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The Gartner Top U.S. Consumer and in Cultural Trends for 2025

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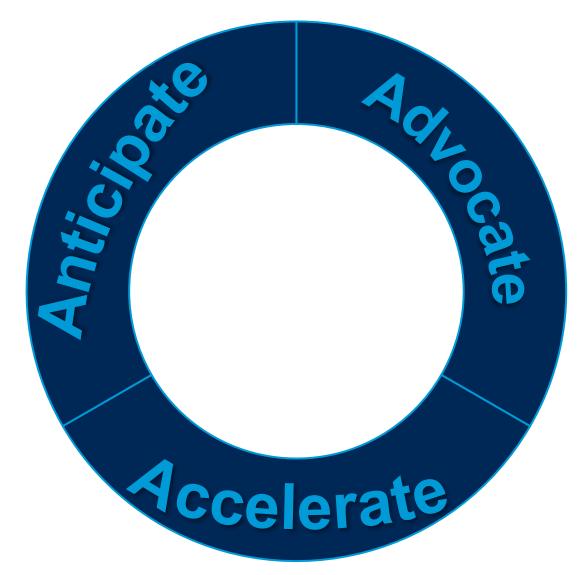
Kate Muhl VP Analyst



Why Top Trends?

To thrive, CMOs must actively identify trends set to influence their organization's short- and long-term opportunities and risks.

They must then develop proactive plans to deal with those trends early on.





Agenda



Current Conditions

Shifts in economic sentiment, expectations for brands and consumer values



The Top Consumer and Cultural Trends for 2025

The five cultural trends most likely to impact CMOs' strategies in the coming year



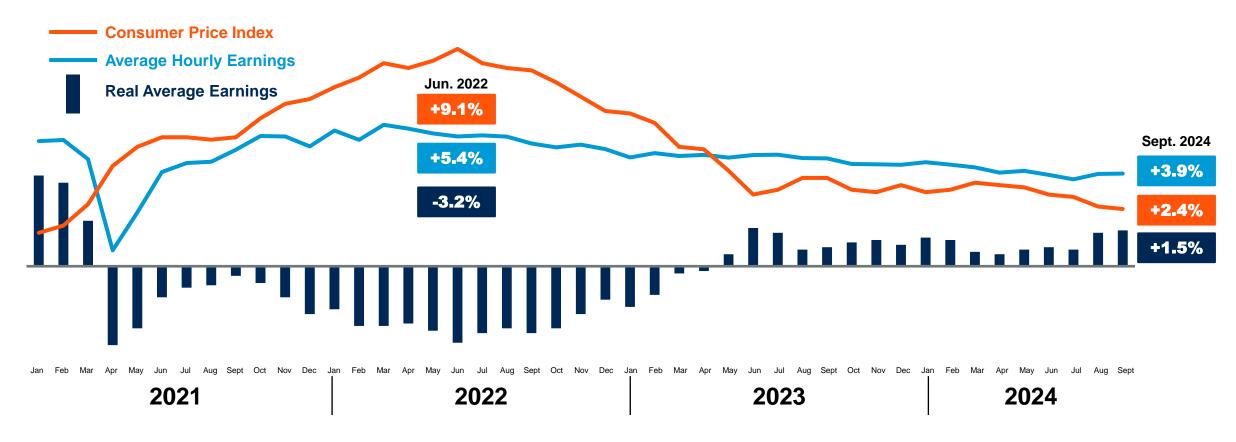
Zeitgeist

Key themes emerging from the all of the above



After Inflationary Run-Up, Wages Outpacing Inflation

Year-over-year change in real and nominal earnings and the Consumer Price Index (CPI-U) in the U.S.



Source: U.S. Bureau of Labor Statistics





The Economic Force of Inflation May Have Subsided



The Economic Force of Inflation **May Have Subsided**

But the Cultural Impacts of Inflation Will Be Felt For Years The Economic Force of Inflation **May Have Subsided**

But the Cultural Impacts of Inflation Will Be Felt For Years

Welcome to the Wake



High prices continue to weigh on consumers.



Trust in big brands continues to fall.



Decision-making is harder.



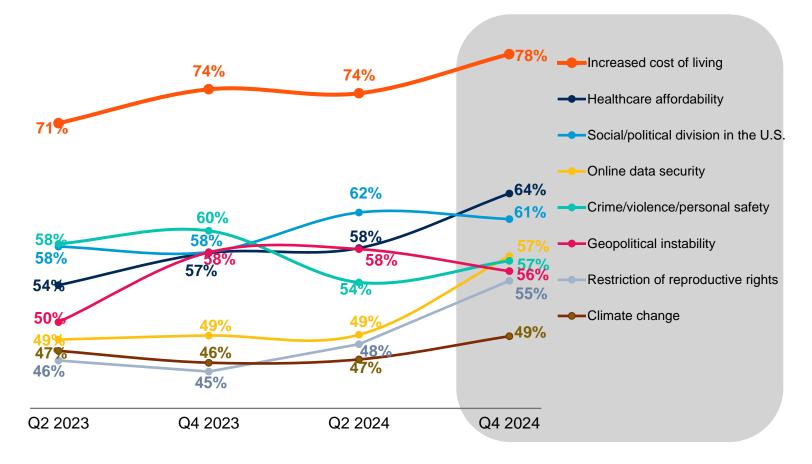
Consumers feel misunderstood.

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Increased Cost of Living Remains Top U.S. Consumer Concern Through Last 18 months

Q. How Concerned Are You About: (T2B% reported)



N = varies per year, U.S. Consumers age 18+

Q: How concerned are you right now about each of the following?

Source: Gartner Consumer Omnibus Survey Q2 2023 – Q2 2024/ Gartner Cultural Attitudes and Behavior Survey 2024 Note: Top 8 concerns as of Q4 20204 shown





High prices continue to weigh on consumers.



Trust in big brands continues to fall.



Decision-making is harder.

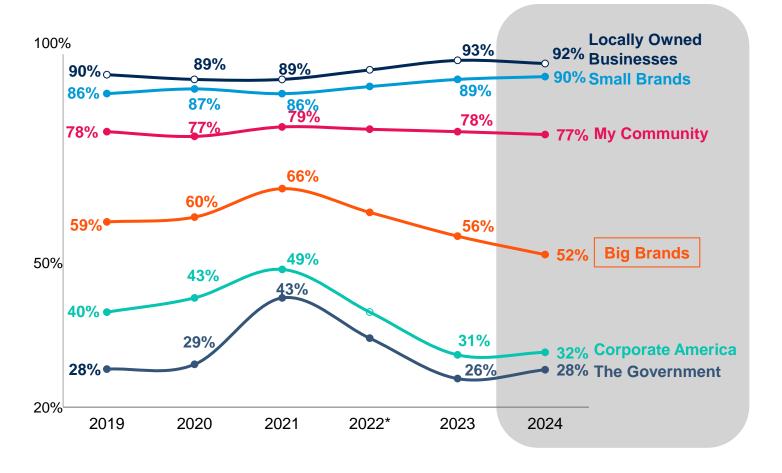


Consumers feel misunderstood.

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Consumers Who Say They Trust Big Brands Continues to Decline in 2024 Percentage of respondents who say the TRUST...



N = varies per year, US consumers ages 15+
A4a. Which best describes how you feel about each of the following?
Source: 2019-2024 Gartner Consumer Values & Lifestyle Survey
Note: *Data not surveyed in 2022, line imputed using average from 2021 and 2023





High prices continue to weigh on consumers.



Trust in big brands continues to fall.

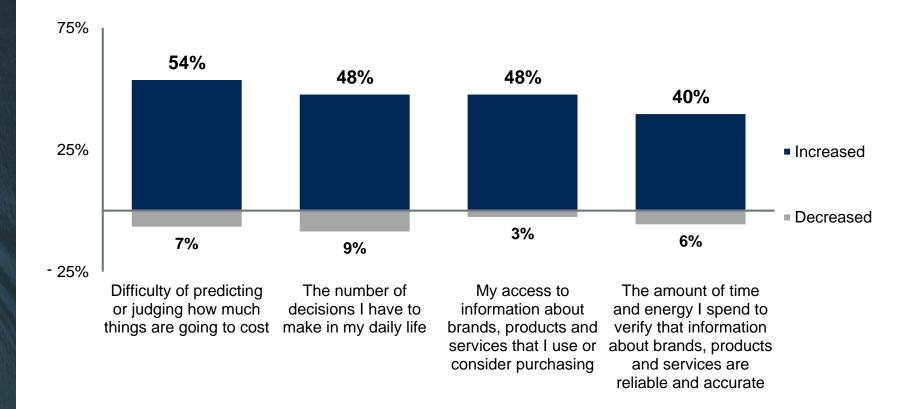


Decision-making is harder.



Consumers feel misunderstood.

Perceptions of Change in Navigation and Decision-Making Experience How the following have changed in past 5 years



n = 1532, US Consumers ages 15+

Q. How has each of the following changed compared to 5 years ago? Source: 2024 Gartner Consumer Cultural Attitudes and Behaviors Survey



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High prices continue to weigh on consumers.



Trust in big brands continues to fall.



Decision-making is harder.

? Consumers feel misunderstood.

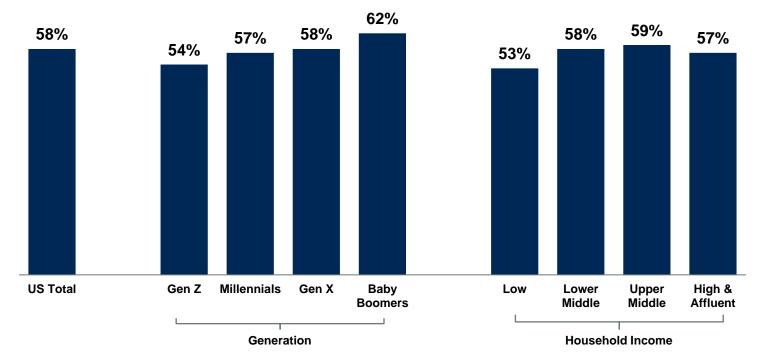
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The "Gets Me" Gap

Percentage of all U.S. Consumers who agree...

"Most companies trying to sell me their products and services don't really understand my preferences and needs as a consumer."



n =4,146 U.S. Consumers age 15+

B6. Please read the below pairs of statements and indicate which you agree with more- that is, "much more" or just "somewhat more" than the other statement

Source: Gartner Consumer Values and Lifestyle Survey 2024



Consumer Values That Matter in 2025

The 5 Values that are...

consistently important		becoming <i>more</i> important		becoming <i>less</i> important		notably divisive	
Loyalty	I am an extremely loyal person when it comes to people, places, institutions, and things that I respect and value.	Safety	I actively seek ways to keep myself, my family, and my friends safe from harm or danger.	Belief	My beliefs give me strength and comfort.	Sustainability	I strongly believe that people and businesses should use our planet's resources responsibly to sustain current and future generations.
Authenticity	Being genuine and authentic is extremely important for me and for the things and people in my life.	Health	One of my highest priorities is to be physically and mentally healthy and free from illness.	Identity	Everything that I do, say, feel, and think reflects my identity or who I am.	Patriotism	I am very proud of and actively support my country.
Equality	I strongly believe that all people should have equal opportunity and equal access in all areas of life.	Relaxation	I greatly desire and search for those occasions when I can just rest and relax.	Duty	I believe it is my duty to fulfill my obligations to family, friends, community, and country.	Inclusion	I believe equal consideration and inclusion of others advances the culture
Responsibility	I always take responsibility and accountability for my actions.	Serenity	I seek out calm, peaceful, and tranquil surroundings and situations.	Freedom	I need to have the freedom to say or do what I want without restrictions.	Diversity	I am always open to ideas, people, and cultures that are different from my own.
Courtesy	I am always polite and respectful in my behavior and expect the same courtesy from others.	Diversity	I am always open to ideas, people, and cultures that are different from my own.	Thrift	I regularly work to be thrifty and not waste money, time, or resources.	Duty	I believe it is my duty to fulfill my obligations to family, friends, community, and country.

Source: Gartner Consumer Values & Lifestyle Survey, 2010-2024

V1.For each statement, please use a scale of 1 to 7, where 1 means that it is not like you at all and 7 means that it describes you exactly. Rankings derived from percentage of 6 or 7 ratings.

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Brand Values That Matter in 2025

The 3 Brand Values that are popular with...

All U.S. Consumers		younger consumers		older consumers		key segments	
	Brands that		Brands that		Brands that		Brands that
Value	offer the best value (i.e., they are fairly priced for what they offer)	Happiness	make me feel happy and content	Practicality	are realistic and practical, not particularly idealistic	Family	are family-oriented (parents; grandparents; millennial women)
Authenticity	are authentic and genuine	Acceptance	are committed to diversity and are accepting of different ideas, people and cultures	Health	support and encourage me to live a healthy lifestyle	Eco-Friendly	have sustainable/ environmentally friendly practices (Green Shoppers; Urban Consumers)
Simplicity	help me simplify my life	Confidence	help me feel confident and like I have worth	Trust	are brands that I trust without question	Convenience	are convenient or help me save time (college educated, high- income workers; parents w. kids in the HH)

N= 4146 U.S. Consumers Age 15+

V3: Please select up to 5 statements that complete the following sentence: "The brands I want to buy from..."

Source: Gartner Consumer Values & Lifestyle Survey, 2024

Note: Up to 5 responses allowed

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Norming

Price Paranoia The New Spartans

Embraceable Automation

The Boomer Boom

Price Paranoia

Prices aren't just high for consumers – they're unpredictable. Inflation may have eased, but suspicion and frustration have not.

Consumer Values

Trust

Honesty

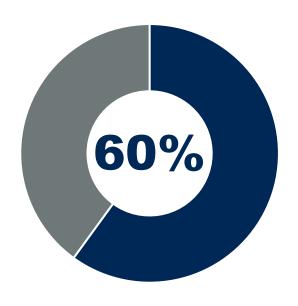
Brand Values

Value

Trust



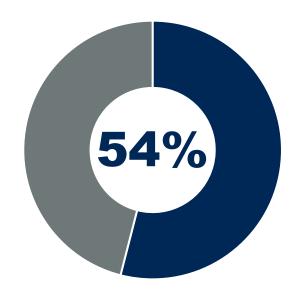
Consumers are Uncertain About Prices



Agree with the statement,

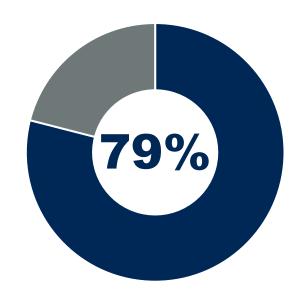
"I don't feel confident about what things are going to cost."

n = 1532 U.S. Consumers ages 15+ Source: 2024 Gartner Consumer Cultural Attitudes & Behaviors Survey



Say that over the last five years the

"Difficulty of predicting or judging how much things are going to cost as increased."



Say that in the last year they

Have Experienced Some Unexpected Price Scenario

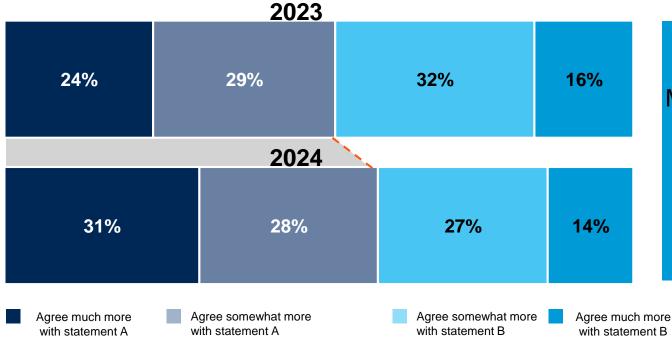
which could include hidden fees, surge pricing, unexpected rate hikes, different prices online versus in-store, and more



But Ever More Certain About Price Gouging

Bi-Polar Agreement: What Consumers Attribute Rising Prices To





Necessary Price Increases: Most companies have had to raise prices in order to cover their own rising costs

Source: 2023 (Q2) Gartner Consumer Omnibus Survey/2024 Gartner Consumer Cultural Attitudes & Behaviors Survey



n = 2025/1455 U.S. Consumers ages 18+

Q. Please read the below pairs of statements and indicate which you agree with more- that is, "much more" or just "somewhat more" than the

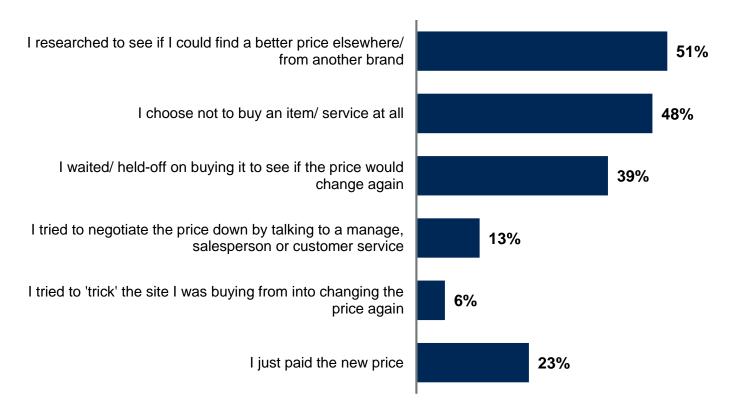
Cultural Observation: Walmart





Price Paranoia Drives Behaviors

Ways Consumers Responded When Encountering an Unexpected/unexplainable Price Change Percentage of Respondents



n = 1532 US Consumers age 15+

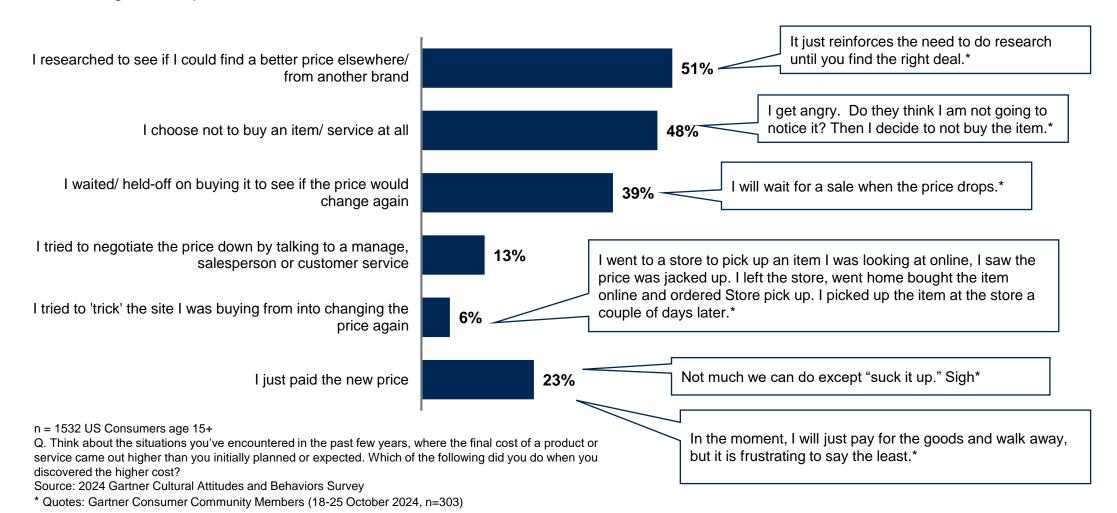
Q. Think about the situations you've encountered in the past few years, where the final cost of a product or service came out higher than you initially planned or expected. Which of the following did you do when you discovered the higher cost?

Source: 2024 Gartner Cultural Attitudes and Behaviors Survey



Price Paranoia Drives Behavior and Attitudes

Ways Consumers Responded When Encountering an Unexpected/unexplainable Price Change Percentage of Respondents

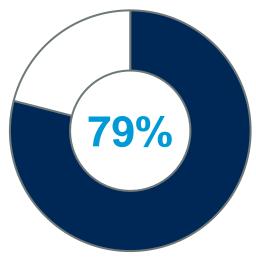




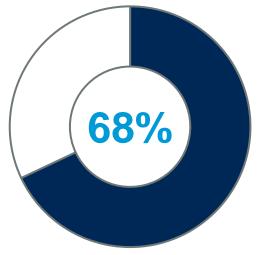


Consistent Pricing Builds Trust

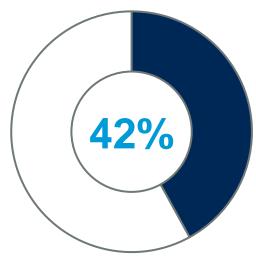
Statement Agreement:



Brands that have consistent pricing are more trustworthy



Brands using dynamic pricing makes me feel taken advantage of



I'd be willing to spend more on a product if consistent pricing was guaranteed

n = 2025/1455 U.S. Consumers ages 18+

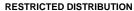
Source: 2023 (Q2) Gartner Consumer Omnibus Survey/2024 Gartner Consumer Cultural Attitudes & Behaviors Survey

n = 303 U.S. Consumers age 18+

Source: Gartner Consumer Community Oct. 18 - 25 2024

n= 1532 US Consumers age 15+

Source: 2024 Gartner Cultural Attitudes and Behaviors Survey





Marketer's Toolkit: Strategy

Inflation drove prices up and sent consumers hunting for lower-priced alternatives. In the wake of inflation, prices still feel high, but also unpredictable. That fuels distrust. And distrust fuels Price Paranoia.

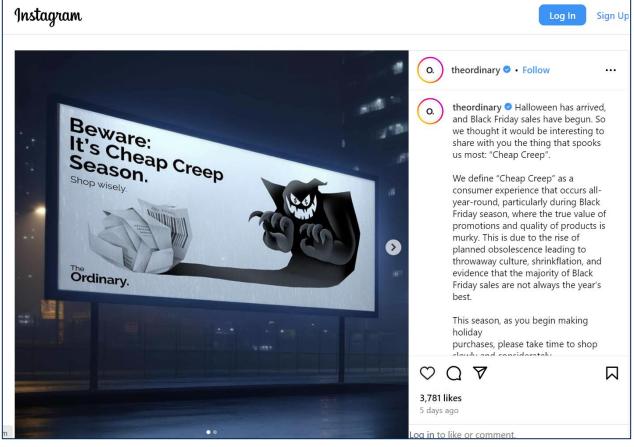
Price Paranoia weighs down consumer loyalty and hardens the brand relationships into something adversarial.

- Be the brand known for price stability. Stable, predictable pricing can be a positive differentiator for the brand. If pricing is out of your team's purview, focus on promotions that offer provide the control your pricing retail channels
- Demonstrate the loyalty you expect from your customers. Support customer retention with price-stabilizing tools and perks for loyalty program members.
- Empower consumers to make changing prices work for them. CMOs in categories that experience more price volatility, be the brand that helps consumers get smart about making the most of a fast-paced market.



Marketer's Toolkit: Execution

Getting it Right: The Ordinary, "Cheap Creep Season"





Norming

As consumers' experience of world gets ever more tuned to their individual behaviors and preferences, they're seeking an objective take on their place on the larger whole.

Consumer Values

Comfort

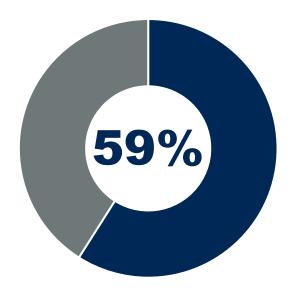
Simplicity

Brand Values
Self-Esteem

Health

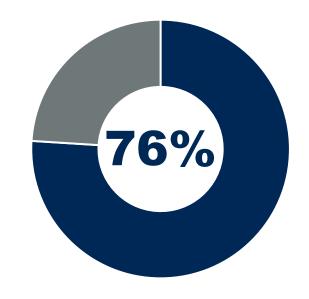


Consumers Feel Adrift in Uncertainty



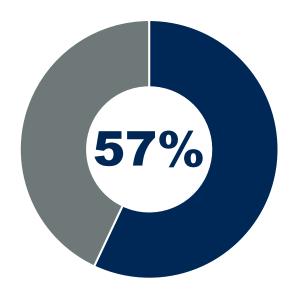
Agree with the statement,

"It feels impossible to know the outcome of anything nowadays."



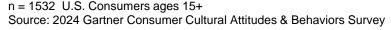
Agree with the statement,

"I feel more comfortable when there are clearly established boundaries."



Agree with the statement,

"I'm more interested in learning about myself and my place in the world than I was 2 years ago.



Norming Offers Consumers Objective Perspective

A large majority (82%) of consumers report doing at least one "norming" activity in the past year

Ways Consumers Approach Norming:



48% - Self-Discovery

"[I'm] not always sure about some things, nice to see what someone else may think and then compare it to how I think"

- Testing their knowledge or a "skills test"
- Checking if an online community would have the same opinion/reaction as I did/had



61% - Consumption Habits

"Wanted to know if my usage was in line with my neighbors."

- Compare usage rates (energy/water resource usage, or time spend online)
- What are others like me/ in my area shopping for/buying?



68% - Financial Progress

"[I was] nosy about [their] financial situation and how they got where they were and if I could do it"

- Look up the housing value/rental rate of my/other's homes
- View content about saving rates/ financial advice
- Check out salary comparisons on job hunting sites

n = 1532, U.S. Consumers ages 15+

Source: Gartner Consumer Cultural Attitudes and Behaviors Survey 2024



^{*} Quotes: Gartner Consumer Community Members (24-31 October 2024, n=289)

Cultural Observation: Refinery29 Money Diaries

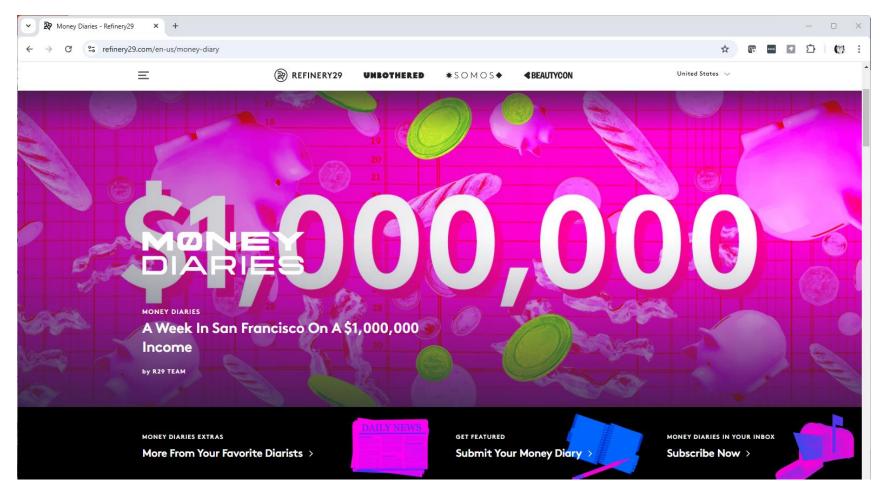


Image: Refinery29



Marketer's Toolkit: Strategy

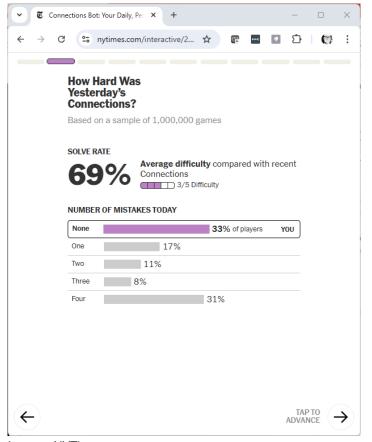
So much of consumers' experience of culture, from media to shopping and beyond, is shaped by their individual data trails. Norming is a consumer counterweight to the tunnel vision imposed by constant personalization. It's a way for consumers to understand their place in the whole. Though this trend is a reaction to the cumulative experience of personalization, personalization still matters. CMOs do still need to ensure brand and shopping experiences are relevant.

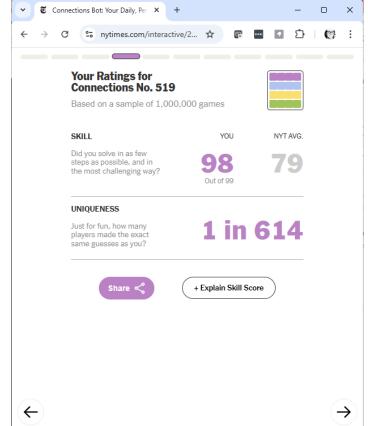
- Resist the temptation to double-down on interactive decision tools like quizzes, diagnostics and suggestion engines. They are time-honored. But, by design, they articulate individual consumers' needs as such. And that can be isolating. And in these untrusting times, they might even inspire skepticism.
- Help consumers understand themselves in context by offering them insight that doesn't necessary lead directly to a product decision. Norming shows us that consumers value context for its own sake.

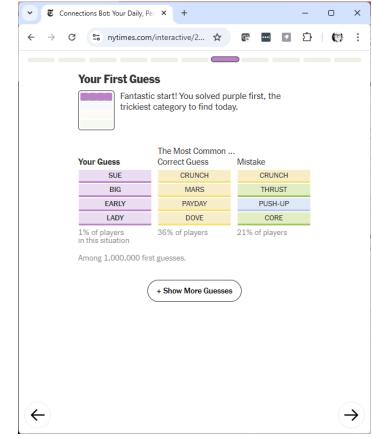


Marketer's Toolkit: Execution

Getting it Right: New York Times, Connections Bot







Images: NYTimes.com

The New Spartans

In the post-Inflation era, making do with less isn't just a tactic, it's a flex.

Consumer Values

Simplicity

Self-actualization

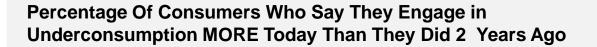
Brand Values

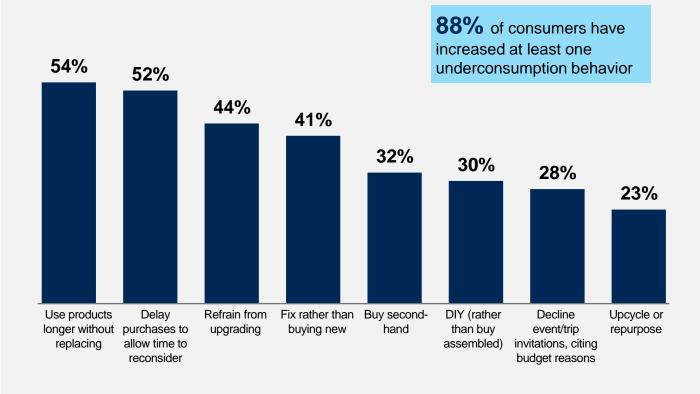
Ambition

Practicality



Consumers are Reframing Thrift as Aspiration





80% of Respondents Agree



"Americans create waste by buying too many things"



Agreement is up

N = 1532, U.S. Consumers ages 15+/1455, US Consumers age 18+ Source: 2024 Gartner Cultural Attitudes and Behaviors Survey 4 RESTRICTED DISTRIBUTION



Conspicuous Underconsumption Has Cache

Consumers are driven by a desire to share (and even boast) about their ability to resist the urge to buy more than they need

While saving money is a driver, 68% of consumers cite intrinsic or self improvement motivations for reducing consumption.

Consumers Top Reasons for Reducing Consumption

- Things are too expensive
- To declutter/simplify my life
- To feel better about myself/my decisions
- Environmental reasons
- To prove to myself that I could
- To show others that I could

I hadn't bought makeup for a whole year and that felt good, to focus on stuff I already have instead of needing more constantly

- Sarah, Gen Z from VA

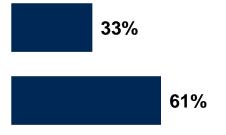
I am always happy to consume less because it shows that I am policing myself and structuring my financial path.

Mark. Gen Xer from MO

Consumer Agreement: Rewards of Spartanism

A benefit of resisting consumerism is being able to tell others about it

Buying less gives me a sense of personal gratification



N = 1353 US Consumers age 15+, who increased their underconsumption

Source: 2024 Gartner Cultural Attitudes and Behaviors Survey

N= 293, US Consumers age 18+

Source: Gartner Consumer Community Oct 25 - Nov 1 2024

Cultural Observation: Rawdog Airlines

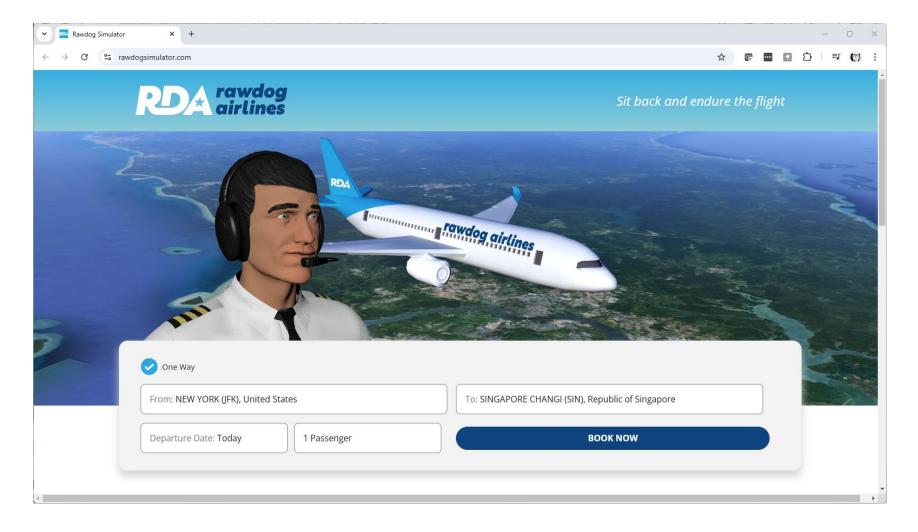


Image: rawdogsimulator.com



Marketer's Toolkit: Strategy

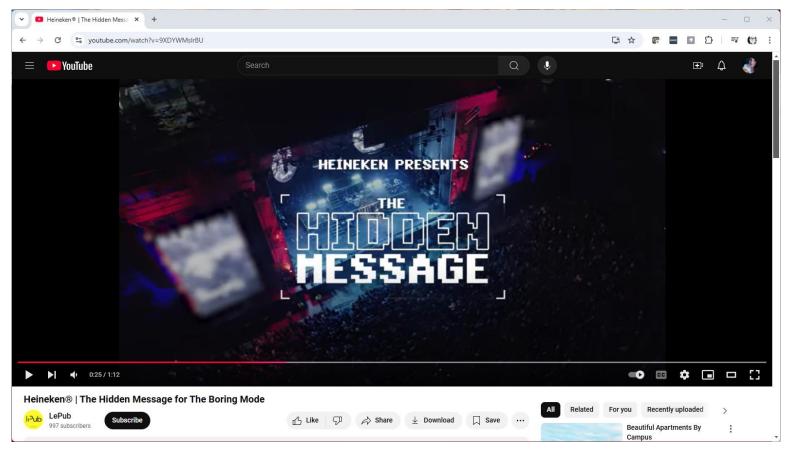
For the New Spartans embracing austerity is a way to reclaim agency and control after years of inflation-driven thrift. Theirs is a conscious effort to decrease consumption of all kinds and curb wasteful habits *because they can*. That they're saving money too is an added benefit.

- Be the brand of playful austerity. Lean into ways your brand supports consumers' efforts to go bare bones. Brands with no-frills values especially have an opportunity to build cultural cache.
- Consumption isn't just about consumerism. Where and how consumers direct their attention can be Spartan too, in an attention economy. CMOs should push teams to think beyond traditional thrift, to find creative ways brands can help consumers protect and direct their' resources.



Marketer's Toolkit: Execution

Getting it Right: Heineken, "The Hidden Message"





Embraceable Automation

While GenAI has been grabbing headlines and concerning consumers, a whole host of IRL interactive automation has quietly captured the hearts and engagement of humans.

Consumer Values

Convenience

Safety

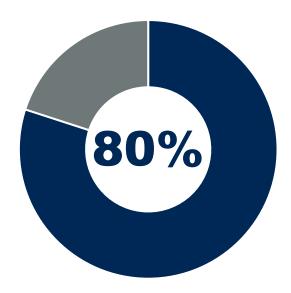
Brand Values

Convenience

Curiosity

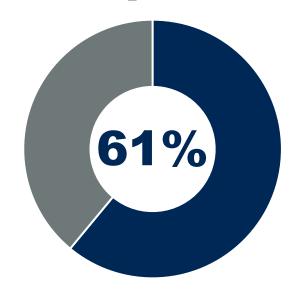


Consumers Are Still Suspicious of GenAl



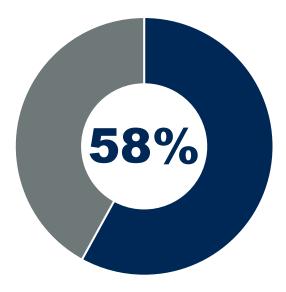
Agree with the statement,

"Generative AI has made it harder for people to distinguish what's real and what's not online."



Agree with the statement,

"I believe companies are listening to my conversations through tech devices in order to sell me things."



Agree with the statement,

"The risks of Artificial intelligence outweigh the benefits."

n = 2,001 U.S. Consumers age 18+

GEN_AI_2. How much do you agree with each of the following statements?

Source: 2024 Gartner Consumer Omnibus Survey

n =4,146 US Consumers ages 15+

B6. Please read the below pairs of statements and indicate which you agree with more- that is, "much more" or just "somewhat more" than the other statement Source:2024 Gartner Consumer Values and Lifestyle Survey



Meanwhile, Human-Free Tech is Gaining

Unlike AI, where exposure leads to ambivalence, experience with the right human free automation product or service leads to greater connection and interest in future experiences



When asked about automated tech (Waymo Taxi's, delivery drones, cashier less stores, robo-restaurant servers and baristas, etc.) 74% of U.S. consumers express openness to the tech with 30% already having tried and 70% being willing to try an automated tech experience.

It was pretty neat having a cat deliver our sushi for my family for dinner. My kids absolutely loved it as it was so unique.

James. Millennial Male from IL

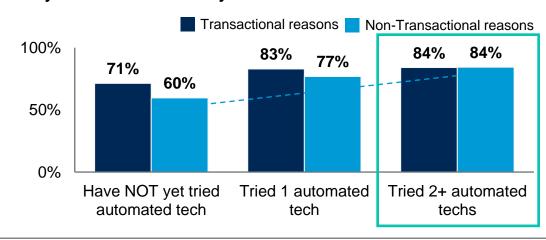
I'm absolutely open to this. As someone with anxiety. sometimes it's less stressful to deal with machines

- Katherine, Millennial women from OH

n = 1535 U.S Consumers ages 15+ (n=1498 who are open or have used automated tech) Source: Gartner Cultural Attitudes and Behaviors Survey 2024 Quotes: Gartner Consumer Community 27 September – 4 October 2024

Transactional reasons like cost, speed, and standardization are the primary draw for new consumers. But for those who have already tried automated tech, non-transactional reasons, like novelty and excitement, begin to hold just as much weight in their motivations for using this tech.







Cultural Observation: Lavazza

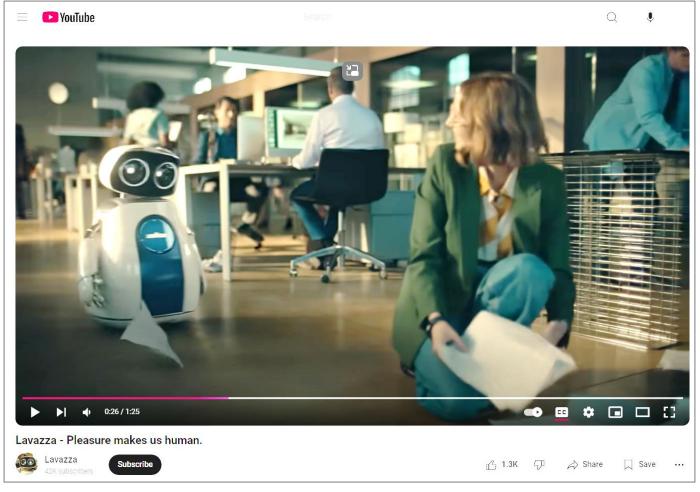


Image: YouTube/Lavazza



Marketer's Toolkit: Strategy

Consumers embrace Embraceable Automation in no small part because of its physicality and the ways it steers clear of the uncanny valley. This is in contrast to the way consumers generally experience GenAI, which is as a disembodied simulacrum of human personality.

- Lean in to embodied technology. Human-free automated services or experiences offer an alternative pathway to engaging consumers via tech.
- Get the transactional benefits right. Consumers' on-ramps to Embraceable Automation are speed and convenience. It may be counterintuitive, but novelty and fun reinforce, rather than establish, value.
- Helper bots are fun. Foster cultural relevance for your brands as appropriate, by incorporating stories of human-free tech into messaging and social content.



Marketer's Toolkit: Execution

Getting it Right: Sweetgreen Infinite Kitchen

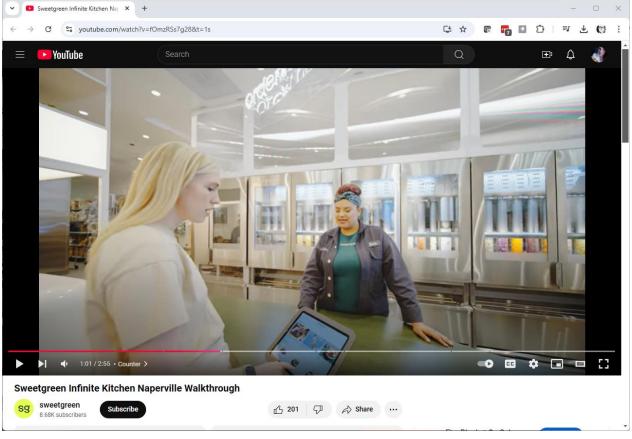


Image: YouTube/Sweetgreen



The Boomer Boom

Baby Boomers are (still) living their best life, the reverberations of which are deepening culture divides and creating challenges for brands.

Consumer Values

Success

Wisdom

Brand Values

Trust

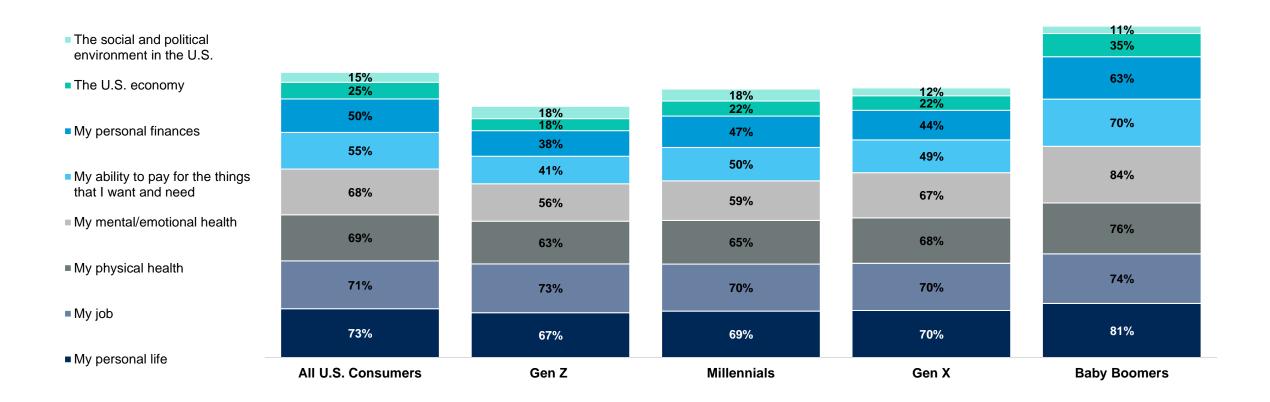
Happiness



Baby Boomers' Confidence Stands Out

How are you feeling right now about the following?

Percentage of U.S, Consumers who gave a top three box or positive, response

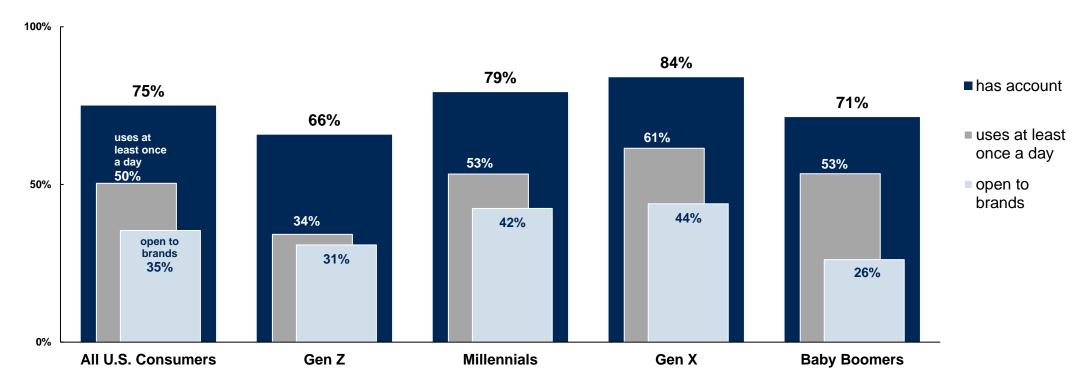


n varies; U.S. Consumers ages 18+, My Job = All employed respondents CONSUMER_CONFIDENCE: How are you feeling right now about the following? Percentages shown are proportion of respondents who answered, "Somewhat Positive," "Positive," or "Very Positive" Source: 2024 Gartner Consumer Omnibus Survey



U.S. Consumer Facebook Usage in 2024

Percentage of all U.S. Consumers who report having an account on Facebook, report using each at least once a day and say they are open to brand messages there



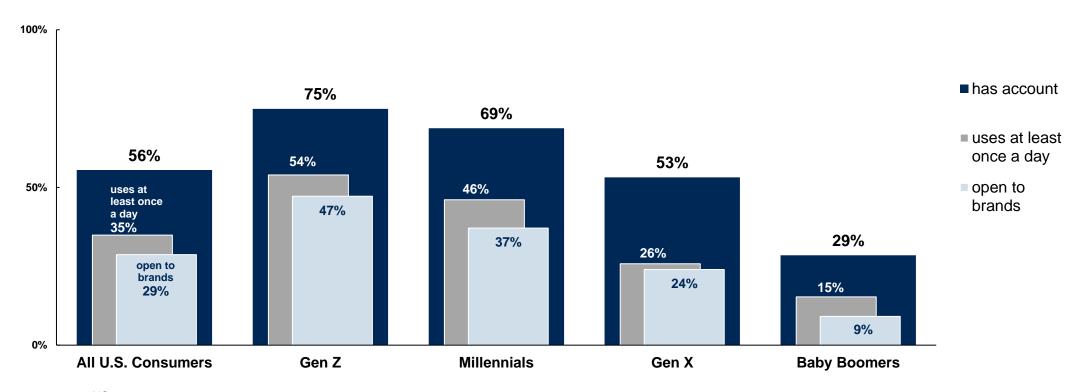
n = 1849 US consumers age 15+

SM2. For which of the following social media platforms do you currently have an account? Navy blue bar shows the percentage who selected each platform/SM3. How often do you use...? Gray bar shows percentage of total who selected "At least once a day."/SM1. On which of the following social media platforms, if any, are you open to viewing or receiving branded content (e.g., advertising, commercials or other brand communications) on? light blue bar shows % who selected each platform Source: 2024 Gartner Consumer Values and Lifestyle Survey



U.S. Consumer Instagram Usage in 2024

Percentage of all U.S. Consumers who report having an account on Instagram, report using each at least once a day and say they are open to brand messages there



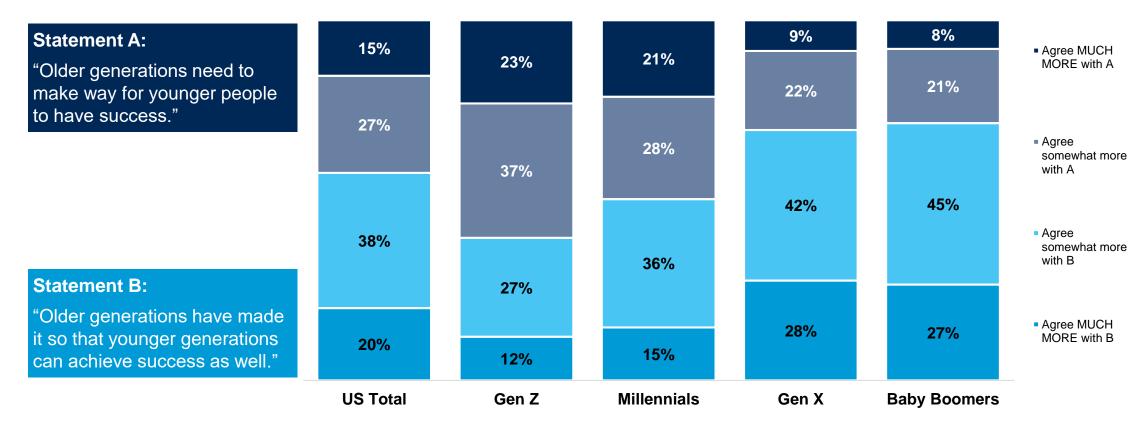
n = 1849 US consumers age 15+

SM2. For which of the following social media platforms do you currently have an account? Navy blue bar shows the percentage who selected each platform/SM3. How often do you use...? Gray bar shows percentage of total who selected "At least once a day."/SM1. On which of the following social media platforms, if any, are you open to viewing or receiving branded content (e.g., advertising, commercials or other brand communications) on? light blue bar shows % who selected each platform Source: 2024 Gartner Consumer Values and Lifestyle Survey



Generation Gap in Attitudes about Younger Consumer Success

Bi-Polar Agreement: Success for Younger Generations



n = 1532 U.S. Consumers ages 15+

Q. Please read the below pairs of statements and indicate which you agree with more- that is, "much more" or just "somewhat more" than the other statement Source: 2024 Gartner Consumer Cultural Attitudes & Behaviors Survey ID:

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On Baby Boomers

If you had to describe each of the following generations with one word, what would it be?

Boomers on Boomers



N=289

If you had to describe each of the following generations with one word, what would it be? Shown: "Baby Boomers" Source: Gartner Consumer Community, 24-31 October 2024

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UDDOINchallenging

Everyone Else on Boomers



Marketer's Toolkit: Strategy

Differences in consumer attitudes and behaviors along life stage lines is to be expected. But the Boomer Boom reflects something more profound and urgent, especially for CMOs whose brands must make authentic connections across generational cohorts.

Upbeat themes and traditional media strategies are needed to reach Baby Boomers. Reaching younger consumers requires smart social media strategies and more culturally sensitive themes.

- Be a brand for celebration to resonate with Boomers. Because they feel they're worth it, to borrow from L'Oreal's famous slogan from Baby Boomer's youth.
- Take advantage of consumers' natural social media self-segmenting to test and run more generationally targeted positioning and messaging. Likelihood of turning off Boomers is lower on social channels because they're simply not there.
- Stay well far away from the fray. This powerful cultural rift should be explored only by edge-case brands looking to stand out in a bold manner to younger consumers.



Marketer's Toolkit: Execution

Getting it Right: Pepperidge Farms, Chilean Sea Bass

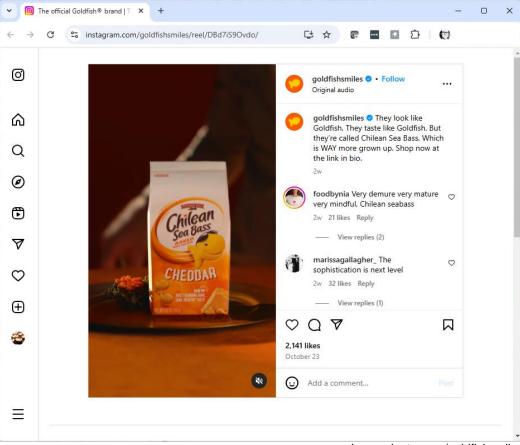


Image: Instagram/goldfishsmiles



Zeitgeist: nemes Heading in

Welcome to the Wake Certainly Uncertain

The Post-Inflation Era will be marked by mistrust in institutions and brands.

If there's one thing that's clear, it's that little is clear.

Generation Gap

The persistent divide between younger and older consumers persists.







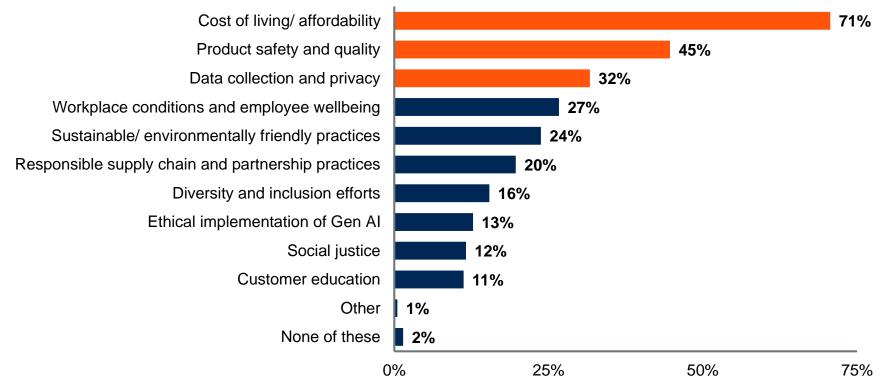


Gartner

Consumers Want Brands To Prioritize the Fundamentals of Consumer-Brand Relationship In 2025

Issues Consumers Say Are MOST Important for Brands to Focus on in Coming Year

Up To 3 Selections Allowed

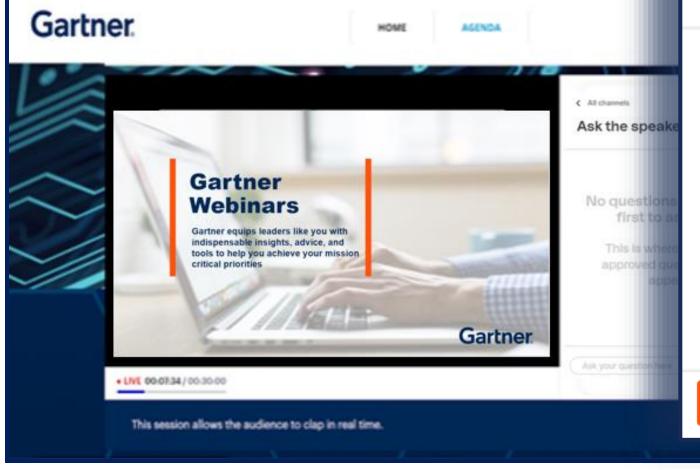


n = 1532 US Consumers age 15+

Q2. Which of the following, if any, do you feel are MOST important for brands to focus on in the coming year?: Source: 2024 Gartner Cultural Attitudes and Behavior Survey



Ask the speaker



All channels Ask the speaker No questions yet. Be the first to ask one! This is where all of the approved questions will appear

Ask your question here





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2024 Conference Top Takeaways



The marketing function of today is designed to adapt to deliver. The marketing function of tomorrow will direct disruption.



Prioritize productivity and recalibrate spending to overcome suppressed budgets and reacquaint with your target audiences. Maintain a sharpfocus on journey value and channel measurement across all stages.



Develop strong brand governance to enable activation at pace, invest in talent to unlock productivity using technology, and relentlessly prioritize customer touchpoints to deliver differentiated experiences.



Collaboratively identify and secure the right partnerships and optimum use cases across your organization. Become a catalyst to accelerate productivity and drive growth, and focus on how GenAl can support your strategy and take action across data, technology, and talent.

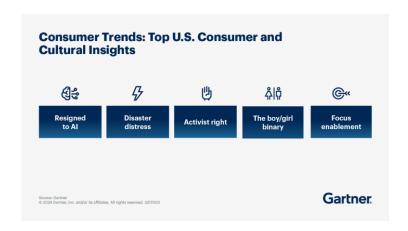


To make cross-functional projects easier for your teams, and to deliver better profit and growth to your organization, invest in developing your talent and improving your workflows and processes.



Develop and activate a strong corporate narrative to advance your company's business evolution and to increase your perceived value within the organization.

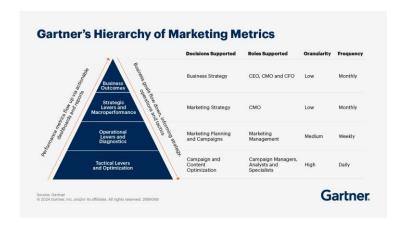
Additional resources to help you stay ahead of the curve in 2025



Top 5 Consumer Trends: Key Cultural Insights

Align your targeting, messaging, and CSR initiatives with the latest consumer trends and attitudes.

Download Report



Your Marketing Strategy Success Guide

Streamline your marketing strategy, secure internal buy-in, engage consumers and convert prospects into loyal customers.

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Learn how we can help you become a world-class marketing leader: Get to know Gartner for CMOs



Gartner for Marketers on social media

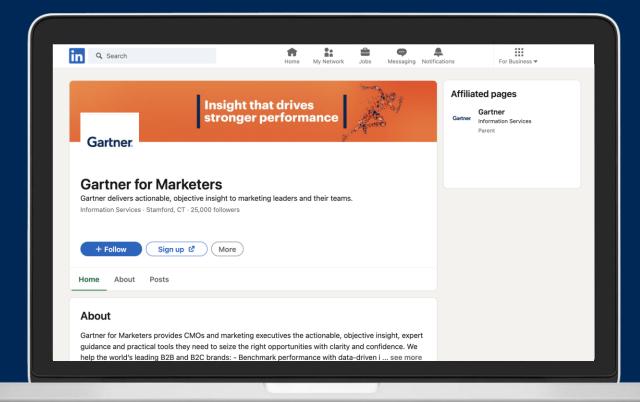
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