

# IMPACT

**Where Experience Defines  
Beauty's Next Era**

Q4/2025

Presented by GRADIENT

# WELCOME

Speaking with incredible leaders and hearing what keeps them up at night, and gathering data from the wider marketing cohort, put years of hard work and industry insight into sharp focus. It has clarified how central experiential became in the beauty industry. Alongside my team at Gradient, this report aims to serve a purpose bigger than us as an agency: to inspire every beauty professional, whether leading a global brand or shaping an independent label, to think experientially.

No matter budget or scale, experience is a mindset; a way of working that listens to people and creates connection. Stay curious. Live in constant research of culture. Find what makes people tick and give them goosebumps where you can. Our obsession is to ground experience as a standalone, measurable driver of impact, not just a marketing extension. It's all connected, and this is only the beginning of what beauty experience can become.

Welcome to I.M.P.A.C.T.

A handwritten signature in black ink, appearing to read 'Anthony Coppers', with a large, stylized flourish at the end.

Anthony Coppers  
Founder  
GRADIENT

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# SUMMARY

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## Beauty has always been experiential.

In 2025, the expectations have evolved drastically. Consumers no longer see experience as a singular moment of trial or spectacle: they see it as the connective tissue between product, purpose, and participation.

This year's Beauty IMPACT Report 2025 builds on Gradient's proprietary methodology, combining data from more than 130 beauty marketers with in-depth interviews from global leaders shaping the next era of beauty.

*Thank you to our participating Beauty Experts:*

- **Benjamin Bernet:** Founder & CEO | **Bravo Sierra**
- **Emily Bromfield:** SVP Global Marketing | **MAC Cosmetics**
- **Laney Crowell:** Founder & CEO | **Saie Beauty**
- **Arnaud Goullin:** Leadership Executive | **ex LVMH | Shiseido | Estée Lauder**
- **Danièle Lahana-Aidenbaum:** President | **Mugler Fashion & Fragrance**
- **Coline Molina:** Director of Marketing & Communications | **La Rosée Cosmétique**
- **Matthew Spiteri:** Head of Global Brand Communications & Advocacy | **Kérastase**
- **Mathilde Thomas:** Founder | **Caudalie**
- **Julien Wintenberger:** Global Brand Image & Communications Director | **La Roche-Posay**
- **David L. Yu:** Global Head of Events & Advocacy | **Prada Beauty**

“WE’RE NOT JUST  
LAUNCHING A PRODUCT,  
WE’RE LAUNCHING  
A CULTURAL MOMENT.”

– Matthew Spiteri  
Kérastase



KÉRASTASE  
PARIS

Kérastase, La Vie en Gloss Experience, 2025

# INTRODUCTION

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The beauty industry is evolving fast. Technology accelerates, AI reshapes expectations, and consumers navigate a world full of noise. As Arnaud Goullin put it, “In a world where AI blurs the lines, experiential in every industry is a real antidote to doubt, bringing validation, reality, and authenticity.” Across all of our interviews, this theme surfaced again and again: experience is becoming the anchor people trust.

**This year's IMPACT analysis intentionally bridges two worlds:** the global giants shaping the industry's infrastructure, and the independent disruptors who move faster and feel culture sooner. By listening to both, we see not just where beauty stands today, but where it's heading tomorrow.

Together, their perspectives reveal a sector where human connection and emotion, participation and purpose converge. While heritage houses scale immersive ecosystems, indie brands focus on human connection, transparency, and community. As Mathilde Thomas of Caudalie notes, “Experience requires utmost focus. Scalability only works when every expression of the brand remains consistent, no matter how big the execution gets.” Laney Crowell of Saie adds, “Consumers want to participate in creation, not just witness it.”

The survey of beauty marketers also provided significant insights. Integration with advertising and retail surged, while influencer content creation grew sharply, confirming experience as the connective tissue across every channel. Social engagement overtook footfall as the leading KPI. And cultural and community alignment became the key predictor of success.

The beauty industry is no longer defined by formulas, finishes, or formats; it is defined by experience.

Rare Beauty, Rare Memories  
Launch in LA, 2025



“CONSUMERS WANT TO  
*PARTICIPATE IN CREATION,*  
NOT JUST WITNESS IT.”

—Laney Crowell  
Saie Beauty

# FROM EVENTS TO ECOSYSTEMS

## Building *Ecosystems*, Not Moments

Experiences are collapsing the traditional funnel into single cultural moments. The most effective activations now operate as media, commerce, and community simultaneously, with remanence—lasting emotional after-effects—seen as a critical driver of brand affinity

The consumer journey has become circular rather than linear. Audiences enter and exit at multiple points: online discovery, retail trial, social content, or advocacy, looping continuously through the experience ecosystem. Each touchpoint must be designed to re-engage, not just convert.

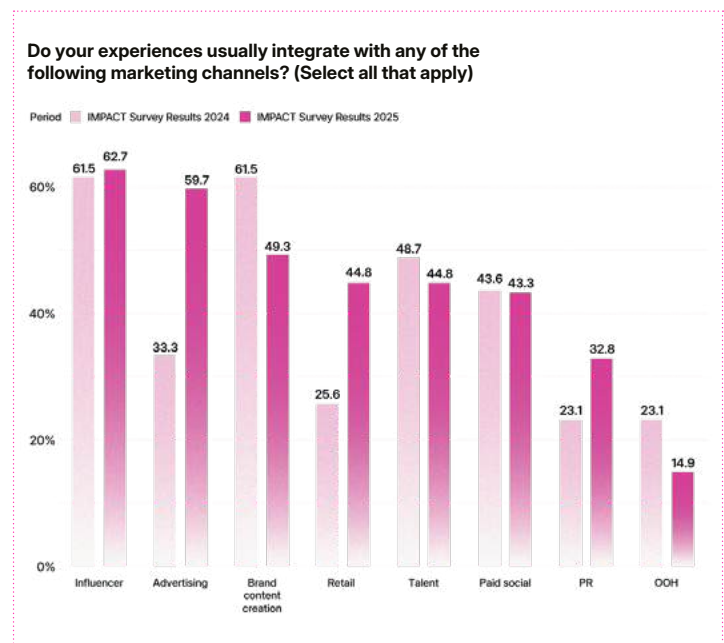
Emily Bromfield (MAC Cosmetics) explained, “An event can be the entire funnel — it drives attention, creates shareability, delivers product interaction, and converts.”

Arnaud Goullin (ex LVMH | Shiseido | Estée Lauder) added, “Events should not be a fifth wheel. They must be integrated into CRM, digital, retail, and content so that the experience resonates long after the event itself.”

Beauty experiences now compete with a three-second digital attention span. Danièle Lahana-Aidenbaum (Mugler) emphasized that the only way to stand out is to build ecosystems that feed all five senses, not just push visuals. Lahana-Aidenbaum explains that “Experience has to be strong enough to interrupt someone’s scrolling or their daily routine. It has to feed the senses. Otherwise, it disappears.”

Mathilde Thomas (Caudalie) reinforced the importance of harmony: “Our retail, spa, and digital touchpoints must breathe together; if one feels off, the whole experience loses balance.”

Coline Molina (La Rosée) echoed this sentiment: “The key is to think in coherent and integrated ecosystems, not in isolated events.”



**Integration** with advertising rose **+26.4 pp** and with retail **+19.1 pp** in this year’s survey.



Maybelline, Summer Carnival, 2025

Experience is no longer a set of parallel events: it's one living ecosystem.

Every retail, digital, and social touchpoint must be consistent in tone, adaptable to context, and ready for content creation. True impact comes from coherence, not scale. Every channel, from store to social, must echo the same tone while adapting to local contexts. Foundational consistency is now the basis for creative freedom.

Mugler illustrated this shift perfectly with its “Inside the Dream” launch in Shanghai, where a documentary screening led into a brutalist pop-up museum, a live performance by a local ambassador, and a small commercial moment that brought the entire experience online. This wasn't an event, it was a cultural loop. What began as storytelling became *storyliving*, and then returned as content that fed commerce.

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**Takeaway:** Build experiences as ecosystems, not one-off events.



Kérastase, La Vie en Gloss Experience, 2025

**Kérastase Gloss Absolu Launch – “La Vie En Gloss”**  
*Luxury made tangible, inclusivity made aspirational.*

In 2024, Kérastase transformed its Gloss Absolu debut into a full-scale cultural event. “Each audience - creator, celebrity, and consumer - co-created the experience,” said Matthew Spiteri, Global Brand Communications & Advocacy Lead. “Everyone had their own role to play.”

The activation merged celebrity appearances, influencer storytelling, and immersive physical spaces, creating momentum before the first product was unveiled. “We had queues forming at 5:30 AM for a 10 AM opening; that’s when you know you’ve created something people crave.”

Vera Wang, LOVE Launch, 2025



“AN EVENT  
CAN BE THE  
ENTIRE FUNNEL.”

– Emily Bromfield  
MAC Cosmetics



# PARTICIPATION OVER PERFECTION

## Designing for *co-authorship*

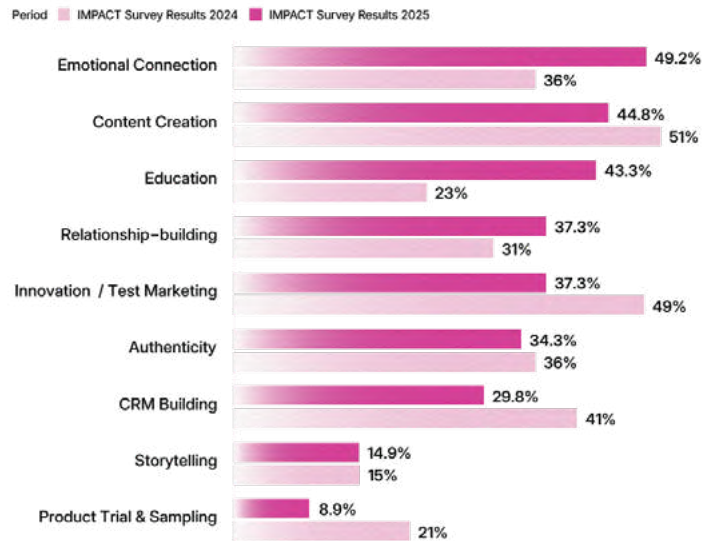
Consumers no longer want to be audiences; they want to be co-authors. Experiences that invite personalization and participation drive higher engagement, especially when rooted in community.

Julien Wintenberger (La Roche-Posay) said, *“We switched from delivering content to co-creating content... it requires a degree of freedom and inherent risk.”*

Laney Crowell (Saie Beauty) echoed this ethos: *“Transparency is participation. When our community sees how we make decisions or test formulas, they feel part of it. That’s what modern influence looks like.”*

**Takeaway:** Design experiences for co-authorship, not control.

### What are the main objectives when hosting events or brand experiences



**Education** rose **+20.3 pp** as an objective, while influencer content creation grew **+25.2 pp**.

L'Oréal, AirLight Pro Launch, 2025



La Prairie, Skin Caviar Lab, 2019



## Case Callout: Prada Beauty Banana Jellies

To launch Prada Balm in Banana Yellow, the brand staged a two-step seeding strategy. First, influencers received unbranded bags of banana jellies, sparking curiosity and speculation. A week later, the balm itself arrived in a custom seeding kit wrapped in Prada's iconic print. The buzz was pre-seeded when Sabrina Carpenter's "Manchild" music video: featuring banana jellies dropped days before. The result: a cultural moment engineered through anticipation and participation.

**“THE PEOPLE *WHO*  
*PARTICIPATE* BECOME  
ADVOCATES.”**

**—Benjamin Bernet**  
Bravo Sierra

# MEASURING MEANING, NOT JUST METRICS

## From ROI to *Return on Intention*

The focus is shifting from short-term ROI to **Return on Intention**, evaluating not just how many showed up but how many stayed engaged, converted into CRM, and evolved into long-term advocates.

Emily Bromfield (MAC Cosmetics) explained, *“Events and experiences are regarded as media spend, emphasizing retargeting and tracking consumer engagement beyond the event date.”*

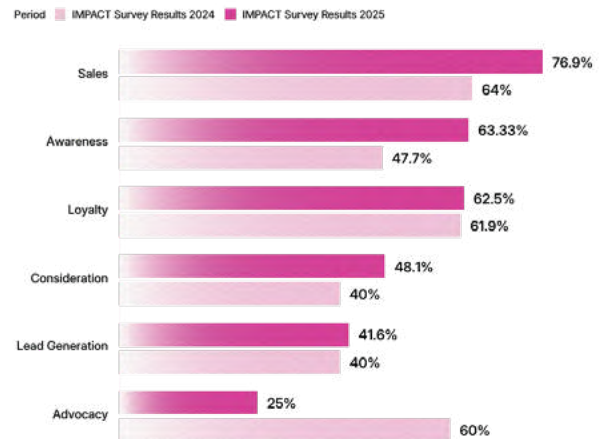
Benjamin Bernet (Bravo Sierra) added, *“Technology should serve measurement. CRM and personalization matter more than flashy tools. We focus on the data that proves the community is growing and staying engaged.”*

Laney Crowell (Saie Beauty) offered an indie perspective: *“We track what brings people back. If someone comments twice in a week or DMs us after an event, that’s our success metric. Engagement that feels human, not automated.”*

Several leaders underscored that measurement only works when paired with generosity. Experiences that offer genuine value ahead of KPIs create a stronger baseline for engagement. Benet summarizes this when he states *“A true brand experience begins with generosity: offer without conditions, don't ask for email right away — let emotion speak, and loyalty will follow.”* The balance between emotional generosity and measurable rigor is where long-term impact forms.

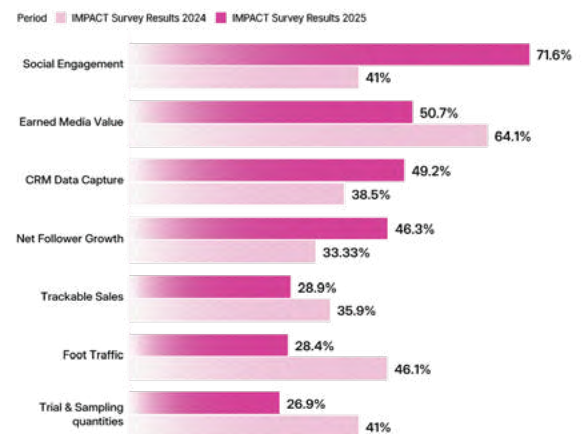
**Takeaway:** Measure both meaning and money, with CRM as the bridge.

What ROI is most important from your experiences or events?



As a Key Performance Indicator, advocacy fell sharply, while in success metrics used, **social engagement** shot to the top, rising **+30.6 pp** in 2025.

What are your current metrics to measure the success of your experiences?



## Case Callout: Kiko Milano “3D Hunt” Digital Game-to-Store

Kiko Milano’s “3D Hunt” activation invited consumers to participate in a mobile game that bridged online engagement with in-store redemption. The campaign integrated influencers, digital storytelling, and retail experience, generating a 10% increase in foot traffic. It exemplified how gamification can transform technology from a novelty into a driver of tangible business results, directly increasing sales revenue multiples over the project investment.

**Editorial insight:** When play becomes participation, data becomes connection.



“ENGAGEMENT THAT  
*FEELS HUMAN,*  
NOT AUTOMATED.”

–Laney Crowell  
Saie Beauty

# MULTISENSORY STORYTELLING

Engineering memory  
*through the senses*

Beauty's strength lies in the senses. Experiences that trigger multiple sensory touchpoints deepen memory and meaning. Mugler even trains its internal teams with multisensory rituals, teaching scent through chords, not notes, and using sound, visuals, and even taste to transmit brand codes. When the internal experience is sensory, the external one naturally follows.

Julien Wintenberger (La Roche-Posay) said, "When we talk about skincare products, we talk about texture, we talk about smell, we talk about touch... These are products that are experimented with, that are lived intimately."

Mathilde Thomas (Caudalie) described it beautifully: "The scent of beauty elixir, the feel of glass in the hand: these are codes of memory as much as of luxury."

Arnaud Goullin (ex LVMH | Shiseido | Estée Lauder) shared, "Digitalization is not a gimmick; it enriches. Tablets and interactive video experiences we tested created lasting impressions because people felt part of the story."

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**Takeaway:** Engineer experiences for multi-sensory resonance, either IRL, purely with tech, or in a hybrid mode.

## Case Callout: Givaudan “Scent Personalization Technology”

As fragrance consumers demand individuality, Givaudan turned scent creation into an interactive experience. Using proprietary “scent-printing” technology, visitors could design a personalized olfactory profile that captured their mood and preferences in real time. The innovation, described by Benjamin Bernet, “allowed users to become co-creators, not just wearers.” Beyond the tech, the experience built emotional ownership—guests left not with a sample, but a signature. By transforming a sensory process into a participatory one, Givaudan bridged science, art, and identity, offering a glimpse into the future of personalization across beauty.

**Editorial insight:** Personalization becomes powerful when it feels like authorship.

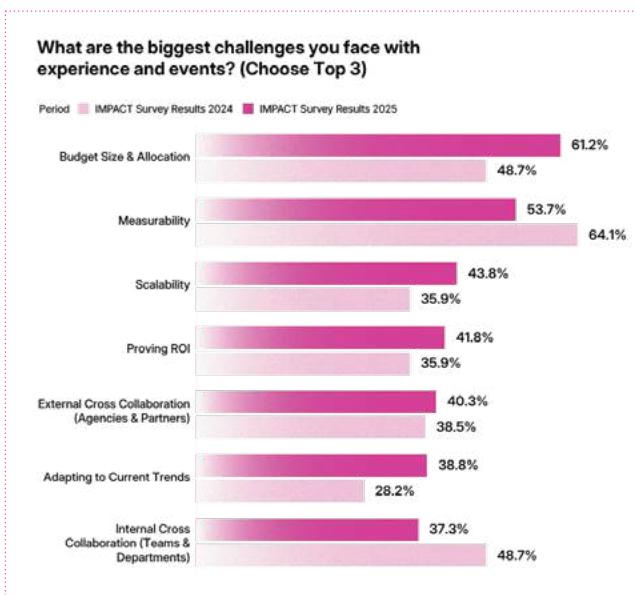


“THE SCENT OF OUR BEAUTY ELIXIR,  
THE *FEEL OF GLASS* IN THE HAND;  
THESE ARE *CODES OF MEMORY* AS  
MUCH AS OF LUXURY.”

– Mathilde Thomas  
Caudalie

# CULTURE AS CATALYST

Building belonging  
*through ritual*



**39% of marketers** cite adapting to current trends a top challenge, a more than 10pts growth from last year.

Beauty resonates most when rooted in community. The strongest brands treat experiences not just as launches but as rituals that build belonging.

David L. Yu (Prada Beauty) noted, “A powerful experience isn’t about lavish moments — it’s about delivering something meaningful, emotional, and true to the brand’s DNA.”

Benjamin Bernet (Bravo Sierra) emphasized, “Community is not a marketing line: it’s growth. We design experiences that bring people closer to the brand and to each other. That closeness drives loyalty.”

Laney Crowell (Saie Beauty) added, “Community is a lab, not a billboard. Our audience helps us shape what comes next.”

Mugler cultivates community through storyliving, not storytelling. Their behind-the-scenes documentary created global fan gatherings—not through polish, but through access. “This documentary let people enter our world for real. It created desire and belonging without artifice,” explains Lahana-Aidenbaum. For Mugler, this creates a circular model: storytelling fuels storyliving, and the lived experience becomes the next chapter of storytelling.

In a volatile world, beauty offers rare moments of stability; spaces where humans reconnect with themselves and others. Belonging and relevance are the new currencies of beauty, creating emotional sanctuaries that brands must protect and nurture.

And cultural communities are also relevant in the B2B space. “When we look back at why La Rosée took off so fast, one of the keys is the relationship and conversation we built with our partner pharmacies” explains Molina of La Rosée Cosmétique. “[...] The brand really grew through word-of-mouth [...] with pharmacies and with our community on social.

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**Takeaway:** Build loyalty through rituals of belonging.

## Case Callout: La Roche-Posay “The Dermatologist Thought Leader”

To reinforce its scientific credibility while deepening emotional trust, La Roche-Posay convened a board of 19 dermatologists from around the world to debate about the challenges in dermatology for the next 50 years, including an aging population, climate change, urbanization, and emerging infections. “Our medical teams were thought leaders and actors of change,” said Julien Wintenberger, “and in the end we achieved a ground-breaking outcome.” The initiative turned medical expertise into a comprehensive whitepaper published in a famous scientific publication. This forward-thinking effort positioned the brand as a thought leader committed to anticipating dermatological care for future generations.

**Editorial insight:** Authority becomes emotion when it’s co-created.



“COMMUNITY IS NOT A  
MARKETING LINE;  
*IT’S GROWTH.*”

– Benjamin Bernet  
Bravo Sierra

# EMBRACING RISK IN CO-CREATION

Credibility through *openness*

True co-creation requires risk. Giving space to experts, creators, and consumers to shape the story means surrendering control; but this builds credibility and trust.

Laney Crowell (Saie Beauty) mirrored this belief: “If you invite your community in, you have to accept imperfection. It’s uncomfortable; but that’s where connection happens.”

Danièle Lahana-Aidenbaum echoed this, noting that brands shouldn’t fear polarization. A strong identity may not please everyone, but it forges deeper loyalty with the people who matter most.

“Event production is content,” said Spiteri. “They’re not separate worlds anymore.” His remark bridges creative and operational realities: reminding us that every experiential moment is also media.

Co-creation as a measurable practice grew across this year’s survey, with education and participatory objectives both rising.

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**Takeaway:** Accept creative risk as the price of credibility.

## Case Callout: Bravo Sierra’s “Community in Motion”

Bravo Sierra’s partnership with the Forte running app became an ongoing experiment in community-powered brand building. The app connected local runners for weekly activations in New York, tracking performance data, sharing content, and rewarding participation with exclusive Bravo Sierra experiences. “Our goal wasn’t reach—it was belonging,” said Benjamin Bernet. “When people participate, they become advocates.” Each activation acted as both event and media, blurring the line between fitness, culture, and brand engagement. The results proved the power of consistency: repeated experiences grew loyalty, not just impressions, and the brand became part of its audience’s lifestyle rhythm.

**Editorial insight:** Community is a muscle—it strengthens through repetition.



“IF YOU *INVITE YOUR COMMUNITY IN*, YOU HAVE TO ACCEPT IMPERFECTION.”

– Laney Crowell  
Saie Beauty



# TECHNOLOGY AS ENABLER, NOT REPLACEMENT

Humanizing *innovation*



Kiko Milano, Xtreme Gloss Hunt, 2025

Technology is moving from novelty to necessity. But its role is to extend access, unlock heritage, and amplify brand codes while preserving humanity.

Emily Bromfield (MAC Cosmetics) noted, “Consumers crave authenticity and ‘reality’ — AI can enhance it, but it can’t replace the human truth at the core.”

At Mugler, Danièle sees AI as a tool that expands what’s possible. “AI should accelerate creativity, not automate identity.” For example, someday thanks to AI, “a consumer will be able to wear an archival fashion piece inaccessible to all but Zendaya, and feel inspired to adapt their entire look, scent, and sense of self from seeing themselves in that unique piece.”

Benjamin Bernet (Bravo Sierra) concluded, “Technology is useful when it’s invisible. If it helps personalize the CRM journey or measure engagement, it matters. Otherwise, it risks being noise.”

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**Takeaway:** Use technology to amplify identity, not automate it. As your message scales, reliance on media gatekeepers fades.

“TECH SHOULD  
*HUMANIZE,*  
NOT AUTOMATE.”

—Laney Crowell  
Saie Beauty



*Clinique, ID Influencer Experience, 2025*

## **Case Callout: Clinique “Digitalized Consultation”**

Clinique evolved its signature in-store skin consultation into a fully digital experience that blends science, data, and human connection. Using interactive tablets and video tools, advisors helped clients analyze skin needs, learn application techniques, and personalize routines. According to Arnaud Goullin, the technology wasn’t designed as a novelty, but as a bridge: “Digitalization is not a gimmick—it enriches.” The process made beauty education feel modern without removing the expert’s human touch. By unifying CRM data, content, and service, Clinique created a model for how traditional brands can modernize retail experiences while keeping the intimacy of one-on-one advice.

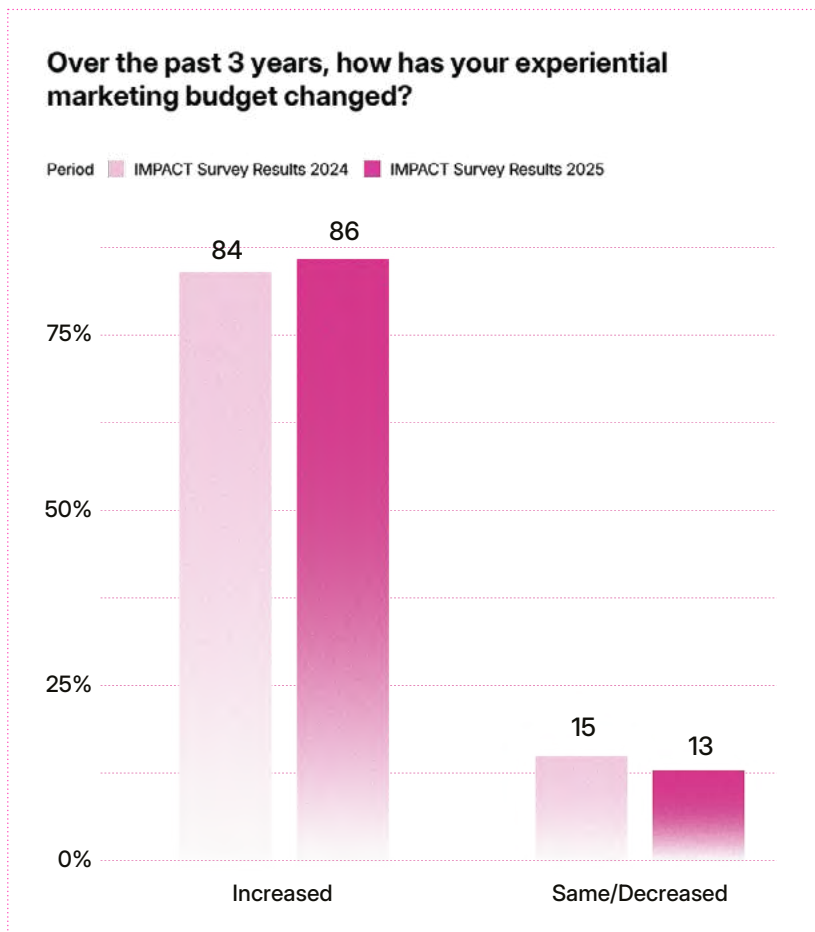
**Editorial insight:** When technology extends empathy, innovation feels human.

# RESTATING IMPACT:

## The Framework for *Beauty Experiential*

### The six principles shaping experiential excellence.

The **IMPACT** framework remains the foundation of Gradient's experiential strategy, guiding how brands integrate strategy, measure results, and cultivate emotion and community. In beauty, its application reveals how leading brands balance creativity with clarity, innovation with intention. As budgets allocated to experiential continue to grow, ensuring a maximized impact for these budgets is essential.





# INTEGRATED:

Connect across *channels and functions*

“Our new approach for MAC is that we don’t do any big campaign without an event.”

— **Emily Bromfield**, SVP Global Events, MAC Cosmetics

“User experience mapping is essential. It sits at the center because consumer experience is the sum of every channel — education, events, content, digital, CRM, retail.”

— **Arnaud Goullin**, Leadership Executive | ex LVMH | Shiseido | Estée Lauder

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**Takeaway:** Treat events as launchpads, not afterthoughts. Plan content, retail, and CRM handoffs in one system.



Maybelline, Summer Carnival, 2024

## SURVEY

Integration with advertising rose +26.4 pp and with retail +19.1 pp.



# MEASURABLE:

*Prove value beyond the event*



L'Oréal, Big Deal Launch, 2025

*“Events and experiences are regarded as media spend, emphasizing retargeting and tracking consumer engagement beyond the event date.”*  
— **Emily Bromfield**, SVP Global Events, MAC Cosmetics

**Takeaway:** Measure Return on Intention alongside ROI, with CRM capture and LTV as leading signals.

## SURVEY

Social engagement became the top success metric in 2025, up +30.6 pp.

# P PARTICIPATORY:

*Invite audiences to co-author*

*"We switched from delivering content to co-creating content... it requires a degree of freedom and inherent risk. Brands have shifted from the shop window to the public square / agora."*

— **Julien Wintenberger**, Global Brand & Communications Director, La Roche-Posay

**Takeaway:** Build public squares, not window displays. Script modular story beats that creators and communities can make their own.



Rare Beauty, Rare Memories Launch in LA, 2025

## SURVEY

Education rose +20.3 pp as an objective, influencer content creation rose +25.2 pp.



# AFFECTIVE:

*Optimize for emotion and memory*



*Maybelline, Brave Together, 2025*

*“Having a meaningful brand experience means a genuine and emotional one... that allows the consumer... to really understand the brand ethos and storytelling.”*

— **David L. Yu**, Prada Beauty

*“The experience has to be strong enough to interrupt someone’s scrolling or their daily routine.”*

— **Danièle Lahana-Aidenbaum**,  
Global President, Mugler  
Fashion & Fragrances

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**Takeaway:** Design for affect. Layer texture, scent, sound, and pacing to create emotionally sticky memories.

## SURVEY

Emotional connection remains a core intention for beauty brands in 2025.

# C COMMUNITY-BUILDING:

Foster durable *participation* and belonging



*"We put together a board of 19 dermatologists from all over the world... we all worked together... and in the end we achieved something frankly remarkable."*

— **Julien Wintenberger**, La Roche-Posay

*"Give consumers real access; let them into. That sense of inclusion in to the party is what drives impact."*

— **Emily Bromfield**, MAC Cosmetics

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**Takeaway:** Build programs that convene experts, creators, and fans. Give them real roles, then sustain the community with rituals and shared IP.



# TRUE-TO-BRAND:

Express brand codes *consistently*

*“Experiences have to be at the right scale for the brand. When people come to see us, they should feel, ‘This is exactly what I imagined La Rosée to be.’”*

— **Coline Molina**, La Rosée Cosmétique

*“In beauty, every experience should mirror the brand’s DNA — creating one continuous, consistent story across all touchpoints.”*

— **David L. Yu**, Prada Beauty

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**Takeaway:** Codify the brand’s sensory language, then apply it obsessively across retail, content, and creator toolkits for recall and trust.



*L'Oréal, Airlight Pro Launch, 2025*

**“A BRAND IS BUILT LOOKING AT THE NEXT QUARTER AND THE NEXT 10 YEARS.”**

— **Julien Wintenberger**,  
Global Brand & Communications Director, La Roche-Posay

# CONCLUSION:

## Beauty Experienced

*The next era of experiential beauty*

Beauty is no longer what people wear. It is what they live.

The 2025 Beauty **IMPACT** Report reveals an industry grounded in integration, participation, emotion, community, and brand truth. The brands leading this transformation, heritage and indie alike, are those that collapse the funnel, build ecosystems of belonging, and measure not just reach but resonance.

As Julien Wintenberger reminds us, “A brand is built looking at the next quarter and the next 10 years.” The future of beauty lies in those who see both.

As Matthew Spiteri reflected, “When you have trust between client and agency, that’s when magic happens.” His words summarize what defines beauty’s next era; collaboration, creativity, and courage to rewrite the rules together.

As Danièle Lahana-Aidenbaum reminded us, beauty has shifted from shaping looks to shaping culture. Experiences now define how people express identity, connect with communities, and navigate a complex world.

The meaning of beauty has evolved. What once centered on creating a look or a feeling now defines how people express identity, community, and values.

Beauty in 2025 isn’t just worn.

**It is experienced.**

# Key Takeaways

## *for Beauty Marketers*

- 1** Treat experience as a system, not a series of events.
- 2** Build belonging through generosity: impact grows when value is shared.
- 3** Keep measurement human: balance KPIs with emotional resonance.
- 4** Track the short term impact while keeping in mind long term brand building benefits.
- 5** Let community lead the dance and guide where the brand finds its tribe.
- 6** Design consistent ecosystems adaptable across cultures and localities.
- 7** Stay true-to-brand while continuously experimenting to evolve with your targets.

# GRADIENT

Gradient is a future-forward experience company. We don't just produce events, we create experiential ecosystems that drive meaningful consumer engagement.

Guided by our IMPACT framework we craft emotionally resonant experiences that amplify across channels and deliver business results.

Combining creativity with innovation, Gradient helps brands move beyond storytelling to embrace storyliving, creating deeper connections and lasting growth.

NEW YORK | LOS ANGELES | MIAMI | PARIS