Ground Shifted

FOUR FORCES IN A WORLD WHERE TRUST IS ON THE LINE

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Ground Shifted:
FOUR FORCES IN A WORLD WHERE TRUST IS ON THE LINE

Nearly half of Americans are pessimistic about the economy, and 44% have switched to store brands in the past three months alone. Consumer behavior isn't just shifting — it's accelerating. These four forces explain what's driving the change, and what brands need to do to keep up.

As a result, they are more strategic in their spending, and businesses will need to adapt to continue to earn their trust—and dollars.

FORCE 1
THE COST OF UNCERTAINTY

Economic pessimism has surged to nearly half of Americans (47%, up 10 points from Q3 2025) — the biggest shift in the study. 62% say the economy is too unpredictable to make financial plans (up from 49%), and 63% are worried about tariffs hitting their household budget. Consumers aren't just stressed — they've stopped planning ahead.

That paralysis is driving real behavior change at the register. In the past 3 months: 44% switched to store brands, 41% used more coupons or cash-back apps, 40% shopped at a different store than usual (Aldi, Walmart, dollar stores), and 23% skipped fresh produce, meat, or seafood due to price. Loyalty is actively breaking down.

THE TAKEAWAY: The battle for the grocery shopper is happening now. Shoppers aren't waiting to see how brands respond — they're already switching stores, trading down, and cutting corners. Brands that meet this moment with honesty and urgency, not silence, will be the ones still standing when the climate shifts.

This isn't just a pricing story — it's a loyalty story. Every time a shopper swaps a brand for a store label, it becomes harder to win them back. The window to act is narrow. Brands that proactively communicate value, demonstrate pricing restraint, and show they understand the pressure consumers are under will be the ones still standing when the economic climate shifts.

FORCE 2
THE PRICE OF LOYALTY

Price is now the #1 trust driver for brands — 77% say price/affordability is important or very important to brand trust, the largest jump of any trust driver. Pricing isn't just a purchase decision anymore. It's a values signal.

Asked what would increase trust in a large company, the top answer was keeping prices low even when they could charge more (40%), followed by transparency about how prices are set (30%). Consumers want restraint — and an explanation.

only
40% say keeping prices low would increase their trust in a large company

THE TAKEAWAY: How brands communicate about pricing matters enormously right now. Silence or vague explanations are being read as confirmation of price gouging. Brands that proactively explain pricing decisions and show restraint have a real trust-building opportunity.

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FORCE 3

THE CREDIBILITY CRISIS

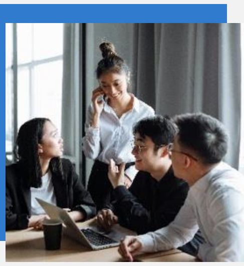
Every institution measured dropped in trust since Q3 2025 — not one went up. Food and beverage brands took the steepest hit, falling 7 points to 24% trust. Healthcare dropped 5 points; tech fell 4. This is a systemic collapse, not a category problem.

At the same time, 64% now agree brands have become more manipulative in how they market (up from 54%), and 46% disagree that brands have customers' best interests at heart — up 13 points in a single wave. People don't trust the product or the message.

Consumer Trust

Food & Beverage	Healthcare
24%	25%
(Down 7% from Q3'25)	(Down 5% from Q3'25)

THE TAKEAWAY: AI recommendations are already as trusted as influencer recommendations — but that edge disappears if the brand behind the product isn't trusted. Fixing the trust deficit is now a prerequisite for any digital or AI strategy to pay off.



INTANGIBLE EFFECTS:

45% feel more grateful vs. a year ago

FORCE 4

GRATEFUL UNDER PRESSURE

Even amid eroding trust, emotional resilience is a real and underreported story. Gratitude is up sharply — 45% say they feel more grateful than a year ago (up from 38%, the largest positive shift in the study). Hope rose to 39%. Anger is down slightly. People are financially stretched but not emotionally broken.

Brands that acknowledge the real financial pressure consumers are under have earned the right to speak to resilience — but it has to feel earned, not tone-deaf.

THE TAKEAWAY: Don't assume your audience is in despair. There's an opening for brands that can authentically speak to resilience and gratitude — but only if the message is grounded in the financial reality first.

WHY EMPATIX?

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