

Meet Canada's

POST-TARIFF CONSUMERS

13%

RAGING  
CANADIANS



“I will *never* buy anything from the US ever again—buying Canadian isn’t just a choice, it’s my duty.”

AGE	Older than other segments (55+)
POLITICS	Liberal, NDP, Bloc
HHI	\$100K+
REGION	Highest in Quebec and Atlantic Canada
EDUCATION	Highest level of education — many university grads
GENDER	Slightly more women

Fired up Liberals committed to buying Canadian to fulfill their patriotic and economic duty. Avoiding American goods at all costs because they have the means and ability to do so.

21%

RESENTFUL  
CANADIANS



“I’m very upset and am supporting Canada. But I can’t buy Canadian 100% of the time, and I don’t want to cancel Netflix just yet.”

AGE	Middle-aged to older (45+)
POLITICS	Liberal, NDP, Bloc
HHI	Half make under \$80K
REGION	Highest in BC and Quebec
EDUCATION	Above-average education levels
GENDER	More women than men

Pretty pissed off Liberals who prioritize Canadian goods in most cases. Might be swayed by price, but determined to choose Canadian when they can.

9%

CONFLICTED  
PATRIOTS



“I’m aware of what’s happening, but don’t really know what to think or what to do.”

AGE	Younger than average (many 25-34)
POLITICS	Liberal & Conservative mix
HHI	Two-thirds make under \$60K
REGION	Highest in Atlantic Canada and BC
EDUCATION	Moderate level of education — more college degrees
GENDER	More men than women

Emotionally conflicted — on one hand, they feel strong ties to Canada. On the other, they don’t have strong negative feelings towards the US. For now, they’ll buy the product that best suits their needs, regardless of origin.

23%

PRICE BEFORE  
POLITICS



“If Canadian and US goods are priced the same, I’ll go Canadian. But at the end of the day, I have bills to pay, and price comes first.”

AGE	Balanced, with more 45+
POLITICS	Liberal & Conservative mix
HHI	Almost a third make less than \$40K
REGION	Highest in the Prairies and Ontario
EDUCATION	Lower — many with only high school education
GENDER	Evenly split

Unhappy with the US but prioritize their budget over anything else. They don’t care too much about buying strictly Canadian goods but most do feel some level of bitterness towards the US.

23%

DETACHED  
CANADIANS



“I’m not really paying attention and couldn’t afford to buy Canadian if I were.”

AGE	Younger than most (many under 35)
POLITICS	Mostly Conservative
HHI	Over half make under \$80K
REGION	Highest in Ontario and Alberta
EDUCATION	Lower — many with only high school education
GENDER	Evenly split

Slightly bothered by what’s happening between the US and Canada but aren’t really keeping tabs. They couldn’t afford to buy Canadian even if they were.

12%

PRO-AMERICA  
CANADIANS



“I like American products and their politics represent me better than most Canadian politics.”

AGE	Younger (many 25-34) with some older
POLITICS	Most Conservative of all
HHI	More mid-to-high earners (\$80K+)
REGION	Highest in Alberta and the Prairies
EDUCATION	Lower education levels
GENDER	Slightly more men

Conservatives who don’t feel betrayed by the US’ actions and who will continue to support and buy US products because they believe they are superior.

Level of Anger Towards the US

MORE ANGRY

MORE INDIFFERENT

# TRUMP EMOTIONS BY SEGMENTS

Resentful Canadians are more likely to report feeling angry and betrayed.

When you think about the way President Trump is treating Canada, how often have you felt...? [Asked of all respondents n=1,000]

Every time or most of the time have felt:	 <b>RAGING CANADIANS</b>	 <b>RESENTFUL CANADIANS</b>	 <b>CONFLICTED PATRIOTS</b>	 <b>PRICE BEFORE POLITICS</b>	 <b>DETACHED CANADIANS</b>	 <b>PRO-AMERICA CANADIANS</b>
Angry	95%	92%	67%	71%	47%	20%
Afraid	55%	56%	64%	44%	28%	17%
Hopeful	7%	6%	60%	10%	16%	20%
Betrayed	95%	86%	67%	63%	44%	28%

# PURCHASING BEHAVIOUR BY SEGMENT

All except the Detached Canadians and Pro-America Canadians report switching about half the time or more.

Thinking about your purchases over the past week, how often have you switched from an American product you usually buy to another product? [Asked of all respondents n=1,000]

Switched from an American product:	 <b>RAGING CANADIANS</b>	 <b>RESENTFUL CANADIANS</b>	 <b>CONFLICTED PATRIOTS</b>	 <b>PRICE BEFORE POLITICS</b>	 <b>DETACHED CANADIANS</b>	 <b>PRO-AMERICA CANADIANS</b>
Every time I could	81%	61%	38%	19%	11%	4%
More than half of the time	10%	20%	37%	19%	14%	3%
About half of the time	3%	9%	14%	20%	21%	7%
Less than half of the time	1%	2%	2%	9%	13%	8%
Never	1%	1%	2%	2%	10%	48%
I didn't have the opportunity to switch from an American product to another over the past week	2%	6%	4%	23%	17%	19%
Don't know	1%	2%	2%	8%	13%	11%



# PRODUCT ORIGIN IMPORTANCE BY SEGMENT

Majority of the first three segments report it's the single most/one of the most important factors, unlike the Pro-America Canadians.

When shopping, how important is it to you that a product is from Canada? [Asked of all respondents n=1,000]

Importance of Canadian Origin	 RAGING CANADIANS	 RESENTFUL CANADIANS	 CONFLICTED PATRIOTS	 PRICE BEFORE POLITICS	 DETACHED CANADIANS	 PRO-AMERICA CANADIANS
The single most important factor	39%	17%	24%	4%	6%	0%
One of the most important factors	51%	59%	52%	37%	24%	3%
Important, but not one of the most important factors	10%	22%	19%	51%	51%	36%
Not very important	0%	1%	3%	6%	11%	27%
Not important at all	0%	0%	1%	1%	5%	33%
Don't know	0%	1%	1%	2%	4%	1%

These results are from an online poll of 1,178 Canadians, sponsored and conducted by INNOVATIVE Research Group Inc., between March 12th and March 16th, 2025. The results are weighted to 1000 by age, gender, region, education, and self-reported past federal vote to ensure the overall sample's composition reflects that of the actual population according to Census data.