

# Tariffs: Consumer breaking points

April 2025



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# Key takeaways I

## Awareness and sentiment toward tariffs

- Most Americans are aware of tariffs but not deeply informed—only 22% say they're *very familiar* with how tariffs impact prices, while nearly half (46%) say they're only *somewhat familiar*.
- A majority (55%) say they're *worried* about the newly announced tariffs, but only one-in-three (34%) believe tariffs are *good for the U.S. economy*. Democrats are especially skeptical—59% believe tariffs are bad for the economy compared to just 20% of Republicans.

## Media consumption shapes perception

- TV news is the dominant source of economic/trade policy information (36% overall), especially for older consumers (66% of those aged 56–75). In contrast, 32% of 26–35 year-olds rely on social media, and 15% of that group cite YouTube or podcasts.
- Those who follow trade news more frequently are more likely to be worried about tariffs—63% of daily followers express concern, compared to 17% of those who never follow it.

# Key takeaways II

## Economic impact and consumer preparedness

- 70% of Americans believe tariffs increase the price of everyday goods, with near-universal agreement among Democrats (86%) while fewer republicans (69%) share that view.
- One-in-five (20%) respondents feel their household is prepared to absorb price increases from new tariffs, while 31% say they are not prepared at all.
- The divide between political ideology and economic reality is particularly striking: while 57% of Republicans say they believe tariffs are good for America, only 27% feel prepared to absorb the higher costs they may bring.
  - Just 19% of Democrats and 20% of Independents feel ready to handle tariff-driven price hikes, with Democrats the most likely to say they are not prepared (40%), reflecting broader economic concerns across party lines.

# Key takeaways III

## Behavioral responses to rising prices

- Consumers are already making tradeoffs to cope with rising prices: More than half say they're cooking at home more often (49%), cutting back on impulse purchases (45%), and ordering less takeout (44%). Others are going further by eliminating non-essential items from their purchasing (33%) and delaying technology upgrades (22%).
- A 5–10% price increase is enough to change behavior in most categories. For example, 56% of consumers would stop buying snacks at just a 10% markup. Categories like fast food (59%), cosmetics (61%), wine and spirits (61%) and tech products (57%) are especially price-sensitive, with majorities saying even a modest increase would prompt them to stop purchasing altogether. This signals potential headwinds for industries like QSR and beauty, where discretionary spending is more easily cut.

# Key takeaways IV

## Support for tariffs is highly conditional

- Tariff support hinges on impact: 28% would support tariffs if prices stayed the same, and 22% if they protected American jobs. 20% would support them to reduce dependence on foreign manufacturing. Nearly one in five consumers (18%) say nothing would make them support tariffs.

## Buying American has limits

- Nearly half of respondents (46%) say they'd be most likely to buy a product labeled "Made in America," but only 20% are willing to pay significantly more for it. Nearly one-third (28%) would choose the cheaper option regardless.
- Interest in "Tariff Free" labeling is relatively low (21%), suggesting economic concerns outweigh ideological ones for most shoppers. 18% of Republicans would be most likely to purchase a product labeled "Trump-Approved" compared to just 4% of democrats.
- Price and quality reign supreme—87% say quality is an important factor, followed by price (85%) and availability (83%). Country of origin matters to just 44%, and ethical sourcing to 54%.

TARIFFS: CONSUMER BREAKING POINTS

# Audience demographics



# Demographics

Nationally representative sample of 1000 consumers

- Respondents are 50% male and 50% female
- Most common political affiliations:
  - Democrat: 26%
  - Republican: 32%
  - Independent: 26%
  - Prefer not to declare: 13%
  - Other: <2%
- Ages:
  - 18-25: 24%
  - 26-35: 21%
  - 36-45: 23%
  - 46-55: 21%
  - 56-75: 11%



**64%** are the primary alcohol purchaser in the household



**85%** are the primary food purchaser in the household



**36%** have children 18 years and younger living with them



TARIFFS: CONSUMER BREAKING POINTS

# Consumer knowledge of tariffs and economic news

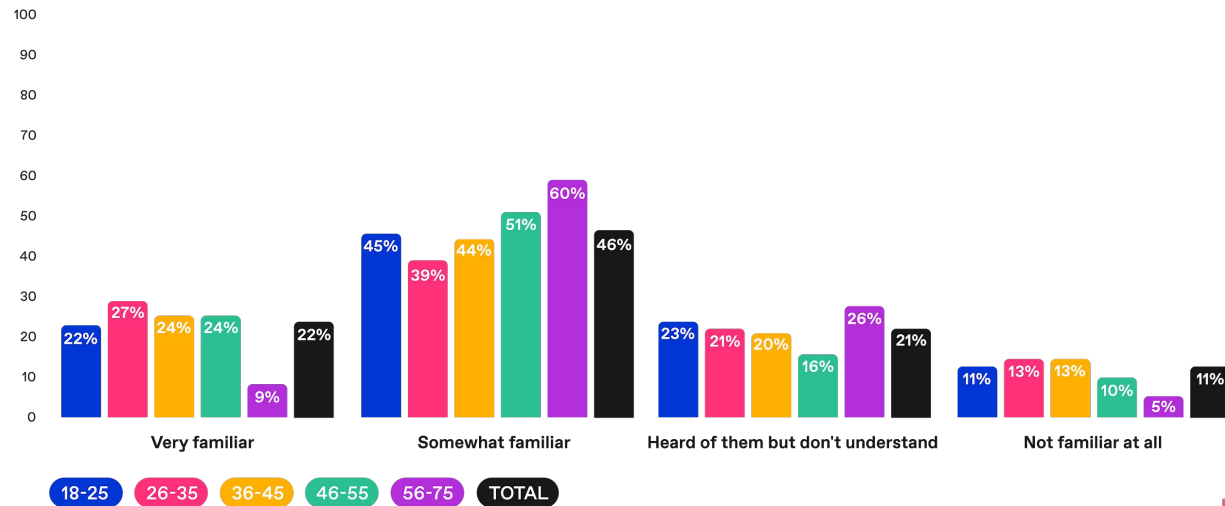


# Most Americans are aware of tariffs

## but most are not deeply informed

- Only 22% say they're "very familiar" with tariffs, while nearly half (46%) say they are "somewhat familiar"
- More than one-in-five consumers (21%) have heard of tariffs but don't understand them, while 11% are not familiar at all.

Before today, how familiar were you with tariffs and how they affect prices?



# Where Americans get trade policy news depends on age

TV dominates overall (36%), especially among older adults (66% of those 56–75). Meanwhile, 32% of 26–35-year-olds rely on social media, with 15% also turning to YouTube or podcasts—revealing a clear generational media divide.

| Where do you get most of your information about economic or trade policy? |       |       |       |       |       |     |
|---|-------|-------|-------|-------|-------|-----|
|   | 18-25 | 26-35 | 36-45 | 46-55 | 56-75 | All |
| TV news   | 24%   | 21%   | 37%   | 47%   | 66%   | 36% |
| Social media  | 31%   | 32%   | 27%   | 21%   | 10%   | 26% |
| Podcasts or YouTube   | 10%   | 15%   | 10%   | 10%   | 10%   | 11% |
| Newspapers or magazines   | 11%   | 9%    | 5%    | 8%    | 6%    | 8%  |
| Friends and family  | 11%   | 12%   | 6%    | 4%    | 3%    | 8%  |
| I don't actively follow this topic  | 13%   | 11%   | 16%   | 10%   | 6%    | 12% |

# Concern about tariffs rises with engagement in trade policy news

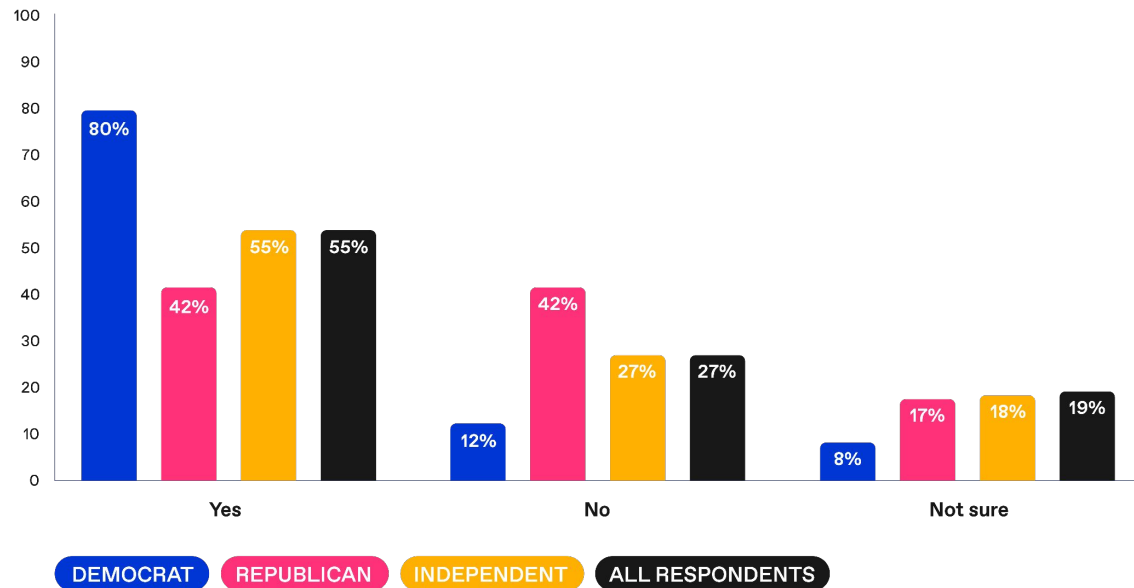
There's a clear correlation between news engagement and concern: 63% of those who follow trade news daily say they're worried about tariffs, compared to 17% of those who never follow this type of news.

| How often do you follow news about economic or trade policy? |     | Are you worried about the newly announced tariffs?           |       |                      |                       |        |       |     |
|--|-----|--|-------|----------------------|-----------------------|--------|-------|-----|
| Daily  | 32% | How often do you follow news about economic or trade policy? | Daily | A few times per week | A few times per month | Rarely | Never | All |
| A few times per week   | 32% |  |       |                      |                       |        |       |     |
| A few times per month  | 14% | Yes  | 63%   | 61%                  | 50%                   | 46%    | 17%   | 55% |
| Rarely   | 14% | No   | 30%   | 27%                  | 23%                   | 25%    | 19%   | 27% |
| Never  | 8%  | Not sure   | 7%    | 12%                  | 26%                   | 29%    | 64%   | 19% |

# Tariff worries break down along party lines

Concern over new tariffs is highest among Democrats, with 80% saying they're worried—compared to just 42% of Republicans. Independents land in the middle at 55%, reflecting a more divided perspective.

Are you worried about the newly announced tariffs?



# Most Americans say tariffs raise prices—views vary by party

70% of Americans believe tariffs increase the cost of everyday goods. Agreement is strongest among Democrats (86%), while 69% of Republicans and 67% of Independents share that view. Those not aligned with a party are most uncertain—nearly half (44%) say they're not sure.

| Do you believe tariffs affect the price you pay for everyday goods? |          |            |             |                   |     |
|---|----------|------------|-------------|-------------------|-----|
|   | Democrat | Republican | Independent | Prefer not to say | All |
| Yes   | 86%      | 69%        | 67%         | 49%               | 70% |
| No  | 7%       | 15%        | 13%         | 7%                | 12% |
| Not sure  | 8%       | 16%        | 20%         | 44%               | 18% |

# Most Americans aren't ready for the financial hit of new tariffs

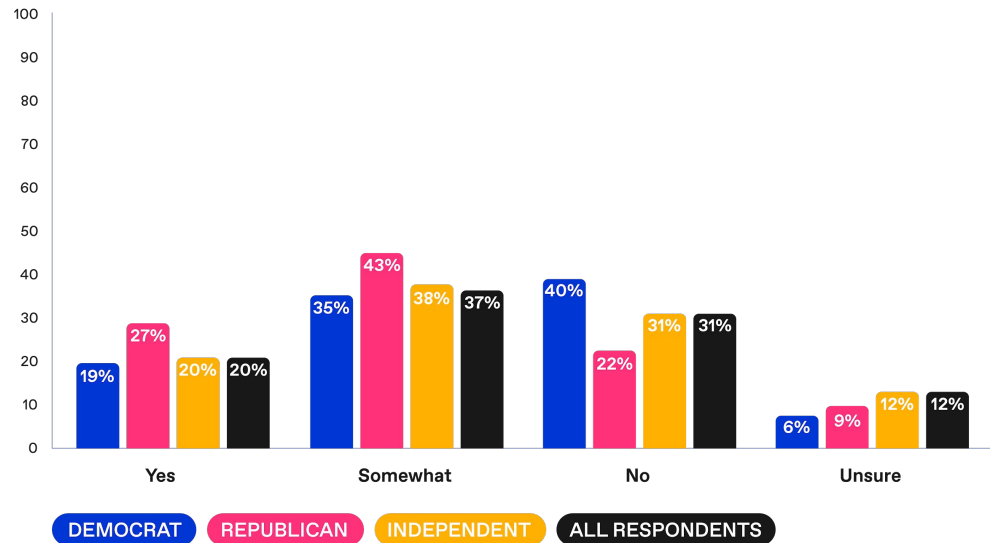
Only 1 in 5 Americans say their household is prepared to absorb price increases from new tariffs, with readiness lowest among 36–45-year-olds (17%). The most common sentiment across all age groups is being “somewhat prepared,” but a notable 41% of 36–45-year-olds and 36% of those 56–75 say they are not prepared at all—underscoring widespread financial vulnerability.

| Do You Feel Your Household Is Prepared To Absorb Price Increases Due To New Tariffs? |       |       |       |       |       |     |
|--|-------|-------|-------|-------|-------|-----|
|  | 18-25 | 26-35 | 36-45 | 46-55 | 56-75 | All |
| Yes  | 21%   | 23%   | 17%   | 20%   | 18%   | 20% |
| Somewhat   | 43%   | 41%   | 31%   | 34%   | 36%   | 37% |
| No   | 23%   | 21%   | 41%   | 34%   | 36%   | 31% |
| Unsure   | 13%   | 15%   | 10%   | 12%   | 10%   | 12% |

# Tariff support vs. financial readiness shows a stark divide

While 57% of Republicans say tariffs are good for America, only 27% feel financially prepared for the impact. Just 19% of Democrats and 20% of Independents feel ready, with 40% of Democrats saying they are not prepared—highlighting a disconnect between policy support and household realities across the political spectrum.

Do you feel your household is prepared to absorb price increases due to new tariffs?





# Tariff support shifts with age and motivation

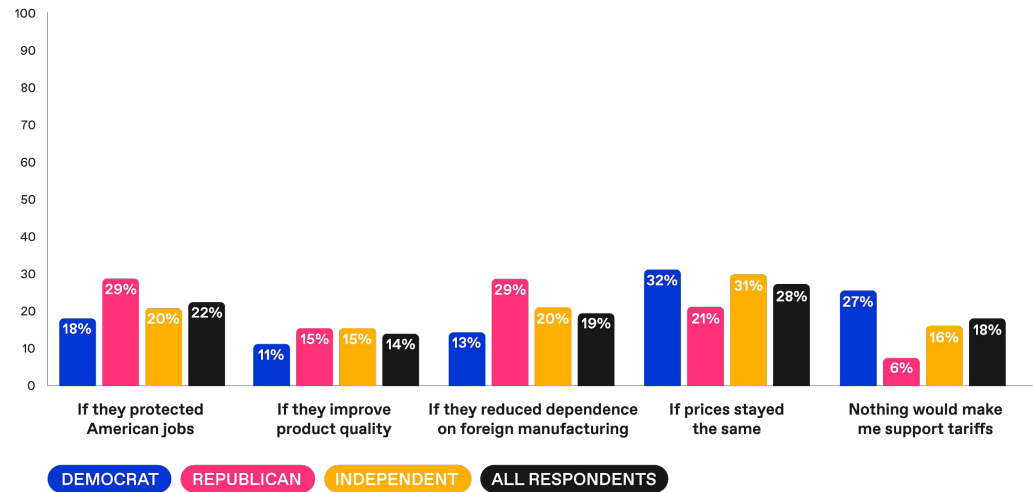
What drives support for tariffs varies by generation. Younger adults (18–25) are more focused on product quality, with 21% saying that would make them more likely to support tariffs—compared to just 3% of those 56 and older. Meanwhile, older Americans (56–75) are most motivated by reducing reliance on foreign manufacturing (30%) and protecting American jobs (26%). Across all age groups, the top condition for support is if tariffs don't lead to higher prices—28% of all respondents say price stability matters most.

| What would make you most likely to support tariffs on imported goods? |       |       |       |       |       |     |
|---|-------|-------|-------|-------|-------|-----|
|   | 18-25 | 26-35 | 36-45 | 46-55 | 56-75 | All |
| If they protected American jobs                                       | 16%   | 25%   | 20%   | 26%   | 26%   | 22% |
| If they improved product quality                                      | 21%   | 17%   | 12%   | 9%    | 3%    | 14% |
| If they reduced dependence on foreign manufacturing                   | 17%   | 16%   | 16%   | 23%   | 30%   | 19% |
| If prices stayed the same   | 27%   | 27%   | 32%   | 27%   | 22%   | 28% |
| Nothing would make me support tariffs                                 | 20%   | 15%   | 20%   | 14%   | 19%   | 18% |

# Price sensitivity is the top driver of tariff support across party lines

Across all political affiliations, the leading condition for supporting tariffs is if prices remain stable — cited by 32% of Democrats, 31% of Independents, and 21% of Republicans — signaling that cost-of-living concerns override ideological divides.

What would make you most likely to support tariffs on imported goods?



# Americans are split on whether tariffs are good or bad for the economy

- Three-in-ten (30%) of consumers are unsure about the impact of tariffs on the US economy, while those that think tariffs are good (34%) and bad (36%) are nearly split.
- There are stark political differences between the interpretation of tariffs. The majority of Republicans surveyed (57%) believe tariffs are good for the US economy overall, while only one-in-five Democrats (21%) agree.

| Do you believe tariffs are good for the U.S. economy overall? |          |            |             |                   |     |
|---|----------|------------|-------------|-------------------|-----|
|   | Democrat | Republican | Independent | Prefer not to say | All |
| Yes   | 21%      | 57%        | 29%         | 11%               | 34% |
| No  | 59%      | 20%        | 38%         | 21%               | 36% |
| Not sure  | 19%      | 23%        | 33%         | 68%               | 30% |

TARIFFS: CONSUMER BREAKING POINTS

# How price increases could impact buying decisions



# Price and quality remain the top drivers of consumer decisions

Price (85%) and quality (87%) top the list of purchasing priorities, far outpacing factors like brand reputation (66%) or ethical sourcing (54%). Availability is also a key consideration, with 83% saying it's important—highlighting that even the most value-driven consumers still want what they need, when they need it.

| How important are the following factors in influencing your purchasing decisions? |       |         |                   |                  |                                 |              |                            |
|---|-------|---------|-------------------|------------------|---------------------------------|--------------|----------------------------|
|   | Price | Quality | Country of origin | Brand reputation | Ethical or sustainable sourcing | Availability | Recommendations or Reviews |
| Very important  | 59%   | 56%     | 21%               | 29%              | 22%                             | 43%          | 27%                        |
| Important   | 26%   | 31%     | 23%               | 37%              | 32%                             | 40%          | 37%                        |
| Neutral   | 12%   | 11%     | 37%               | 26%              | 33%                             | 14%          | 27%                        |
| Not important   | 4%    | 3%      | 19%               | 9%               | 13%                             | 3%           | 8%                         |
| "Important" + "very important"  | 85%   | 87%     | 44%               | 66%              | 54%                             | 83%          | 64%                        |

# Most consumers are blending brand names with generics

Over half of shoppers (54%) say they buy a mix of brand name and store brand items when grocery shopping. But gender differences stand out: men are significantly more likely to stick with brand names (29%) compared to women (18%), pointing to differing perceptions of value and quality at the shelf.

| When grocery shopping, do you primarily purchase: |      |        |                         |     |
|---|------|--------|-------------------------|-----|
|   | Male | Female | Primary food purchasers | All |
| Brand name items                                  | 29%  | 18%    | 23%                     | 21% |
| Store brand or generic items                      | 21%  | 25%    | 23%                     | 24% |
| A mix of both                                     | 50%  | 57%    | 53%                     | 54% |

# 9 in 10 consumers are making tradeoffs to manage rising prices

Rising costs are forcing widespread behavioral shifts: nearly half of consumers are cooking more at home (49%), cutting back on impulse purchases (45%), and reducing takeout (44%). One in three are switching to generic brands, eliminating non-essentials, or shopping at discount stores—showing that price pressures are reshaping how people spend across everyday categories.

| What tradeoffs are you already making because of rising prices?<br>Please select all that apply |     |                                     |     |
|---|-----|-------------------------------------|-----|
| Cooking more at home  | 49% | Shopping at discount grocery stores | 31% |
| Reducing impulse purchases  | 45% | Buying in bulk                      | 31% |
| Cutting down on fast food or takeout  | 44% | Delaying technology upgrades        | 22% |
| Buying fewer non-essentials   | 38% | Reducing alcohol purchases          | 22% |
| Switching to generic / store brands   | 32% | None of these                       | 9%  |
| Eliminating non-essential items   | 33% |                                     |     |

# Consumers respond differently to political and economic product labels

While “Made in America” leads overall, preferences vary widely by political affiliation. Democrats are most likely to choose a “Tariff Free” label (33%), while nearly 1 in 5 Republicans (18%) say they’d be most likely to purchase a product labeled “Trump Approved.” Labels with political overtones drive polarization—19% of Independents and 18% of Democrats say none of these would influence their purchase.

| Which of the following product labels would you be MOST likely to purchase? |          |            |             |                   |     |
|---|----------|------------|-------------|-------------------|-----|
|   | Democrat | Republican | Independent | Prefer not to say | All |
| Made in America   | 38%      | 57%        | 50%         | 30%               | 46% |
| Tariff Free   | 33%      | 14%        | 22%         | 11%               | 21% |
| Liberation-Approved   | 7%       | 4%         | 5%          | 2%                | 5%  |
| Trump Approved  | 4%       | 18%        | 4%          | 6%                | 9%  |
| None of these   | 18%      | 7%         | 19%         | 52%               | 19% |



# Price impacts on consumer product categories



# How much is too much?

## Methodology:

- To understand consumer price sensitivity in the face of tariffs, we asked respondents to imagine they were purchasing their favorite product in each of the following categories. We then asked at what point a price increase would cause them to stop buying that product. Each pie chart in this section represents the share of consumers who would stop purchasing at various price markups — 5%, 10%, 25%, or 35% — or who say they'd continue buying no matter the price.

## Key findings & industry takeaways:

- A 5–10% price increase is enough to change behavior in most categories. More than half of consumers would stop purchasing snacks, fast food, cosmetics, wine and spirits, and tech products if prices rose by just 10%.
- Consumers are already in a cost-cutting mindset: Many report cooking more at home (49%), reducing impulse purchases (45%), and eliminating non-essentials (33%) to cope with rising costs.
- Tariff-driven price increases could have a swift impact on demand, especially in discretionary categories like QSR, beauty, and alcohol. Brands in these industries should consider how to justify price hikes or shift messaging to highlight value and necessity.

# Price impacts on consumer categories:

## Produce

Consumers show more flexibility with produce: 28% say they'd continue purchasing no matter the price.

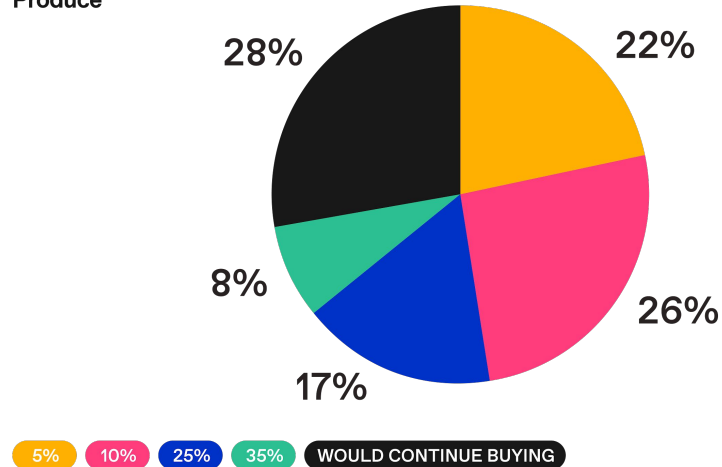
Still, nearly half (48%) would stop buying at a 10% markup or less — showing even essential items are vulnerable to price hikes.

### Industry takeaway:

Fresh food suppliers may have some buffer on pricing but should avoid assuming produce is immune to demand shifts. Pricing transparency and highlighting quality or origin may help retain loyalty.

At what price increase would you stop buying items in the following categories?

Produce



# Price impacts on consumer categories:

## Snacks

More than half (56%) of consumers say they would stop buying their favorite snacks if prices increased by 10% or less.

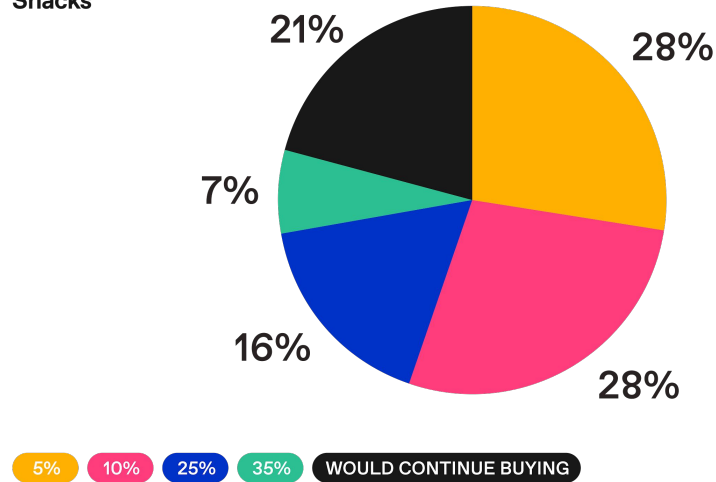
Only 1 in 5 say they'd continue purchasing no matter the cost — suggesting snacks are a price-sensitive category.

### Industry takeaway:

Snack brands may need to rethink pricing strategies or offer smaller pack sizes if tariffs drive up costs, especially in a category where private label products are carving out greater market share.

At what price increase would you stop buying items in the following categories?

Snacks



# Price impacts on consumer categories:

## Beverages

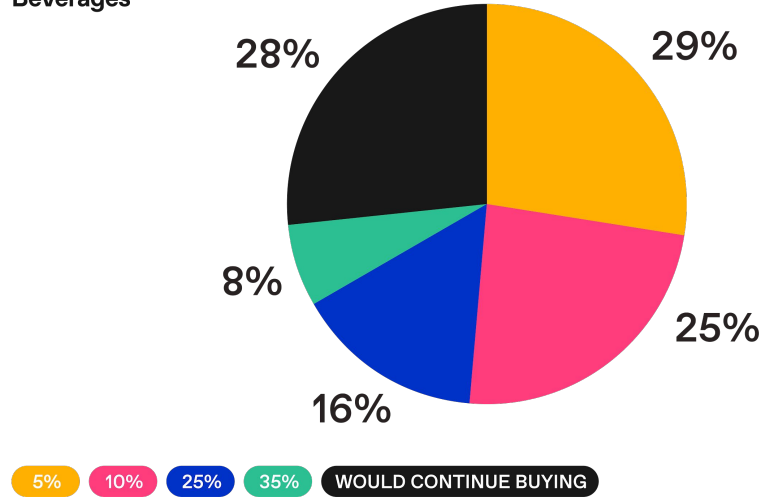
Only 24% say they'd keep buying no matter what, suggesting that loyalty isn't guaranteed in this category.

### Industry takeaway:

Whether it's soda, juice, or functional drinks, brands in this space should be prepared to justify price increases — or risk losing share to cheaper alternatives or store brands.

At what price increase would you stop buying items in the following categories?

Beverages



# Price impacts on consumer categories:

## Dry goods

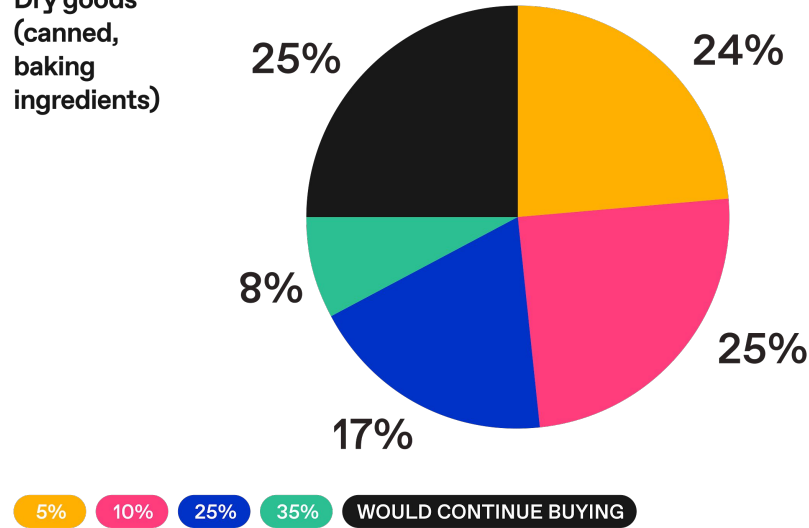
But 25% say they'd continue purchasing no matter the increase, making this one of the more resilient pantry categories.

### Industry takeaway:

Dry goods brands may face less immediate fallout than snacks or beverages, but still should monitor elasticity — especially in lower-income or bulk-buying households.

At what price increase would you stop buying items in the following categories?

Dry goods  
(canned,  
baking  
ingredients)



# Price impacts on consumer categories:

## Fast food

Fast food faces a steep cliff: 59% of consumers say they'd stop buying at a 10% price increase or less.

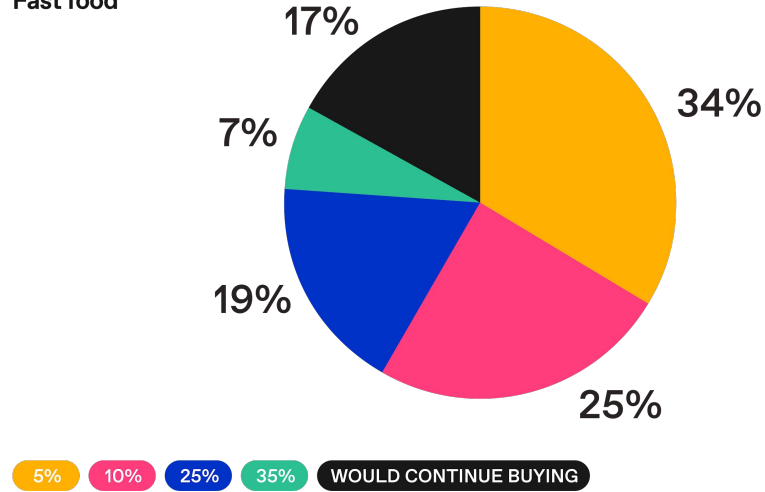
Only 17% would continue buying at any price.

### Industry takeaway:

Quick-serve restaurants may need to hold prices steady or pair increases with clear value messaging. Discretionary dining is among the first areas consumers are cutting back.

At what price increase would you stop buying items in the following categories?

Fast food



# Price impacts on consumer categories:

## Cosmetics

Cosmetics are among the most price-sensitive categories: 61% of consumers say they'd stop purchasing by a 10% increase.

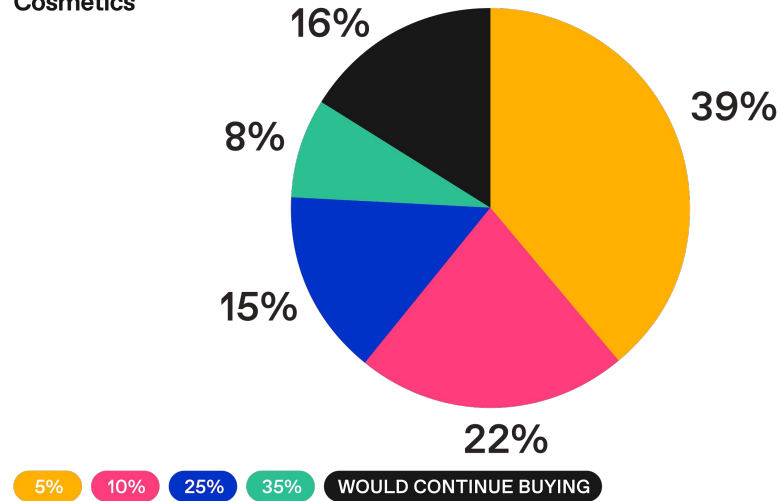
Just 16% would keep buying at any price.

### Industry takeaway:

Beauty brands should be cautious about price hikes — or focus on premium-izing products to justify the cost. This is a category where brand loyalty may not withstand inflation.

At what price increase would you stop buying items in the following categories?

Cosmetics





# Price impacts on consumer categories:

## Wine & spirits

61% of consumers would stop buying their favorite alcohol brands by the time prices rose 10%.

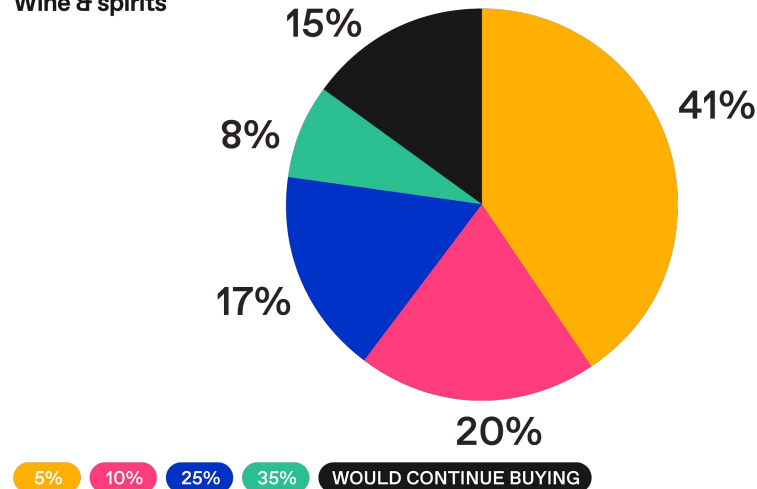
Only 15% would stick around at any price.

### Industry takeaway:

Tariff-driven increases in alcohol could prompt consumers to switch to lower-cost brands or cut back entirely. Messaging around quality, origin, or local sourcing could help soften the blow.

At what price increase would you stop buying items in the following categories?

Wine & spirits



# Price impacts on consumer categories:

## Computers

Over half (58%) of consumers say a price increase of 10% or less would stop them from buying a new computer.

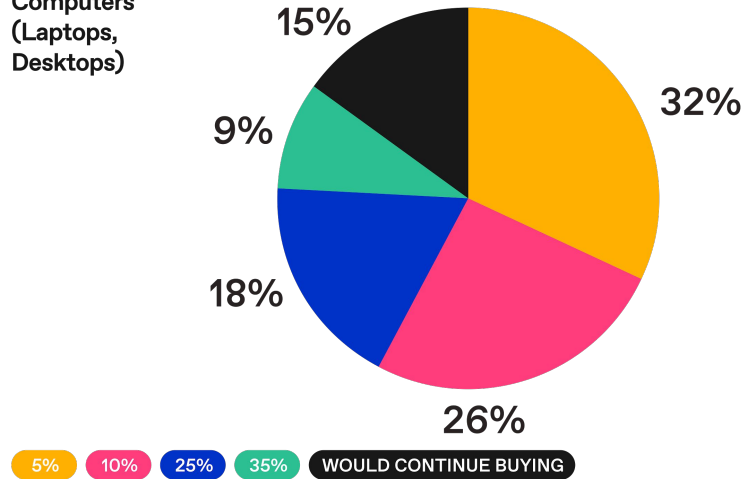
Only 15% would continue purchasing no matter the markup.

### Industry takeaway:

Infrequent, high-consideration purchases like computers may be delayed or skipped altogether when prices rise. Brands should focus on financing options, trade-ins, or bundles to maintain interest.

At what price increase would you stop buying items in the following categories?

Computers  
(Laptops,  
Desktops)



# Price impacts on consumer categories:

## Consumer technology

57% of consumers would stop buying tech accessories or gadgets with just a 10% increase in price.

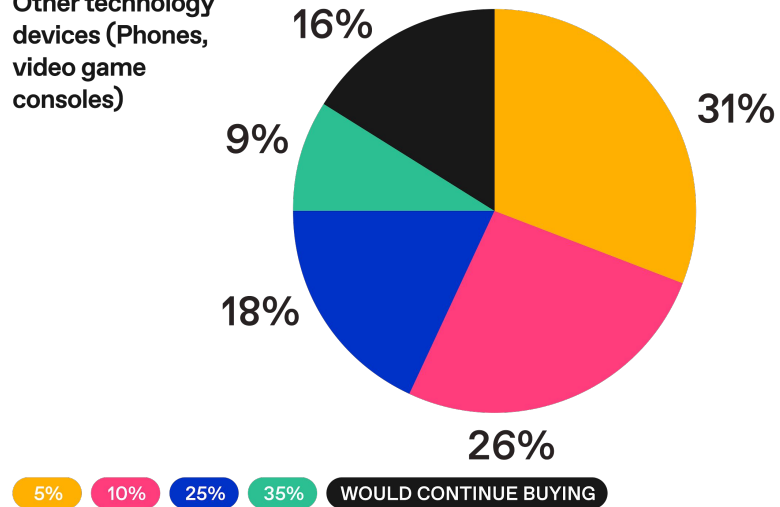
Only 16% are brand-loyal enough to keep buying regardless.

### Industry takeaway:

Smaller-ticket tech items (like wearables, smart home devices, or peripherals) are at risk of being deprioritized during economic pressure. Focus on clear value and utility to sustain demand.

At what price increase would you stop buying items in the following categories?

Other technology devices (Phones, video game consoles)

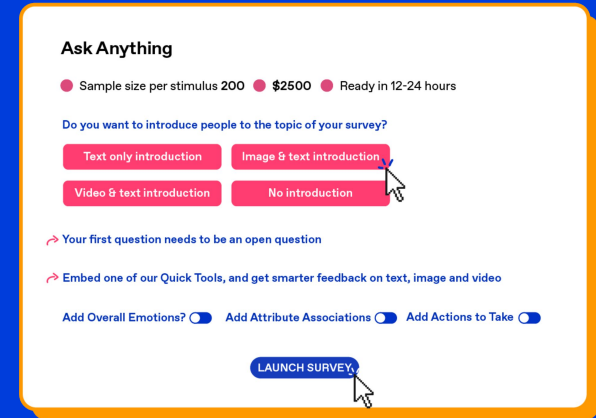
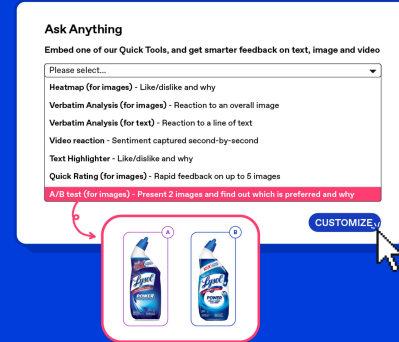


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