cheeses to high-end cosmetics - transforming December into a month-long celebration of self-gifting. This desire for everyday unboxing is now spilling across categories, with brands like *Brightland* driving rapid growth through gift boxes and curated collections of posh groceries and booze that offer micro-moments of delight year-round.

Dopamine brands deliver a visual sugar rush for treat-seeking browsers

In a Treat Culture Attention Economy driven by constant pleasure and stimulation-seeking, thumb-stopping visuals are the fastest way to tap into consumers' treat-seeking reward centres. Enter the rise of "Dopamine Branding", a term used to describe aesthetically-intense brand identities designed to deliver a rush of stimulation and delight to browsers wired to seek pleasure. See the acid-bright designs of Gen Z-targeting food brands like *Fly By Jing*, *CHOMPS*, and *Omsom*.



Spicy noodle brand Omsom hacks attention with its highly saturated and vivid colour palette



Budget retailers Temu, Shein and Vinted have normalised self-gifting as a daily practice

With the rise of budget e-tailers, the postman rings daily

With their rock-bottom prices making self-gifting financially feasible on an almost daily basis, platforms like *Temu*, *Aliexpress*, *TikTok Shop*, and *Vinted* have normalised a mindset of everyday indulgence and habitual self-reward. As this behaviour scales, so does the industry behind it - the global courier and delivery market is projected to reach an enormous US\$ 895.23 billion by 2034. [GlobalNewsWire]





“When I think about the amount of stuff I’ve bought on Vinted or TikTok that I really didn’t need, it’s quite depressing.

Half the time, the most exciting part is just waiting for it to get delivered, then it goes back into a wardrobe or cupboard and I barely see the item again”

Female, 23, Manchester

The Great Dopamine Dilemma

However, as we increasingly question our reliance on daily dopamine, the *maximise the moment* mindset is set to evolve in two distinct directions...



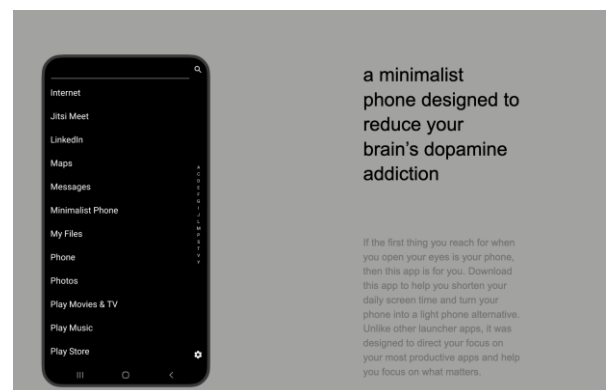
Immersive experiences will grow more ambitious as both the war for attention intensifies and internet of the senses arrives

Advances in technology and 'the internet of the senses' will create even more powerfully indulgent micro-moments

As we move toward the Internet of the Senses, (projected by Ericsson to be mainstream by 2030), the ability for brands to lean into the treating mindset and deliver immersive and multisensory consumer experiences will expand exponentially. Haptic feedback, VR-enhanced retail, scent marketing, and reactive interfaces will elevate even the smallest brand interactions into indulgent, sensorially-rich moments of micro delight.

While Gen Z leads the great dopamine detox

However, as the constant pursuit of micro-indulgence begins to feel overwhelming, a counter-movement toward dopamine detoxing and structured pleasure is loudly emerging. Gen Z are leading the way in seeking more intentional ways to build stability, structure, and long-term gratification into their lives – from creating 'dopamine menus' to curate sustainable highs for everyday life; to full-on detox programs designed to free you from your phone.



App, books and DIY wellness techniques promising to help dopamine addicts detox have peaked in popularity in the past 12 months (picture: minimalist phone)



A generation stuck in perpetual adolescence seek the soothing stability of 'adultcore'

Now, having been raised in a culture of hedonistic presentism, a shift in aspiration is taking place, as younger generations are reimagining adulthood as a desirable lifestyle defined by elegance, control, and earned indulgence. This romanticisation of adulthood is already expressing itself in fashion, with aesthetics like Corporate Core, Office Siren, and Old Money framing classic markers of responsibility - workwear, heritage, financial security, and routine - as highly coveted status symbols.

'Corpcore' and other microtrends that celebrate the once-dreary responsibilities of adult life are thriving in a culture where adulthood is out of reach for many. Picture: Pinterest



What role could your brand play in *Treat Culture*?

The Everyday Delighter

ROLE

Dedicated to bringing moments of sensory joy to otherwise ordinary moments of their customers' daily lives, The Everyday Delighter weaves a thread of micro-delights through the customer journey with uniquely hooky, shareable experiences, transforming functional interactions into joyful touchpoints. For brands ready to push boundaries, The Everyday Delighter can evolve into a Mind Blower, leveraging multisensory branding and cutting-edge technologies to deliver unexpected, immersive experiences.

WHAT DOES IT LOOK LIKE

- *Personalised packaging surprises*
- *AR-enhanced interactions*
- *Thumb-stopping aesthetics*

WHO'S ALREADY DOING IT?

- ❑ Duolingo's addictive UX and haptics
- ❑ Dopamine branding from *Fly By Jing* and *Poppi*
- ❑ Sharable, elevated packaging and gifts from social-first beauty brands *P.LOUISE*, *Made by Mitchell* and *Isamaya*

The Coach

ROLE

Committed to offering coaching and structure to Treat Culture detoxers looking to free themselves from dopamine addiction and pursue meaningful, long-term goals, The Coach balances instant gratification with stability, helping people sustain pleasure in a way that aligns with their ambitions, building deeper, more enduring relationships with them.

WHAT DOES IT LOOK LIKE

- *Gamified savings and wellness apps*
- *Audio coaching for career and fitness goals*
- *'Slow dopamine' release activations e.g. painting, drawing and reading*

WHO'S ALREADY DOING IT?

- ❑ Self-care and savings app like *Finch* and *Brightfin*
- ❑ Self-improvement mega podcasts e.g. *Diary of a CEO*
- ❑ Frugal and FIRE communities on Reddit



In treat culture

SNACKS ARE ENTERTAINMENT & FOOD IS STATUS

After a decade of mukbang and food pics, social media has normalised the idea of food as a performance. And when performance is layered onto food's core functions (nourishment, taste, and comfort) it shifts from a personal experience to a social and aesthetic statement.

Eating becomes an opportunity for stimulation, self-expression, and connection, where any meal can be optimised for discovery, novelty, and status as much as taste.



Edible Spectacles

In 2025, food is more than just sustenance, it's entertainment and experience. Treaters are seeking out foods that offer more than deliciousness, as they add thrills, novelty and vibes to the snack value equation.



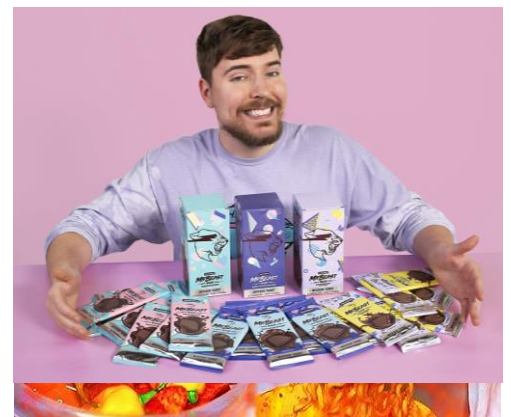
World's most successful creator, Mr Beast, has made a fortune selling snacks imbued with his chaotic high-octane spirit

Sensory extremes and viral flavours are still driving snack culture

The demand for bold, intense, and high-sensory snacking isn't slowing down, as spice continues to drive viral food trends. Hyper-spicy, sour, or intensely flavoured snacks have seen brands like Buldak go viral (with sales to match) by tapping into the thrill-seeking, sensory-maxing behaviour of enthusiastic treaters, turning everyday treats into an adrenaline hit and shareable experience

Vibes-based snacking is a commercial force

Now creators are turning snacks into mood-driven experiences, embedding their distinct vibes into every bite through savvy social-first and personality-first brand building. Snacks from influencers are as much about attitude and emotion as they are about flavour. MrBeast's Feastables (\$500M revenue in 2024 [TIME]) embodies his chaotic, larger-than-life persona. These aren't just products—they're edible expressions of their creators' signature energy, offering fans a way to 'taste' the world through their lens



Taki noodles went viral thanks to their extreme spiciness, inspiring online challenges



Pastel hued cookware brand Our Place has grown amidst the trend for status-boosting premium cookware

Food status symbols and social trophies are elevating dinner tables

Treaters are increasingly seeking moments of status-boosting gastronomic sophistication, even while the cost-of-living-crisis puts pressure on purse strings. This desire for aesthetic food objects is reflected in the growth of the global tableware market, which is projected to reach \$63.7 billion by 2030 [GlobalNewsWire] and the hype around kitchenware – a recent *Le Creuset* discount sale led to four-hour queues and police intervention [Guardian].



Serving Social Status

Now, food's function in treat culture is evolving. Borrowing from fashion and fandom, it's amplifying its role as a fluid source of cultural currency, with brands and creators meeting Gen Z's desires to use food to flex their membership and insider knowledge of fast-moving digital tribes.



5th wave coffee brands like BigFace borrow streetwear and fashion aesthetics to create a sense of community and identity (Image: BigFace)

Food brands are by adopting entertainment and drop culture to build fandoms

If, in a treat culture, food is entertainment, then the natural evolution is for food brands to cultivate their own fandoms. Limited edition drops, branded merch, and streetwear-inspired aesthetics harness the mechanics of online fan culture, where exclusivity and cultural currency drive loyalty. This shift is reshaping youth-focussed FMCG, notably seen in Gen Z coffee brands like *BigFace*, *Chamberlain Coffee*, and *Top of the Mornin'*, who offer not just a product, but a sense of belonging to a half-real, half-imagined gang.

Food brands are adopting entertainment and drop culture to build fandoms

When Treat Culture food brands aren't cultivating fandoms, they're borrowing from the luxury and fashion playbook - using scarcity, exclusivity, and cultural cachet to amplify their status. Unexpected collaborations, like *Fortnum & Mason x Get Baked* or *Greggs x Primark*, use irony and play to create 'treating' moments of cultural capital, turning everyday items into winking status symbols. Meanwhile, the still-growing trend of supper clubs, like *2sday*, *The Candid Club*, and *Dinner for One Hundred*, transforms culinary experiences into a gateway for belonging in tight-knit, curated (exclusive) communities.



Playful collaborations create intrigue and hype amongst foodies in the know. (Image: Get Baked x Fortnum & Mason)

Meanwhile social media chefs perform identity, as the body becomes the recipe



Social media stars like Nara Smith use cooking videos to perform identity and status (Image: TikTok)

Social media chefs aren't just making meals, they're performing identity. Their gestures, tone, and physicality turn cooking into a cultural language, signaling aesthetic, tribe, and worldview. Nara Smith, known for her tradwife-inspired homemaking rituals, embodies this shift. Her slow, hyper-curated cooking videos turn kitchen labour into an aspirational act. Her recent socially-native *Marc Jacobs* ad collapsed fashion, food, and self-making into one piece of super sticky content. In treat culture, identity itself is something we craft, knead, and cook, one sixty-second-video at a time.



What role could your brand play in *Treat Culture*?

The Alchemist

ROLE

The Alchemist doesn't just market a vibe - they build it into the product itself. By taking a cultural mood, aesthetic, or attitude and turning it into a physical, sensory experience, The Alchemist ensures that every bite, sip, or unboxing feels like stepping into a moment. Whether it's through bold aesthetics, interactive elements, or unexpected twists, this role makes food feel like an act of self-expression and entertainment.

WHAT DOES IT LOOK LIKE

- *High intensity ingredients and flavours*
- *Interactive packaging and products*
- *UGC-seeding challenges and recipes*
- *Personality-led brands*

WHO'S ALREADY DOING IT?

- ❑ *Buldak noodles' viral spice*
- ❑ *Little Moons dreamy mochi*
- ❑ *Feastables vibes-based snacking*
- ❑ *Doritos social media strategy*

The Concierge

ROLE

The concierge doesn't just sell a product, they curate a world around it. By leveraging creative collaborations, merch drops, and socially-buzzy activations, The Concierge transforms food and drink brands into cultural destinations. Whether premium or mass-market, success comes from starting from a clear, confident POV, ensuring the brand feels magnetic, not try-hard.

WHAT DOES IT LOOK LIKE

- *High-low and cross-category collabs*
- *Limited merch drops*
- *Curated, exclusive IRL brand pop-ups that double as social content factories*
- *Food-centric content and events*

WHO'S ALREADY DOING IT?

- ❑ *Chamberlain Coffee's merch and content*
- ❑ *Mold and Slop magazines blending of food and social clout*
- ❑ *Norman's Café's merch & fashion activations*



In treat culture
**EVERYONE
IS ENTITLED
TO LUXURY**

A global influx of middle-class consumers into the luxury category, coupled with deep access to brands and information on social media, has cemented Treat Culture's connection with everyday prestige.

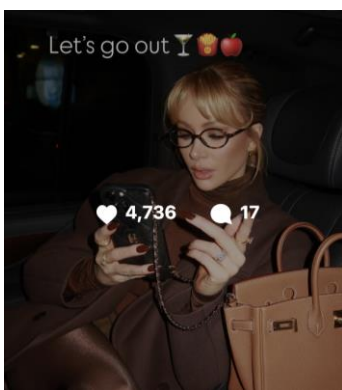
No longer an aspiration just for 'others', luxury is now an expectation for many; something to participate in.

Today's consumers seek status symbols and prestige pieces that seamlessly integrate into daily life. In response, the luxury sector is evolving, leaning into deeper cultural codes, insider knowledge, and more nuanced expressions of status to maintain its allure in an era of hyper-accessibility.



Everyday Exclusivity

Social media has democratised luxury expertise, making knowledge, not just wealth, the new status marker. As insider understanding of brands, craftsmanship, and cultural codes spreads, consumers seek products that signal fluency, blurring the lines between luxury and everyday indulgence.



Entry-point luxuries like the Miu Miu spectacles have gone viral on social media (image: TikTok)

Fashion enjoys a growing sweet spot for entry-level luxury

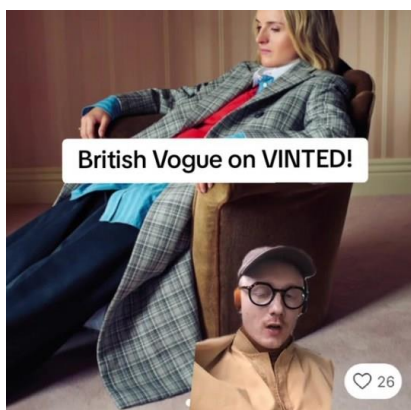
The "just attainable" tier of luxury is booming, as brands expand their offerings to capture aspirational middle earners and the fashion-conscious middle class. The success of Louis Vuitton's \$2,030 Neverfull tote (BoF) and the rise of Miu Miu's €393 Regard optical glasses highlight a shift toward quieter, more insider-coded pieces; in contrast to the monogrammed trophy bags that have dominated entry-level luxury in the past. As fashion knowledge becomes more democratised, these items signal status to an ever-growing number of 'fashion girlies' in the know.

Meanwhile premium groceries apply the same 'entry-level luxury' formula to food

Driven by treat culture's dual obsessions with food and luxury, accessible status symbols in grocery are a growing category. In the UK, supermarkets experienced a 14.6% increase in premium own-label sales in 2024 with Sainsbury's Taste the Difference line growing 16% year-on-year, and Tesco's Finest* range up 15.5%. [WARC] For the committed treaters, next-gen food retailers like DELLI Market feel more like vinyl stores or boutiques than greengrocers, with limited 'drops', aestheticised packaging and an emphasis on creators' stories.



Rising star food start-up Delli saw its customer base grow 16 times over in 2024, with its Gen Z-focused strategy of curating 'little luxury' groceries (image: Delli)



British Vogue on VINTED!

Even Vinted has been co-opted by fashion insiders, with Vogue launching on the platform (Image: TikTok).

Secondhand Luxury is growing up and getting serious

Preloved is no longer a compromise; it's an elevated, insider-driven entry into luxury that speaks to treaters' desire for accessible price points and the clout of rare, knowledge-flex pieces. Now, the market is expanding to keep up. Reseller Luxe Collective's TikTok has exploded, reaching 1.5M+ followers with its highly informed take on navigating luxury fashion, while The RealReal and Vestiaire Collective continue to thrive [BoF]. Meanwhile, brick-and-mortar consignment stores are booming across the U.S., as secondhand luxury moves into its grown-up era. [Vogue Business].



“I feel like what ‘I deserve’ is just getting bigger and bigger.

I should be eating out multiple times a week, booking big holidays. Because it feels like everyone else is?

Every catch-up convo with friends is, ‘you got anything booked?’, ‘been anywhere cool?’ etc. Basically, its always centred around spending, so if I don’t spend, I just don’t have much to talk about.

Female, 25, Manchester

Immersive Affluence

As deep luxury knowledge goes mainstream, breadth of awareness is reshaping expectations across the market. In response, brands are evolving both high-end and everyday indulgences as status markers, from supermarket premiumisation to archival trophies and ironic exclusivity.



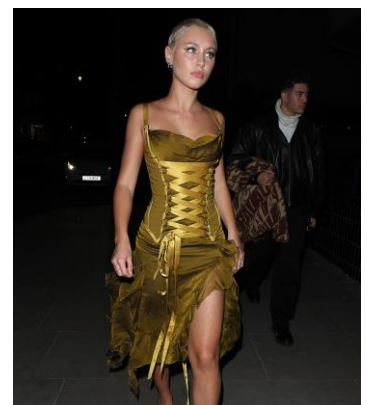
Walmart's \$40 dupe for iconic luxury handbag, the Hermès Birkin created significant controversy, but also sold out almost immediately (Image: YouTube)

Luxury is heading to the supermarket

The ongoing premiumisation of Treat Culture is reshaping expectations even for the most routine shopping occasions. From Walmart's controversial Birkin dupes to the cult of Harrods' Food Hall on TikTok, the idea that a trip to the supermarket can also be an in-road into a luxurious treating experience is gaining traction in popular culture and consumer sentiment.

Archival trophies grow in power as a status symbol

With deep luxury knowledge now mainstream, status is shifting further from ownership to rarity, cultural fluency, and the ability to weave personal storytelling into style and consumption. Archival fashion no longer just signals wealth; it reflects connoisseurship, insider knowledge, and even lineage in a celebritocracy where soft legacy holds value. In a Treat Culture where luxury is democratised, "archival" will increasingly replace "preloved" and "vintage," in the language of second hand, emphasising the wearer's expertise and access.



Model, actress, content creator and daughter of celebrities Iris Law flexes her cultural clout in Y2K Versace, as seen on Beyoncé



Loewe leans into the complexity and delight of humour with their 'Decades of Confusion' campaign featuring comic actors Aubrey Plaza and Dan Levy

Wit and whimsy are emerging as the New Codes of Luxury

As luxury navigates a hyper-democratised, social media-driven landscape, brands are turning to humour, surrealism, and absurdity to maintain a sense of exclusivity and aspiration. Jacquemus has mastered this shift, using irony and playful exaggeration to reinforce desirability while maintaining a luxury edge. Now, Loewe is scripting skits for Aubrey Plaza and Dan Levy, as the quicksilver nature of wit – ever-changing and slightly inaccessible – makes it an ideal signifier of status in a mature Treat Culture landscape.



What role could your brand play in the future of *Treat Culture*?

The Maverick

ROLE

The Maverick ignores category rules. While others compete on price or safe premiumisation, The Maverick transforms everyday products into objects of desire through bold creativity. In a Treat Culture craving emotional reward, it turns routine purchases into moments of joy and discovery.

WHAT DOES IT LOOK LIKE?

- *High-low collaborations*
- *Unexpected and ironic dupes*

WHO'S ALREADY DOING IT?

- ❑ *Hellman's x Chopova Lowena*
- ❑ *Walmart's Birkin dupe*

The Archivist

ROLE

The Archivist rifles through their back catalogue to inspire audiences to connect with their identities and cultural roots. By reviving past products and artifacts, they transform brand history from a corporate relic into a personal touchpoint, inviting Treaters to use premium purchases to tell insider stories and flex their cultural clout.

WHAT DOES IT LOOK LIKE?

- *Archival resale collections*
- *Recent vintage (last twenty years)*
- *Relaunching from the back catalogue*

WHO'S ALREADY DOING IT?

- ❑ *Vintage 90s Ralph Lauren pop-up in Superdry London*
- ❑ *Prada's re-edition range*
- ❑ *Taco Bell's Volcano menu relaunch with Paris Hilton*



In treat culture

HEDONISM IS CONTROLLED

Indulgence used to be about losing yourself and losing control - now it's about curating the right kind of excess.

Younger generations are drinking less, partying less, and having less sex, but they aren't experiencing less stimulation. Instead, indulgence and intimacy have moved from the physical to the digital realm.

As the offline world becomes more restrained and optimised, hyper-sexualised content, parasocial relationships, and algorithmically-optimised obsessions play out on screens. In a Treat Culture, pleasure hasn't disappeared - it's been filtered, curated, and controlled.

"People have now outsourced all of their community to the Internet."



Kyla Scanlon *Financial
Content Creator & Educator
(Talking to Firefish)*



Control Through Content

Today, the wellness mantra of "everything should optimise my *well-being*" has merged with the Treat Culture ethos of "everything should optimise my *pleasure*," fueling a cross-category explosion of permissible indulgences. These new-wave treats are reshaping the way indulgence looks and feels, as purity and mental escape take precedence over sensuality and "guilty pleasures".



Poppi's combination of fun, community and wellness saw it lauded by Forbes as 'reshaping soda culture for Gen Z'

'Hybrid' drinks and snacks make pleasure and wellness into a zero-sum game

Fusing indulgently opposing drinks and snack categories (e.g. flavoured soda and probiotics like *Poppi* or protein-enhanced chocolate bars) hybrid drinks and snacks have emerged in a Treat Culture where the abiding expectation is that all pleasure can be optimised for both indulgence and wellbeing. The fusion beverage market is tipped to grow by 6.2% YOY to 2030 [GVR]

Carnal pleasures can be optimized and premiumised too

Next-gen sexual wellness brands like *Maude* and *Hello Cake* speak to a growing cultural desire to navigate the chaos of human sexuality with the addition of reassuring wellness benefits. The popularity of its ethical and natural products like 'aloe-based lubricants' and daily arousal gummies has seen *Maude* expand to 33 countries and onto the shelves of *Sephora*.



Maude's controlled approach to sexual wellness typifies Treat Culture's controlled relationship with carnal desires



Sweet Cheeks Gelato promises a disembodied, transcendent form of pure indulgence

The visual language of indulgence is shifting from physical pleasure to mental escape

In Treat Culture, mental stimulation is more palatable and aspirational than full-bodied indulgence. In this landscape, the new semiotics of pleasure are shifting away from bodily hedonism toward dreaminess, transcendence, and a more curated, controlled sense of escape. This is particularly evident in ice cream, where emerging brands like *Sweet Cheeks*, *Little Moons*, and *The Dreamery* restaurant in London are leaning heavily into dreamlike visuals and language. These emerging codes promise all the pleasure of indulgence - without the intensity, risk, or loss of control that traditional hedonism implies.



Control Through Community

As Gen Z - the 'loneliest generation' - seeks to reconnect and find genuine intimacy, their desire for control remains. Treaters are seeking out experiences and products that offer safe, premium spaces for indulgence, where closeness and pleasure are balanced with a sense of freedom and comfort.



From chess clubs to listening bars, curated and organized fun makes hedonism palatable in a treat culture (Image: Next Door Records)

Organised fun is on the rise

As Gen Z rejects isolation, they are redefining socialising - seeking structured, intentional experiences over chaotic nights out. Now highly organised events and nights out, from mahjong clubs to gentle listening bars, are growing in popularity. The chess night in the basement of Downtown L.A.'s *Rhythm Room* boasts 200 weekly attendees paying \$60 a ticket [Time Out].

Supper clubs use food as a gateway to community and status

Meanwhile supper clubs, chef-led pop-ups, and private dining experiences are booming as Treat Culture's obsession with food sees it emerge as a powerful IRL social filter and status marker. These gatherings aren't just about eating, they are controlled, high-status social spaces. From London's *Spoons Supper Club* to New York's *Dept of Culture*, invite-only dining experiences offer elevated intimacy, exclusivity, and social capital.



Supper clubs turn Treat Culture's obsession with food into a form of social filtering and curation. (Photo: Department of Culture on Instagram)



Pinkydoll reacts to 'gifts' from her millions of livestream viewers, acting out human 'emotes' to say thankyou, in the style of a video game character

And online, mechanisms for digital intimacy are multiplying

While Gen Z seeks to rebuild connections IRL, the demand for virtual intimacy remains powerfully in play. In the wake of skyrocketing post-pandemic pornography consumption, more softcore, interactive avenues for digital intimacy are also multiplying. TikTok is pioneering new ways to foster platonic connections between creators and audiences, with features like 'live gifts,' where viewers purchase virtual offerings during livestreams in exchange for a personal thankyou or instant response. Creators like @PinkyDoll, with 1.9 million followers, are reaping the rewards.



What role could your brand play in *Treat Culture*?

The Ritualist

ROLE

The Ritualist transforms indulgence into a controlled, almost sacred experience - where the mind is free to revel, but the body stays clean. By designing pleasure with precision, The Ritualist turns treating into an elevated, intentional act, whether through sophisticated non-alcoholic drinks, sensory-driven wellness treats, or immersive consumption rituals. This is hedonism without chaos - pleasure with purpose.

WHAT DOES IT LOOK LIKE

- *Transcendent aesthetics e.g. ethereal visuals, dreamy textures, celestial cues*
- *Mental over physical indulgence; surprise, delight, and sensory-driven rituals*
- *Purity-infused pleasure; wellness ingredients in traditionally indulgent treats*

WHO'S ALREADY DOING IT?

- ☐ Poppi
- ☐ Sweet Cheeks
- ☐ Surprise Scoop Ice Cream, NY
- ☐ The Dreamery, London

The Moderator

ROLE

The Moderator makes social connection effortless by removing friction and creating structured, rewarding spaces for people to interact. Whether through carefully designed social platforms, curated in-person experiences, or guided group dynamics, The Moderator sparks real intimacy - not through chaos but through thoughtful facilitation.

WHAT DOES IT LOOK LIKE

- *Supper clubs and literary salons*
- *IRL social networking nights*
- *Intimate online spaces for purposeful connection*

WHO'S ALREADY DOING IT?

- ☐ Harper's Bazaar's literary salon
- ☐ Dua Lipa's Service 95 book club



What is Treat Culture?

Premium own-label products are growing, now accounting for 7% of UK supermarket sales.

- Sainsbury's 'Taste the Difference' grew 16% YoY, Tesco's 'Finest' grew 15.5%. [Retail Gazette] <https://www.retailgazette.co.uk/news/2024/sainsburys-finest/>
- In the U.S., Kroger's 'Private Selection' premium range is expanding, offering upscale products at competitive prices. [Emarketer] <https://www.emarketer.com/content/kroger-private-selection-q4-2024-sales-performance>

Consumers are investing in high-end home dining experiences, driving demand for kitchen appliances and designer homeware.

The UK homeware market was valued at £14.32 billion in 2023 and is projected to grow 1% annually until 2028. [GlobalData] <https://www.globaldata.com/en/report/uk-homeware-retail-market-analysis>

Gen Z spends nearly double the UK average on eating & drinking out (16% vs. 8% of discretionary income) [Home.Barclays]

- <https://home.barclaysinsights/2024/11/gen-z-lives-on-ten-4/>
Spending on food & drink is 16% of discretionary income for Gen Z, compared to 8% for the average adult. <https://www.barclays.com/press/2024/11/gen-z-lives-on-ten-4/>
- Food & drink remains Gen Z's top spending category in the U.S. [Statista] <https://www.statista.com/chart/13544/generation-z-food-consumption-in-the-us/#table4Chart>
- The premium snacks market is projected to grow at a CAGR of 4.8% from 2025 to 2030. [Mordor Intelligence] <https://www.mordorintelligence.com/insights/premium-snacks-market>

We Maximise The Moment

Gen Z favours a "hedonistic present" time perspective, unlike older generations. [Brill] https://brill.com/view/journal/1611/article-p31_004.en/1604000000

Traditional markers of adulthood (job security, home ownership) are increasingly out of reach.

- Global home ownership is declining, delaying independence & family formation. [EIU] <https://www.eiu.com/en/global/economic-outlook/article/2024/04/04/global-home-ownership>
- Fertility rates are below replacement levels in the 15 largest economies. [Economist Impact] <https://impact.economist.com/people/health/infertility-for-continuing-declining-birth-rates>

Haptic technology is projected to reach \$7.1B by 2035 (4.4% CAGR). [IDTechEx] <https://www.idtechex.com/en/research/article/haptic-technology-market-to-grow-to-us-7-1b-by-2035/31731>

"Sephora Tweens" are driving sales of luxury anti-ageing skincare—designed for adults 30+. [New Yorker]

<https://www.newyorker.com/culture/the-weekend-essay/what-bevans-gets-from-sephora-and-what-they-get-from>

Indulgence is Controlled

Sexual activity among teens (180,000 across 33 countries) has declined significantly in 25 countries over the past decade. [Telegraph]

<https://www.telegraph.co.uk/news/2024/02/10/teen-sex-lives-tyrant-seen-britain-japan-korea/>

Youth alcohol consumption has also fallen globally. [BBC]

<https://www.bbc.com/health/article/20220920-why-gen-zs-are-giving-up-alcohol-entirely>

Desire to stay in control is a key driver of youth sobriety. [Kantar]

<https://www.kantar.com/en/insights/inspiration/consumer/why-young-adults-are-turning-to-low-no-alcohol-drinks>

Gen Z scores highest on seeking pleasure & fun compared to older generations. [Guardian]

<https://www.theguardian.com/social/2023/jun/07/young-hedonists-survey-reveals-what-drives-generation-z>

Gen Z is the loneliest generation, with high isolation & anxiety rates. [Telegraph]

<https://www.telegraph.co.uk/news/2024/11/20/gen-z-is-the-loneliest-generation/>

Porn use skyrocketed during the pandemic. [National Library of Medicine]

<https://pmc.ncbi.nlm.nih.gov/articles/PMC6607694/>

OnlyFans has 305 million users. [FORTUNE] <https://fortune.com/2024/08/12/onlyfans-reveals-record-breaking-revenue-6-6-billion-2024/>

Sales of erotic books have doubled in five years. [Guardian]

<https://www.theguardian.com/books/article/2024/aug/06/five-years-of-reading-hardly-steamy-book-sales-have-doubled-and-are-found-out-10x>

Downtown L.A.'s Rhythm Room sees 200 weekly attendees paying \$60 per ticket. [Time Out]

<https://www.timeout.com/los-angeles/news/how-a-dress-club-has-become-the-queen-of-tuesday-nights-051024>

Food is Entertainment

100,000 mukbang videos were uploaded between 2017-2019. [Seoul University Yun, Sowon; Kang, Hyunjoo; Lee, Hongmie (2020). Mukbang- and Cookbang-watching status and dietary life of university students who are not food and nutrition majors.

The psychology of snacking shows consumers seek impulse & excitement. [Food Institute]

<https://foodinstitute.com/insights/the-consumer-feels-behind-the-high-fiving-feasible-brand/>

Feastables reached \$500M revenue in 2024. [Time]

<https://time.com/collection/time100-leadership-picks/2024/25/mukbang-phenomenon/>

Global tableware market projected to grow 5.7% CAGR (2023-2030), reaching \$63.7B.

[Global News Wire] <https://www.globalnewswire.com/news-release/2024/08/07/2024080528124GenTablewareMarketTrendsReport2024-2030BlendingVersatilityandBeautifulStyleswithFunctionalityDurabilityandPerformance.html>

In 2024, police were called to a 4-hour queue at a Le Creuset sale. [Guardian] <https://www.theguardian.com/business/2024/nov/11/police-called-to-creuset-warehouses-sale-from-hour-queues>

Everyone is Entitled to Luxury

Luxury's growth is being driven by the middle class, especially in Asia. [WSJ]

https://www.wsj.com/news/world/asia/luxury-brands-boost-middle-class-05485d77?mod=business_lead_pos1

The luxury resale market is set to hit \$64B by 2025, growing faster than fashion. [Luxury London]

<https://luxurylondon.co.uk/article/second-hand-pre-owned-luxury-fashion-handbags-jewellery-watches/>

Resale platforms are expanding to brick-and-mortar locations in 2025. [BoF]

<https://www.businessoffashion.com/articles/retail/brick-and-mortar-resale-boom/>

Delli saw a 16x customer increase in 2024. [Balderton]

<https://www.balderton.com/news/independent-food-and-drink-platform-delivers-on>

Lidl & M&S Food saw the biggest sales growth in UK grocery (2024). [The Grocer]

<https://www.thegrocer.co.uk/comment-and-opinion/the-art-of-marketing-the-little-more-expensive-brands-to-grocery-shoppers/20240601/article>

Loewe & Jacquemus lead social engagement with eccentric output. [BoF]

<https://www.businessoffashion.com/articles/marketing/bof-looks-at-the-most-marketing-intensive-fashion-brands-brand-engagement-ranking>

METHOD & SCOPE

This report draws on a rigorous analysis of hundreds of cultural texts, images, & data points using a blend of trend analysis and semiotic techniques.

While our primary focus is on Gen Z as the generation currently leading cultural influence, this report also considers the wider implications of Treat Culture on older cohorts as well as the emerging Gen Alpha. As Gen Z's behaviours ripple outward, they set the tone for cultural norms and consumer expectations across age groups.

Our analysis centres on US and UK-driven youth culture, with a focus on developed economies where the drivers of Treat Culture – economic uncertainty, social media saturation, and wellness commodification – consistently emerge. For detailed data sources and references, please see the Sources section above.

The "Now" trends highlighted in this report represent dominant forces in Treat Culture, indicating behaviours and mindsets that are already mainstream within Gen Z and are expected to influence wider cohorts over the next five years. Conversely, the "Next" trends are emergent; currently resonating with leading-edge Gen Z and set to hit the mainstream culture in five+ years.



This report was developed by Firefish's Cultural Strategy team to decode the shifting landscape of Indulgence. Through in-depth cultural analysis, trend mapping, and semiotic insight, we explore the forces shaping consumer mindsets today and what's next on the horizon.

At Firefish, we believe cultural strategy is more than just observing change—it's about identifying the opportunities it creates. Whether you're looking to refine brand positioning, inspire innovation, or future-proof your strategy, we help brands turn cultural intelligence into action.



WANT TO CONTINUE THE CONVERSATION?

We'd love to discuss how these insights can be applied to your brand. Get in touch at...

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