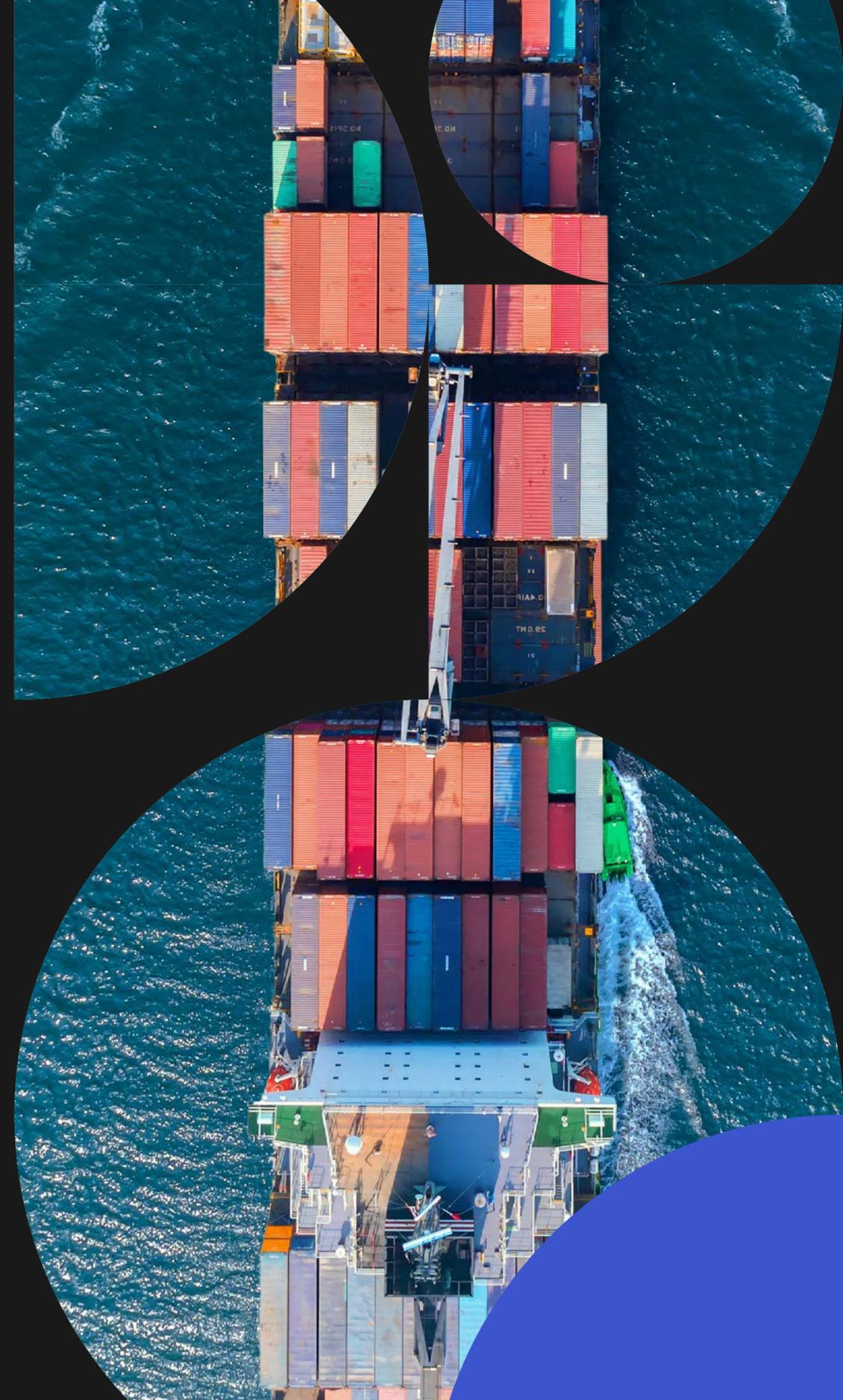


Wunderkind

U.S. Tariffs: Consumer Impact Survey Series

*A special report following consumer purchase
intent and behaviors*

April 2025



Market Alert: Tariffs Are Reshaping Consumer Sentiment

As U.S. tariffs drive up costs across key product categories, consumer behavior is shifting—fast. From increased price sensitivity to weakened brand loyalty, Americans are adjusting how, when, and where they shop.

This mini-report equips brand marketers with the insights they need to align messaging and promotional strategies to evolving consumer expectations.

It is based on survey data collected between April 14 - 16, 2025, from 307 U.S. consumers, evenly split across genders and adult age groups.

Inside, we outline the new rules of engagement for brands navigating economic turbulence and planning for revenue resilience in the months ahead.

We plan to continue to poll U.S. consumer sentiment and behavior as long as the tariff persist in 2025.

Consumer Awareness: *A Key Driver of Behavior*

High awareness of upcoming tariffs—reported by 91% of surveyed consumers (63% very aware, 28% somewhat aware)—signals that price shifts and economic uncertainty are firmly on the public radar.

This widespread consciousness means brands can't afford to ignore tariff-related concerns in their messaging. The gender gap, with 71% of men versus 55% of women reporting high awareness, also presents an opportunity for more nuanced targeting.

Tailoring content by demographic can help marketers more effectively address the different ways consumers perceive and respond to price volatility.

3% Only 3% of consumers are unaware of the tariffs

Engagement with Marketing:

Value Drives Action

As inflationary pressure and tariff-related costs take hold, consumers are signaling a clear openness to marketing—when there's value in return. **43% of shoppers are willing to opt into email or text communications in exchange for better prices or early access to deals.** This intent is even stronger among **Gen Z, with well over half (54%)** indicating a preference for value-first engagement strategies.

Marketers also have a growing opportunity to influence purchase timing. **56% of consumers are willing to wait longer for a product if the price is right**—a number that climbs to **69% for Gen Z and 61% for Millennials.** Gender differences present opportunity for further refined messaging: 62% of men are comfortable trading speed of fulfillment for savings, compared to 50% of women.

For brands, these behaviors reveal a key strategy: highlight value clearly, use email and text to deliver that value, and frame longer fulfillment times as a tradeoff for better deals. In a high-awareness, cost-sensitive market, consumers will reward brands that respect their budgets and communicate with clarity.

Brand Loyalty Under Pressure:

Price Is the New Priority

As tariff-driven uncertainty intensifies, brand loyalty is taking a hit. **Just 46% of consumers say they would remain loyal, even with clear updates on pricing and availability**—meaning more than half are willing to switch brands if the price is right. This signals a critical shift: **loyalty is no longer guaranteed**, even for brands that communicate transparently.

This erosion opens the door for disruption. Challenger brands have a unique window to win over customers by leading with competitive pricing, transparent communication, and faster or more reliable delivery. In a landscape where value perception outweighs past affinity, **brands that adapt quickly and communicate effectively can outpace even the most established players.**

For marketers, this is a clear call to action: loyalty must be earned—again, message by message, deal by deal, promise by promise.

46%

Less than half of consumers will remain loyal to brands—even when offered perks, transparent pricing, and clear communication

Shifts in Consumer Spending:

Frugality Becomes the Default

Tariffs are already reshaping how, and how much consumers spend. **23% of Americans have begun cutting back on non-essential goods**, and **Gen Z (21%) is actively switching retailers** in pursuit of lower prices. This early response indicates that price sensitivity isn't just theoretical—it's already hitting the bottom line.

Looking ahead, the outlook for peak shopping seasons is just as sobering. **37% of consumers plan to reduce spending during the summer and holiday periods**, with **32% focusing only on essentials** and **42% hunting for discounts**. Brands targeting Gen X should pay close attention—**45% expect to tighten their budgets**, making them the most cautious generation in the current climate.

For marketers, this means adapting messaging and promotions to align with a more restrained, value-driven consumer. Emphasize affordability, must-have items and time-sensitive deals. More than ever, your campaigns must reflect the economic mindset of your audience—because they're already changing how they shop.

Category Concerns:

Essentials, Apparel, and Tech Under Watch

Consumer anxiety around tariffs is showing up clearly in specific product categories. **Groceries and everyday essentials top the list, with 53% of shoppers worried about affordability**—especially Gen X (62%), who are feeling the greatest financial pressure.

Discretionary categories aren't immune either. **46% are concerned about rising fashion and clothing prices**, while **41% are anxious about affording tech and electronics**—a red flag for back-to-school and holiday electronics campaigns. Even the automotive sector is feeling the squeeze, with **36% of consumers expecting price hikes on auto parts and maintenance costs**.

For marketers, the takeaway is clear: pricing transparency and targeted value messaging are more critical than ever. Lead with value and affordability in sensitive categories, especially when engaging Gen X or price-conscious younger audiences. Highlight cost-saving bundles, loyalty rewards, or payment flexibility to ease friction in high-concern verticals.

6%

Only 6% of consumers say they aren't concerned about tariffs impacting prices

Closing Insight:

Marketing Through Disruption

Tariffs are reshaping more than just price tags—they're redefining consumer priorities. For marketers, this moment demands a strategic pivot:

Price now outranks loyalty

Strike a smart balance between value-driven offers and long-term retention.

Transparency is non-negotiable

Clear communication on pricing and availability builds trust amid uncertainty.

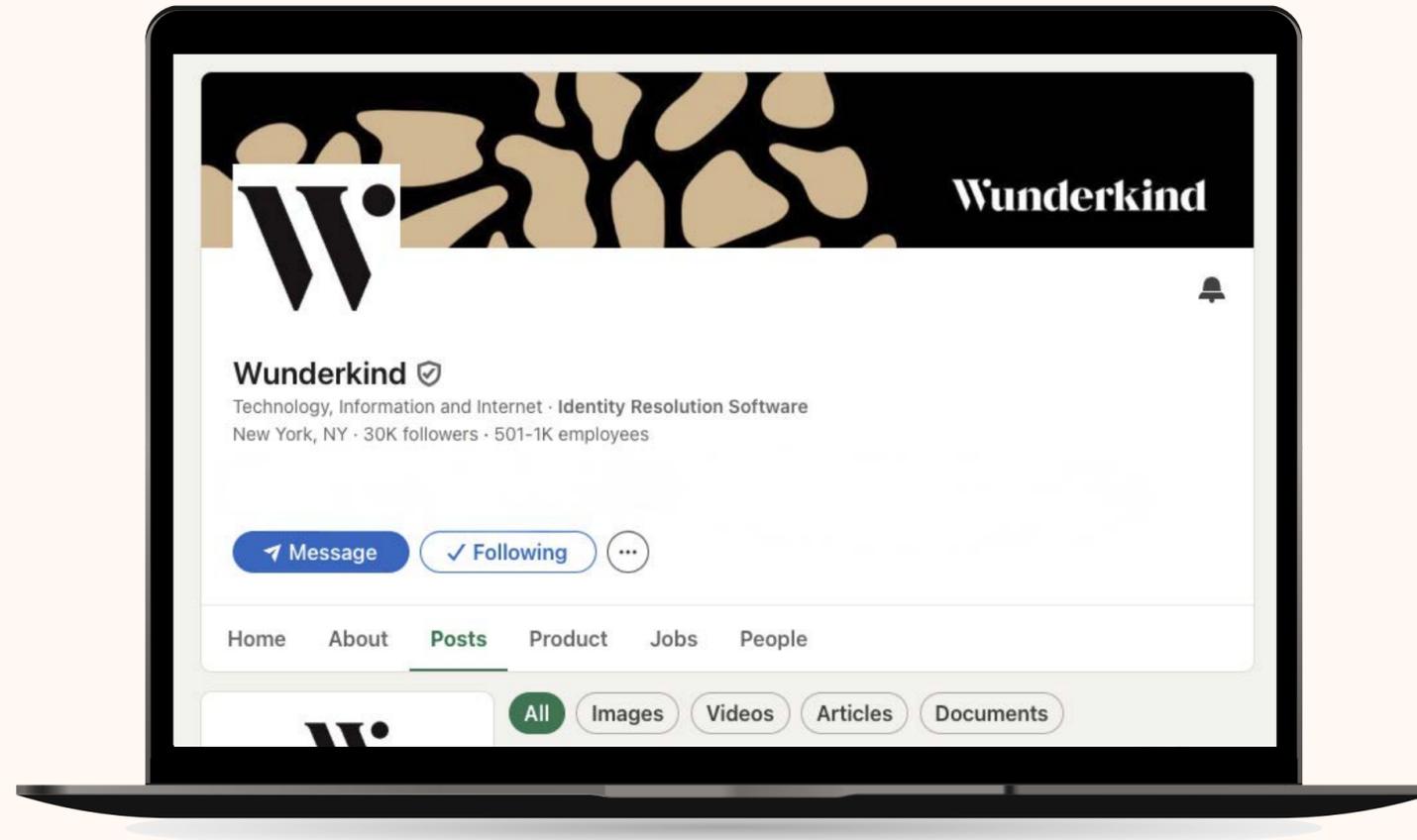
Innovation is your advantage

Agile campaigns and competitive pricing can turn market volatility into growth opportunities.

This isn't just a challenge—it's a chance to lead. Brands that adapt with speed, empathy, and strategy will emerge stronger, earning loyalty not through legacy, but through relevance.

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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 Shoe Carnival partner with Wunderkind to drive top-line revenue through its guaranteed results.



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