

Canadians still feel angry and betrayed by Trump

In July, a majority (59%) reported feeling angry when they think about how Trump is treating Canada, and 56% report feeling betrayed. These majorities are lower than when we first measured in March, when 67% reported feeling angry and 64% reported feeling betrayed.

Passion about trade tensions is concentrated among older Canadians

Older (55+) respondents were most likely to say Canadian origin was at least one of the most important factors in their purchase decisions, (57% of men 55+, 60% of women 55+). Older respondents were also the most likely to say they have switched from an American product (51% of men 55+, and 50% of women 55+).

Many Canadians still avoiding American products

Forty-two percent (42%) say they switch from American products at least half the time — down from 51% in March. The share reporting they switch "Every time I could" declined 7 pts. from March to July, possibly reflecting a limit to the product switching consumers feel capable of. Those who are trying to switch to Canadian products are in practice still checking labels more often, suggesting continued follow-through.



Cost remains a barrier to buying Canadian

When asked, 47% reported that whether a product is Canadian is the most/one of the most important factors. However, when "whether a product is made in Canada" was just one of many factors to choose from, only 10% put it as their most important factor.



Low interest in US travel, driven by politics

Only 24% are likely to travel to the US in the next year; 56% say they're not at all likely. Younger adults (18–34) are more open to travel (39% of men, 36% of women), while interest drops sharply among those 55+. US politics and the social climate are the top deterrents (59%), while a better exchange rate (25%) or political change (via open-ended responses) could make some more willing to travel.



STUDY OVERVIEW

Objective

This survey research seeks to understand how Canadians think about buying Canadian versus American goods in the context of U.S. trade tensions and tariff policies — and is a continuation of research began in March 2025.

Key Topics Explored

Attitudes toward Canadian-made products vs. American alternatives.

Emotional reactions to U.S. trade policy and past treatment of Canada.

Shopping priorities: price, quality, convenience, origin.

Travel plans to the US in the next year.



BULING CARADIAN

Trade tensions with the US kicked off in February.

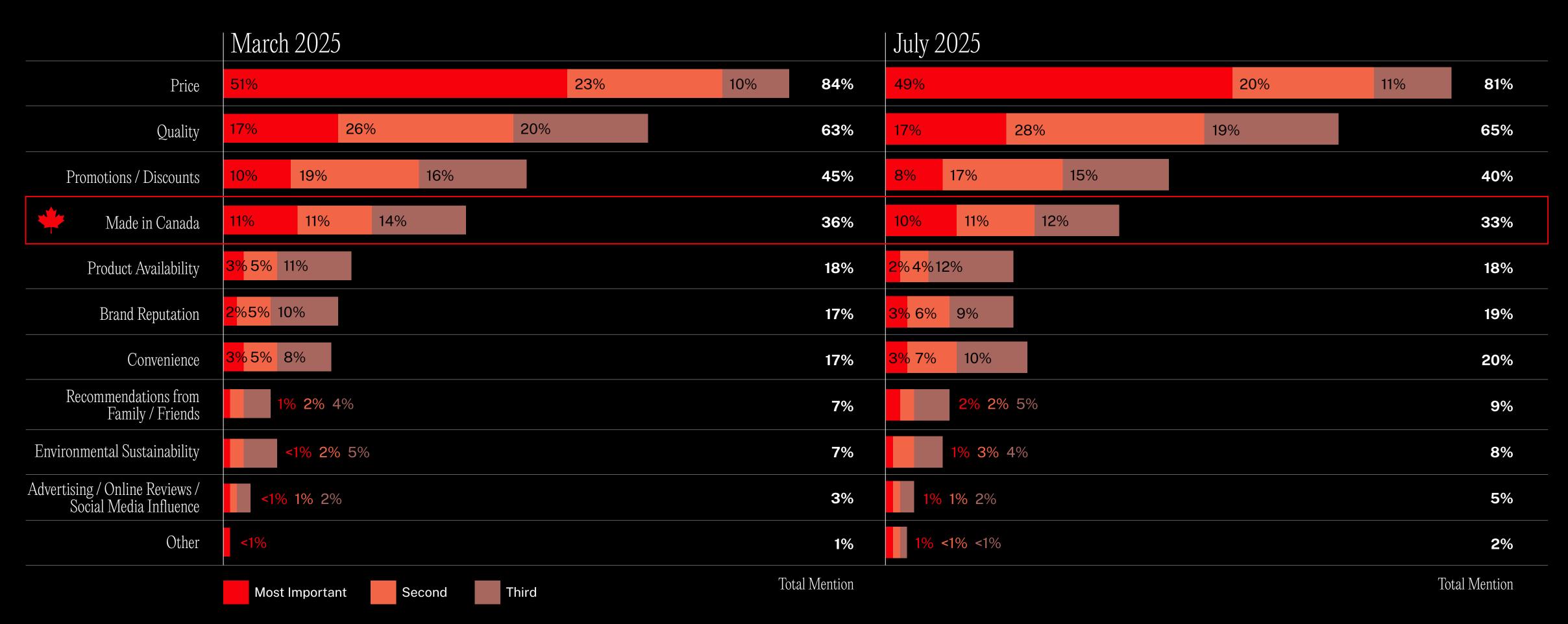
We measured sentiment in March around how important 'buying Canadian' is—and followed up in July to see if Canadian consumers were feeling differently.



Influential Factors for Purchasing

Price is still the crucial factor for most. Whether a product is made in is still the 4th in total mentions.

Which of the following is the most/second most/third most important factor that influences your decision to buy a particular product? [Asked of all respondents; March n=1000; July n=2,000]



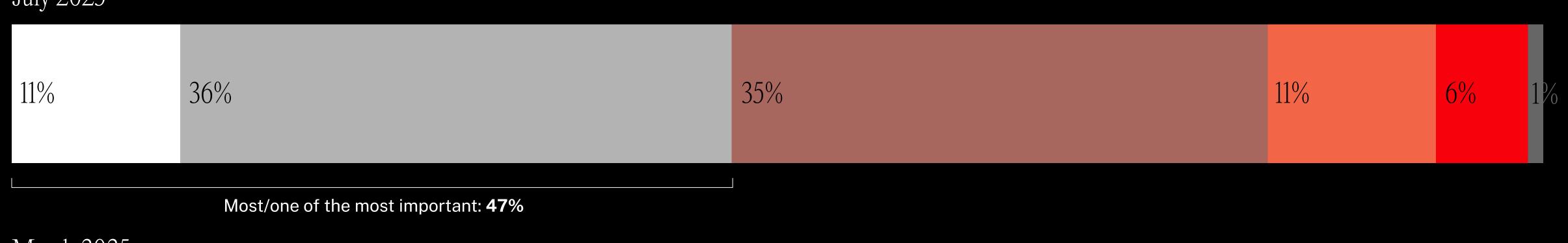


Importance of Origin

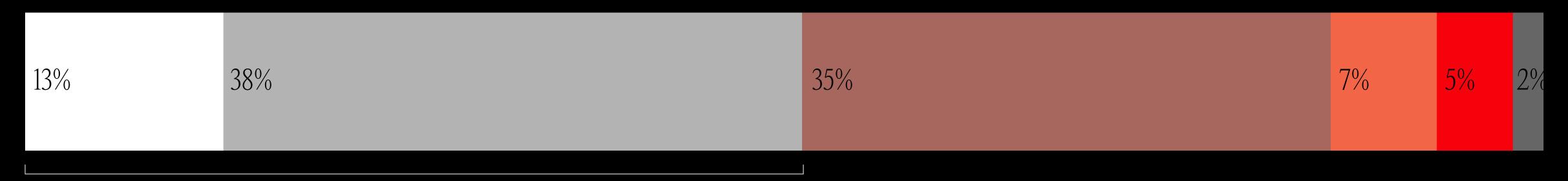
In July, 47% report "made in Canada" to be at least one of the most important factors, down 4 pts. from March.

When shopping, how important is it to you that a product is from Canada? [Asked of all respondents; March n=1000; July n=2,000]

July 2025



March 2025



Most/one of the most important: **51**%

The single most important factor One of the most important factors Not very important Not important at all Don't know Important, but not the most important factors



Importance of Buying Canadian by Segmentation

Men and women 55+ report Canadian origin to be more important than younger respondents.

When shopping, how important is it to you that a product is from Canada? [Asked of all respondents; n=2,000]

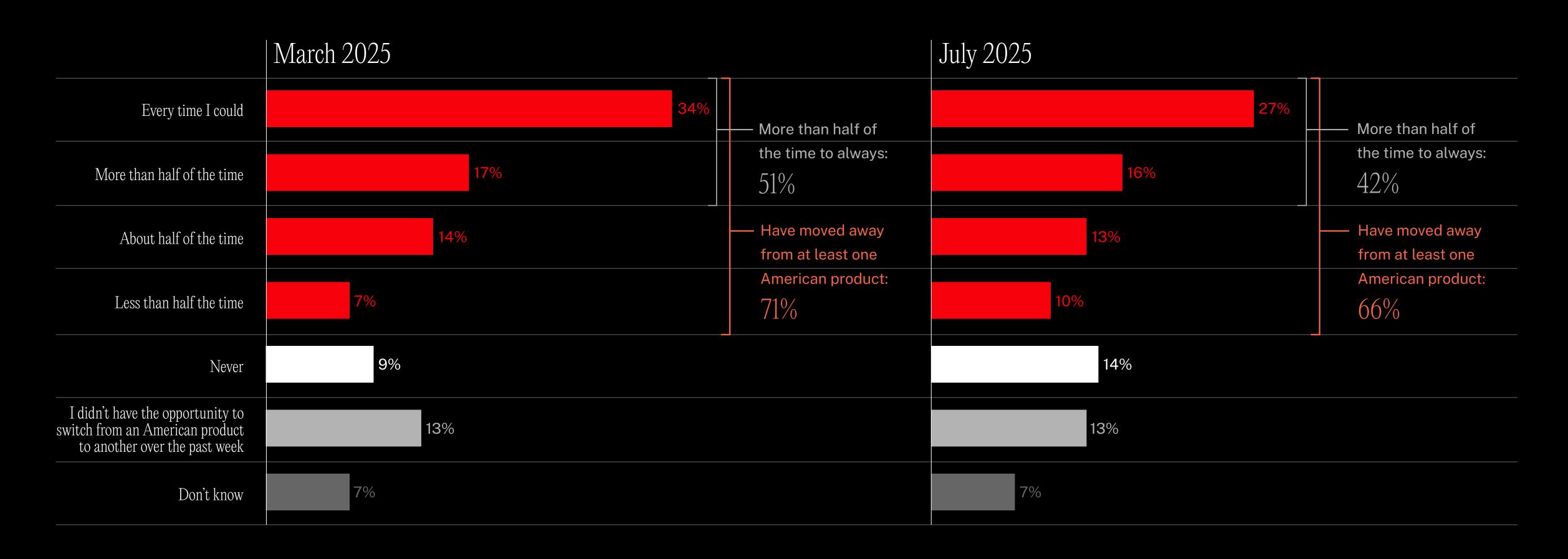
Segmentation	Age / Gender					Region					Income			Shopping Frequency			
	Male 18–34	Male 35–55	Male 55+	Female 18–34	Female 35–55	Female 55+	British Columbia	Alberta	Prairies	Ontario	Québec	Atlantic	Less than \$60K	\$60K- \$100K	\$100K and more	Always & Often	
At least one of the most important	42%	39%	57%	31%	43%	60%	45%	42%	41%	50%	47%	51%	44%	51%	48%	49%	40%



Moving Away from the USA

42% report switching more than half the time in July, down from 51% in March.

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; March n=1000; July n=2,000]





Moving Away from the USA by Segmentation

Half Canadians aged 55+ switched from an American product more than half of the time.

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=2,000]

Segmentation	Age / Gender					Region							Income		Shopping Frequency		
	Male 18–34	Male 35–55	Male 55+	Female 18–34	Female 35–55	Female 55+	British Columbia	Alberta	Prairies	Ontario	Québec	Atlantic	Less than \$60K	\$60K- \$100K	\$100K and more	Always & Often	Sometimes & Rarely
Switched more than half the time	39%	40%	51%	30%	38%	50%	41%	39%	36%	46%	41%	39%	39%	35%	46%	45%	33%



Check Origin By Moving Away from the U.S.

Respondents who report switching from a US product are also checking labels for origin.

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; March n=1000; July n=2,000]

Switched from American Product in Past Week

Check Product	Tot	al	Every tin	ne I could	More than ha	alf of the time	About half of the time		
Origin	March 2025	July 2025	March 2025	July 2025	March 2025	July 2025	March 2025	July 2025	
Always	19%	22%	41%	51%	14%	20%	9%	12%	
Often	32%	31%	39%	37%	48%	51%	34%	34%	
Sometimes	30%	26%	16%	9%	32%	25%	47%	45%	
Rarely	12%	13%	3%	2%	5%	4%	5%	8%	
Never	5%	7%	1%	1%	0%	1%	5%	1%	

Note: "Never" check product origin is a small n-size, 54 (July '25); "Don't know" (.5% - July '25; 1%-March '25) check product origin not shown, "Less than half of the time", "Never", "I didn't have the opportunity", and "Don't know" not shown for switched from American product.



EMOTIONAL REACTION

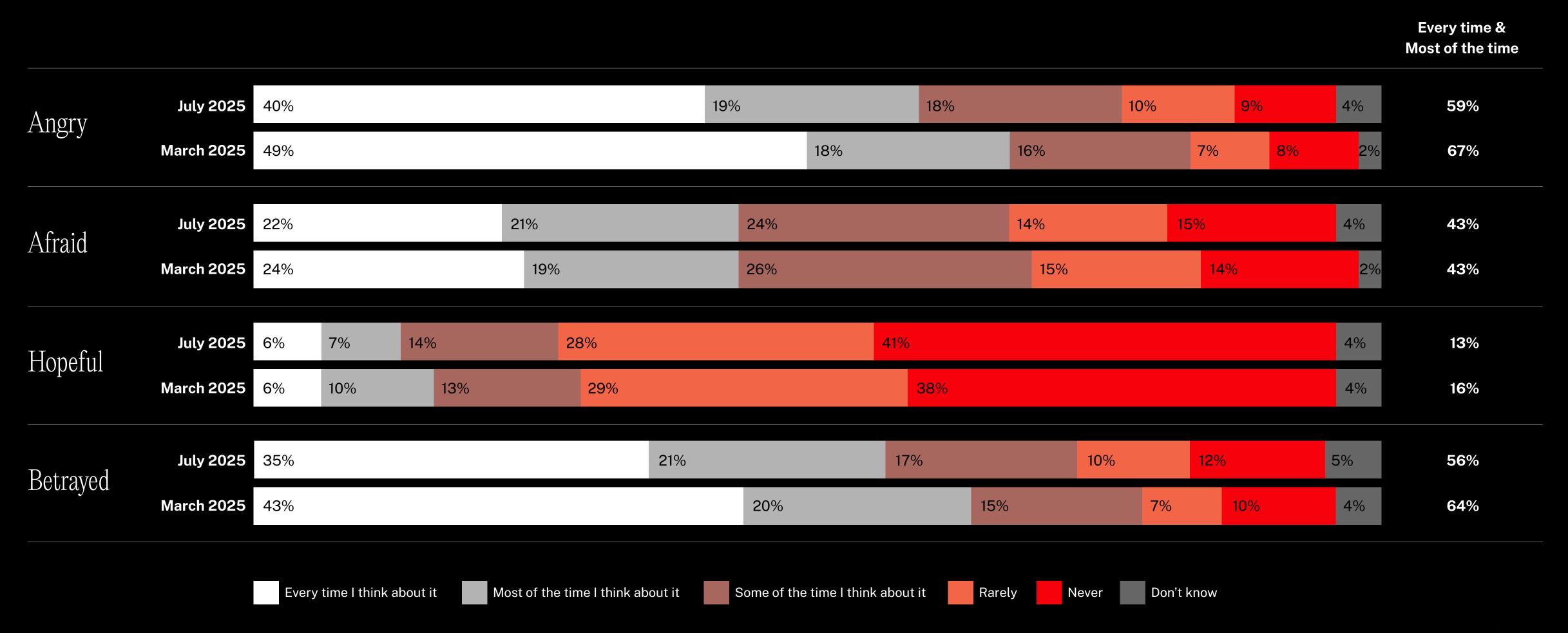
Canadians reacted with strong emotions to Trump's treatment of Canada in March—we asked respondents again in July how they felt.



Trump Emotions

Majorities still feel angry and betrayed, although down from March levels.

When you think about the way President Trump is treating Canada, how often have you felt...? [Asked of all respondents; March n=1000; July n=2,000]





TRAVEL TO THE US

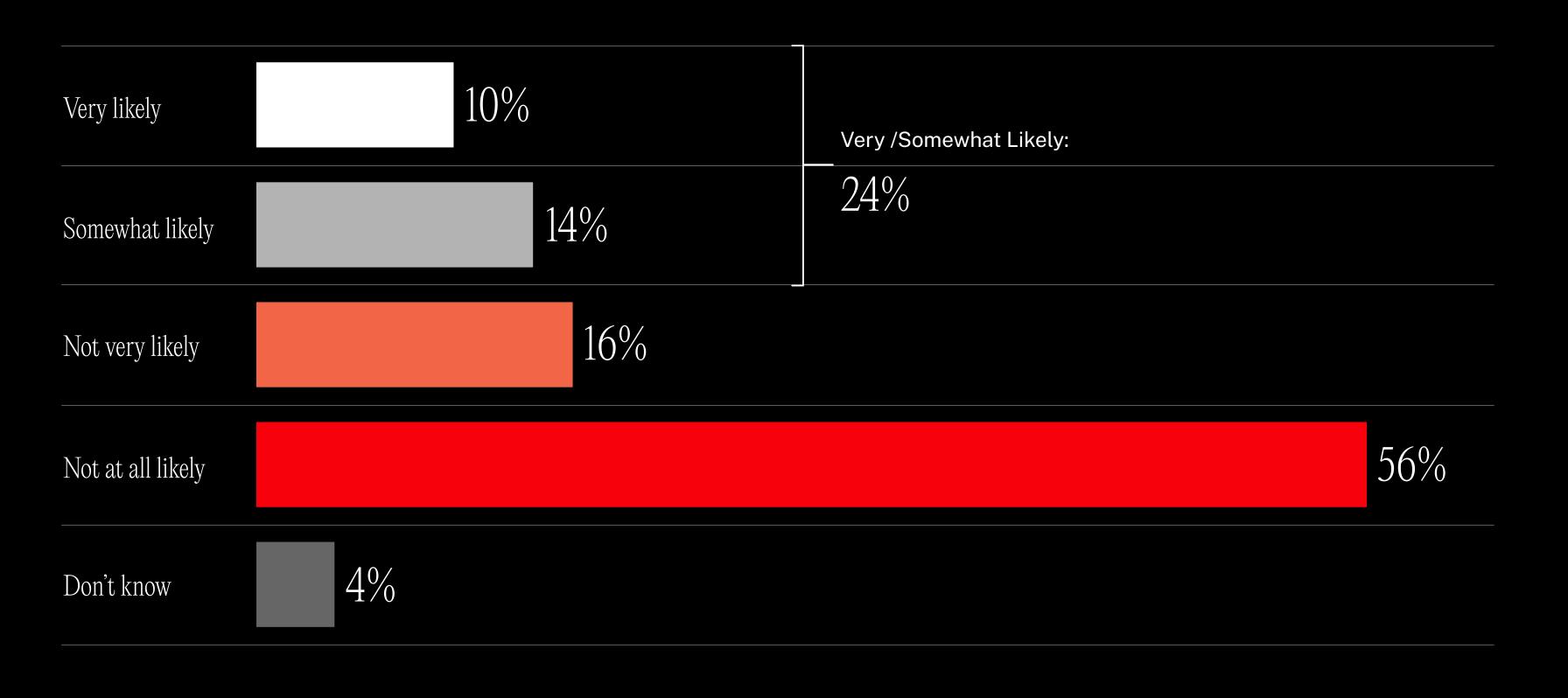
A new element in the research, we asked Canadians in July about their travel plans to the US, and how they feel about it—their answers were clear...



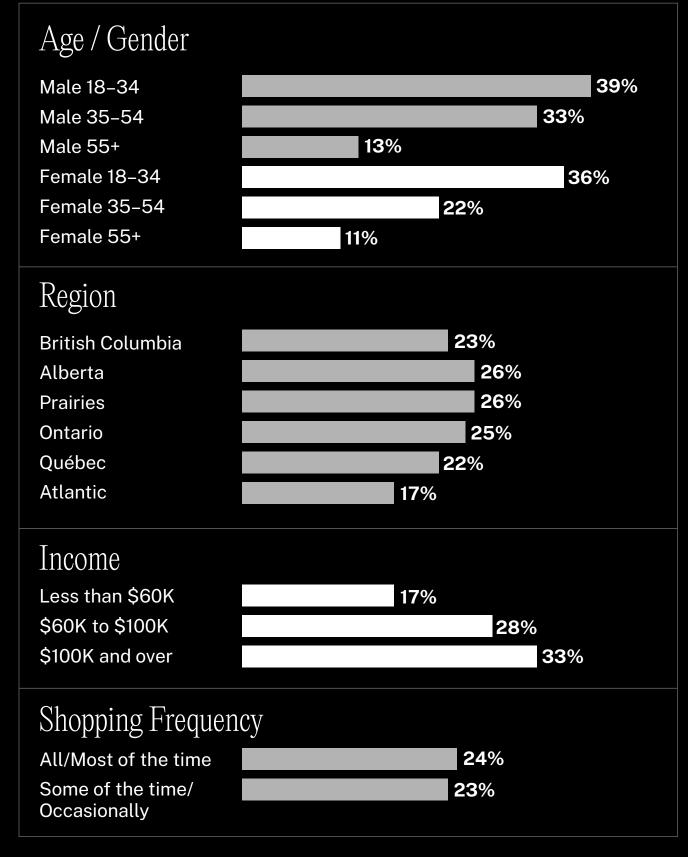
Travel to U.S.

Only 1-in-4 likely to travel to the US in the next 12 months, with a higher likelihood of travel among Canadians age 18–34.

How likely are you to travel to the United States in the next 12 months, either for leisure, work, or personal reasons? [Asked of all respondents; July n=2,000]



Segmentation Those who say "likely"



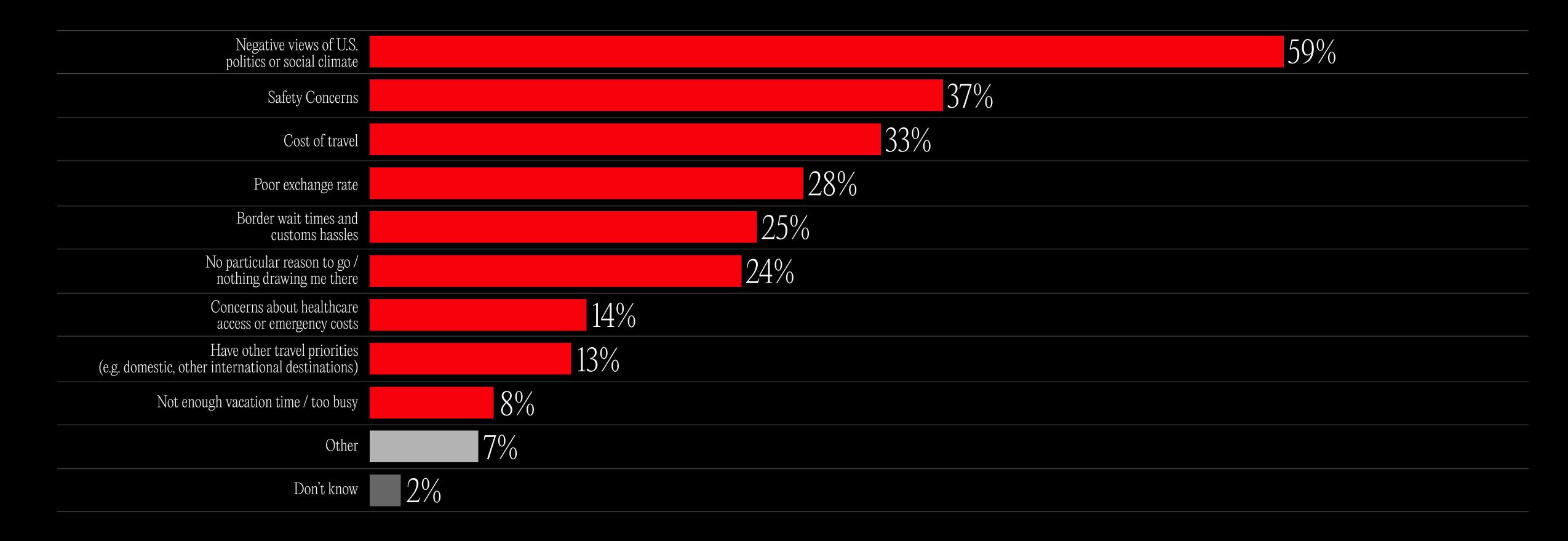
Note: CTM July '25 data



Barriers to Traveling to U.S.

More than half state negative views of US politics/social climate as reason for holding back from travel to the US.

What's currently holding you back from traveling to the US? [multiple mention] [Asked of only respondents who are not likely to travel to the US in the next 12 months; n=1,450]



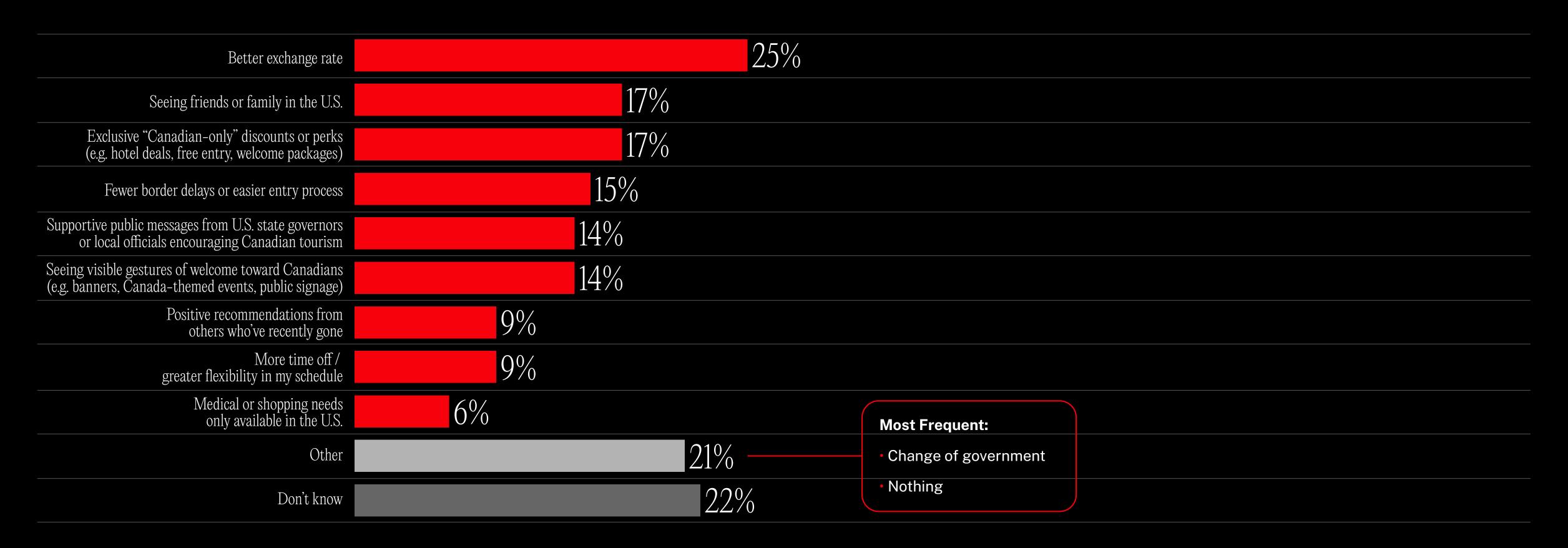


Motivation to Traveling to U.S.

1-in-4 state that a better exchange rate would make it more likely to travel to the US.

What would make you more likely to travel to the US in the next year? [multiple mention]

[Asked of only respondents who are somewhat likely, not very likely, not likely at all, or don't know whether to travel to the US in the next 12 months; n=1,805]





METHODOLOGY OVERVIEW

These are the results of an online survey conducted between July 4th and July 28th, 2025.

Method

This online survey was sponsored and conducted by INNOVATIVE Research Group Inc. using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Dynata, a leading provider of online sample. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

Sample Size

n=3,732 Canadian citizens, 18 years or older. The results are nationally weighted to n=2,000 based on Census data from Statistics Canada.

Field Dates

July 4th and July 28th, 2025.

Weighting

Results for Canada are weighted by age, gender, region, education, and self-reported federal past vote to ensure that the overall sample's composition reflects that of the actual population according to Census data, in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error

This is a representative sample. However, since the online survey was not a random probability-based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

Gender & Age	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)	
Men 18-34	335	9.0%	226	13.4%	
Men 35-54	543	14.6%	319	16.0%	
Men 55+	979	26.4%	386	19.4%	
Women 18-34	358	9.6%	260	13.1%	
Women 35-54	573	15.4%	329	16.6%	
Women 55+	927	25.0%	429	21.6%	
ВС	549	14.7%	280	14.0%	
Alberta	473	12.7%	224	11.2%	
Prairies	248	6.6%	130	6.5%	
Ontario	1372	36.8%	772	38.6%	
Québec	796	21.3%	460	23.0%	
Atlantic Canada	294	7.9%	134	6.7%	





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