

Wunderkind

# The U.S. Tariff Effect: Marketer Reactions & Revenue Strategy in 2025

Wunderkind Marketer Survey Report: May 2025



# Tariff Impact, May 2025:

## *How Marketers Are Responding in Real-Time*

As the ever-evolving U.S. tariffs ripple through supply chains and consumer sentiment, digital marketers are reacting with unprecedented speed.

This report provides a strategic analysis of the May 2025 Marketer Survey, focusing on how senior marketing leaders are adapting to rising tariffs, economic uncertainty, and changing consumer behavior.

The data underscores a significant shift toward performance marketing, identity resolution, and first-party data strategies, offering a clear roadmap for brands aiming to drive revenue through owned channels.

This report presents key insights from a Wunderkind-commissioned survey of 168 digital marketers conducted between April 28 and May 5, 2025, in response to newly announced US tariffs affecting imported goods.

The survey explores how these trade policies are influencing brand messaging, marketing budgets, performance expectations, and consumer engagement tactics.

We plan to continue to poll U.S. consumer sentiment and marketer reactions as long as the tariffs persist in 2025.

# Tariffs and Pricing:

## *Prices Are Rising*

A majority of marketers (57%) report selectively increasing prices in tariff-impacted categories—indicating a strategic effort to protect margins while limiting consumer disruption. In contrast, only 1% have offset tariff costs without price changes, highlighting the limited viability of operational efficiencies alone.

This reinforces marketing's critical role in shaping how price changes are communicated. As cost sensitivity rises, brands must proactively articulate value—emphasizing quality, transparency, and product integrity. Messaging should be personalized based on customer behavior and loyalty, ensuring relevance and minimizing friction.

Behaviorally triggered campaigns, deployed via onsite and owned channels, can contextualize price shifts and help preserve conversion rates. Promotional strategies should be reserved for categories most affected by tariffs, where price elasticity demands a nuanced, data-informed approach. In this climate, effective pricing communication is not just a sales tactic—it is a brand imperative.



**72%**

**Almost three-quarters of brands have increased prices due to the tariffs.**

# Shifts in Sourcing and Manufacturing:

## *Preparing for Structural Change, While Maintaining Consumer Confidence*

Over half (52%) of marketers report they are exploring shifts in sourcing or manufacturing locations due to U.S. tariff policy, yet only 17% have acted. This suggests that while awareness of risk is high, most brands remain in a planning or contingency phase.

For marketers, this presents an opportunity to strengthen consumer trust through transparent communication. As supply chains evolve, messaging that highlights ethical sourcing, sustainability, or domestic production can differentiate a brand and reinforce loyalty.

Owned channels—particularly email and onsite experiences—should be used to inform customers about these transitions in a way that supports brand equity. When tied to broader values such as quality, responsibility, or community, these messages not only mitigate uncertainty but also create affinity. As brands re-evaluate operations in response to global pressures, marketing must lead in translating those decisions into narratives that resonate with today's values-driven consumers.



**38%**

The infographic features a large orange rounded square containing the text. To the right of the square are several overlapping circular shapes in shades of blue and teal. A small white 'W' logo is visible in the top right corner of the page.

**of brands have already shifted  
sourcing / manufacturing or  
plan to in the next 12 months.**

# Growth Opportunities for 2025

## *First-Party Data Emerges as the Clear Strategic Priority*

Almost half (48%) of marketing leaders identified first-party data growth as their top opportunity for 2025—far surpassing goals like acquiring price-sensitive consumers (23%) or converting competitors' loyalists (15%). This marks a decisive shift in focus as reliance on third-party data continues to decline.

The strategic path forward is clear: brands must aggressively capture and activate first-party data to fuel personalization, segmentation, and retention. Without it, marketers will lack the insight required to compete in an increasingly privacy-conscious and performance-driven environment.

Web-based list growth strategies, particularly those integrated across email and text, will be critical. Simultaneously, identity resolution technologies should be prioritized to convert anonymous site visitors into addressable contacts. For marketing leaders, this is not a tactical adjustment—it is a foundational shift in how brands drive customer engagement, loyalty, and lifetime value.

# Marketing Technology Priorities:

## *Personalization at Scale is Leading Investment Focus*

When evaluating where to invest limited technology budgets, 40% of marketing leaders prioritized personalization engines that deliver dynamic offers based on shopper behavior. While this category led responses, identity resolution and behavioral-triggered messaging also emerged as essential components of a high-performing marketing stack.

Taken together, these investments reflect a broader strategic focus: maximizing the precision, speed, and impact of every customer interaction. Dynamic personalization alone is powerful, but its effectiveness is significantly amplified when combined with identity resolution and real-time behavioral triggers.

Brands that recognize and convert anonymous visitors, then engage them with timely, personalized messages across owned channels, will be best positioned to drive meaningful revenue growth. Email and SMS campaigns triggered by cart abandonment, browse behavior, or customer milestones are no longer optional; they are foundational. The most effective marketing leaders are now aligning personalization, identity, and triggers into a unified performance strategy.

# Holiday Marketing Adjustments:

## *Tariffs Are Forcing a Rethink to Q4*

Over two-thirds (68%) of marketers plan to modify their holiday strategies in response to tariffs and broader economic uncertainty. This majority signals a clear understanding that conventional Q4 playbooks are no longer sufficient in today's volatile environment.

To perform in a highly competitive and margin-sensitive season, brands must shift from reactive to proactive planning. Waiting until October is no longer viable. Instead, testing messaging, offers, and segmentation strategies during summer promotional windows will be critical to refining execution ahead of peak holiday demand.

Performance marketing technologies, particularly those rooted in identity resolution and triggered messaging, will play a decisive role. Recognizing anonymous traffic early in the funnel allows for more personalized outreach as holiday buying intent builds. Triggered email and text flows tied to browsing, cart behavior, and urgency cues—such as shipping cutoffs—will be essential for converting intent into revenue. Leading marketers will treat Q4 as a year-round preparation cycle.



**68%**

**of marketers are making adjustments to holiday season marketing due to the tariffs.**

# Impact of Price Increases on Marketing Strategy:

## *Accelerating the Shift to Owned Channels*

Recent tariff-driven price increases are materially shaping how brands approach their 2025 marketing strategies. The most common strategic response is a stronger investment in owned channels—email, text, and website—which was selected by 48% of respondents. This signals a clear preference for channels that offer more control, better margins, and direct access to the customer.

Additionally, 45% of marketers are testing new product pricing and value bundles, while 40% are increasing the use of promotional offers and discounts. These shifts point to a broader recalibration of value communication, where price sensitivity is driving both innovation in packaging and greater reliance on incentives. Notably, 39% are leaning into “Made in USA” or local sourcing themes, revealing an intent to turn cost-related challenges into brand-building opportunities.

In sum, the response to tariff pressures is not isolated to pricing—it is reshaping the entire marketing ecosystem. Marketers are responding by building more resilient, performance-oriented programs that prioritize first-party engagement, adaptability, and brand trust. The strategies taking shape in 2025 reflect a clear evolution: from reactive adjustments to proactive, revenue-centered planning that redefines how value is delivered and communicated.

# Owned Channel Strategies:

## *Core to Value Communication and Retention*

Marketers are making decisive shifts in how they use owned channels to respond to pricing pressures and evolving consumer expectations. Sixty percent are increasing price and value-based messaging, another 60% are using opt-in incentives to grow their lists, and 43% are deploying behavioral triggers. Just 2% reported making no changes—underscoring how essential these adjustments have become.

Owned channels such as email, text, and onsite messaging are no longer viewed simply as conversion levers; they are now central to reinforcing brand value, sustaining trust, and driving long-term loyalty. In an environment where price sensitivity is high, the ability to deliver relevant, timely messaging has a direct impact on performance.

Personalized campaigns tied to cart behavior, product interest, or customer lifecycle moments are critical. Triggered messaging combined with first-party data and identity resolution allows marketers to maintain relevance at scale, while loyalty-based exclusives and early access offers deepen engagement with high-value segments.

# Recognizing Anonymous Website Traffic:

## *An Opportunity with the Right Technology*

While 67% of brands rely on customer login or account creation to identify site visitors, only 38% are currently leveraging identity resolution partners. This gap reveals a significant missed opportunity: the inability to recognize and market to the majority of web traffic that remains anonymous.

A third (34%) will rely on their ESP, which face many shortcomings, with dependence on logged-in users, third-party cookies and siloed data.

Brands that can identify anonymous visitors in real-time unlock a broader and more valuable addressable audience. When combined with behavioral triggers and dynamic content, identity resolution enables one-to-one communications that drive measurable revenue across email, text, and onsite messaging. Recognizing a user's intent and delivering relevant follow-up—regardless of login status—is now a baseline requirement for any marketing team focused on efficiency and growth.



**28%**

**of marketers have no strategy to recognize anonymous website visitors.**

# Promotional Strategy Adaptation:

## *A Shift from Discounts to Value Reassurance*

Marketers are adapting their promotional strategies to reflect more than just pricing tactics. The most frequently adopted approaches include free shipping and product bundles (52%), enhanced loyalty rewards (49%), and flexible return policies (41%). These shifts indicate that consumers are increasingly motivated by perceived value and confidence, not just cost savings.

This evolution reflects a broader trend: promotions are no longer about price alone. Instead, they are becoming tools to build trust and reduce friction in the decision-making process. In uncertain economic conditions, shoppers are looking for reasons to feel secure in their purchases—whether through flexibility, added value, or recognition for repeat behavior.

For marketers, this means embedding reassurance into every touchpoint. Cart abandonment and browse recovery campaigns should emphasize return policies and loyalty perks. Messaging that reinforces convenience and customer-first policies can drive conversions while supporting long-term brand loyalty.

# Consumer Behavior Challenges:

## *Pressure Mounts on Alignment, Loyalty and ROI*

Marketers identified their most pressing challenges as maintaining customer loyalty in the face of heightened price sensitivity (49%) and navigating budget limitations (46%). Additional barriers such as internal misalignment and shortened planning cycles were also cited, reflecting the complexity of executing cohesive strategies under pressure.

These findings highlight the growing imperative for marketing to operate not only as a revenue driver but as a unifying force across the business. In a constrained environment, siloed execution is a liability. Strategic clarity, data transparency, and cross-functional alignment are essential to move at the speed of today's market demands.

Marketing leaders must centralize performance data to inform collaborative decision-making and prove return on investment. Partnerships with finance, product, and executive teams must be strengthened to prioritize initiatives that deliver measurable outcomes. As customer expectations rise and margins tighten, coordinated, data-driven execution will distinguish successful organizations from the rest.



**49%**

**Half of marketers are worried about maintaining customer loyalty as prices rise.**

# MarTech Investment Outlook:

## *Performance and Proof Over Promises*

In 2025, marketing technology investment is being reshaped by a decisive shift toward accountability and revenue impact. Over half of marketing leaders (56%) are prioritizing performance-based solutions that deliver guaranteed outcomes, reflecting a clear demand for technologies that prove their value in measurable, attributable terms. Closely aligned with this focus, 51% are increasing investment in first-party data solutions—reinforcing the central role that data ownership and activation play in enabling performance marketing.

In contrast, only 10% of respondents reported making no change to their MarTech strategies, indicating that nearly all organizations are actively reassessing their stacks. This reassessment is driven by a need to reduce risk, consolidate platforms, and ensure each tool contributes to revenue growth.

The implications are clear: the era of experimental or siloed tools is giving way to integrated, outcome-oriented platforms. Marketing leaders are consolidating around solutions that unify identity resolution, behavioral targeting, and real-time personalization—creating a technology foundation purpose-built for efficient acquisition, retention, and lifetime value.

# Closing Insight

The 2025 marketing environment demands a more disciplined, data-driven, and performance-oriented approach. As tariffs, economic pressures, and shifting consumer expectations reshape the market, successful brands will be those that embrace owned channels, deepen identity capabilities, and deliver personalization at scale. Marketing leaders must act now to implement the infrastructure and partnerships that can drive growth in a complex and competitive landscape.

## ***List Growth Tactics***

Deploy advanced behavioral triggers and segmented campaigns to increase opt-ins for email and text.

## ***Leverage Identity Resolution***

Use Wunderkind's capabilities to recognize and convert anonymous traffic, especially during high consideration and abandonment periods.

## ***Optimize Owned Channel Messaging***

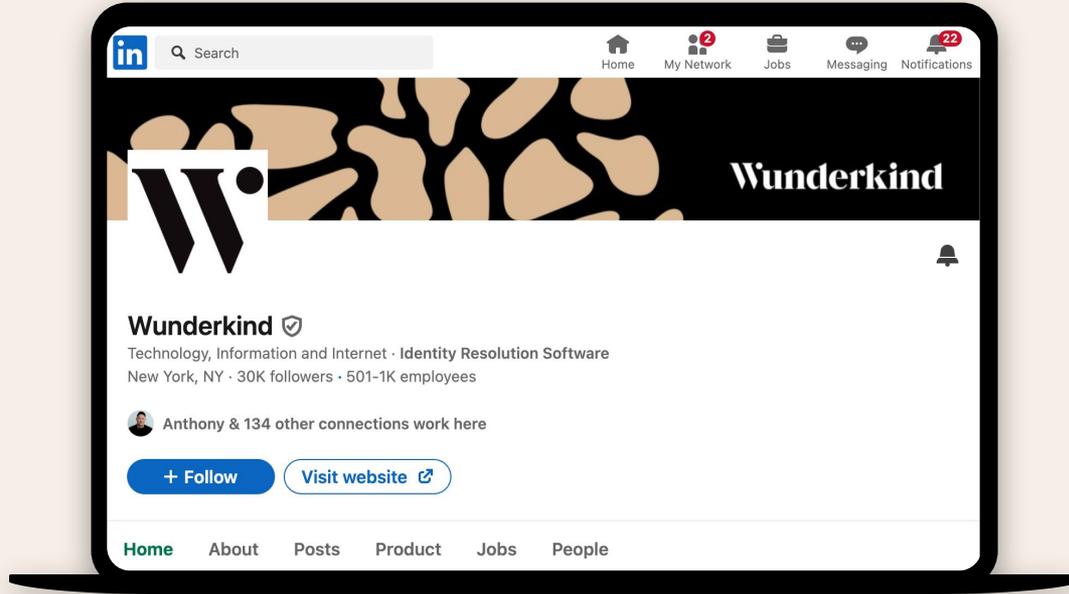
Personalize email and text at scale to reflect consumer intent (e.g., cart abandonment, browsing categories, exit intent).

# Recommended Strategic Actions for Marketers

1. **Shift Budgets to Owned Channels:** Reduce dependency on paid media in anticipation of inflated CPMs due to tariff-related costs. Use Wunderkind to scale email and SMS revenue.
2. **Lean Into Value and Scarcity Messaging:** Promote limited-time offers, shipping incentives, and loyalty perks through high-impact onsite and triggered messaging.
3. **Accelerate First-Party Data Capture:** Implement intelligent pop-ups and exit intent overlays to capture more emails and mobile numbers.
4. **Retain and Re-engage High-Intent Visitors:** Use identity signals to deliver timely post-visit messaging and re-engagement emails.
5. **Test Cross-Channel Sequencing:** Coordinate email and text journeys to prioritize channel preference and lift overall conversion rates.

# Stay in the Know

## *Get All of Our Future Survey Reports*



Follow us on LinkedIn

Visit our Website

# Wunderkind

Wunderkind is the leading AI-driven performance marketing solution that collects consent-based, first-party data and identifies anonymous traffic for brands in order to scale hyper-personalized one-to-one messages. Brands lean on the Wunderkind Identity Network, a proprietary database recognizing 9 billion devices and 1 billion consumers, and observes 2 trillion digital transactions every year, to trigger the most impactful offers to their target audience at the right moment and in the right channel. This proprietary data is accessed by Wunderkind's Autonomous Marketing Platform, an AI engine that integrates seamlessly into a brands' existing ESP to boost performance across email, text and advertising channels.

Wunderkind is the only performance solution that guarantees a lift in revenue for its clients and delivers over \$5 billion in directly attributable revenue annually for brands across a number of industries, often ranking as a top 3 revenue channel in clients' own analytics platforms. Brands such as Harley-Davidson, Perry Ellis International and Wolverine Worldwide partner with Wunderkind to drive top-line revenue through its guaranteed results.



P E R R Y E L L I S<sup>®</sup>

WOLVERINE | W  
worldwide