



INDUSTRY REPORT

2025 State of Growth Marketing in DTC + Ecommerce

Top brands share their marketing objectives and trends, budget allocation, trusted news sources, and more.

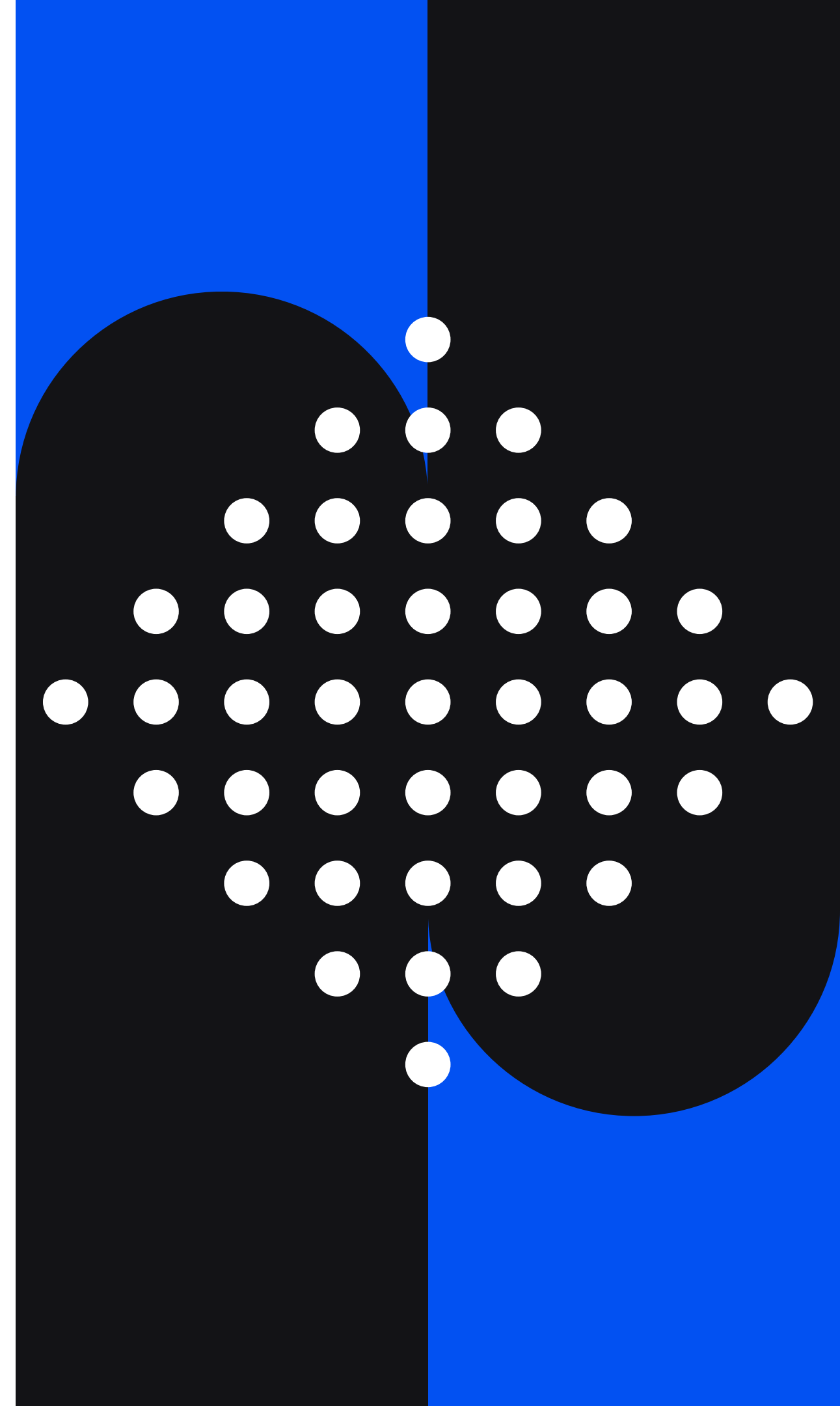


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Executive summary

When we set out to conduct our first-ever industry survey at the end of 2024, we knew we wanted to focus on growth marketing and measurement across ecommerce and DTC brands.

Across tariffs, the threat of a TikTok ban, and major shifts in how brands connect marketing to budget decisions, it was clear that changes impacting omnichannel brands deserved a closer look.

Between December 2024 and January 2025, 76 brand participants took Haus' inaugural industry survey. 79% of these brands have at least \$50M in annual revenue, and 100% spend at least \$6M on paid marketing annually. 76% of all responses came from Director+ level participants.

This report — published Q2 2025 — includes responses from leading consumer brands in fashion, beauty, health and wellness, home goods, jewelry, pets, travel, technology, and more. Brands that are shoppable online, across ecommerce marketplaces, and in physical stores.

The survey themes are illuminating — as a measurement partner, understanding industry headwinds, tailwinds, and attitudes is crucial to serving not only our customers, but the broader growth community. Responses were candid, honest, and thoughtful.

If you have any questions, **feel free to reach out and ask** — anytime. For more information about Haus or to request a demo, visit **haus.io/demo**.

Key takeaways

1 Incrementality testing is one of the most trusted forms of marketing measurement

90% of brands rank incrementality testing as one of their top two most trusted forms of marketing measurement.

2 63% of brands say declining efficiency of core marketing channels is their #1 challenge

Marketing measurement ranks as the second-biggest challenge for brands in 2025.

3 Brands are keen on building awareness

35% of brands say building brand equity is a top priority in 2025, with the greatest increases in channel adoption expected in YouTube, influencer marketing, and TikTok.

4 AppLovin and CTV expected to see big jumps in adoption

AppLovin adoption is expected to double while CTV is poised to become near ubiquitous. 28% of linear TV and 23% of programmatic buyers expect to decrease their spend in 2025.

5 Only 21% of brands are actively implementing AI outside of pilots

Marketers are still figuring out how, when, and where to weave AI into various brand and performance marketing functions.

6 Trusted voices are evolving

LinkedIn, private Slack communities, and industry newsletters are the top three sources for industry news. Vendor newsletters are near the bottom of the pack.

About the participants

Dec 2024 – Jan 2025

Dates conducted

Why is this significant?

It was after some U.S. policies about tariffs and other economic levers were announced, but before tariffs were enacted.

76

Total participants

79%

\$50M+ annual revenue

100%

\$6M+ annual paid marketing spend

**DTC, ecommerce,
and/or retail**

Industries

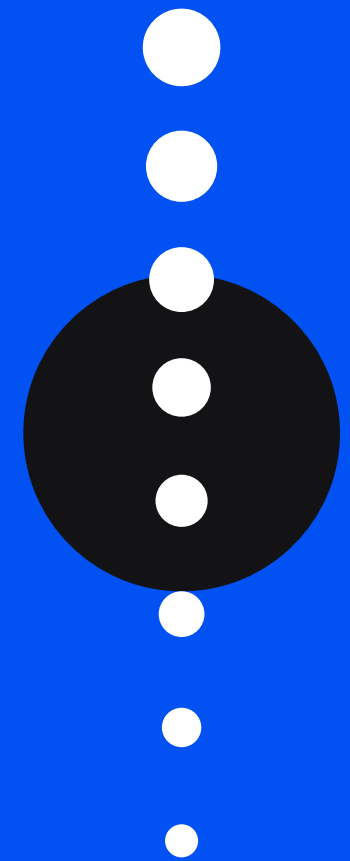
**Growth marketers or
marketing leaders**

Roles

**76% are director
or higher**

Job level

Marketing measurement priorities and trends



Efficiency is top of mind in 2025



Top objective

61% say **overall marketing efficiency**

[See Figure 1.1](#)



Top challenge

63% say **saturation or declining efficiency of core marketing efforts**

[See Figure 1.2](#)

What is your biggest growth marketing objective in 2025? Select up to three.



Figure 1.1: The top objective for brands in 2025 is overall marketing efficiency.

What are the biggest marketing challenges you anticipate in 2025? Select up to three.

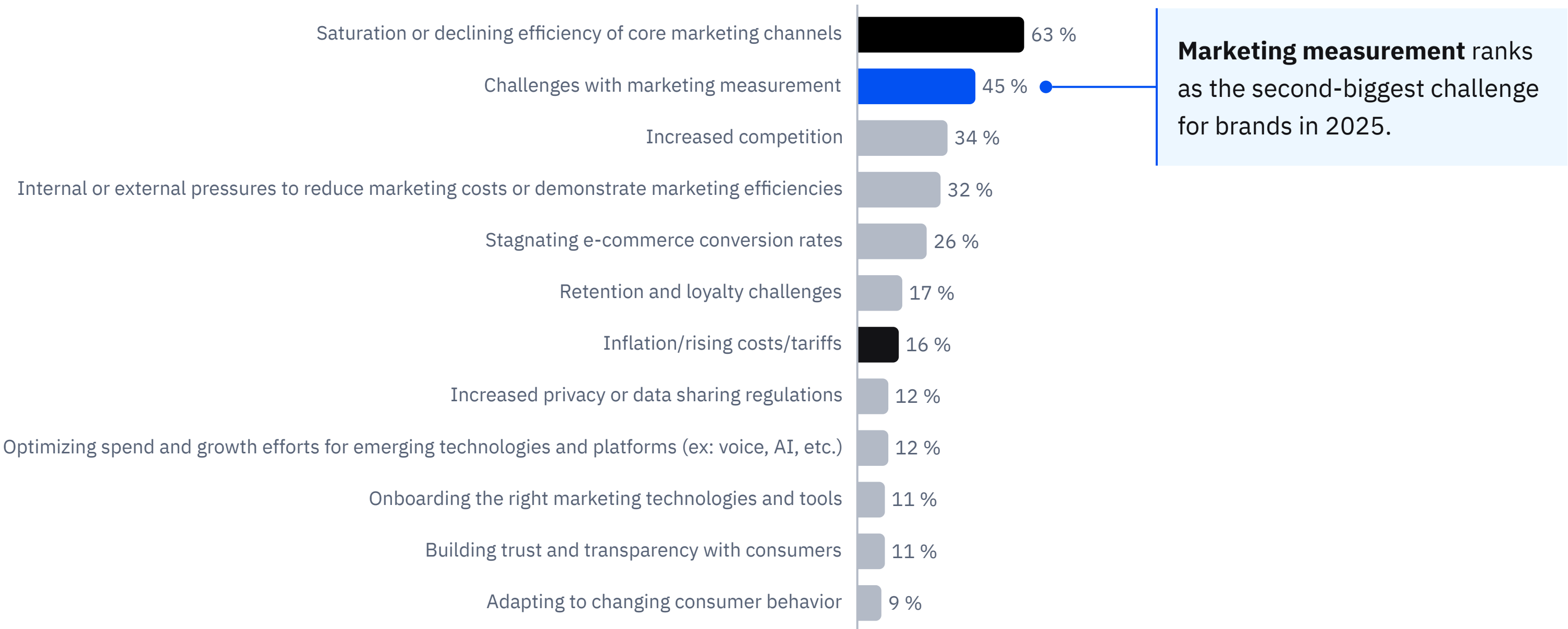


Figure 1.2: At the time this survey was conducted, inflation and rising tariffs trend towards middle-of-the-road concerns relative to broader marketing efficiency and measurement.

Marketing budgets expected to rise in 2025

The majority of brands expect marketing budgets to increase in 2025 — with just single digits signaling they expect budgets to decrease, as shown in Figure 1.3.

More than half of brands who anticipate budget increases expect increases by 11-25% — a decent size jump going into an economically uncertain year, as shown in Figure 1.4.

How do you anticipate your marketing budget changing in 2025?

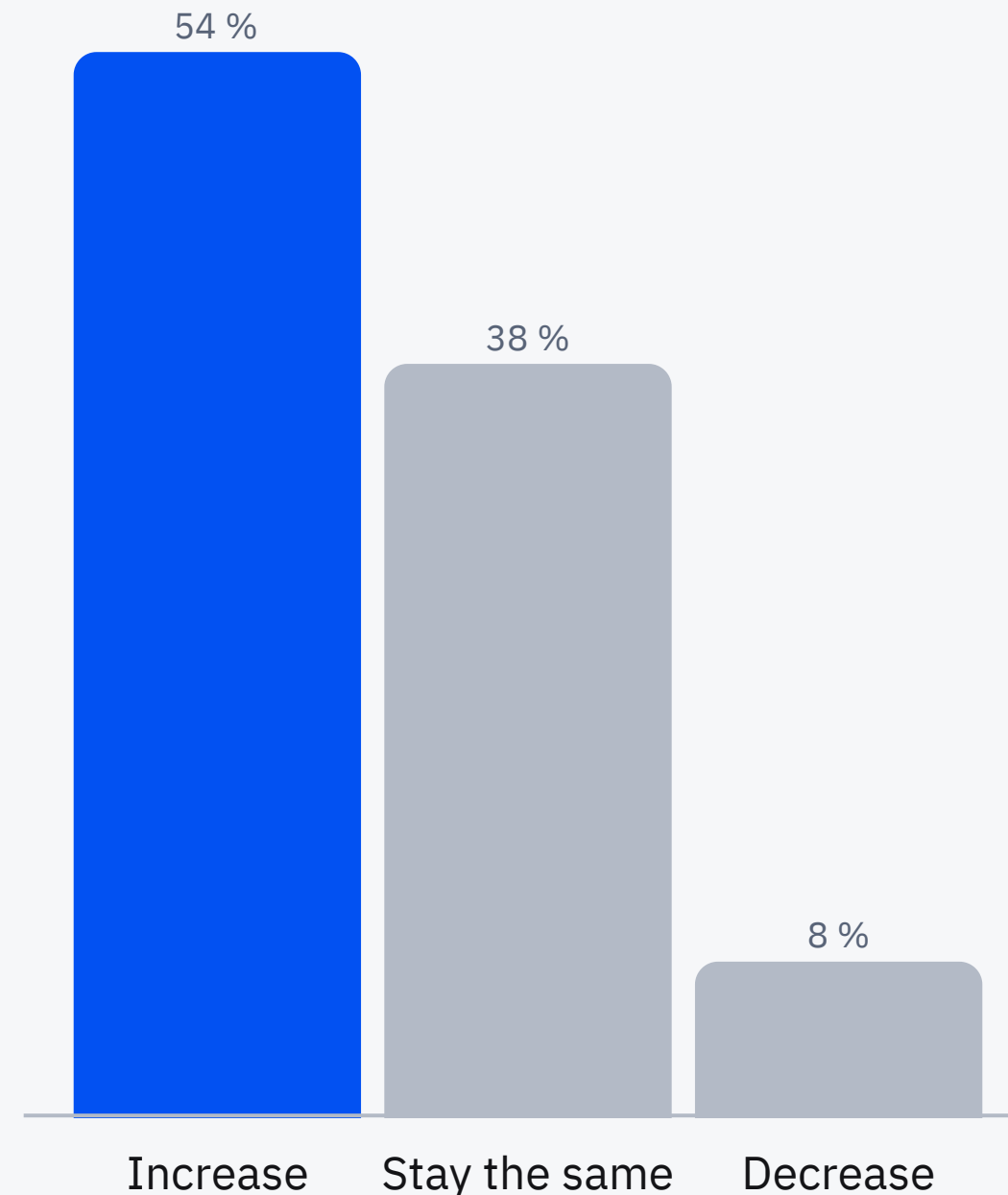


Figure 1.3

For brands with rising budgets, by how much do you expect your marketing budget to increase in 2025?

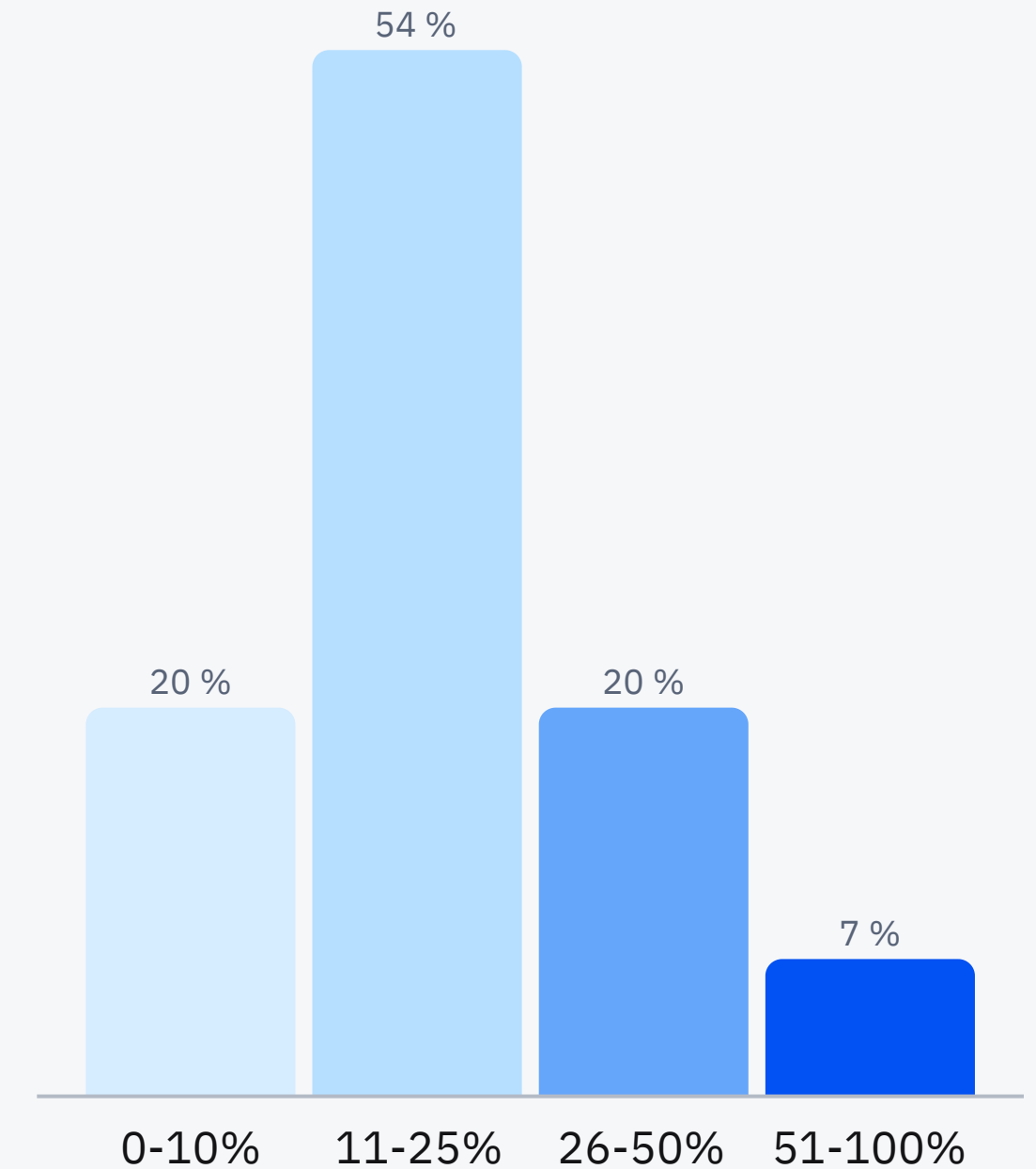


Figure 1.4

Brands seek to expand beyond tried-and-true

In 2025...



AppLovin adoption is expected to 2x, while CTV is poised to become near ubiquitous.

[See Figure 1.5](#)



28% of linear TV and 23% of programmatic buyers expect to decrease their spend in 2025

[See Figure 1.6](#)



YouTube expects strong increases in spend with very few decreases.

[See Figure 1.6](#)

Percentage of brands spending in marketing channels: 2024 and 2025

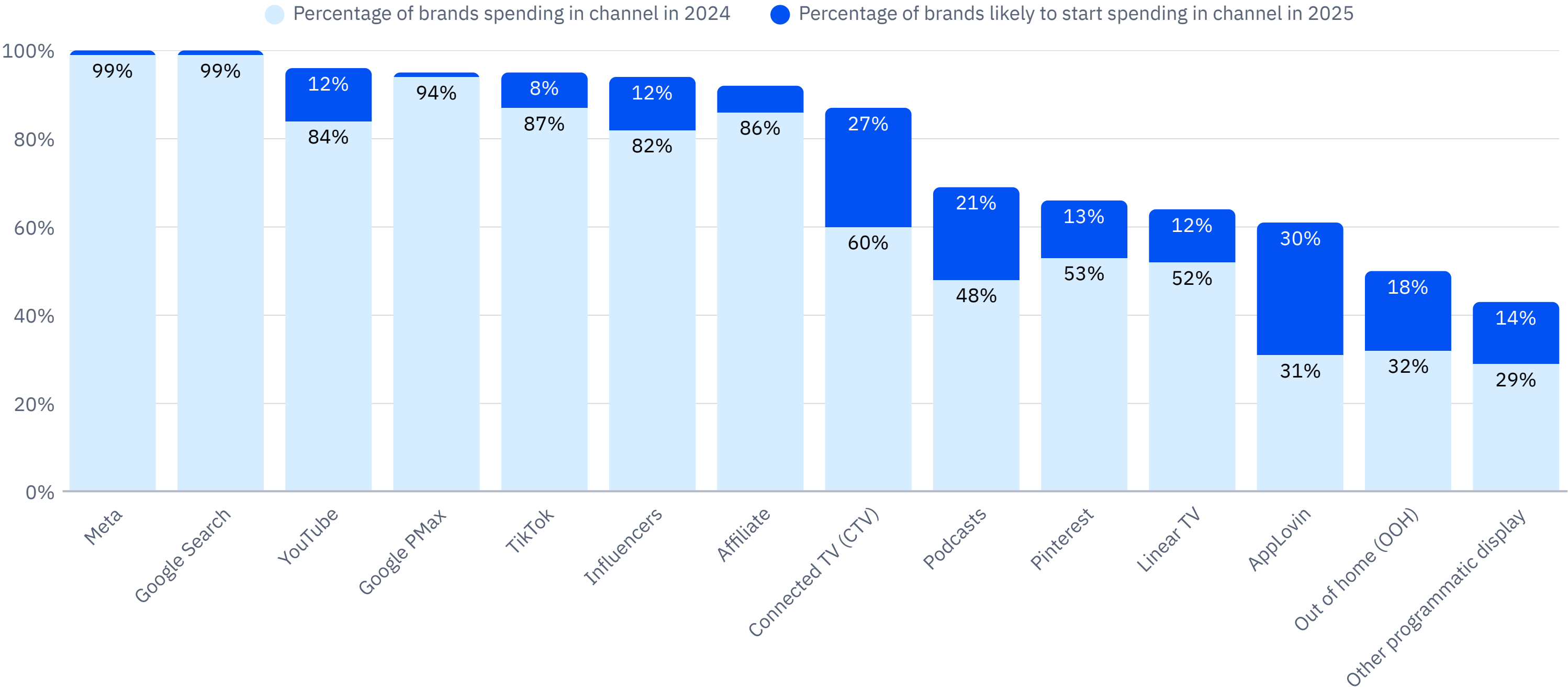


Figure 1.5: Chart shows where brands spent paid marketing in 2024 and where they expect to spend in 2025. Notable upticks are expected in Applovin, CTV, and Podcasts.

In 2025, where do you expect to increase or decrease your spend? (% of brands who spent in each channel in 2024)

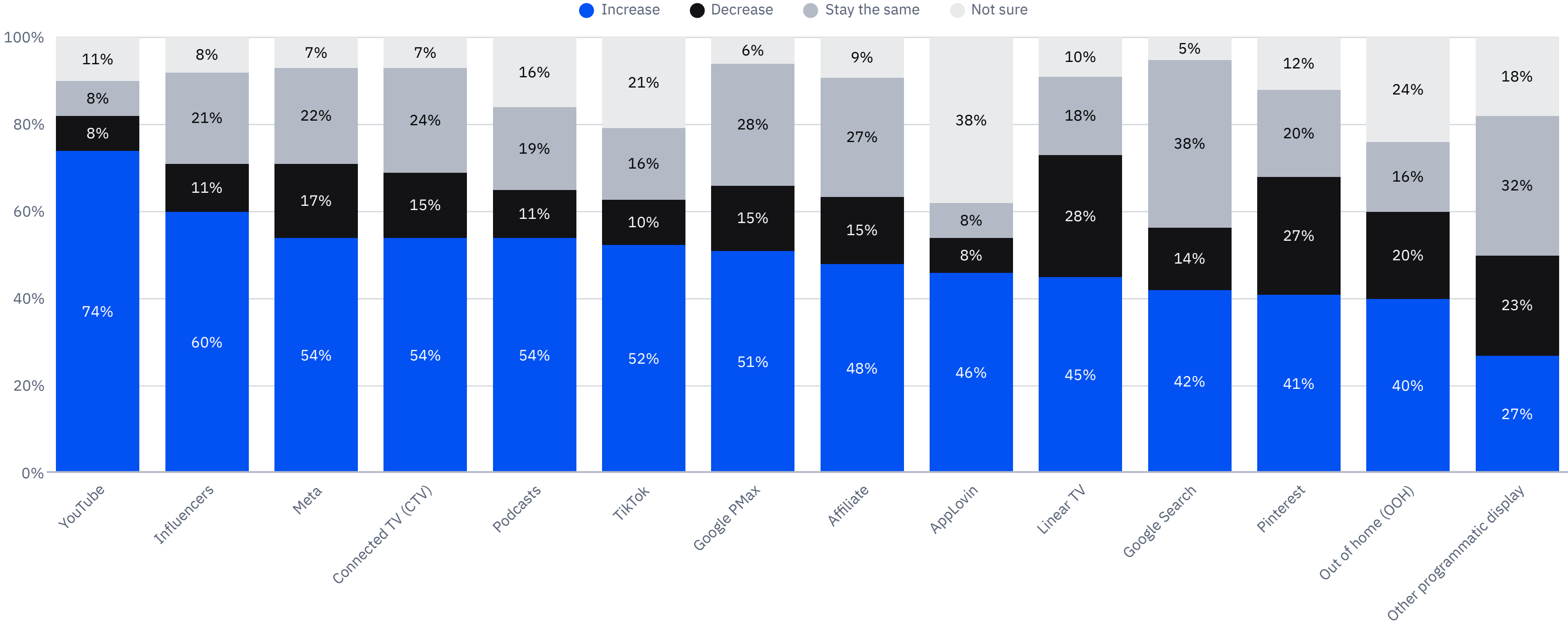


Figure 1.6: Chart shows expected movement in share-of-wallet across paid marketing channels.

Increase in Net Spenders: In 2025, where do you expect to increase or decrease your spend?

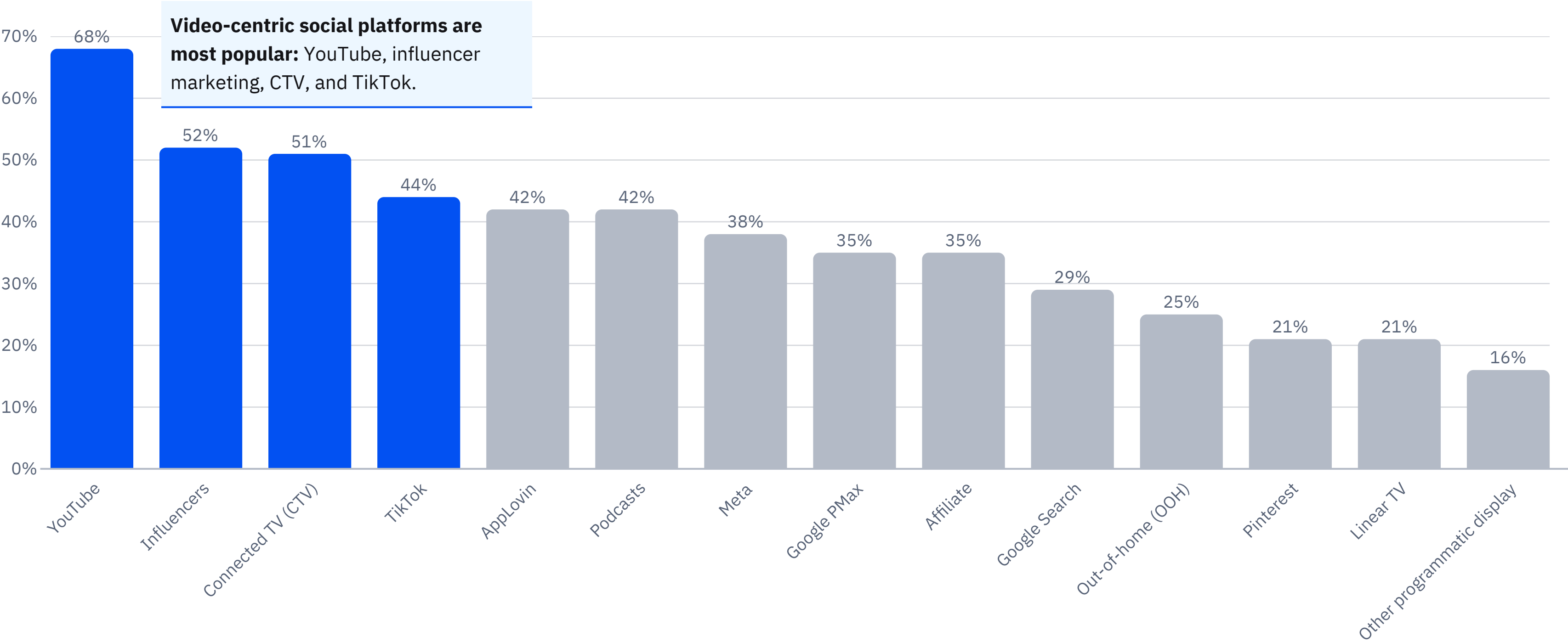


Figure 1.7: This chart combines Figure 1.5 and 1.6, adjusted to show the net percentage of brands increasing spend on platforms (Increase minus Decrease; brands not spending but likely to start are considered in Increase)

Declining efficiency of core marketing channels is a **major challenge for smaller brands**, but less of a worry for larger brands.

Most brands — regardless of revenue — **spend 64 to 72%** of their paid marketing budgets on **Google and Meta**.

Percentage of brands concerned with saturation or declining efficiency of core marketing channels, by annual revenue

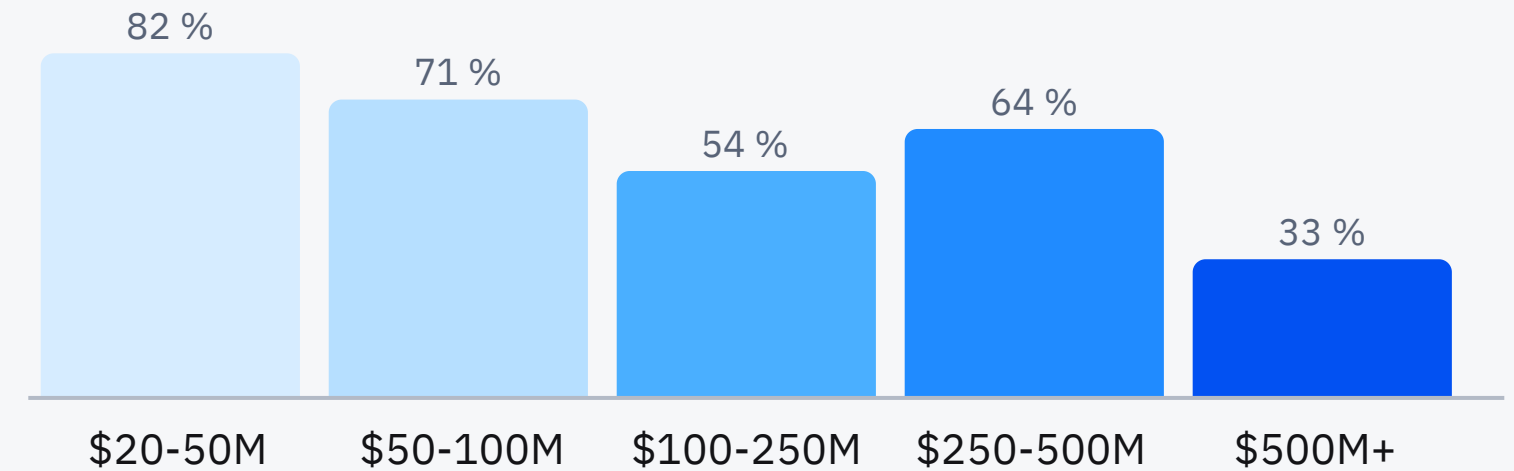


Figure 1.8

Percent of spend on Google and Meta combined in 2024, by annual revenue

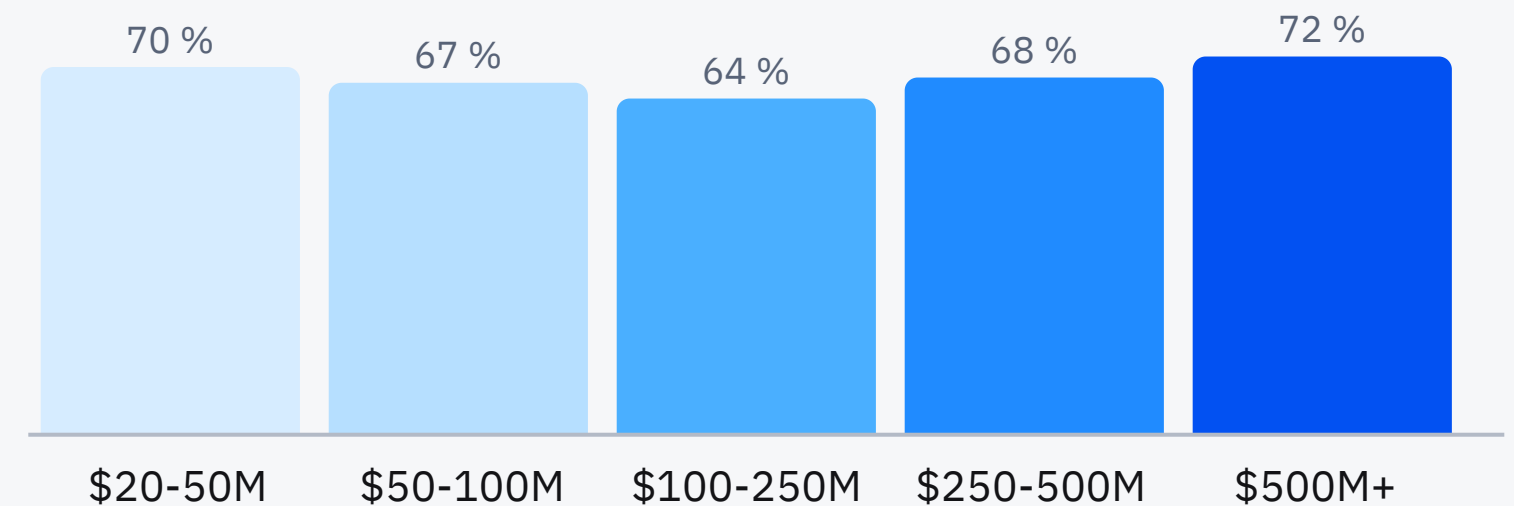


Figure 1.9

Brands with **\$100-250M** in annual revenue **value marketing channel diversification as a notable priority.**

Importance of marketing channel diversification as a 2025 primary objective, by annual revenue

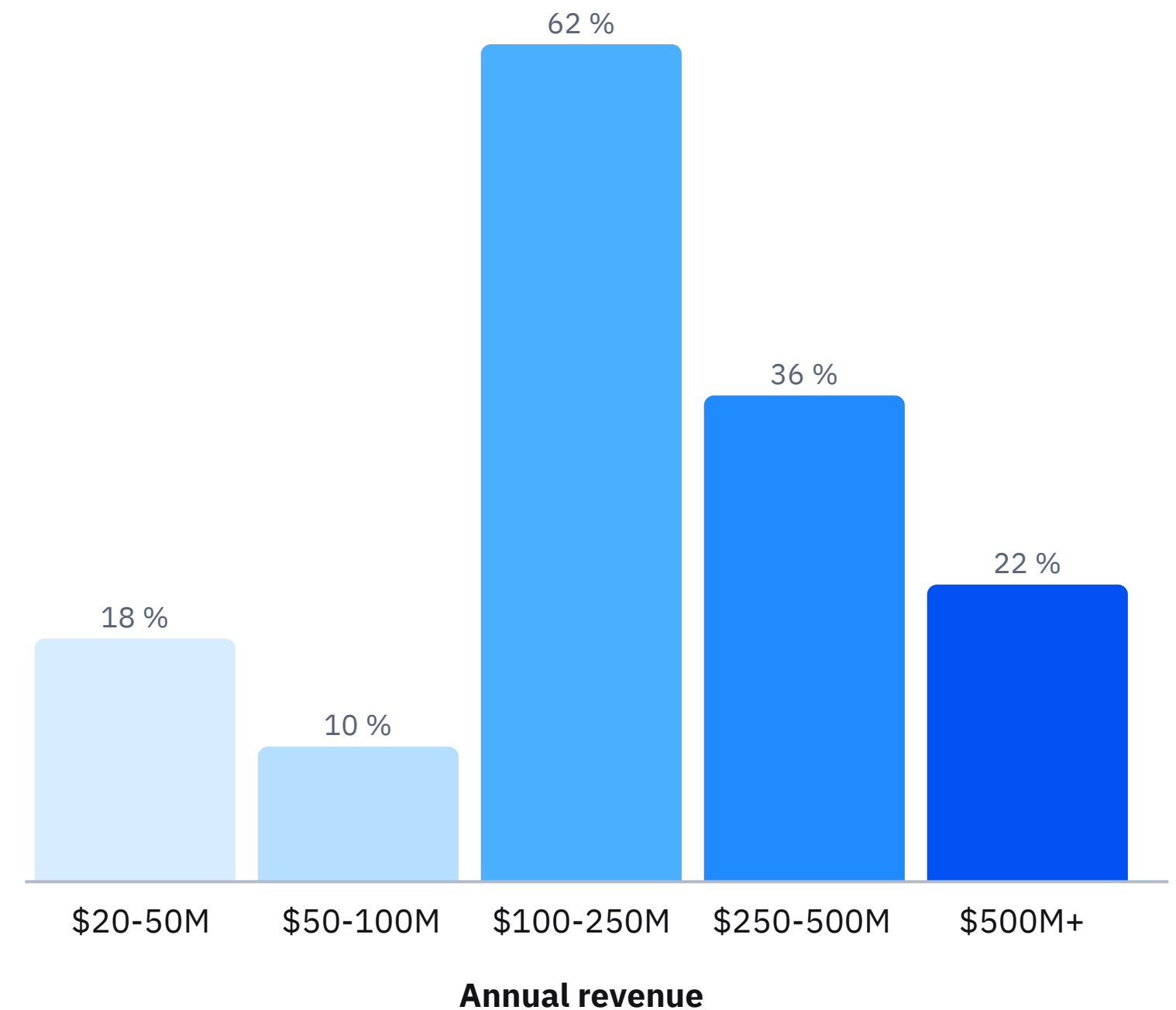


Figure 1.10

Attitudes about existing measurement solutions

Brands harmonize multiple tools to measure marketing efforts

From in-platform reporting and last-touch attribution to incrementality testing and post-purchase surveys, brands conduct an orchestra of solutions for comprehensive marketing measurement.

While 52% of survey respondents are Haus customers, **76% of survey respondents indicate they use incrementality testing** – signaling industry adoption beyond the Haus customer base.

What types of measurement solutions do you use today?

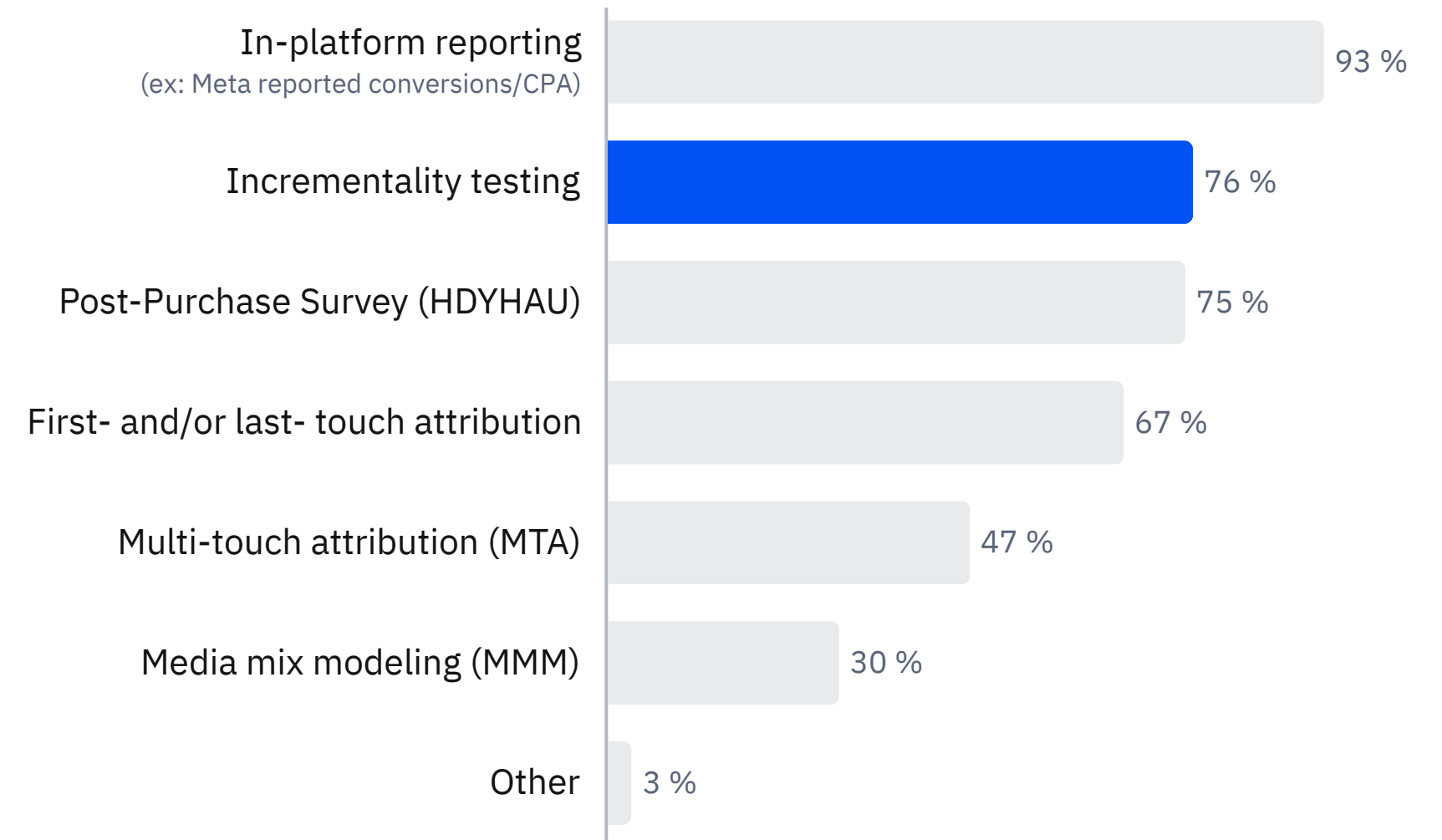


Figure 2.1

... but many brands still struggle to precisely and comprehensively measure impacts

How would you characterize your ability to accurately measure the business impact of your marketing activities?

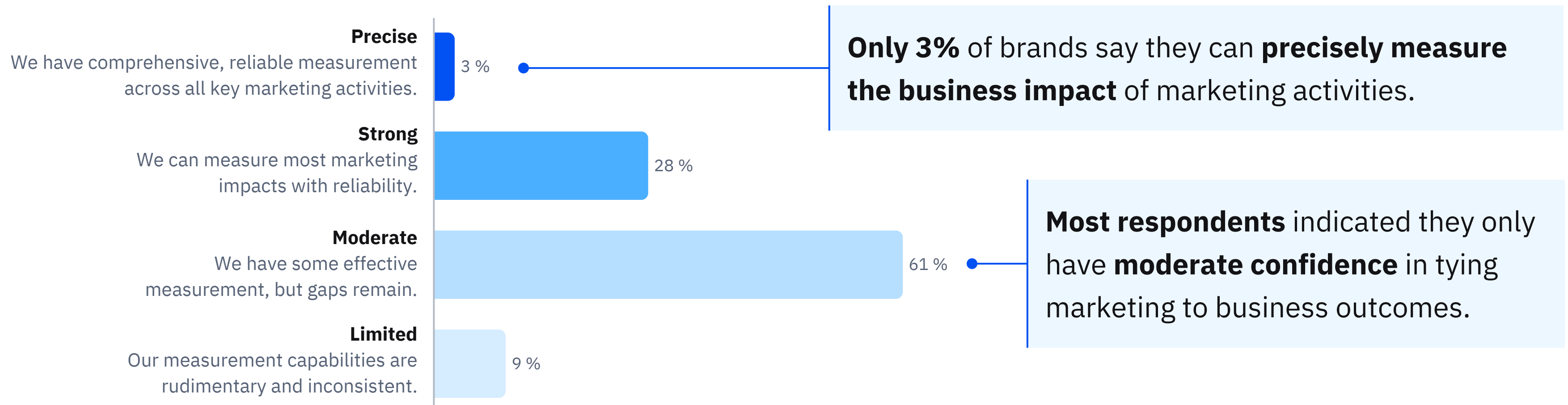


Figure 2.2

*52% of respondents are Haus customers

\$100M+ brands lead in MMM adoption

But smaller brands want MMMs, too: When asked in an open-ended question about what respondents desire, **34% of brands who do not have an MMM today signaled they want one.** Among this group, brands under \$100M were nearly 2x as likely to want an MMM.

Percentage of brands that use MMMs, by annual revenue

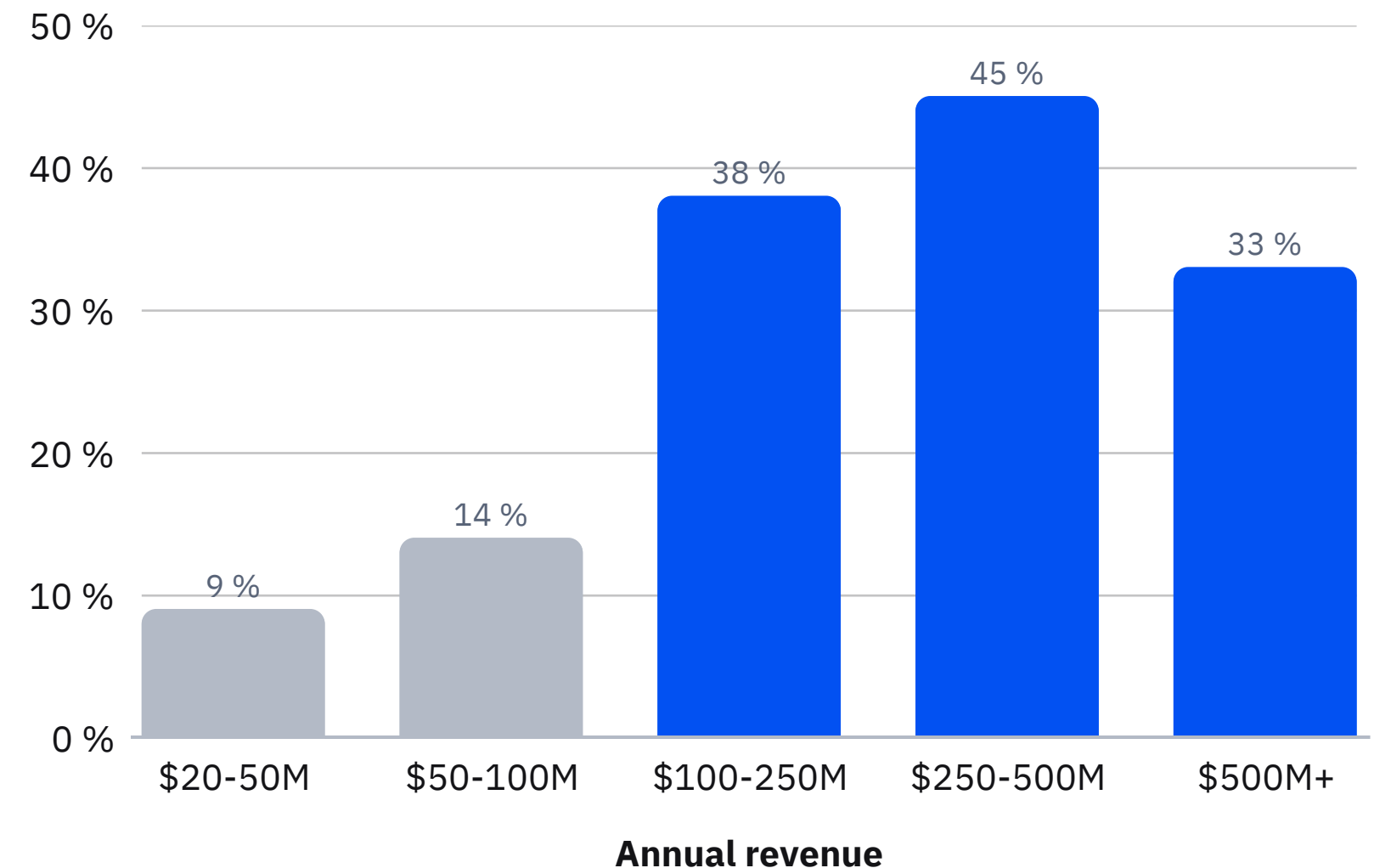


Figure 2.3

Incrementality testing ranks as the most trusted form of marketing measurement

90% of brands rank **incrementality testing** as one of their top two methods of marketing measurement, as seen in Figure 2.4.

*52% of respondents are Haus customers

Top-ranked trusted methods for marketing measurement
(of brands using that measurement method, % that ranked it as first or second most trusted)

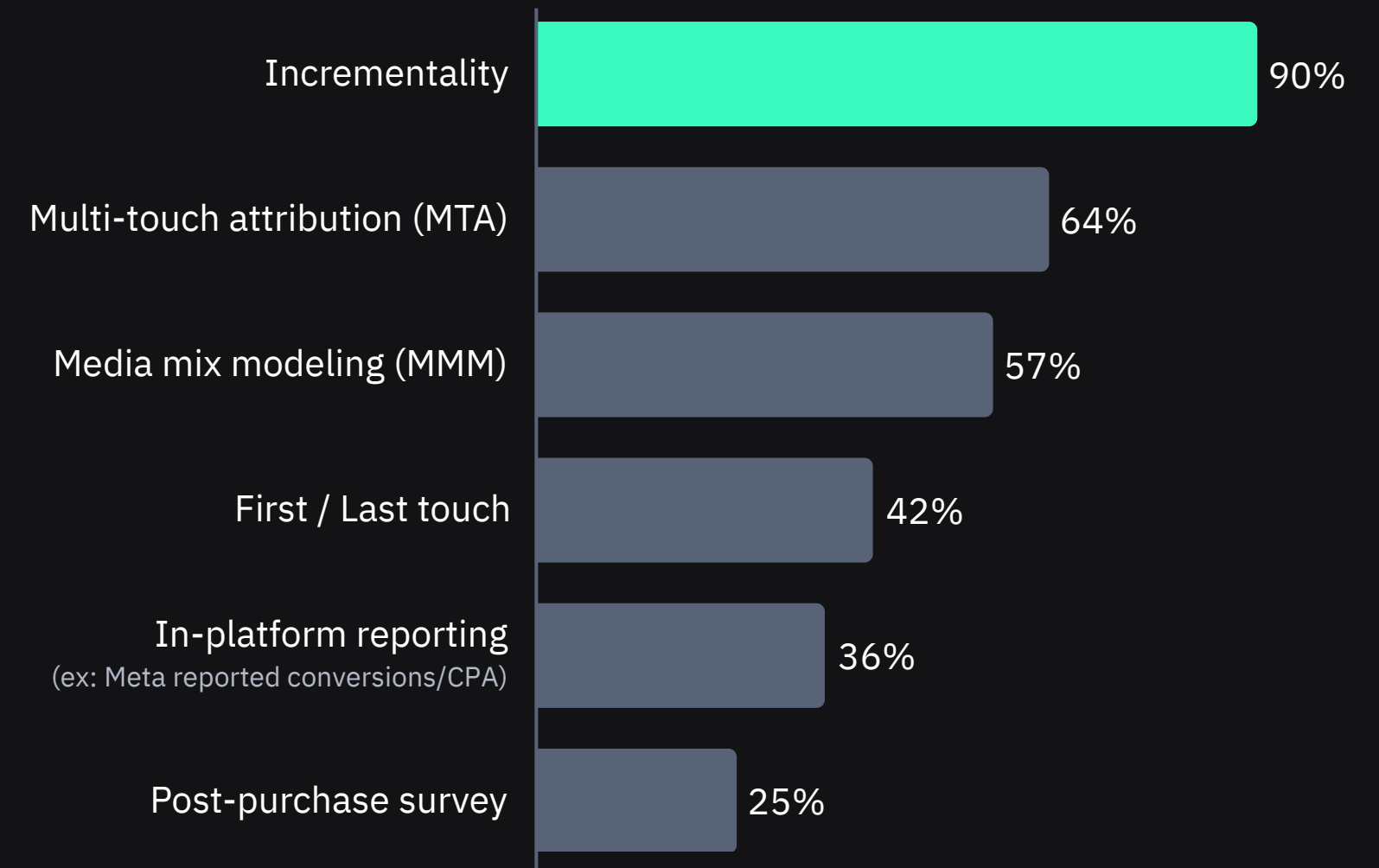


Figure 2.4: Question: Rank your most trusted marketing measurement methods, from highest to lowest trust

AI in marketing



AI in marketing is still in its early days

Marketers are still figuring out how, when, and where to weave AI into workflows and activities.



Only 21% of brands are **actively implementing AI** outside of pilots



37% are piloting AI or in early evaluation phases



40% of brands aren't prioritizing AI or haven't yet developed an AI strategy

[See Figure 3.1](#)

Which of the following best describes your organization's current approach to AI in marketing?



Figure 3.3: Only 21% of brands are actively implementing AI outside of pilots.

To what extent is AI currently integrated into each of these marketing workflows?

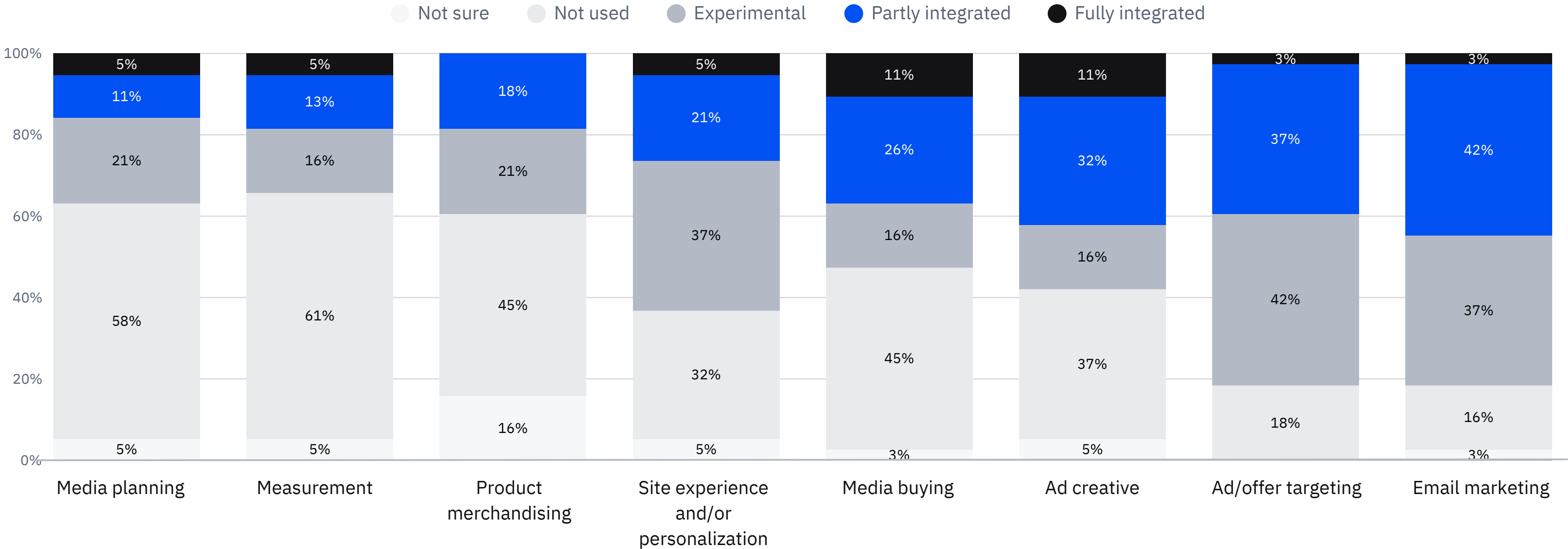


Figure 3.4

How growth marketers stay in-the-know



Staying up-to-date requires a mix of traditional media, social networks, and communities

Publications like **AdExchanger**, **AdWeek**, **Ad Tech Daily**, **Digiday**, **Glossy**, **eMarketer**, **Marketing Brew**, **MediaPost**, **Modern Retail**, **PPC News**, and **Search Engine Land** were all cited as reliable industry resources. But **there's a clear trend of embracing private communities and individual voices** for trusted news, information, and updates on DTC + ecommerce growth marketing.

Respondents name-dropped experts like: **Adriaan Dekker**, **Ann Handley**, **Cherene Aubert**, **Christopher Penn**, **Cody Plofker**, **Connor MacDonald**, **Connor Rolain**, **Dara Denny**, **David Hermann**, **Eric Seufert**, **Jeremiah Prummer**, **Kevin Hillstrom**, **Olivia Kory**, **Sean Larkin**, **Taylor Holiday**, **Thomas Eccel**. And communities, podcasts, and smaller publications like: **Foxwell**, **Marketing Operators**, **Marketecture**, **Mobile Dev Memo**, **Nik Sharma**, **Lenny's Newsletter**, **Pivot Podcast**, **Social Savannah**, and **Stratechery**.



Top trusted news sources

LinkedIn and private communities

[See Figure 4.1](#)

What are your top sources for marketing industry news? Select up to 3.

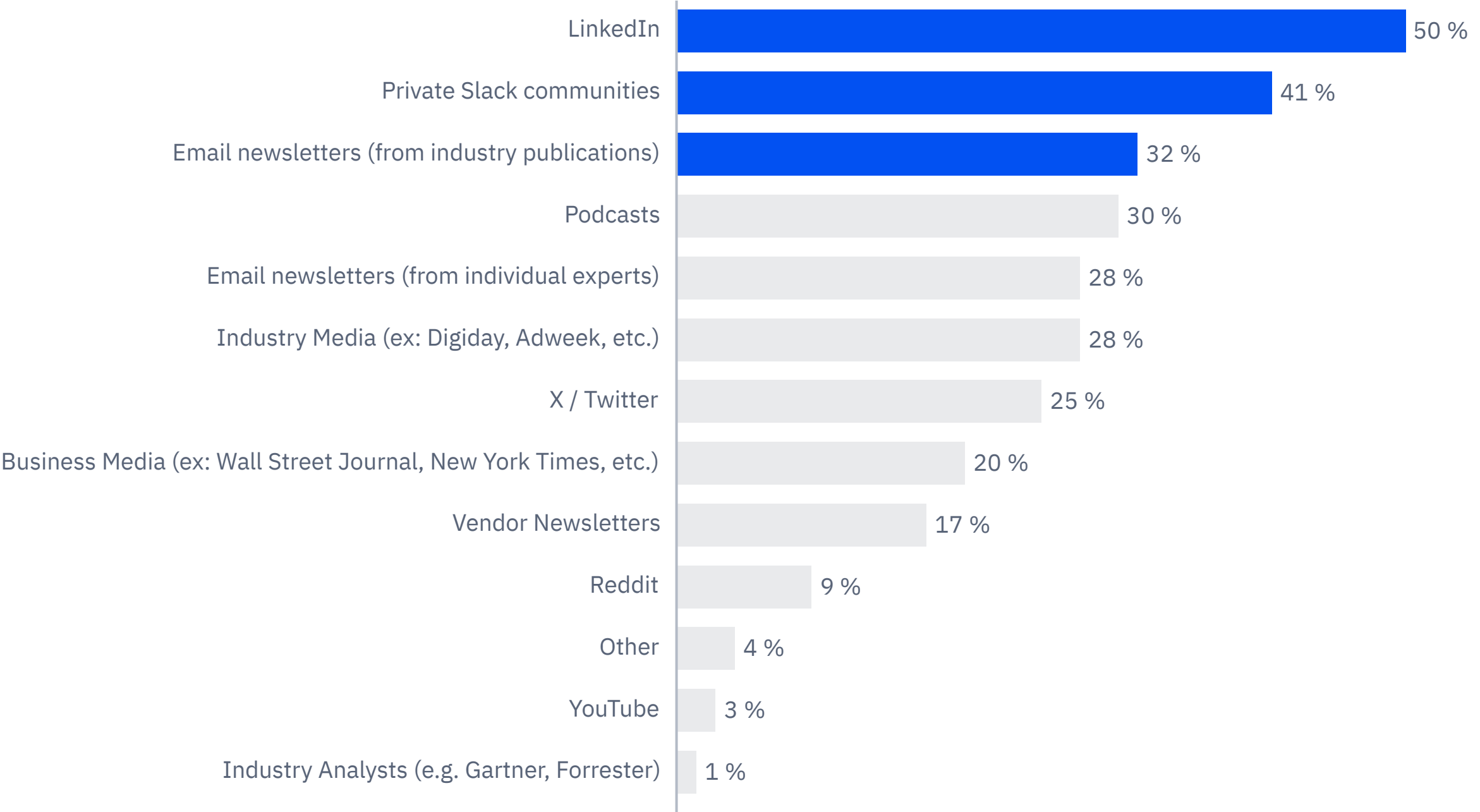


Figure 4.1: LinkedIn, Slack communities, and email newsletters are top news sources.

What's Your Next Move?

The survey results reveal both the challenges and opportunities facing brands in 2025. From shifting budgets to the increasing complexity of measurement, staying competitive requires strategic agility and a deep understanding of what's driving business outcomes.

At Haus, we believe that better measurement leads to better decisions. The insights shared in this report reflect the honest, thoughtful perspectives of leading growth marketers — providing a valuable pulse check on the state of the industry. Whether it's investments in new channels, explorations in AI, or shared concerns about declining efficiency, these findings offer a foundation for smarter decision-making, knowledge-sharing, and community.

Many thanks to the extraordinary brands who took the time, energy, and care to help the broader industry by participating in this survey.



Stay ahead of the curve

Sign up for the Haus newsletter for the latest insights, industry trends, and actionable strategies from Haus and the broader growth marketing community.

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