

TARIFFS IN THE AISLES

a data-driven look at how trade policy is impacting consumer grocery habits

August, 2025



Introduction

Economic uncertainty, like in the case of changing tariff policies, typically brings with it an increase in price sensitivity--making merchandisers jobs that much more complex. In light of ongoing economic shifts and rising trade tensions, InContext conducted a survey to understand how shoppers are reacting to perceived or subsequent changes at the shelf. We asked questions about perceptions on pricing, private labels, promotions and more.

Keep reading to learn about how shoppers are feeling today, and how you can prepare your teams for what's to come.



14,132 Total Respondents

Survey Background

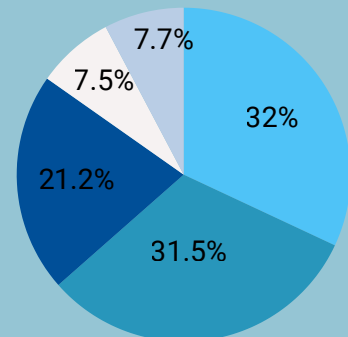
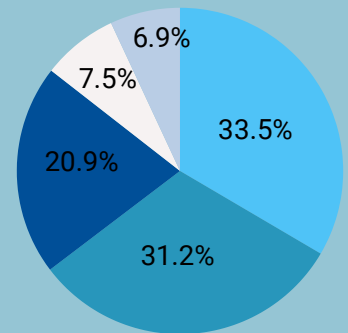
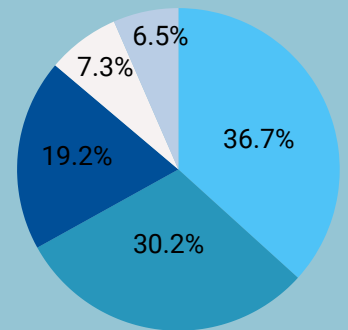
Respondents were asked to rate statements regarding recent government tariffs and how they feel they are affecting their shopping habits, on a scale of 1-5.

67% of respondents believe tariffs will affect their grocery prices

65% of consumers indicated they were concerned that tariffs would raise the prices of household items like appliances

64% of respondents indicated that discounts and sales are top of mind when shopping

1 - very little affect 2 - little affect 3 - neutral
4 - affects me moderately 5 - affects me greatly



Key Takeaways

- Shoppers are more likely to purchase store brand grocery products or in bulk due to tariffs
- Retailers must cater to shopper needs by promoting store-brand offerings (i.e., loyalty rewards programs, bulk pricing)
- Shoppers are turning to U.S.-based retailers and manufacturers, emphasizing recent growth in “*economic patriotism*”
- Retailers and brands need to be transparent with consumers about pricing changes
- Manufacturers are advised to utilize more locally and ethically sourced goods, highlighting these features on product packaging

Executive Summary

Across all demographics, we see that shopper behavior is shifting due to recent government tariffs. To stay competitive, retailers and brands must proactively promote things like value-driven pricing models and ethically-sourced materials--and then clearly communicate these efforts through packaging and marketing.

Digital twins offer a powerful solution, enabling companies to simulate, test, and optimize their strategies in real time. By leveraging this technology, businesses can remain agile, customer-focused, and resilient in an uncertain economic environment.

Introduction to InContext Solutions

InContext is a global leader in 3D simulation software and virtual market research specifically designed for the retail sector. By harnessing the power of both augmented reality (AR) and virtual reality (VR), ICS empowers retailers and brands to experiment, visualize, and optimize their in-store strategies digitally—making smarter, faster, and higher-ROI decisions without the expense of physical trials.



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ShopperMX™

ShopperMX™ is a cloud-based virtual store platform that enables brands and retailers to simulate real in-store shopping experiences in a risk-free environment.



SMX GO is an augmented reality mobile app that enables field reps, brand teams, and merchandisers alike to easily visualize, validate, and maintain planograms in real time.