

2025

# US consumer trends report

*Essential insight for the year ahead*



# Introduction

This year's consumer trends survey comes at a pivotal time; following the **re-election of Donald Trump as president**, but prior to him being sworn into office. There are a lot of unanswered questions at this stage: **who will make up Trump's cabinet? What policies will he be pursuing? How will he handle key diplomatic issues like Russia/ Ukraine and Israel/Palestine?**

**The data reveals a mixed reaction from consumers to the new government, with high earners anticipating a buoyant 2025, while women are dubious about their economic prospects.** With this sentiment influencing the way consumers behave, brands must adapt their approach. This report tells you what you need to know.

## Survey sample

The data in this report comes from a nationally representative survey of 2,000 US consumers aged 18-67. It was conducted on the Attest platform during November 2024.

## Trend 1

# A gender divide is driving reduced spending

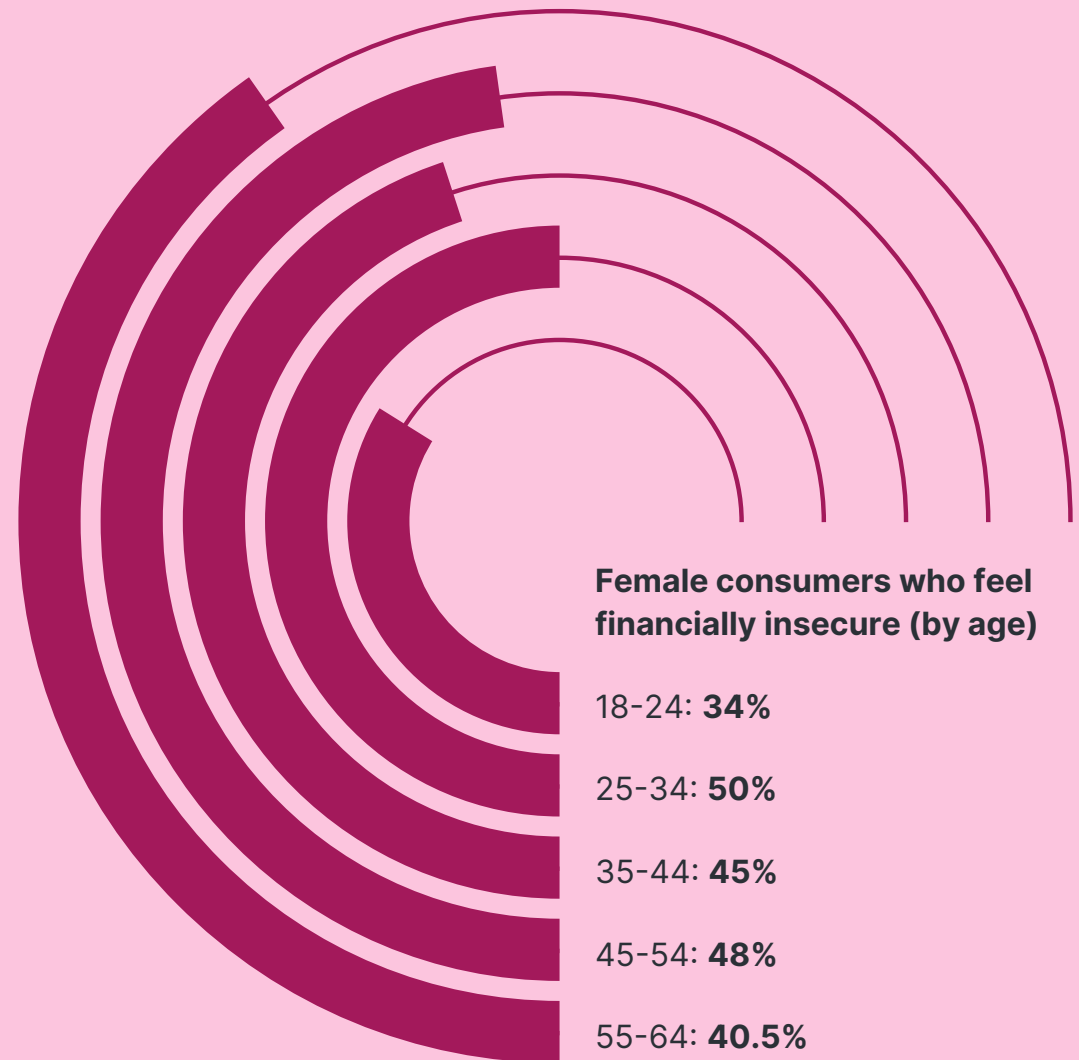
One thing that stands out in this year's survey results is a difference between the sexes - sentiment is notably more negative among female consumers.



# Financially, American women believe they are significantly worse off than men.

Overall, 45% say they feel financially insecure in comparison to 33% of men.

And the level of insecurity that women are experiencing is more extreme, with **22% feeling “very financially insecure”** versus 15% of men.



## This insecurity is impacting the way female consumers are spending their money.

**63% say they are spending cautiously at the moment versus 46% of men.** Again, a difference can be seen at either end of the spending scale, with 27% of women spending “very cautiously” compared with 17% of men. And only 5% of women describe themselves as spending “very freely” versus 10% of men.

## As a result, female consumers are more likely to purchase cheaper brands than their male counterparts

41% would choose a cheaper brand over their favorite to save money right now compared with 34% of men.

**63%**  
**of female**  
**consumers**  
**are spending**  
**cautiously**



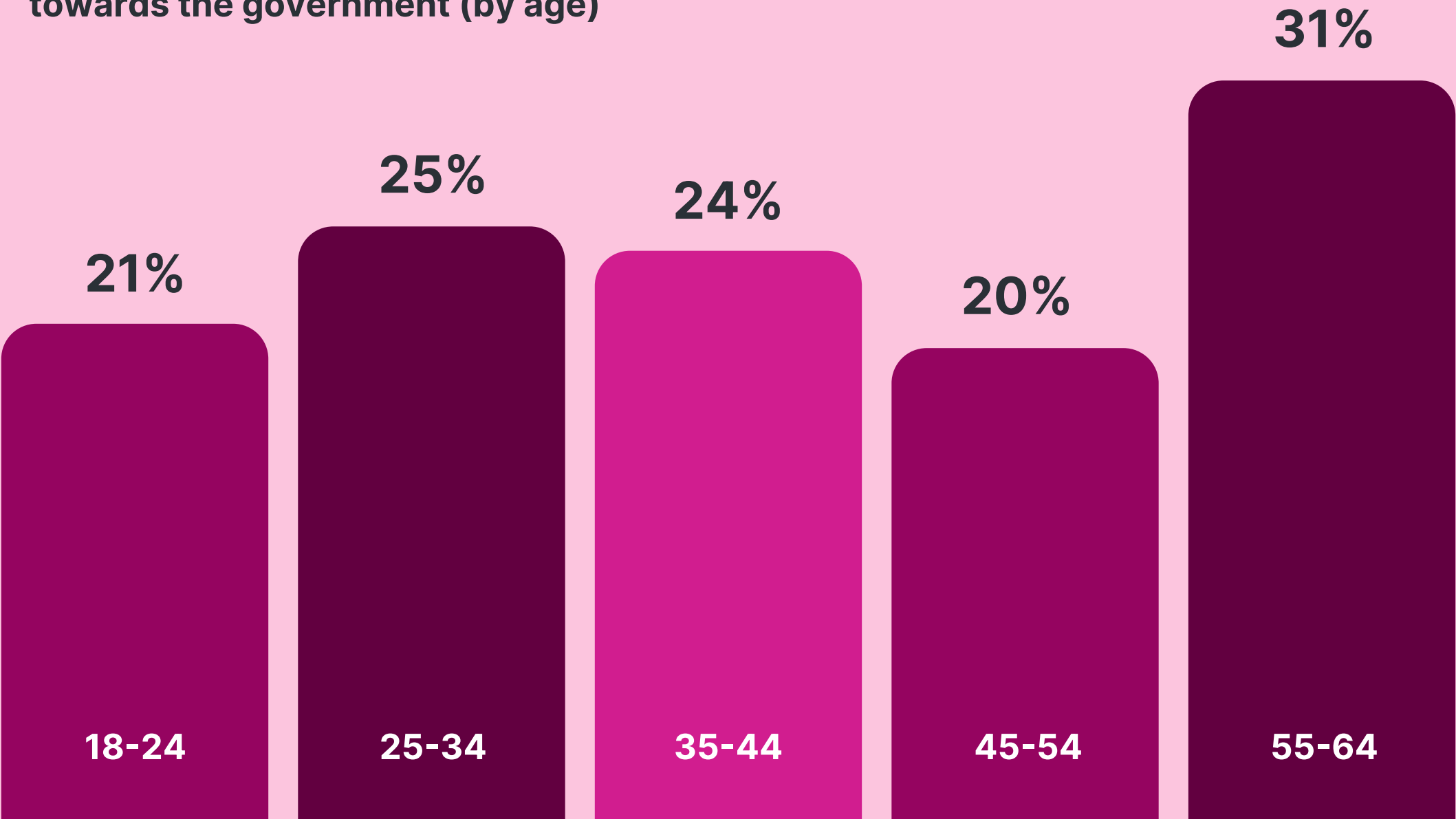
The uncertainty of an election year appears to have put female consumers on their guard, as there's been a +7 percentage point increase in cautious spending. Interestingly, among men, there's been a -5 percentage point decline.

**The data shows that while 36% of men feel confident about spending in light of the government's plans for the economy, just 23% of women are reassured by economic policy.**

**Men feel notably more positive about the government,** with a third expressing positive sentiment compared with only a quarter of women. In general, American women feel positively about their lives (66% feel positive at the moment) but they do not show the same strength of feeling as men, 34% of whom feel "very positive" (versus 26%).



**Female consumers expressing positive sentiment  
towards the government (by age)**





## What this means for brands

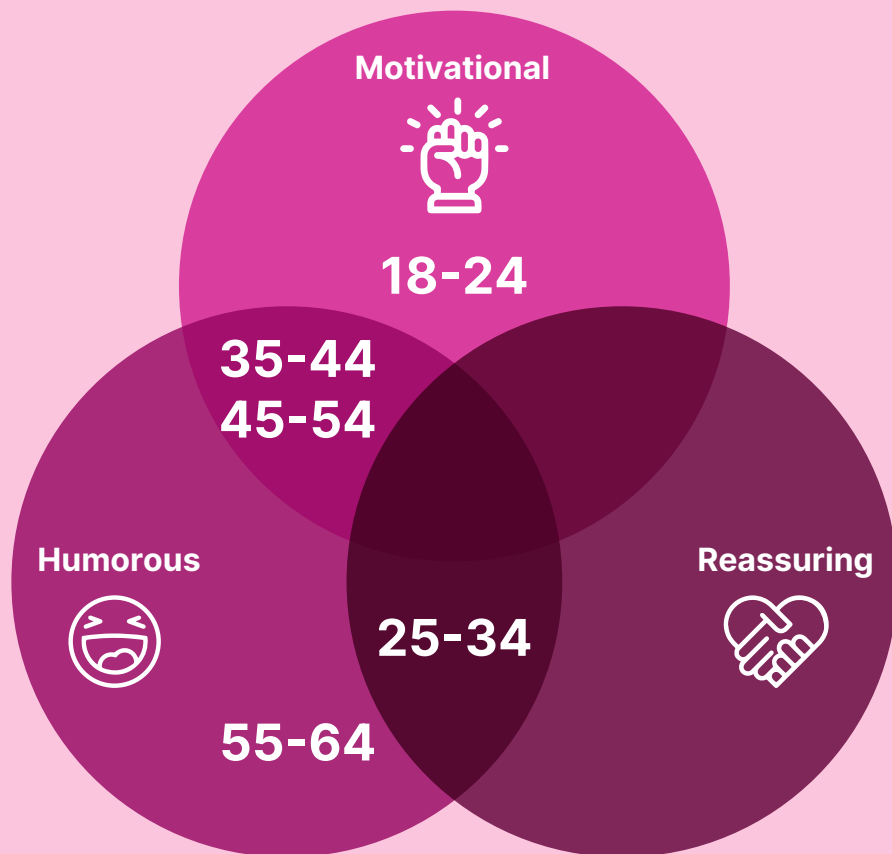
Our research shows that women are looking for different things from brands than men. In terms of marketing, they're significantly more likely to want to hear reassuring messaging (41% versus 32% of men), although motivational messaging holds the most appeal overall (52%).

## Female consumers are also looking for brands to weigh in on women's rights.

Behind poverty and inequality, which 35.5% of women want brands to tackle, it's the top issue, with **34% wanting brands to take a stance**. Gen Z women (aged 18-26) feel especially strongly, with **59% wanting action from brands on women's rights**.



## Type of marketing messaging that appeals most to female consumers (by age)



It should be noted that **women have lower trust in brands**; while 36% of men trust big global brands to put consumers before profits, less than a quarter of women do. Even purpose-driven brands fare worse among female consumers; 41% trust them versus 49% of men.

**Lower trust is also felt towards social media companies, with only 24% of women trusting them compared to 30% of men.**

This trust gap is something brands should keep in mind when crafting communications.



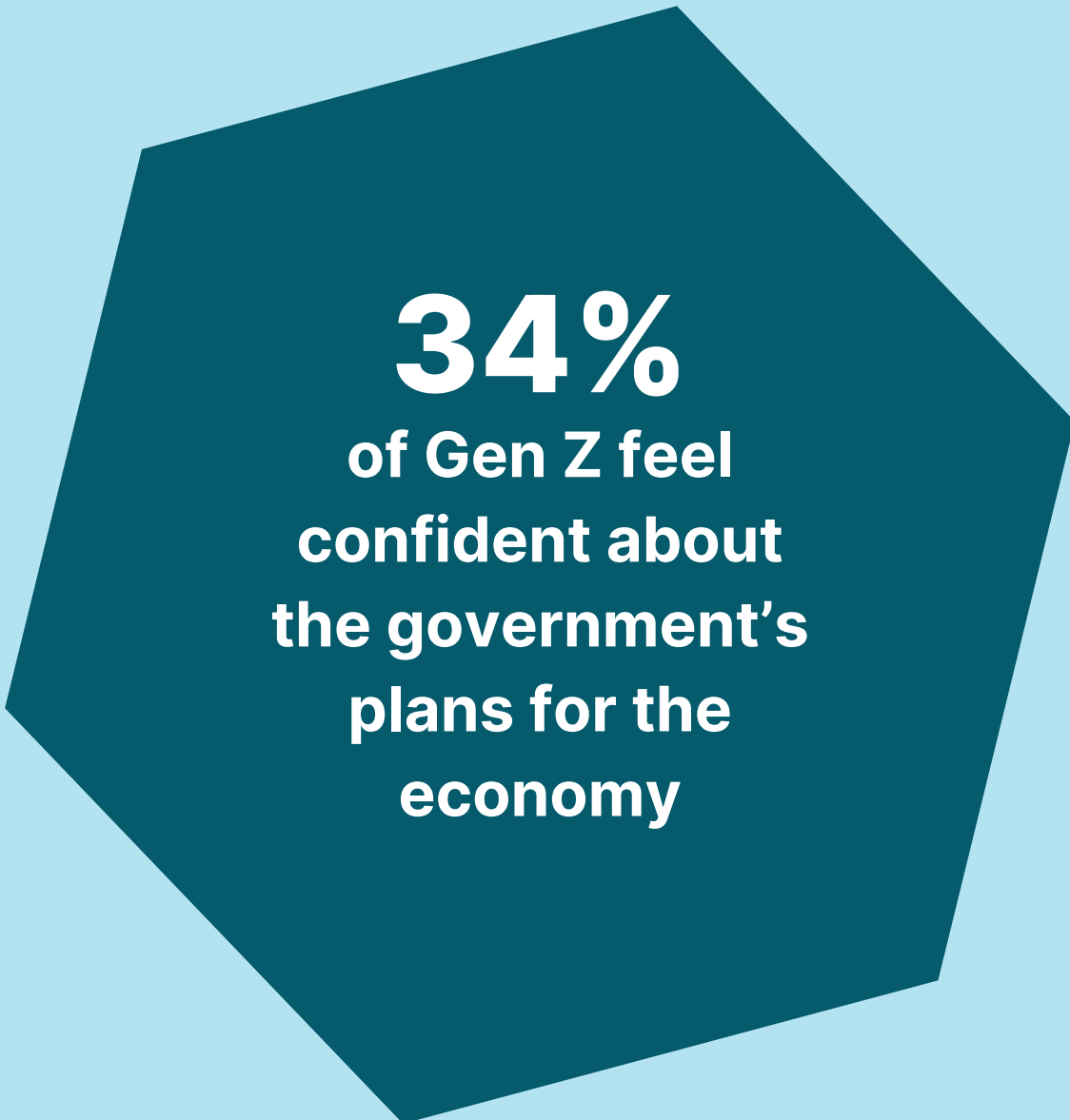
## Trend 2

# Gen Z consumer confidence has been dented

Gen Z tend to look on the bright side of life but **they appear to have lost a little of their optimistic spirit**. Compared with last year, there's been a **-7 percentage point drop in positivity** among this age group (18-27).

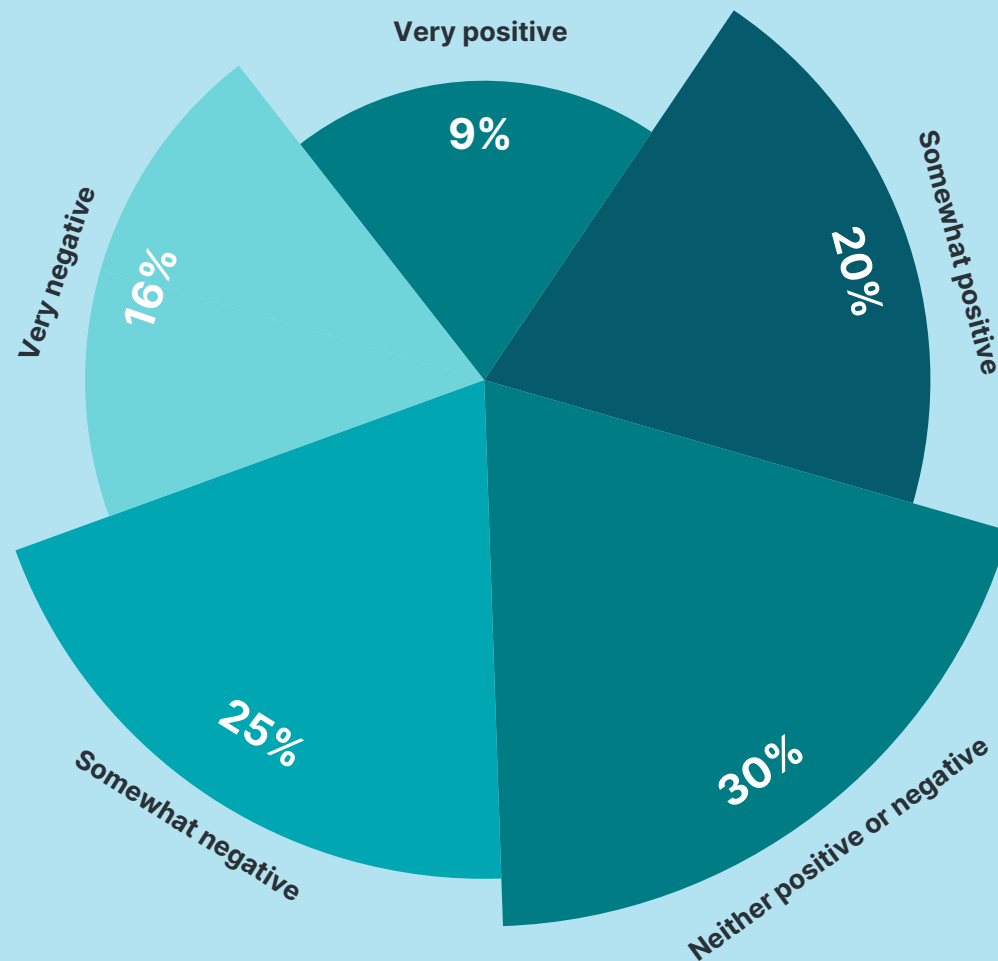
**Just under 70% of Gen Z state they feel positive at the moment** which, while still high, could point to a changing attitude.

**We also see that Gen Z are less likely to spend with abandon this year; 35% say they are currently spending “freely” (down from 39%).**



**34%**  
**of Gen Z feel confident about the government's plans for the economy**

## How Gen Z consumers feel about the government



Around three in 10 Gen Z consumers feel positively about the government, but **four in 10 express negative sentiment**. They remain unconvinced by the government's economic plans, with only a third feeling confident to spend.

## An indicator of reduced consumer optimism is less willingness to interact with brands.

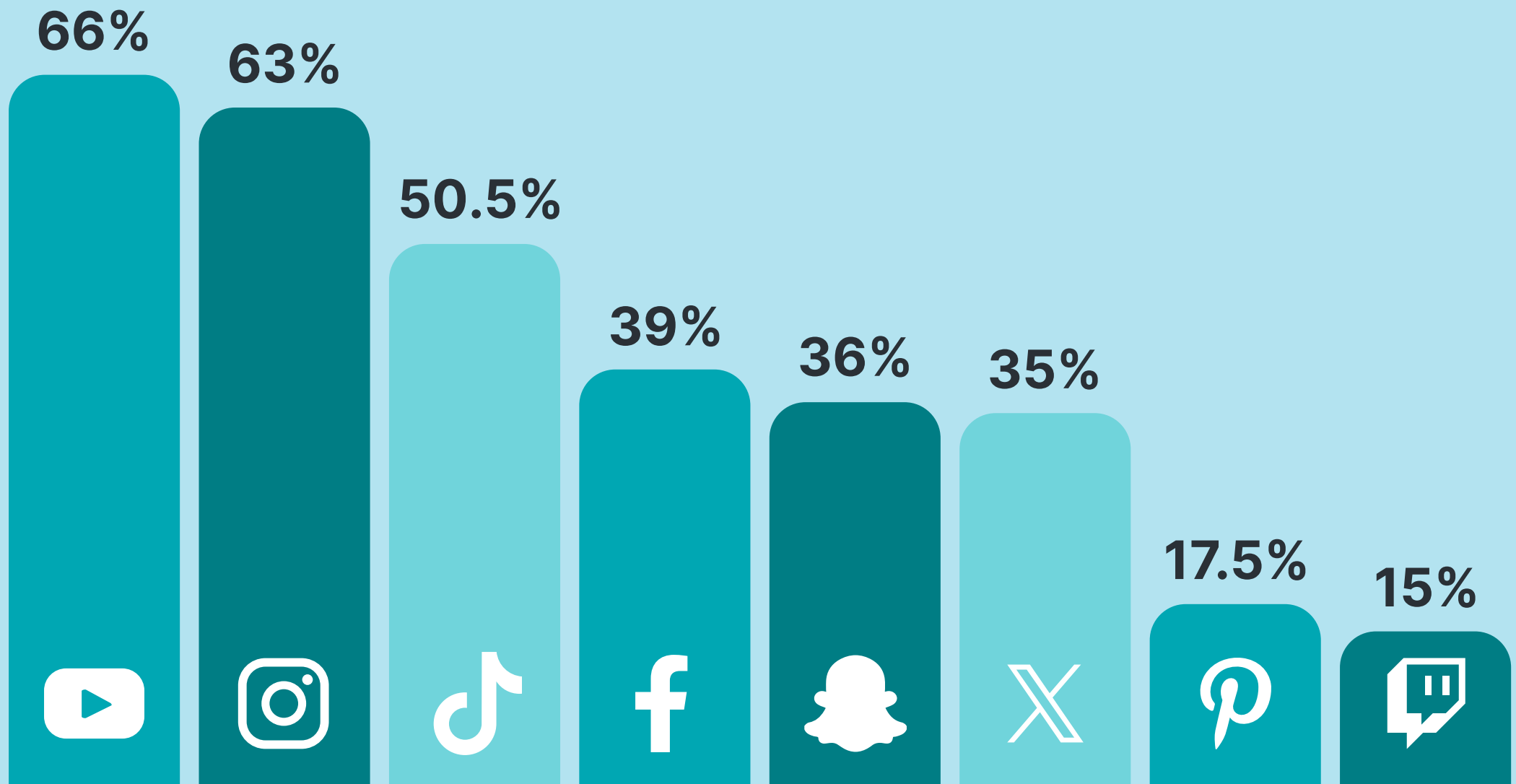
The percentage of Gen Z who are happy to receive emails from brands more than once a week has fallen by -8 percentage points to 39%. And it's not just email; **they're becoming less receptive to contact via their favorite medium, social media, too.**

**There have been losses in brand engagement across nearly all of the biggest social platforms among this age group.** TikTok has suffered the largest, recording a -17 percentage point decline. Just over half of Gen Z say they interact with brands on TikTok, which makes it less popular than YouTube and Instagram. Fellow Gen Z fave, Snapchat has also experienced a -10 percentage point decline and now only achieves brand interaction with 36% of its young audience.





## Gen Z consumers who interact with brands on social media (by platform)



## What this means for brands

Having a strategy that relies solely on social media for securing Gen Z consumers in 2025 is a **bad idea**.

**Not only are this demographic less interested in interacting with brands there, they're also becoming less likely to make purchases via social.**

Last year, 18.5% of this age group reported that they were most likely to start an online shopping journey on social media, **but that has dropped to just 12.5%.**



Instead, this demographic are **increasing their use of marketplaces**; 43% would start a shopping journey on a marketplace, up from 39% last year. At the same time, we see **rapid adoption of AI for search** with **36.5% of Gen Z using it at least half of the time** they do a search.

## Where Gen Z consumers are most likely to start an online shopping journey



**This trend means pay-per-click search engine advertising will become less effective.**

However, much of Gen Z's shopping is now taking place offline. **Last year, 46% said they were doing most or all of their non-grocery shopping online, but today that has fallen to 31%.** In-store shopping is notably strengthening among Gen Z, with 31% favoring it, meaning brands must focus on delivering a compelling in-store experience.



### Trend 3

# Climate change has taken a backseat to the economy

President Trump's pledge to deregulate the energy sector and pull the US from the Paris Climate Agreement seems **broadly in line with the thinking of the American people.**



There is a general consensus that growing the economy and jobs is more important right now than worrying about climate change. **Only 25% of consumers disagree with this sentiment** (with 26% on the fence).

**The opinion that the economy should take precedence over the environment is held by all demographics, with only Boomers (aged 60-67) slightly more likely to disagree (29.5%). Men and women are also in agreement on the issue.**

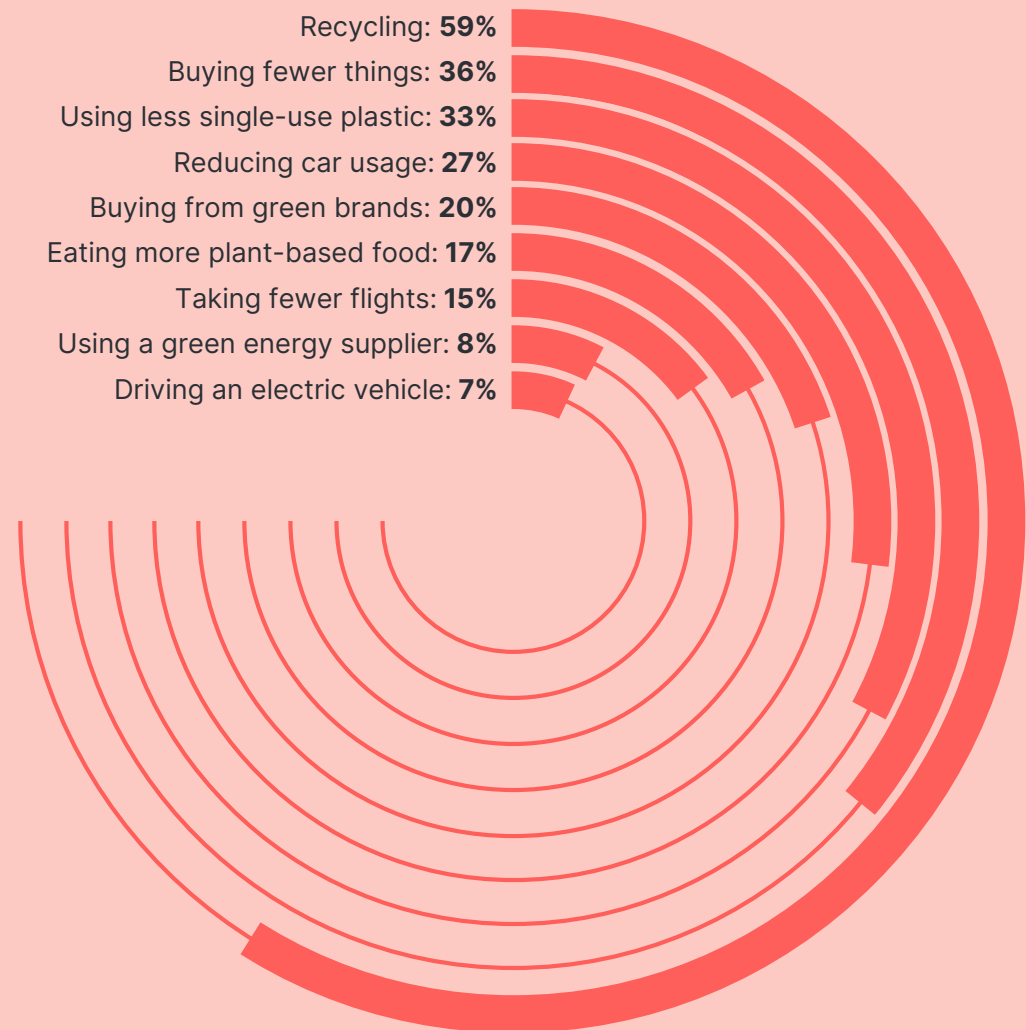




## Consumers' environmentally-friendly behaviors

**The good news is that this attitude hasn't had a negative impact on environmentally friendly behaviors.**

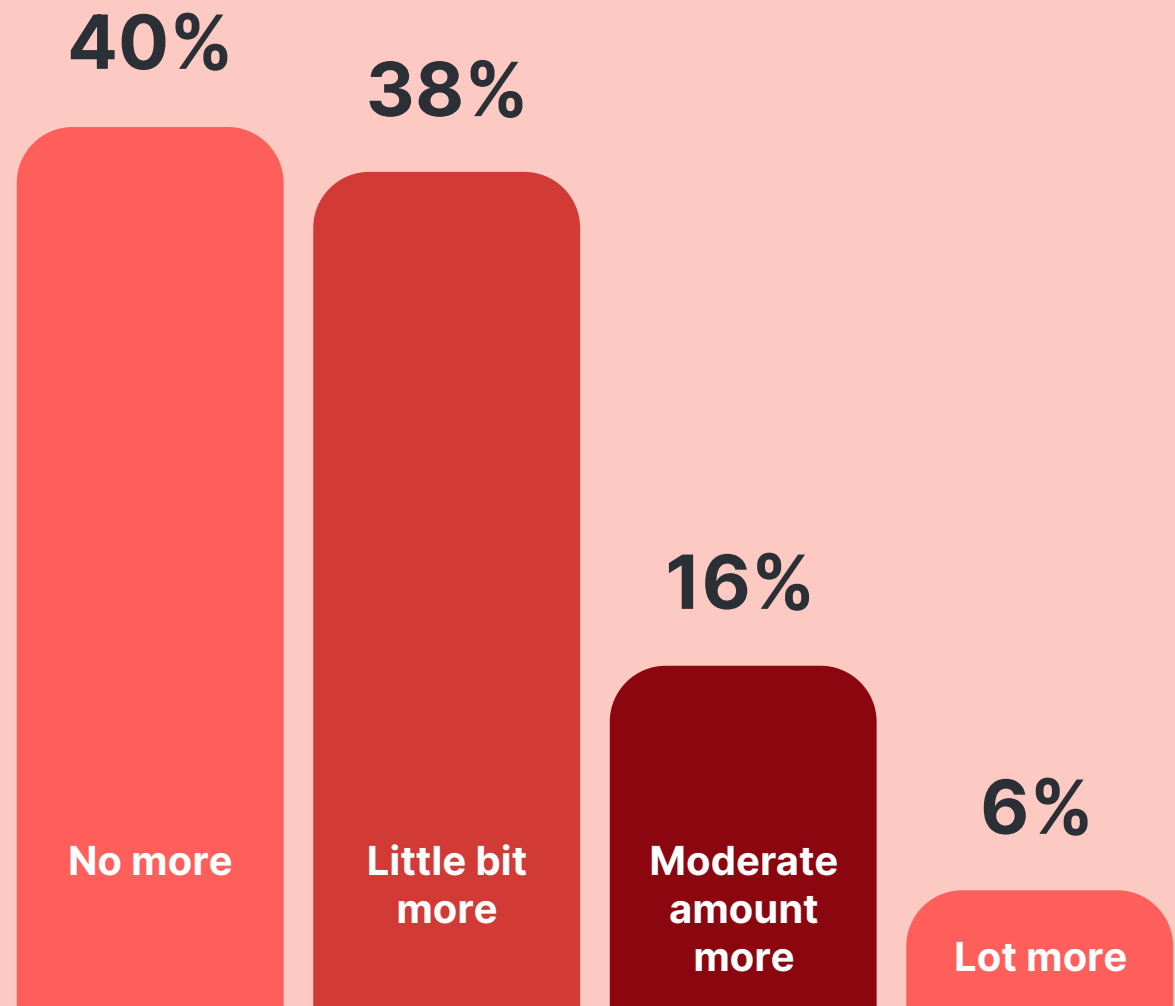
None of the nine behaviors we measure have changed significantly. There's been a small decline in recycling (59%) accompanied by small increases in using less single-use plastic (33%), buying from environmentally-friendly brands (20%), and buying fewer things in general (36%).



## Surprisingly, we also see an increased willingness to pay for environmentally- friendly products.

Last year, 44% of consumers wouldn't pay anything extra for a green product, but that figure has decreased to 40%. Gen Z are the most likely to pay a premium (73% say they'd pay more), while Boomers are the least likely (50%).

### Consumer willingness to pay more for environmentally-friendly products



## What this means for brands

Leading with environmental messaging is likely to appeal to a smaller segment of consumers in 2025.

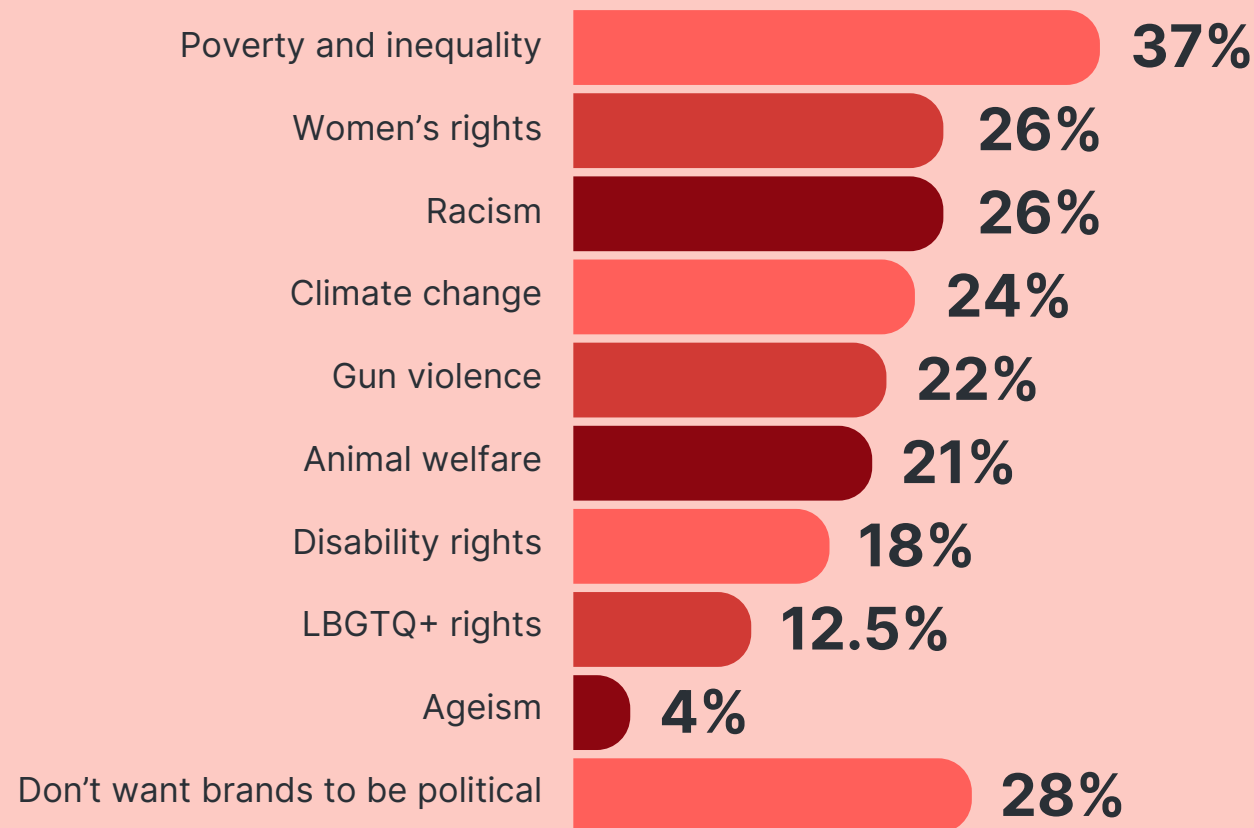
## Year-on-year data shows less desire for brands to represent climate change as an issue.

**In 2022, 29% of consumers wanted brands to take a stand on it, but that has fallen to 24%.**

**Pivoting to poverty and inequality will lead to broader buy-in**, with 37% of consumers wanting brands to address this issue. But green brands that want to stay true to their values can engage their core consumers by doubling down and shouting louder.



## What issues consumers want brands to represent



The 21% of consumers who say they actively buy from environmentally-friendly brands significantly over-index for engaging with brands on social media.

YouTube is the top platform, with 70% interacting with their favorite brands there. **And they want to receive regular email from brands too: 47% will be happy to hear from you multiple times per week.**

## **Trend 4**

# **High earners are reassured and ready to spend**

By maintaining lower tax rates and expanding deductions, President Trump's tax policies are designed to primarily benefit high earners. Our survey data shows the country's high earners are feeling good about the economy as a result.



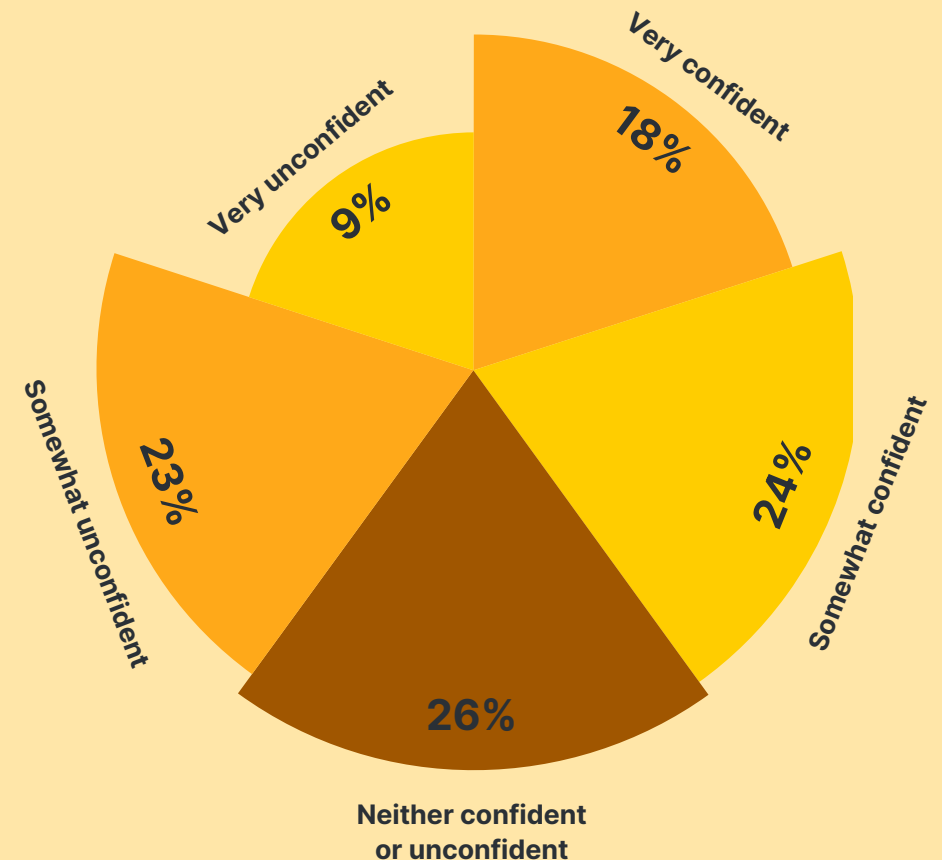


When considering the government's proposals for the economy, 42% of consumers who have an income over \$100K\* feel confident about spending. That's in contrast to 27% of consumers with an income of less than \$100K. In general, high earners are feeling positive about the government; 22% feel "somewhat positive", while 20% go as far as to say they feel "very positive".

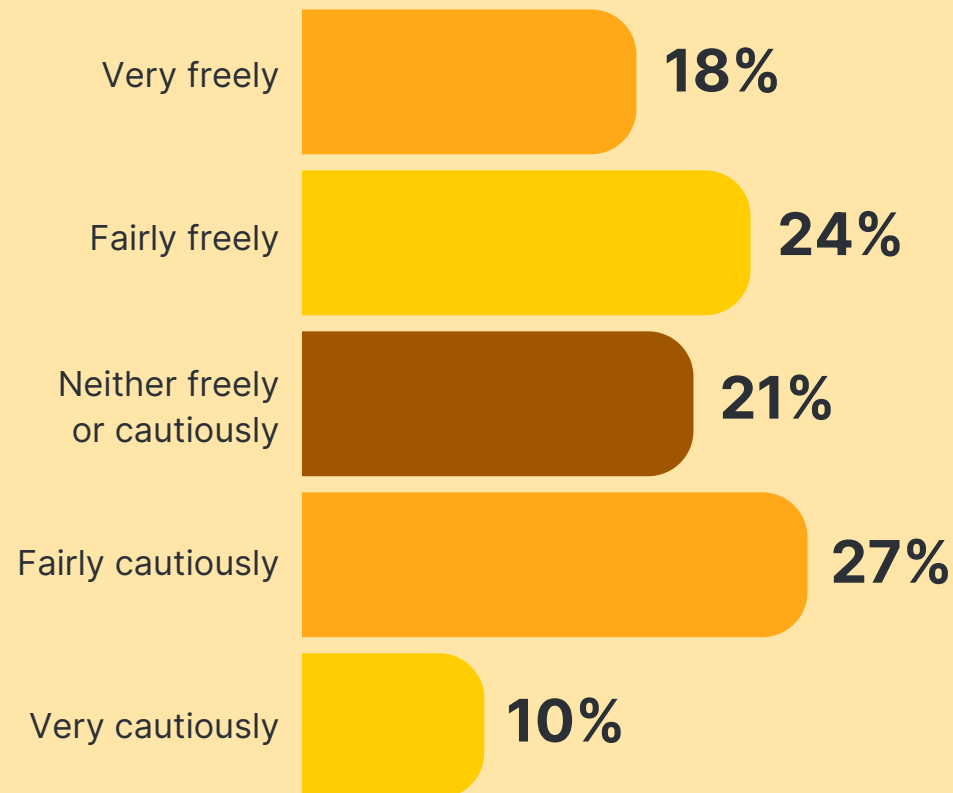
\*sample size of 307 respondents

**42%**  
of high earners feel  
positively about the  
government

## How confident consumers with an income over \$100K feel about economic policy



## How consumers with an income over \$100K are spending



There's a lot of support among higher earners for prioritizing the economy over environmental initiatives, with 57.5% agreeing that it's more important than worrying about climate change. This compares to 48% of lower earners, despite this demographic being likely to suffer more in a poor economy.

**Currently, 63% of high earners have the perception of financial security.**

This sentiment appears to be having an impact, with a decline in cautious spending. **Compared with last year, there's been a -7 percentage point decrease in the number of high earners spending cautiously (to 37%) and a corresponding increase in spending freely (to 42%).**

## What this means for brands

**Demonstrating much consumer confidence, pursuing higher earners in 2025 could pay off.** But brands preparing to craft a strategy should note that this demographic exhibit some unique behaviors.

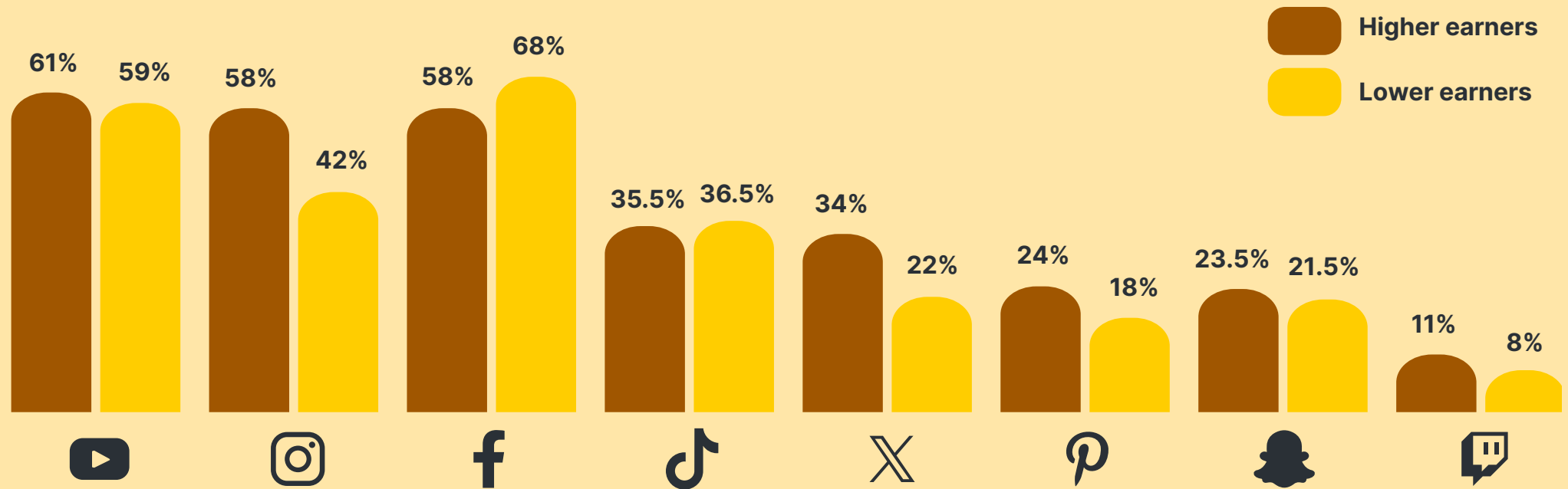
## One thing to know is that high earners are significantly more likely to shop online.

Nearly 42% of consumers with an income over \$100,000 say they habitually shop online for non-food items. This compares to 24% of people with a lower income. **A tech-savvy demographic, they're also more likely to use AI tools;** 30% use AI for search “most or all” of the time (compared with 16% of lower earners), and **40% are likely to use an AI shopping assistant on a brand's website.**

**Focusing on your digital presence is therefore vital to capture this audience,** which includes making sure you're on the right social media platforms. The data shows some distinct preferences for brand engagement, with **higher earners significantly more likely to interact with brands on Instagram** (58% versus 42% of lower earners).

## Which social media platforms consumers use to interact with brands (by income level\*)

\*above \$100K vs. below \$100K



When it comes to the content you might be sharing on social (or anywhere), **high earners have become notably more interested in thought-provoking and educational messaging** since last year. Both types of messaging have increased by +11 percentage points, with 42.5% and 43.5% respectively wishing to hear it.



## **Trend 5**

# **The silver dollar is getting harder to reach**

With proposals to start increasing the retirement age in 2025, it's maybe no coincidence that Boomers are feeling unsure about the future.

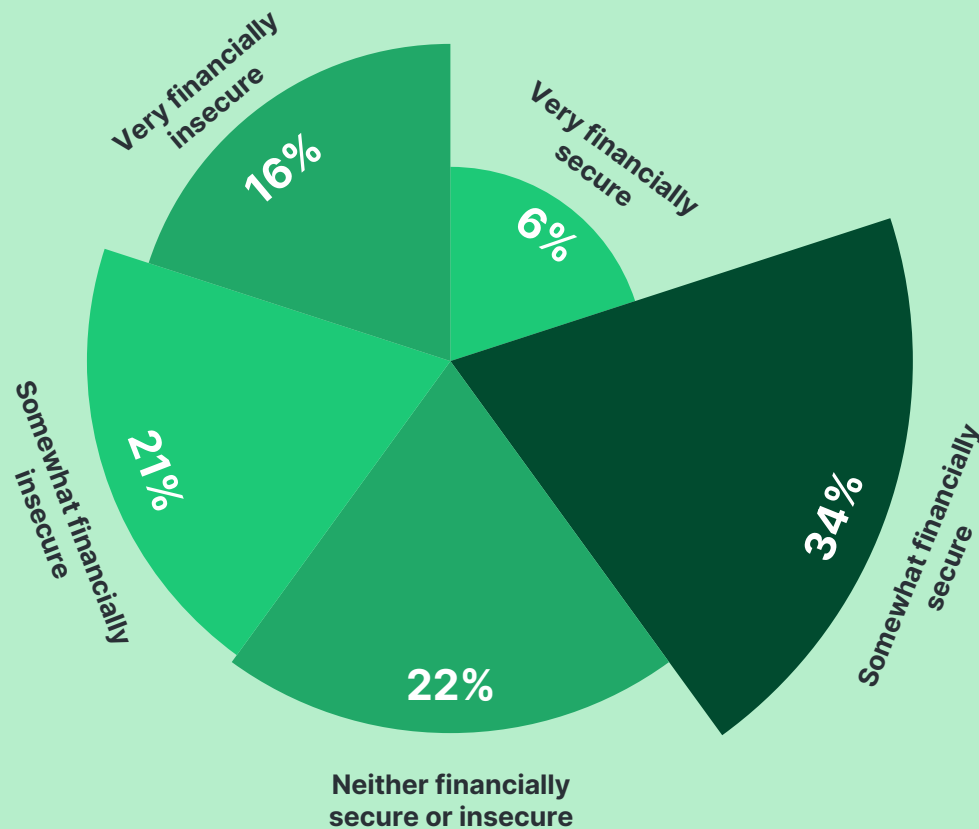


**The data shows that those in the 60-67 age group feel the least confident about spending based on the government's plans for the economy.**

**Only a quarter of Boomers say they feel confident about spending**, while 43% feel unconfident. This sentiment is evident in the nearly 70% of older consumers who say they're currently spending cautiously, as well as the +3 percentage point increase in very cautious spending (to 27%) since last year.

**70%**  
**of Boomers**  
**are spending**  
**cautiously**

## How financially secure Boomers feel



Interestingly, **Boomers aren't experiencing higher levels of financial hardship than any other demographic.** Gen X (aged 43-54) are actually the most likely to report financial insecurity (42% versus 38% of Boomers). **But Boomers are living more frugally;** 39% say they're actively trying to consume less, up from 33% last year.

This trend might be contributing to a change in the way Boomers shop, with online shopping becoming significantly less popular among this age group. Following a +12 percentage point decline, only 20% now prefer to shop online. Additionally, Boomers' behavior when they do shop online has shifted, with a -7 percentage point decrease in the use of search engines.

## Where Boomers are shopping for non-grocery items



**Just 20% start a shopping journey with an internet search, while 54% head to a marketplace and 20% to a brand's website.**

## What this means for brands

With Boomers' consumer confidence waning it's perhaps not surprising that, now more than ever, they want to hear reassuring messaging from brands; **43% are looking for brands to "make them feel safe"**. That's an increase of +9 percentage points since last year. Meanwhile, **desire for humorous messaging has fallen by -10.5 percentage points** to 53%.

However, brands should be aware that reassuring Boomers comes with challenges due to the high level of distrust they have in companies to put consumers before profits.

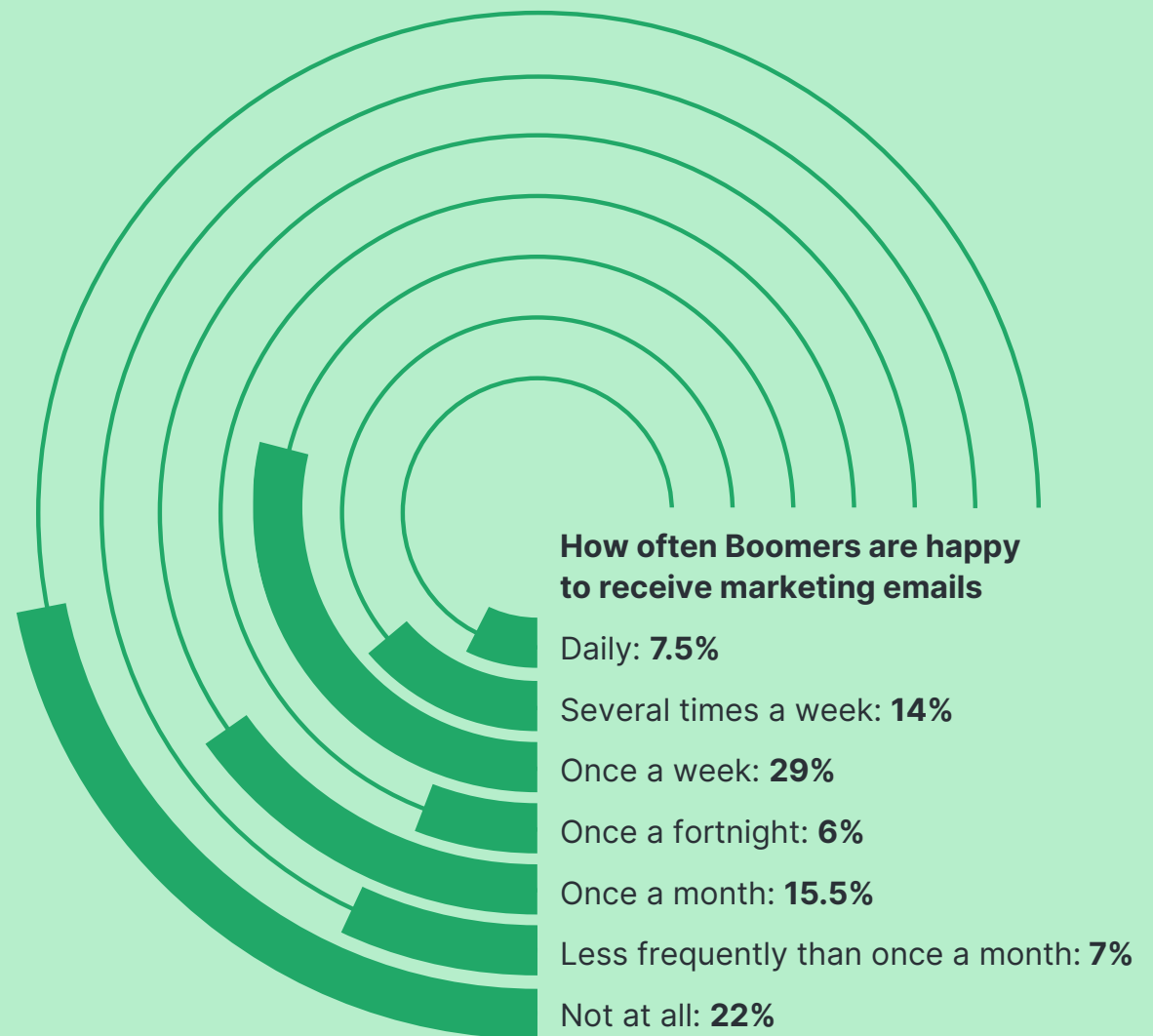
## More than half actively distrust big global brands and 61% distrust social media companies.

**Purpose-driven companies are deemed more trustworthy**, with only 24% distrusting them. Yet, when asked about brands taking a stance on social issues, **Boomers are the group most likely to say they don't want brands to be political** (37%).



## More bad news is that Boomers have become significantly less receptive to email marketing.

Since last year, the number happy to be contacted more than once a week has declined by -14 percentage points to 21%. **Nearly 22% say they now don't want to be emailed at all**, which means brands targeting the silver dollar may have to lean more heavily on traditional ad channels like print and TV.





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