

CONSUMER TRENDS 2Q25

Insights to improve every
brand experience



Understand. Engage. Thrive. In 2025.



As 2024 winds down, 2025 waits in the wings with new and old challenges for marketers. Whether it's macro trends like a new president or continued economic pressures, or micro trends like shifts in media consumption, signal loss, or [AI in advertising creative](#), marketers are expected to be futurists, anticipating where the opportunities and threats lie for their brand each new year.

Today, [retail is heating up as inflation cools](#) but some consumers are still [holding off](#) on major purchases. Meanwhile, Google decided that the [cookie could stay](#), and TikTok and other social media platforms became serious search contenders.

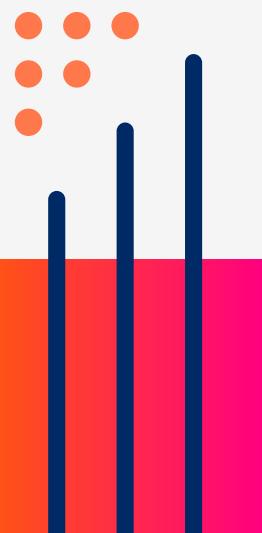
What does this mean for advertisers? They must be ready for shifts and move fast when they happen. While we can't predict the future, we do see some key themes emerging from our 2025 Consumer Trends report.

First, the consumer path to purchase will continue to evolve... rapidly.

Second, the power of a brand to drive consumers to purchase will only grow as more marketers understand its connection to performance.

Third, successful marketers will diversify their campaigns to increase relevancy, tapping into strategies like personalization, targeting, and contextualization.

This report examines the forces shaping these and other dynamics in the coming year. With these insights, we hope to empower you and your brand to better understand modern consumerism, so you can engage



CONSUMER TRENDS 2Q25

METHODOLOGY

DISQO surveyed 2,988 US adults (18+) from our first-party, identity-based audience from August 30 to September 12, 2024. The data informing the report was balanced on age, sex, ethnicity, and income and weighted to represent the US population.

More than 2.3 million people have opted in to share their brand experiences with DISQO, empowering clients to cultivate deep insights about their target audiences and to perform objective, single-source measurement of ad effectiveness on attitudes and digital behaviors.

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General outlook

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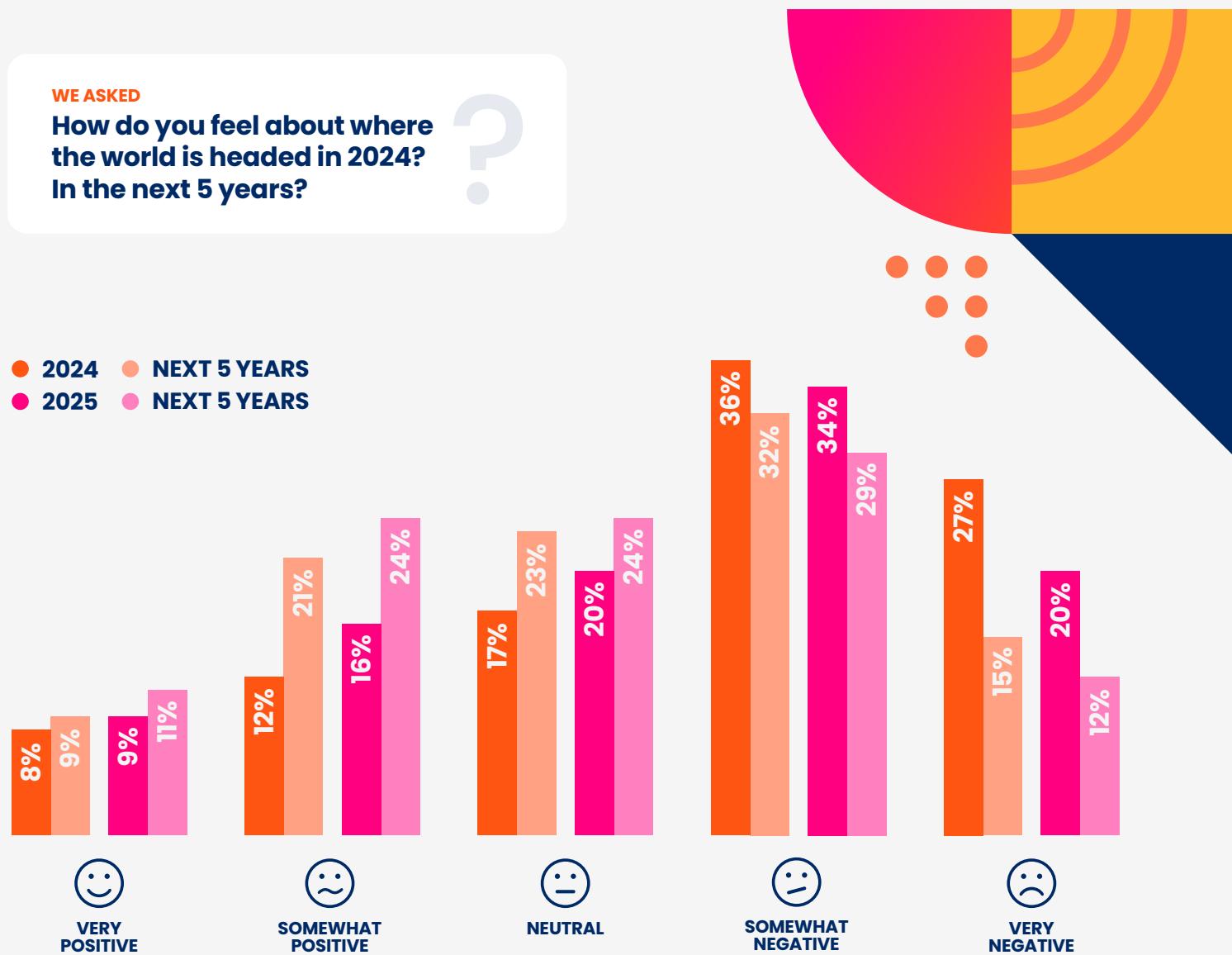
Brand experience

What shapes brand experience most? What drives brand loyalty? What are the categories in which a brand name is most important?

General outlook

As we head into a new year, with a new president and half a decade out from the start of the COVID pandemic, we see consumers settling in and feeling a little better about the future. They are slightly more optimistic about 2025 and the next five years than last year. We see a slight uptick in positive and neutral sentiment and downturns in negative sentiment. Those who felt very negative about the approaching new year saw the most significant decline at seven percentage points.

Consumer sentiment appears to be slowly rebounding following a turbulent few years. This shift toward optimism presents an opportunity for brands to re-engage consumers who may be more willing to open their wallets in the coming year.



Optimism across groups

There were few differences in optimism among income groups, but we do see that Millennial (34%), Black (40%), and Very Liberal (46%) consumers were more optimistic than their peers about 2025. Overall, people expect things to improve over the next five years. Boomers' growth in optimism is especially notable, with only 22% feeling optimistic about 2025 and 36% feeling good about the next five years.

40%

**of Black consumers
feel good about 2025**

WE ASKED

**How do you feel about where
the world is headed in 2025?**



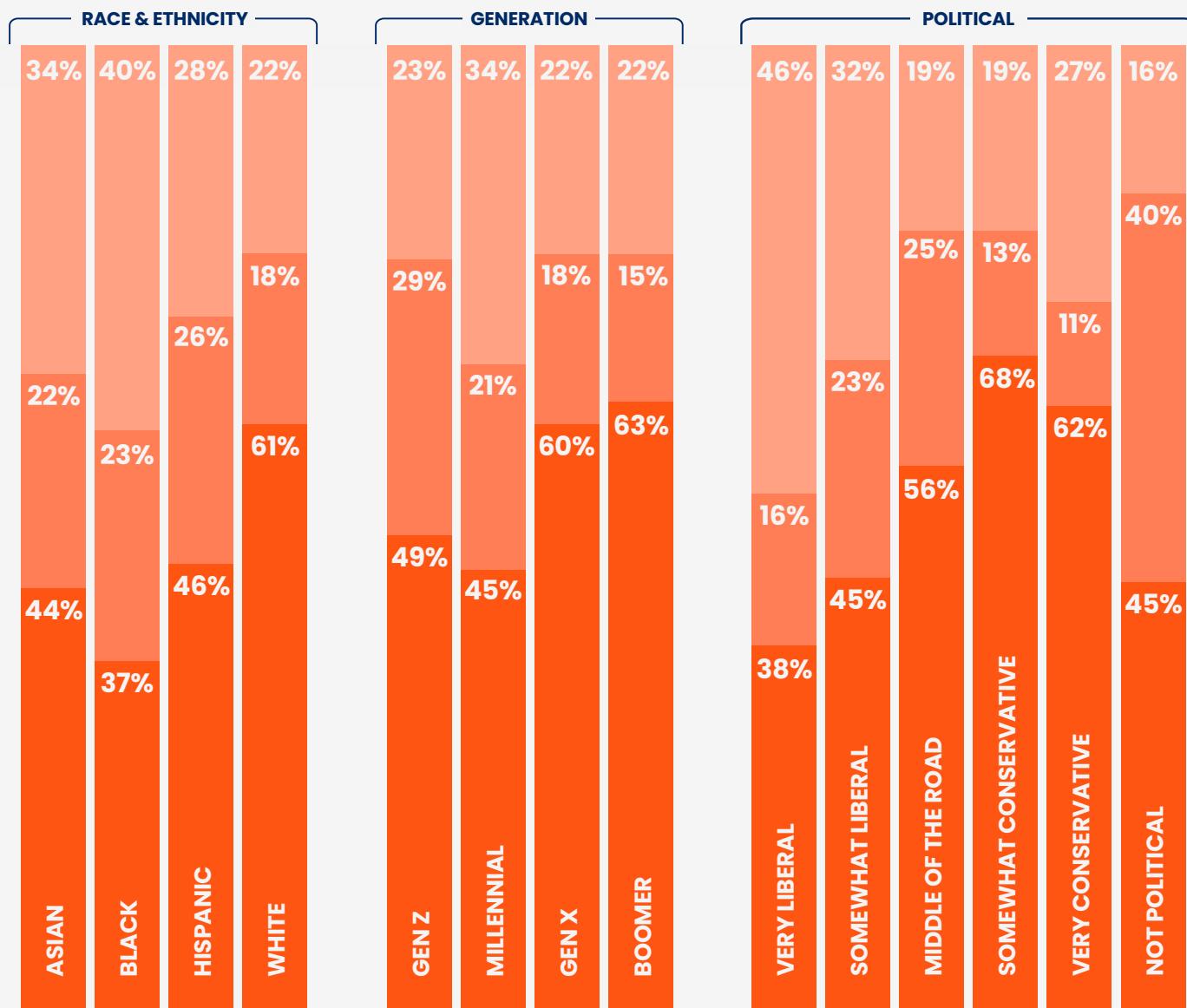
POSITIVE



NEUTRAL



NEGATIVE



The economy remains consumers' top concern

As we look toward 2025, consumers are balancing a range of significant concerns alongside cautious optimism. Across all demographics, anxieties persist around inflation (63%), a potential recession (52%), and geopolitical conflicts (48%). These worries are particularly pronounced among Gen X and Boomer consumers, who are more apprehensive about economic decline. The only outliers are Very Liberal people, who cite climate change and women's rights as their top concerns.

While AI promises to be an increasingly important topic in the coming years, it's not yet at the top of people's concerns. When comparing the results to our 2024 Consumer Trends report, fewer people are concerned or optimistic about the technology. However, with its current predicted trajectory of reaching [almost 117 million users](#) in the US in 2025, expect AI to rise as a driver of both concern and optimism in the coming years.

42%

of women are concerned about their rights in 2025





Index of consumer feelings against the general population

Concern

	ALL	SEX		GENERATION			INCOME			POLITICAL			
	18+	Female	Male	Gen Z	Millennial	Gen X	Boomer	<\$75K	\$75K-\$125K	>\$125K	Very Liberal	Middle of the Road	Very Conserv.
Inflation	63%	2	-2	-5	-5	5	4	-2	5	3	-13	6	4
Recession or economic decline	52%	1	-2	-10	-5	7	4	-3	5	6	-14	4	4
War or global conflicts	48%	-1	1	-1	-7	1	11	-3	-1	7	-4	0	0
New US President	44%	1	-1	0	-6	2	8	-2	4	3	1	0	-1
Climate change	36%	2	-1	4	-2	-2	6	-1	2	1	21	2	-18
Unemployment	31%	2	-3	5	0	2	-13	1	1	-8	-2	1	3
Women's rights	30%	12	-13	6	1	-2	-6	-1	1	-1	25	-2	-19
Artificial intelligence (AI)	30%	0	0	0	-1	-1	5	0	2	0	1	-2	5
US transition of power	27%	0	0	-6	-6	4	8	-1	0	3	3	-3	1
Minority groups' rights	18%	3	-4	4	0	-1	-4	-1	1	-1	18	-3	-9
None of these	4%	1	0	3	2	-2	-2	1	-2	-2	-2	-1	-1

Optimism

	ALL	SEX		GENERATION			INCOME			POLITICAL			
	18+	Female	Male	Gen Z	Millennial	Gen X	Boomer	<\$75K	\$75K-\$125K	>\$125K	Very Liberal	Middle of the Road	Very Conserv.
New US President	34%	-2	2	-9	-5	4	12	-1	3	2	9	-3	5
Economic Growth	31%	-3	3	-2	-2	1	4	0	2	-1	5	0	-1
Slowing inflation	30%	-4	4	-6	-5	2	14	0	1	1	0	1	-4
Employment	26%	-1	1	2	3	-1	-7	1	1	-3	4	1	-3
Improvements in women's rights	19%	3	-3	5	-3	-2	2	-1	2	-1	9	0	-9
Addressing climate change	18%	0	0	-1	-1	0	3	0	-2	2	9	1	-7
Artificial intelligence (AI)	18%	-3	3	2	2	-2	-2	-1	1	1	1	3	-4
Less global conflict or war	16%	-1	1	2	-1	-1	3	2	-1	-5	2	1	-1
Minority rights improvements	15%	1	-1	0	0	0	-1	0	1	-2	9	-1	-5
US transition of power	14%	-1	2	-3	0	-1	4	-1	1	3	6	-2	7

Gen Z over indexes on societal vs. economic concerns

Impact of the presidential election

2025's top optimism driver is the prospect of a new US president. While our survey was fielded before the election, we wanted to know what impact the election results might have on consumer confidence and spending plans. These results are based on hypothetical questions about a Kamala Harris or Donald Trump win in 2024. While we presented both scenarios to respondents, it is interesting to note that there was very little difference when comparing the overall results. This reflects news reports at the time of a tightly contested election. But, a dig into demographic groups reveals a different story.

A Trump presidency

Trump's election to the presidency will have lasting impacts on the US economy and consumers' spending plans. Overall, positive sentiment and its impact on the economy is equal to negative sentiment; one-fifth of the population remains neutral. However, the sentiment doesn't necessarily translate to consumer spending plans. Only 22% of people said they would spend more if he won the race, versus 32% who said they would spend less. Most consumers are not changing their spending plans in 2025 due to the election.

Men, White consumers, and those with a trade school education were among the most optimistic about a Trump win. Boomers and people with a graduate degree expressed the most negative feelings. Boomers were also the most decisive about the election outcome, with only 11% saying they felt neutral about it. Among demographic groups, there is slight variation in spending plans following Trump's win, with Asian consumers standing out as the one exception, showing a slight increase in their intention to spend. Boomer, Black, and Hispanic consumers, as well as people with high school educations, are more likely to say they'll spend more under Trump's administration in 2025.

46%
will not change
spending plans due
to election results

Impact of Trump's presidency on consumers

WE ASKED

How does a Donald Trump presidency affect your feelings about the economy and your finances?



- ECSTATIC ● CONFIDENT
- NEUTRAL
- ANXIOUS ● DEVASTATED



38%

**feel positive about a
Trump presidency**

General outlook takeaways

Tap into growing optimism

Consumer optimism for the coming year is rising overall, especially among specific demographic groups. Advertisers should build campaigns that tap into pockets of optimism with targeting and messaging strategies that resonate with people who have positive outlooks and future aspirations.

Navigate economic concerns

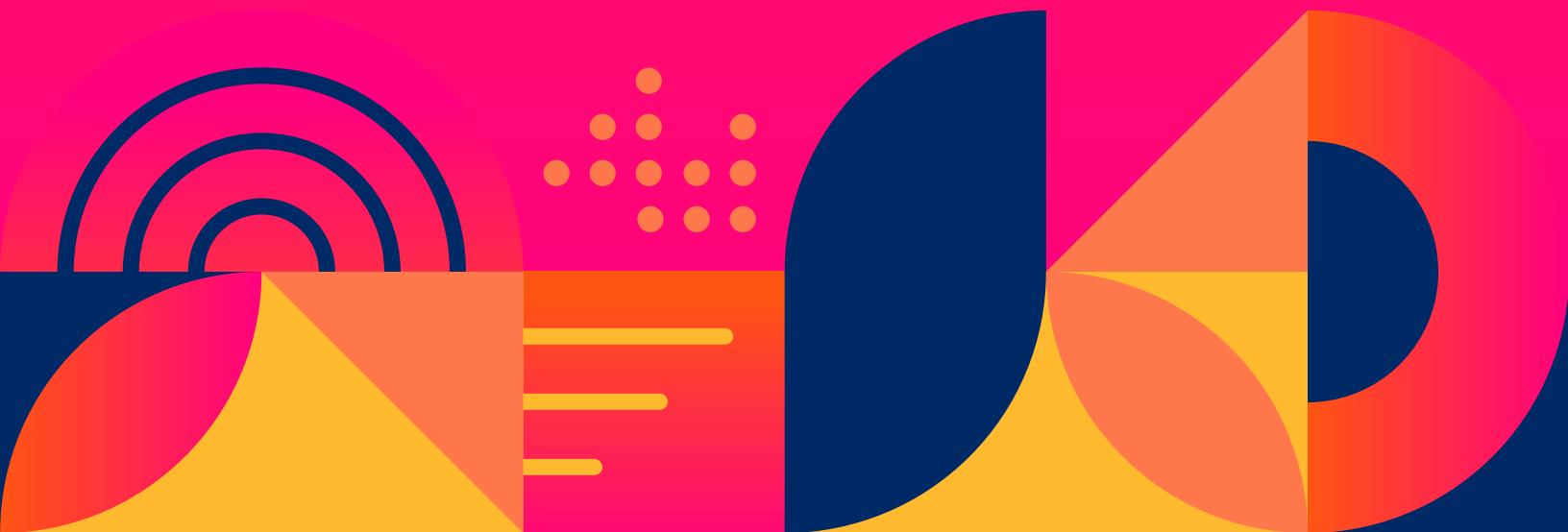
Despite growing optimism, significant anxieties remain around inflation, a potential recession, and geopolitical conflicts. Marketers can address these concerns by emphasizing affordability and stability in their offerings.

Prepare for presidential election impact

While the impact on spending plans and consumer sentiment was not significantly different overall, specific demographic groups diverged. As the country adapts to welcoming a different president to the helm for the third consecutive election cycle, marketers should approach their messaging with care, letting demographic insights guide targeted marketing efforts.

Adopt and adapt to AI innovations

While AI is not a top concern for consumers today, its evolving role and potential for marketers should not be overlooked. Brands should explore integrating AI to enhance customer experience and operational efficiency while balancing the advancement with transparency and a thorough test-and-learn strategy.



Personal finances

Little has changed with consumers' feelings about their finances since last year. They remain more optimistic about the upcoming year than the current year. Overall, 23% of consumers felt 2024 was better than last year, versus 40% who felt it was worse. And, 40% think next year will be better than this year, versus 21% who think it will be worse. Given the uncertainty that presidential elections bring and the already noted consumer concerns, the relatively flat changes in expectations year over year can provide reassurance to marketers.

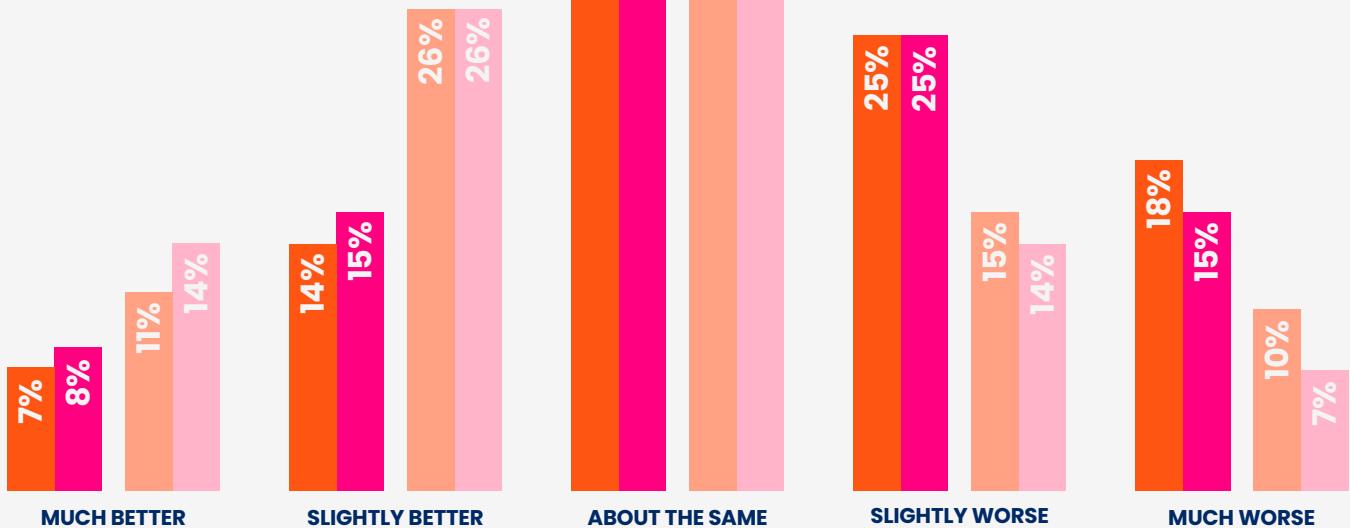
WE ASKED ●●

Compared to last year, how would you rate your current personal financial situation?

WE ASKED ●●

What are your expectations for your personal finances in next year?

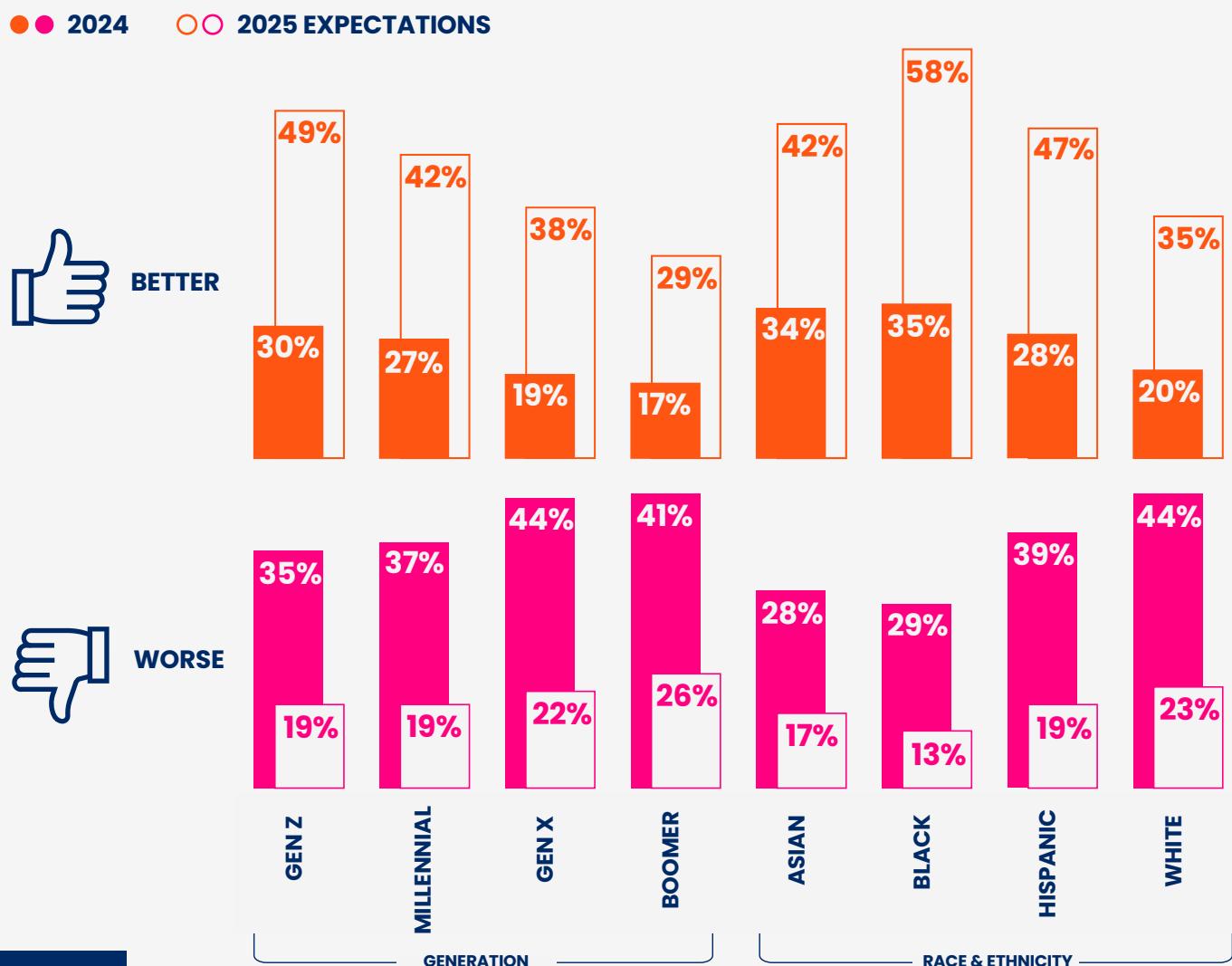
● 2023 ● 2024 EXPECTATIONS
● 2024 ● 2025 EXPECTATIONS

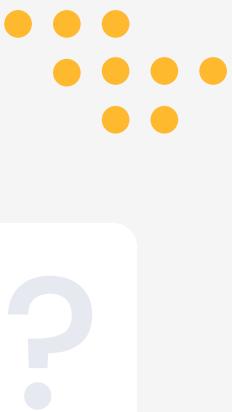


Demographic nuances

Even though the overall sentiment is steady, demographic factors like generation, race, and ethnicity reveal a more nuanced picture. Black consumers are among the most likely to say that this and next year will be better, driven by their higher optimism around employment (+10pp) and the economy (+9pp). Gen Z is also looking forward to the future, although their index on optimism drivers wasn't as high as Black consumers. Instead, this generation is likely looking to the increased opportunities that come with age. Asian consumers are also at the top of cohorts who think 2024 was a better year than 2023.

Understanding these nuanced financial feelings across demographic groups can help marketers tailor their strategies to resonate more effectively. Consider embracing a multicultural and generational marketing strategy that plays to each group's strengths.





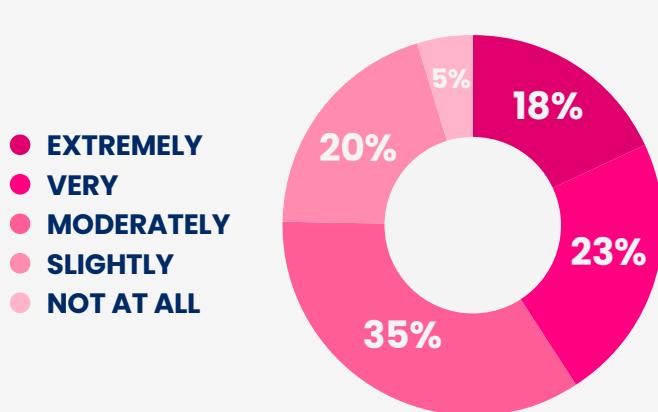
Inflationary concerns

Inflation led the headlines post-pandemic. While we've seen inflation slow down in 2023 and 2024, consumers are still feeling the pain. Ninety-five (95%) percent said they are affected to some degree, even though only 63% cited it as one of their worries in 2025.

Consumers are still tempering spending plans for discretionary items compared to needed purchases like food and groceries. When looking at people who are worried about inflation, they are less likely to spend more in 2025 across all categories. This points to a continued need to tread lightly with consumers. Communicating the benefits and cost effectiveness of products can help justify expenditures, especially for those still cautious about spending. Additionally, adopting a measurement approach that lets you see results throughout the funnel can enable more efficient optimization and future planning.

WE ASKED

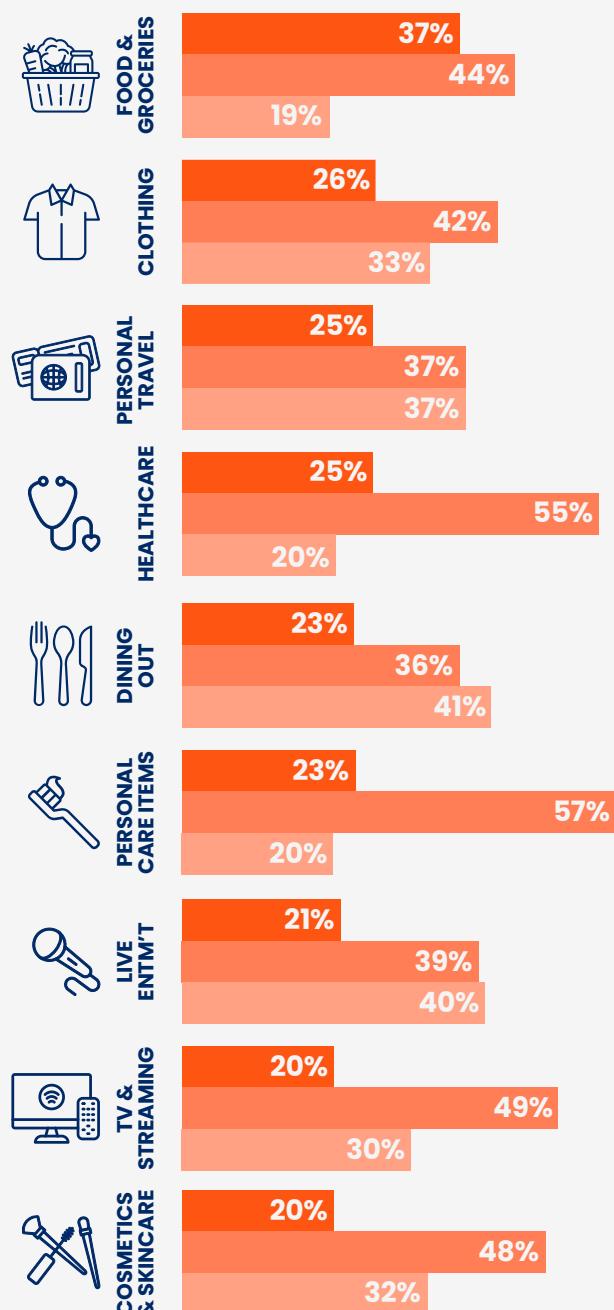
How are you affected by inflationary pressures?



WE ASKED

Compared to 2024, how much do you plan to spend on the following in 2025?

(+) MORE (=) THE SAME (-) LESS



Personal finances takeaways

Offer a clear value proposition

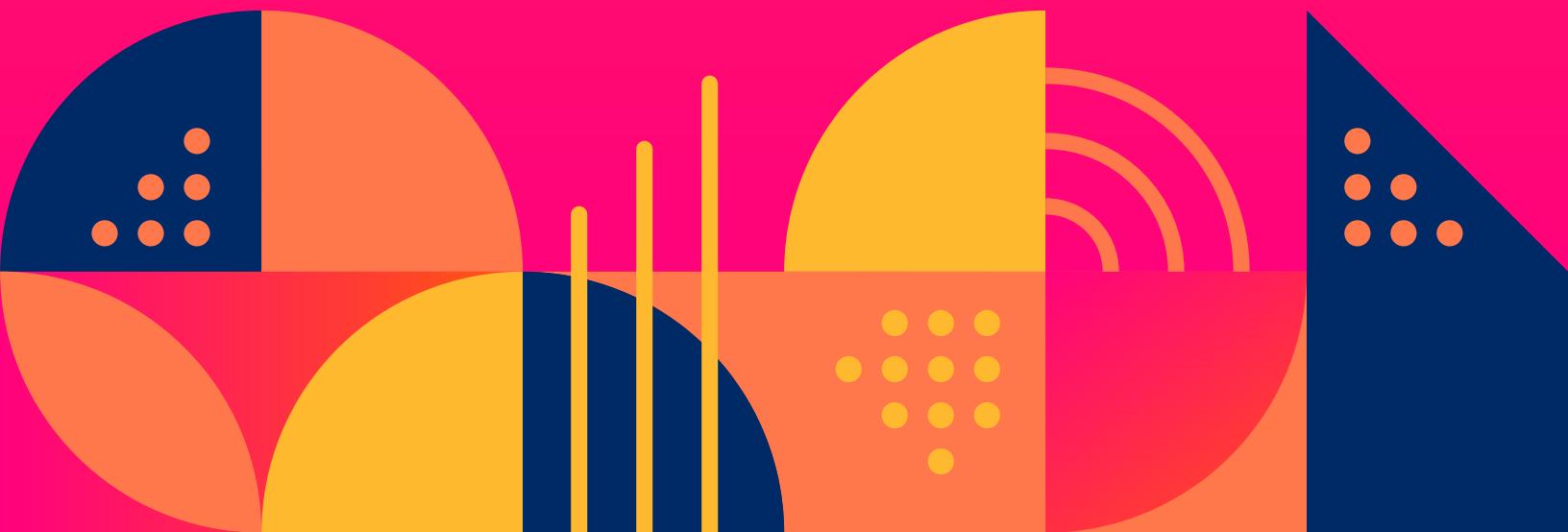
Consumers are still apprehensive about the economy and inflation. To stand out, focus on the value you provide to your customers and emphasize your products' tangible benefits and cost-effectiveness.

Embrace multicultural and multigenerational marketing strategies

Leveraging cultural insights, develop separate campaign threads that cater to different demographic groups' nuanced preferences and needs. By resonating with the differing priorities across backgrounds, you can more effectively navigate the economic uncertainties while also increasing ad relevancy and impact.

Consistently measure your advertising throughout the full funnel

During economic stress, consumers' priorities can shift quickly. Allocate resources more efficiently by adopting an always-on measurement approach to analyze the performance in each funnel stage. This allocation helps sustain campaign effectiveness, protect your marketing budget, and develop more resilient strategies that anticipate and mitigate risks.





Advertising

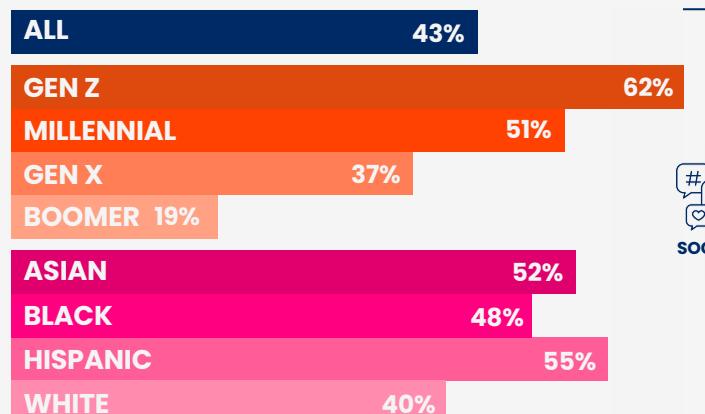
Media consumption and shopping choices continue to fragment as new product discovery avenues open up and are embraced by consumers. But, this is not a consistent story across consumer groups. Advertisers must deeply understand their target audiences, how to reach them, and how to move them to purchase.

Consumer purchase drivers

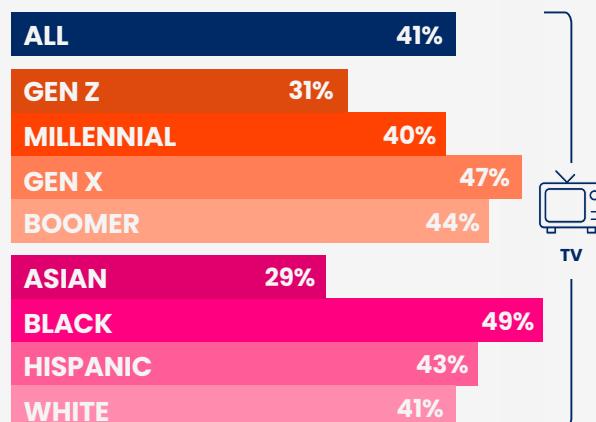
As evidence of this continued shift, we see social media overtake TV this year as the top purchase driver. In our [2023 study](#), 43% of people said an ad on TV caused them to buy a specific product vs 41% of people who said an ad on social media did the same. This year, we see the numbers reversed. The growth is powered chiefly by the increased adoption of middle generations, Millennial (+2pp) and Gen X (+3pp), who follow in Gen Z's footsteps. Gen Z's social media purchase motivation between last and this year is flat at 62%.

WE ASKED

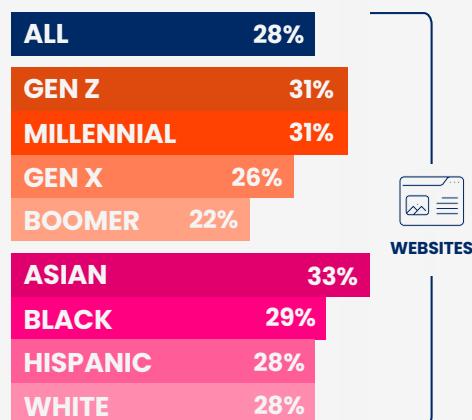
Where have you seen or heard an ad that caused you to buy a product?



SOCIAL



TV



WEBSITES

Media purchase influencers

SOCIAL

43%



GAMES

14%



PODCASTS

15%



TV

41%



WEBSITES

28%



RADIO

13%



OOH

10%



PRINT

12%



NONE

24%



Product discovery

The journey from product discovery to purchase has become increasingly fragmented, presenting a significant challenge for advertisers. Today's consumers use a variety of channels to research their product choices, from search engines (50%) to retailer websites (32%) and social media platforms (28%).

This fragmented discovery-to-purchase journey means that brands must be present across multiple platforms to ensure they meet consumers wherever they seek product information, adding complexity to strategy and execution.

+22pp

**Gen Z consumers
who use social media
for product research
vs. overall**

+7pp

**Black consumers
who use AI for product
research vs. overall**

WE ASKED

**Where do you usually
research products
before buying?**



SEARCH ENGINES	50%
FRIENDS/FAMILY	37%
CUSTOMER REVIEWS	37%
RETAILER WEBSITES	32%
SOCIAL MEDIA	28%
REVIEW SITES	28%
PRICE COMPARISON	21%
AI PLATFORMS	8%
NONE OF THESE	7%

Advertising sentiment

Media and brands alike walk a tight line between annoying and pleasing audiences. Finding the right balance of relevant messaging and ad frequency can mean the difference between a successful campaign and a failure.

Television and social media both received the highest ranking for irritating and also the highest rankings for informative and entertaining. Marketers have opportunities to better target ads on both mediums, especially with the growth of CTV, and ensure the creative aligns with their target audiences.

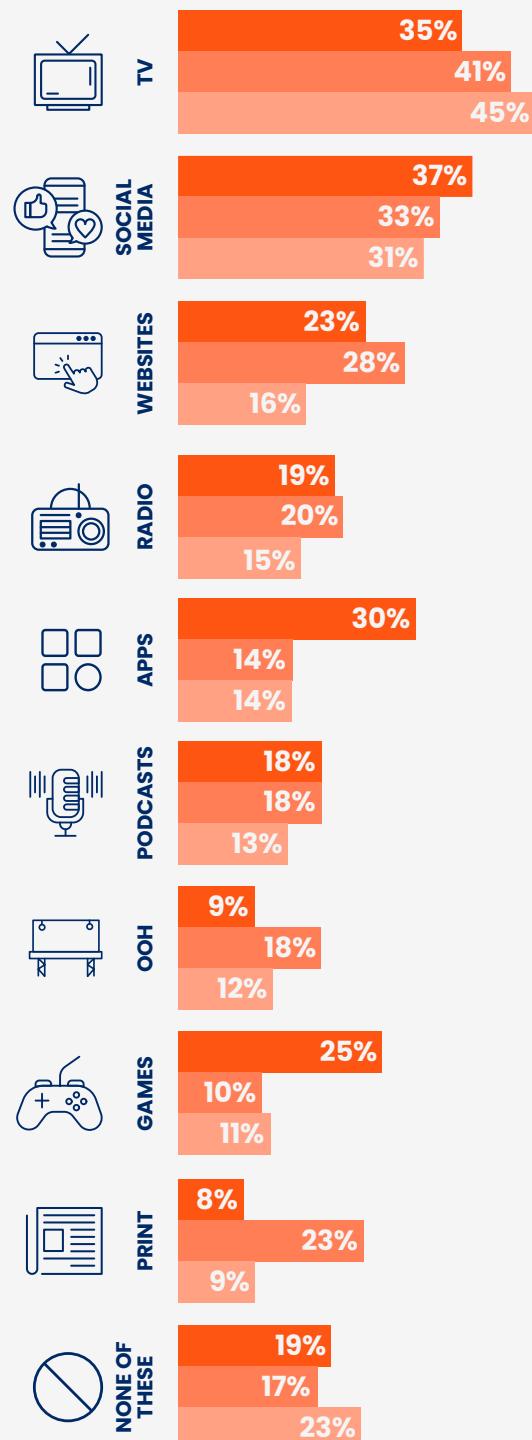
Radio and podcast ads are less likely to be perceived as irritating than most other formats (19% and 18% respectively) but they also rank lower on informative and entertaining. For audio, exploring sponsorships or host-read ads that naturally integrate into content may improve the perceived value and entertainment of the ads.

Overall, the mixed results call for a strategic cross-platform media plan partnered with a comprehensive measurement framework that can deterministically measure campaign performance across channels.

WE ASKED

On which do you find advertising: irritating, informing, entertaining?

- **IRRITATING**
- **INFORMATIVE**
- **ENTERTAINING**

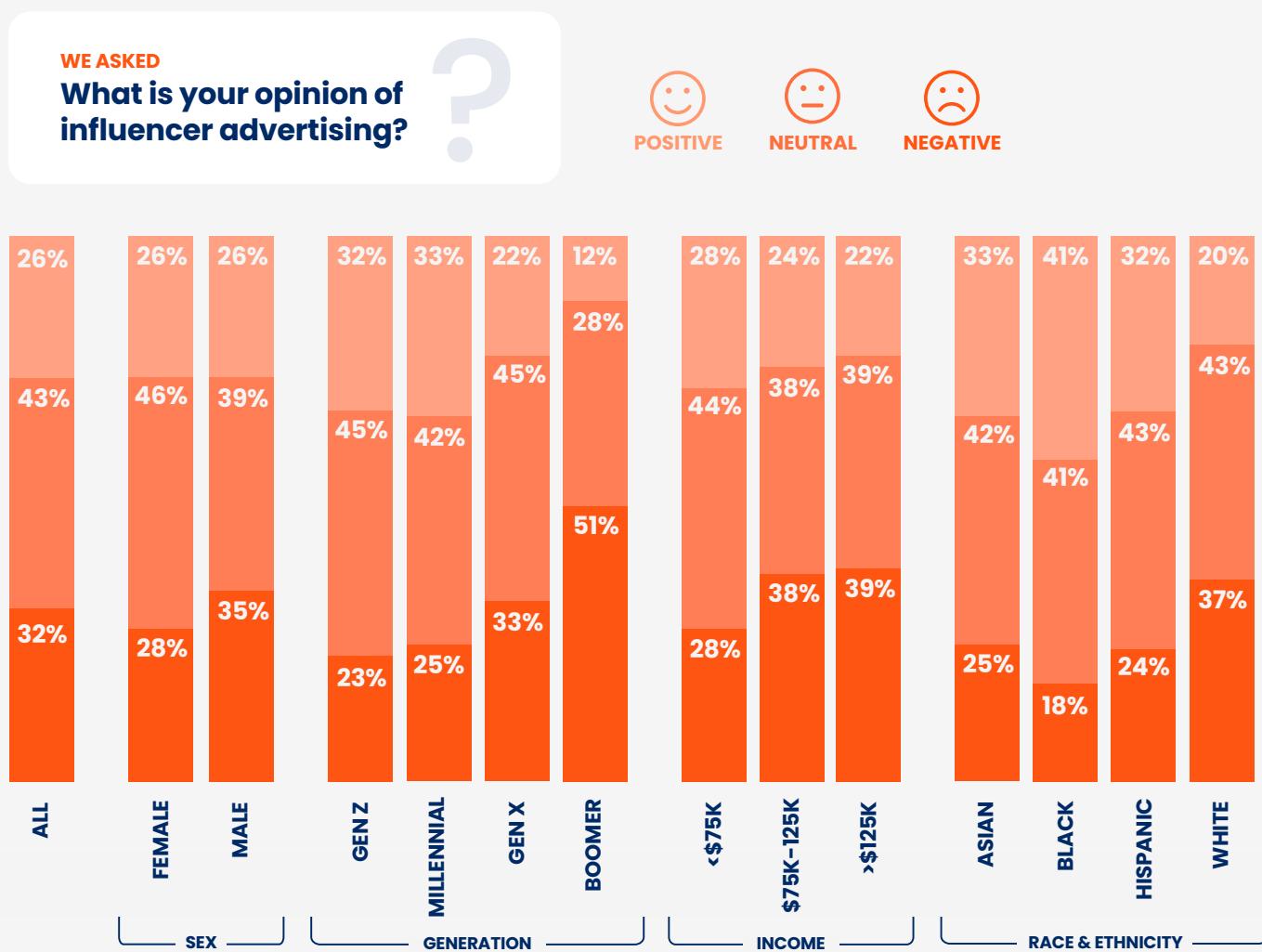


Influencer impact

Influencer marketing is exploding, projected to reach a worldwide market size of [\\$24 billion in 2024](#). As influencers' importance to brand and performance grows, marketers are increasingly seeking to partner with the right individuals.

Despite this explosiveness, they should proceed with caution. Influencer acceptance in advertising varies across age, sex, income, and ethnicity. Among their peer groups, Black, Gen Z, and Millennial consumers were the most likely to embrace influencers. People making over \$75K per year, Boomer, and White consumers were the most likely to feel negatively.

Given the mixed opinions, brands should consider using influencer content as part of a broader, omnichannel, targeted marketing strategy rather than relying on it as the sole tactic. Integrating influencer campaigns with traditional or other digital advertising with a targeted and personalized strategy can balance perspectives and tap into the more positive segments.



Advertising takeaways

Develop a deep understanding of your target audiences

Today's consumer preferences for media consumption, product discovery, and shopping choices vary widely across different groups, making it imperative to identify and engage with audience segments through tailored strategies. This means knowing where people spend their time, their purchase drivers, and how to move them through the purchase journey.

Understand the optimal ad frequency and messaging

While receiving high marks for informative and entertaining, television and social media also rank high in irritating consumers when ads are too frequent or poorly targeted. Measure and test ad strategies to optimize ad frequency and ensure your messaging is hitting the mark with your audiences.

Build a presence across multiple channels and platforms and measure it

With the customer journey increasingly fragmenting, you need to maintain a strong presence across many channels and platforms. Consumers today utilize a variety of channels for both product research and media consumption. Brands that win in 2025 will ensure visibility at every touchpoint of the buying journey and simplify the purchase path. To understand which channels work and how they interact, establish a comprehensive measurement framework upfront. This framework should prioritize deterministic measurement across various channels and platforms.

Adopt a strategic influencer marketing approach

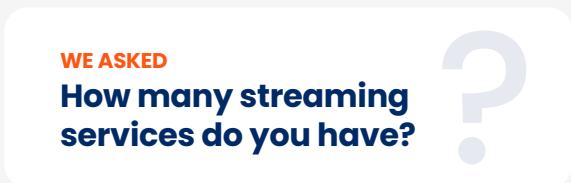
Influencer marketing continues to grow, with its impact varying across demographics. After ensuring a strategic brand-fit with influencers, integrate their content within a broader, omnichannel marketing strategy. Personalized and targeted outreach that builds on the strengths of these partnerships will mitigate risks associated with overreliance on any single advertising tactic.



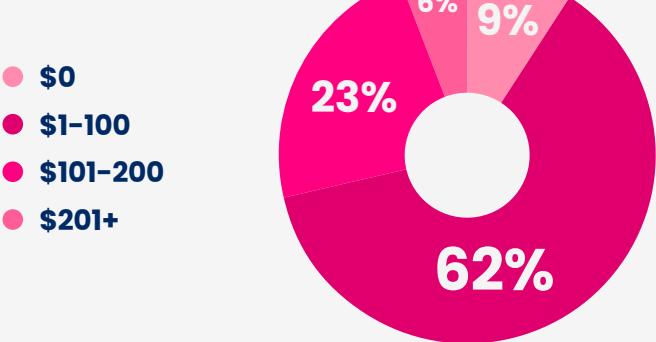
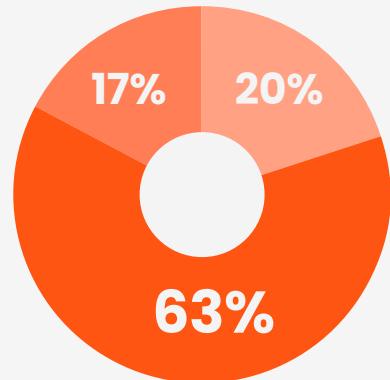
Media

Consumers are increasingly embracing streaming content, and the industry is moving to keep pace. Today, people expect choice and control over their viewing experiences, powering a growing streaming landscape. But, the industry must navigate consumer shifts carefully – they are not one-size-fits-all.

Most (62%) expect to maintain the same number of streaming services in 2025, with equal numbers planning to add or drop services. This compares to 58% in 2024, suggesting many are settling into their subscription strategy.



- 1
- 2-4
- 5 OR MORE



- INCREASE
- STAY THE SAME
- DECREASE



A deeper look at subscribers

Looking deeper into streaming subscribers, Boomers are the most likely to keep just one service (37%), but they also spend more overall. Income also plays a significant role in how many subscriptions a household keeps.

As people maintain a stable subscription count, marketers should diversify ad placements across multiple services to ensure they reach viewers wherever they are. This means considering both large platforms like Max and Paramount+, smaller, more niche services that may attract specific audience segments, and ad-supported tiers that offer budget-friendly options for the cost-conscious.

WE ASKED

How many streaming services do you subscribe to?



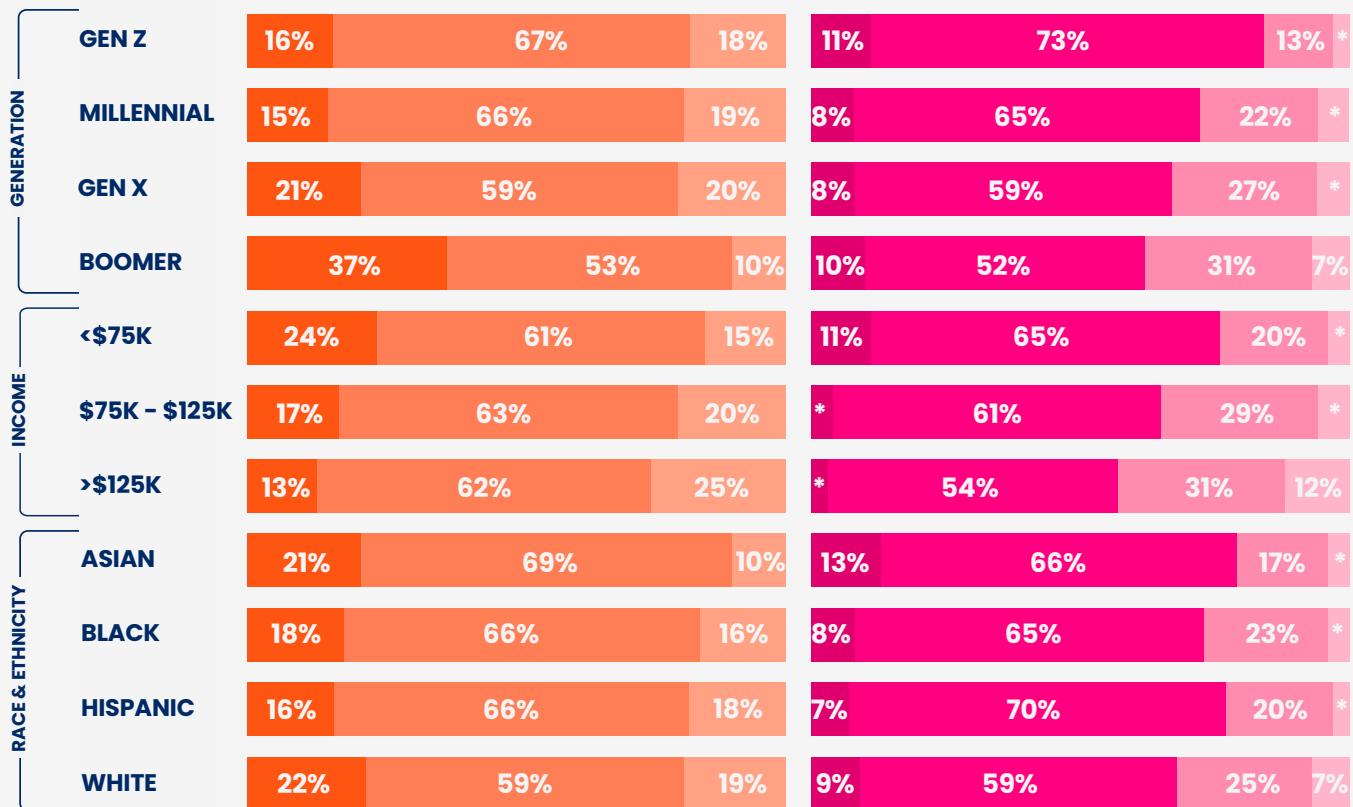
WE ASKED

How much do you spend monthly on streaming & TV?



● 1 ● 2-4 ● 5 OR MORE

● \$0 ● \$1-100 ● \$101-200 ● \$201+



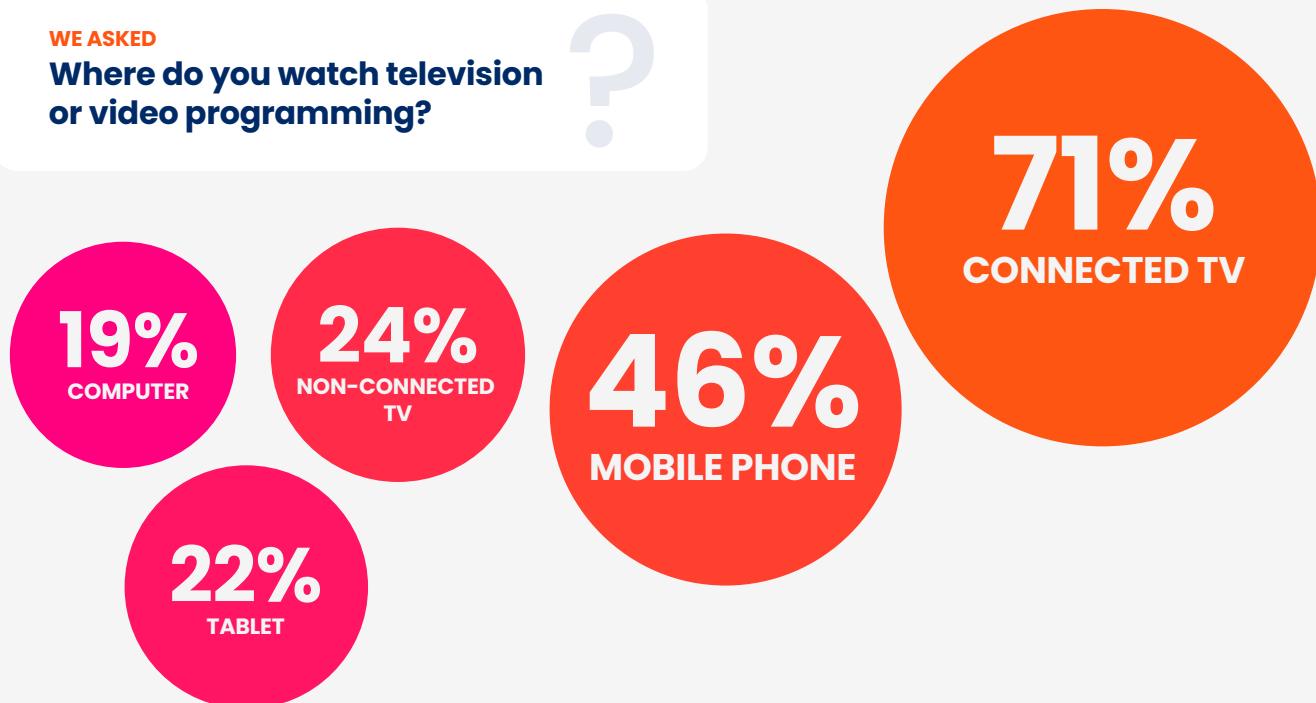
* Values 6% and below are not noted in the chart

Connected TV dominates

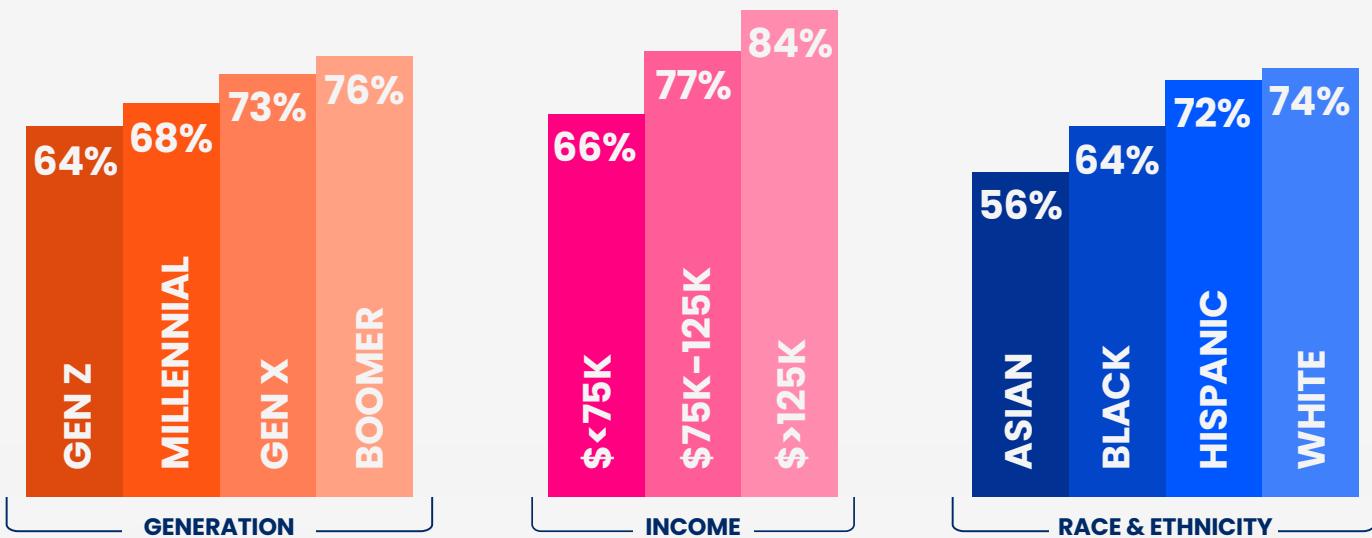
Connected TVs (CTVs) remain the top pick for watching TV and video, followed by smartphones. As older, non-CTVs phase out of people's homes, their usage drops. Tablets and computers remain close in popularity. CTV's wide adoption across all demographic groups points to a growing opportunity for brands to target consumers.

WE ASKED

Where do you watch television or video programming?



Connected TV Viewers



Media takeaways

Diversify ad placements across streaming services

As consumers stabilize their streaming subscriptions, marketers must diversify their advertising placements across multiple platforms and services, striving for a balanced reach and frequency strategy. Consumers expect advertising to add value and not disrupt their viewing experience, which can only be achieved when the right creative is paired with the right media plan. Diversifying ad placements across multiple streaming platforms enables brands to meet viewers where they are and match their appetite for relevant, engaging content. Further, by leveraging insight into ad performance across disparate platforms, marketers can develop media plans that avoid oversaturation, particularly on high-impact channels like CTV while also ensuring broad reach across ad-supported tiers.

Build a cross-platform plan that includes CTV

With CTVs dominating as the preferred device for watching TV and video content, and as the trend away from non-connected TVs continues, incorporating CTV into the advertising mix is essential. By prioritizing CTV in their strategy, marketers can leverage the platform's broad reach and the high engagement rates associated with larger screen viewing to deliver impactful, high-quality advertising experiences that resonate.



Brand experience

With so many different purchase journey avenues available to customers, successful brands must find ways to stand out and foster loyalty. The biggest influence on consumers' brand perceptions is their personal experience with the brand. And it's even more impactful as consumers age. Prioritizing positive product and service experiences early on with a consumer can build life-long customers. In fact, Gen X is 12pp more likely to favor previous experiences with a brand than Gen Z, and Boomers are 23pp more likely.

+12pp

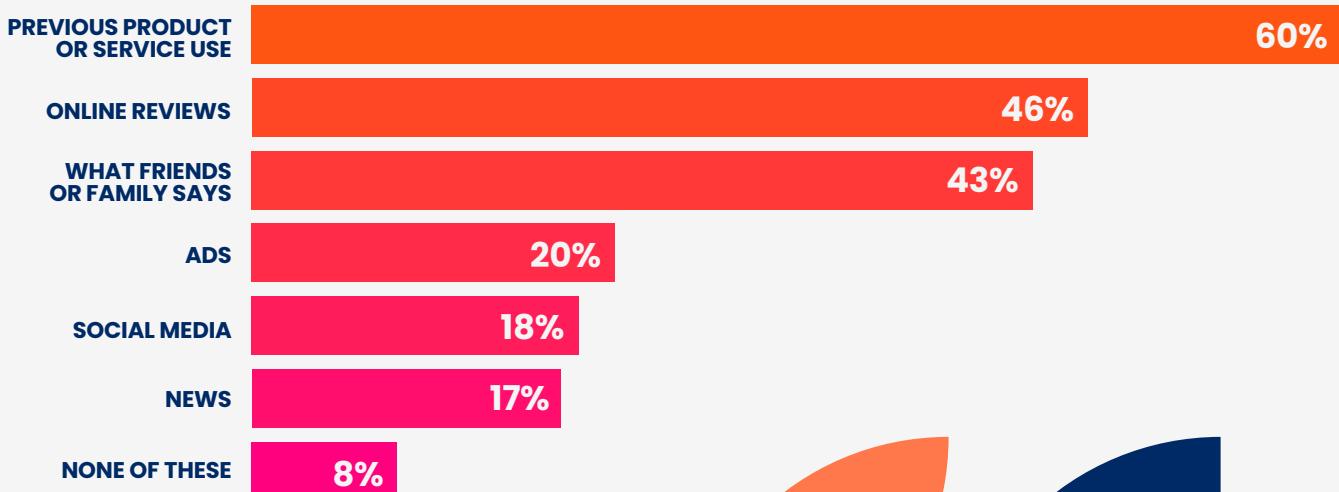
Gen X favors previous product or service experience over Gen Z

+23pp

Boomers favor previous product or service experience over Gen Z

WE ASKED

Which touchpoints(s) influence how you view a brand?

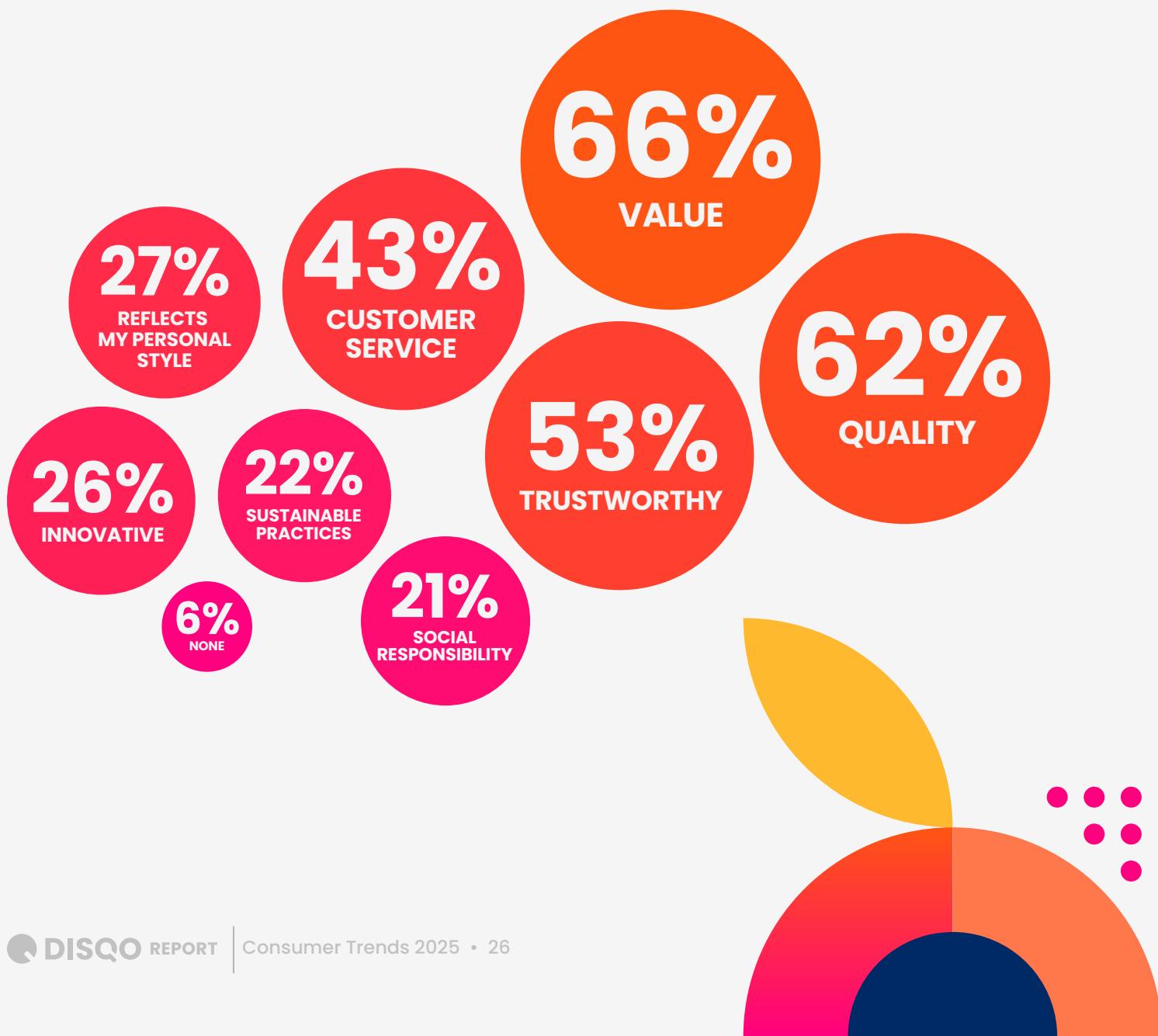


Authentic brand experience

People appreciate authentic connections with brands; value, quality, and trustworthiness are at the top of the attribute list that impacts their views. Value was the number-one attribute across nearly all demographic groups. While Gen Z was more likely to favor sustainability and personal style than others, they were still focused on experience factors like value and quality. The one cohort that placed value in second place was those who make over \$125K per year – they were more likely to prioritize quality.

WE ASKED

Which attribute(s) impacts
your view of a brand?



Brand loyalty

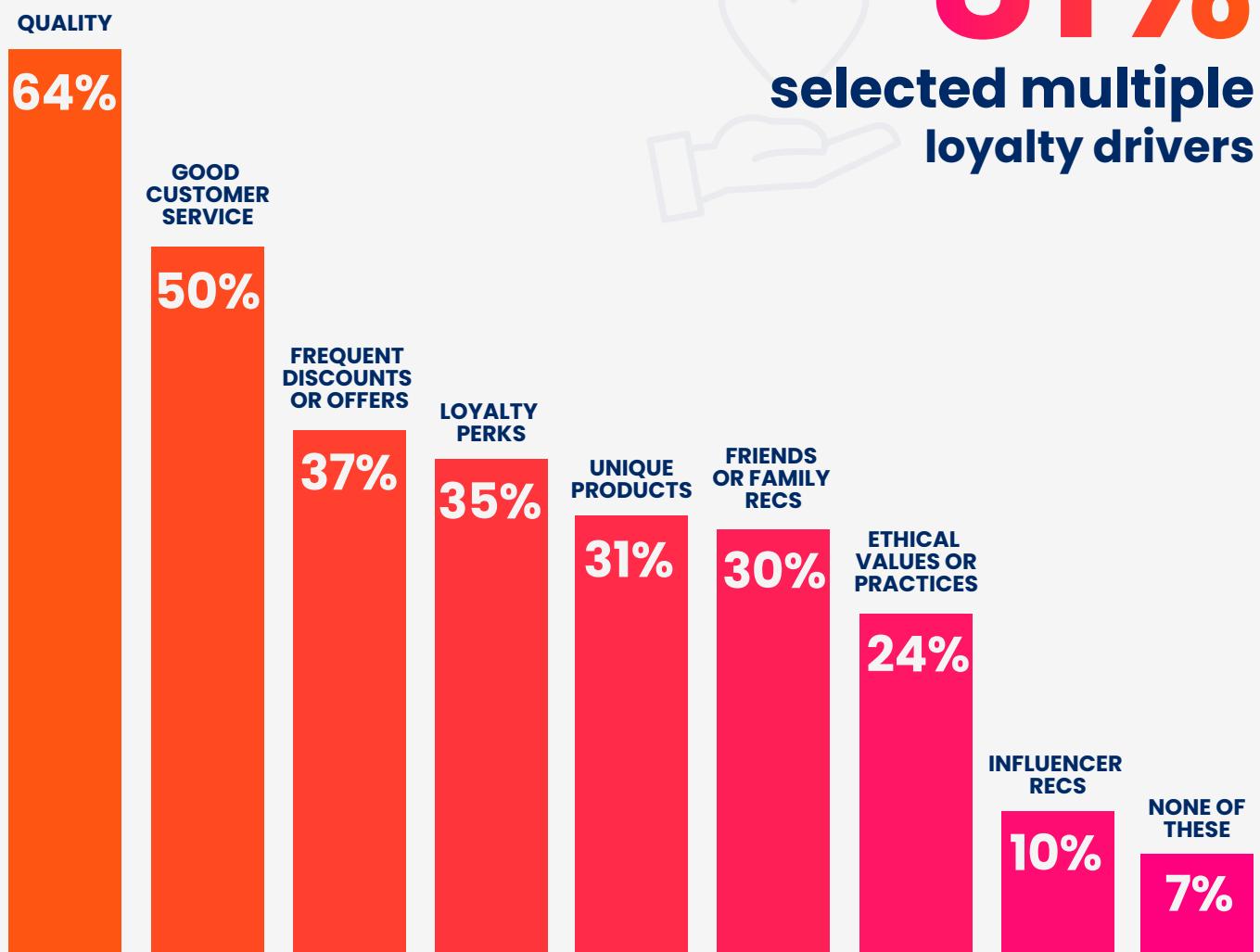
Establishing and growing a loyal customer base is critical for successful brands today, but it's not always easy to understand how these customers are fostered. There isn't just one driver of brand loyalty; in fact, 81% cited more than one factor as a brand loyalty influencer.

Marketers should focus on consistency through touchpoints to build a positive brand experience. Coordinated approaches that tap into customer data throughout the funnel, like personalization, targeted omnichannel advertising campaigns, loyalty programs, and post-purchase engagement, can help cultivate a loyal following. Balancing other long-term brand-building efforts like quality and good customer service is also important.



WE ASKED

**What makes you
loyal to a brand?**



Brand value

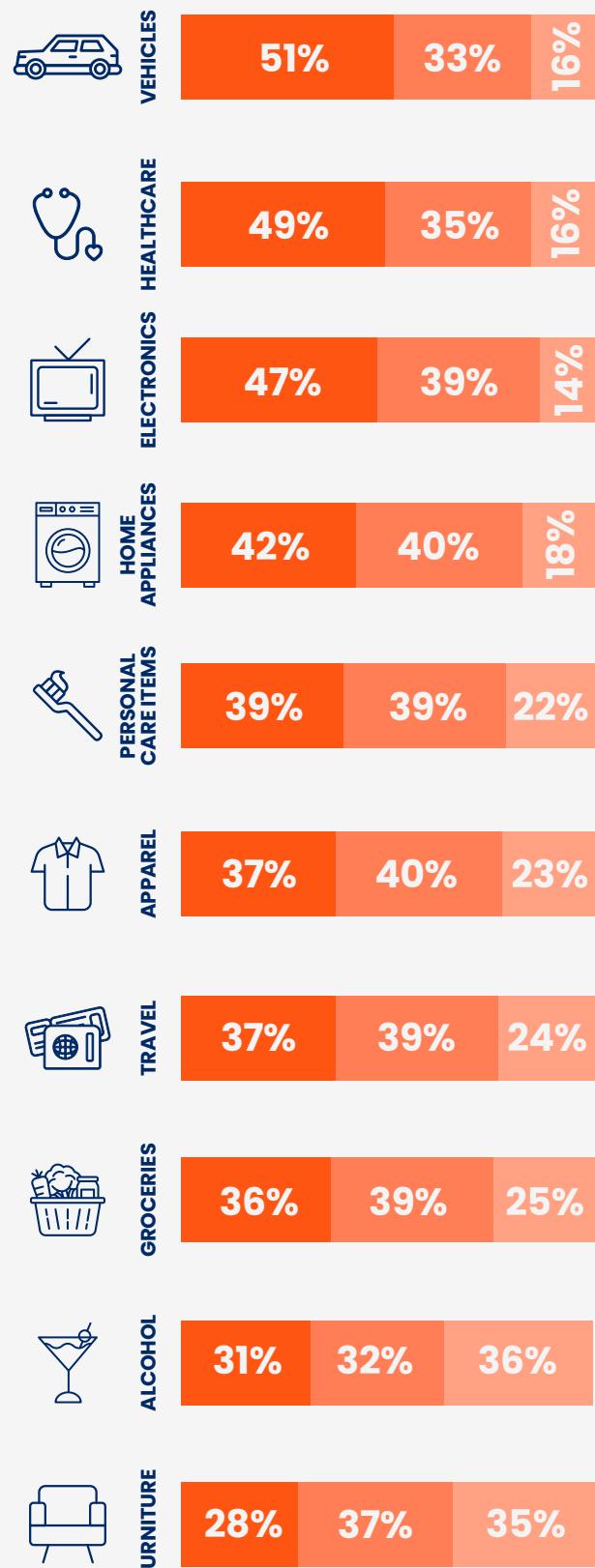
The battle for brand loyalty is intense. Whether it's brand vs. brand or brand vs. generic, demonstrating value alignment—monetary or personal—is an ongoing affair. Consumers are more likely to embrace brand names for significant purchases like vehicles, healthcare, and electronics, but choices vary slightly across generations.

We see that younger consumers tend to place more value on brand names in everyday and lifestyle products like clothing, electronics, and personal care. At the same time, older generations prioritize brands for high-stakes purchases.

WE ASKED

How important is brand name when buying these products?

- **IMPORTANT**
- **SOMEWHAT IMPORTANT**
- **NOT IMPORTANT**



Brand experience takeaways

Prioritize positive brand experiences early in consumer lifecycle

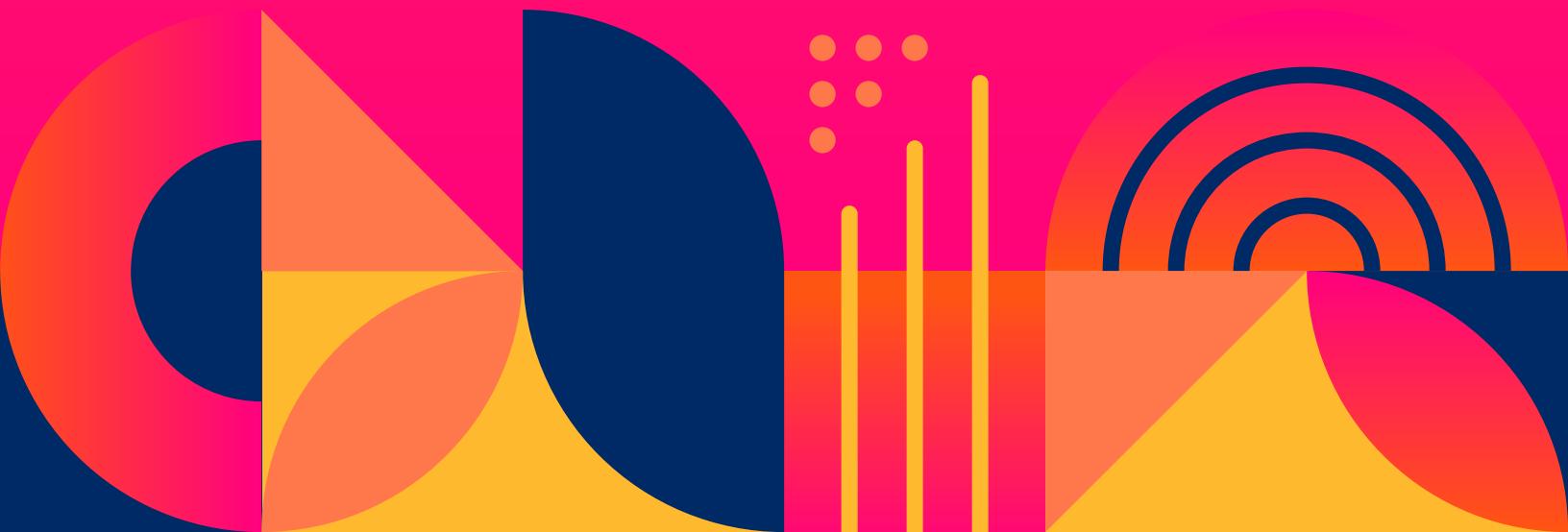
The impact of experience with a brand only grows with age. Establishing positive brand experiences early in a consumer's life can create a foundation of trust and preference that endures. This strategy enhances immediate engagement and fosters long-term loyalty and advocacy, ensuring a sustained customer base.

Balance brand and performance strategies to cultivate loyalty

To build a loyal customer base, brands must balance their focus between performance metrics and brand-building efforts. By employing coordinated strategies that harness customer data for personalized interactions and engaging consumers through targeted omnichannel advertising, brands can align performance goals with broader brand objectives.

Demonstrate value alignment across all consumer segments

Consumer preferences for brand names vary by age and product type. Marketers should align brand communications and promotions with these preferences to demonstrate relevant value, ensuring brand relevance and loyalty across different demographic segments.



Advertising Measurement

WITH  DISQO

BRAND LIFT & OUTCOMES LIFT

DISQO provides holistic ad measurement with a single-source, identity-based methodology. Our Brand Lift product enables cross-platform measurement of attitudinal lift on KPIs like awareness, consideration, and favorability. Our Outcomes Lift product uniquely adds measurement of post-ad exposure digital behaviors like search, site visits, and e-commerce activities. Combined, these products give a complete picture of full-funnel advertising effectiveness.



BRANDS & AGENCIES

At a time when media spend is under scrutiny, DISQO reveals exactly how advertising drives tangible business outcomes and, importantly, which channels are moving the needle most. This allows you to prove the effectiveness of investments and make valuable ROI optimizations.



MEDIA PLATFORMS

Media platforms today need to prove how their content delivers against campaign goals. DISQO offers measurement of consumer actions post-ad exposure once the consumer leaves your domain. This enables powerful conclusions about performance so you can get proper attribution for the efficacy of your media and ad formats.

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