



Navigating Canada-US relations

FEBRUARY 2025

Tariffs, economic
independence, and sovereignty:
Where to next?

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Angus Reid conducted a comprehensive study of what Canadians are thinking, doing and worrying about in response recent upheaval of Canada-US relations. Below is a selection of key findings of the much larger study. The study also includes oversamples of BC and Alberta as well as a range of sectors and brands.

To find out where your stakeholders or customers are on these issues and many more, contact us.

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About the report

- **Sample**

The online survey was conducted among a proportionately representative sample of n=3,310 Canadians selected from the Angus Reid Forum. BC and Alberta were oversampled to n=500 each.

- **Field window**

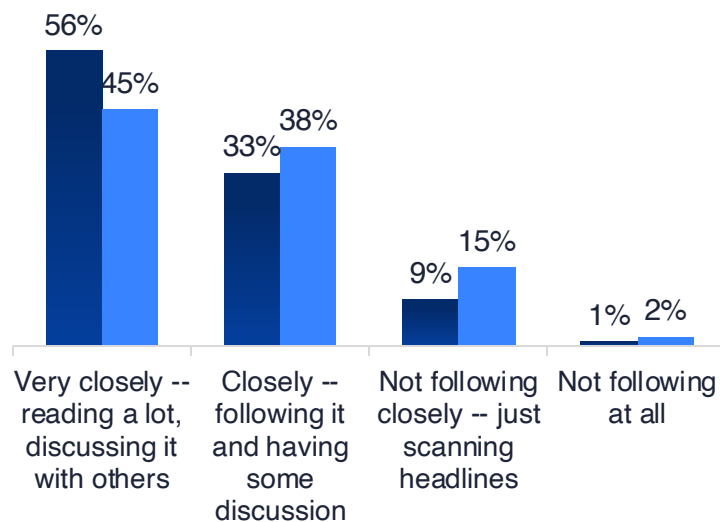
The Angus Reid Group completed a large 24-hour turnaround national study (n=1,800) immediately after Trump's formal announcement of tariffs (on Feb 1, 2025) and before they were delayed. We conducted the first of many planned tracking surveys between February 14-16, 2025 (n=3,310).

Awareness

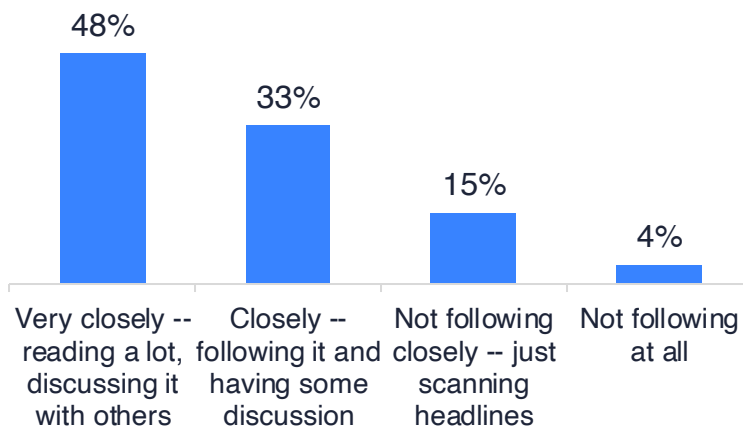
The tariffs issue continues to catch the attention of almost all Canadians. But the annexation issue has entered the equation at equal levels, and while a bit lower the steel/aluminium tariffs are also being followed.

Tariffs Issue

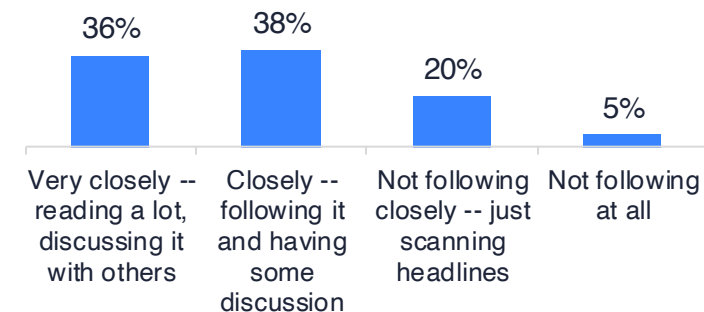
■ Feb 1-3 ■ Feb 14-16



Annexation Issue

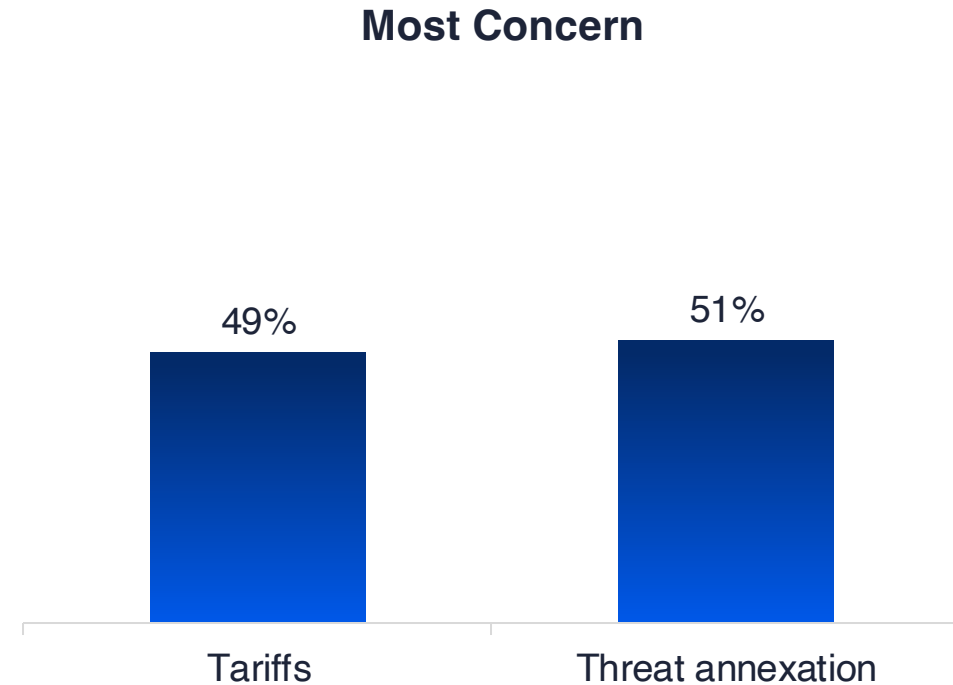


Steel/Aluminum Tariffs



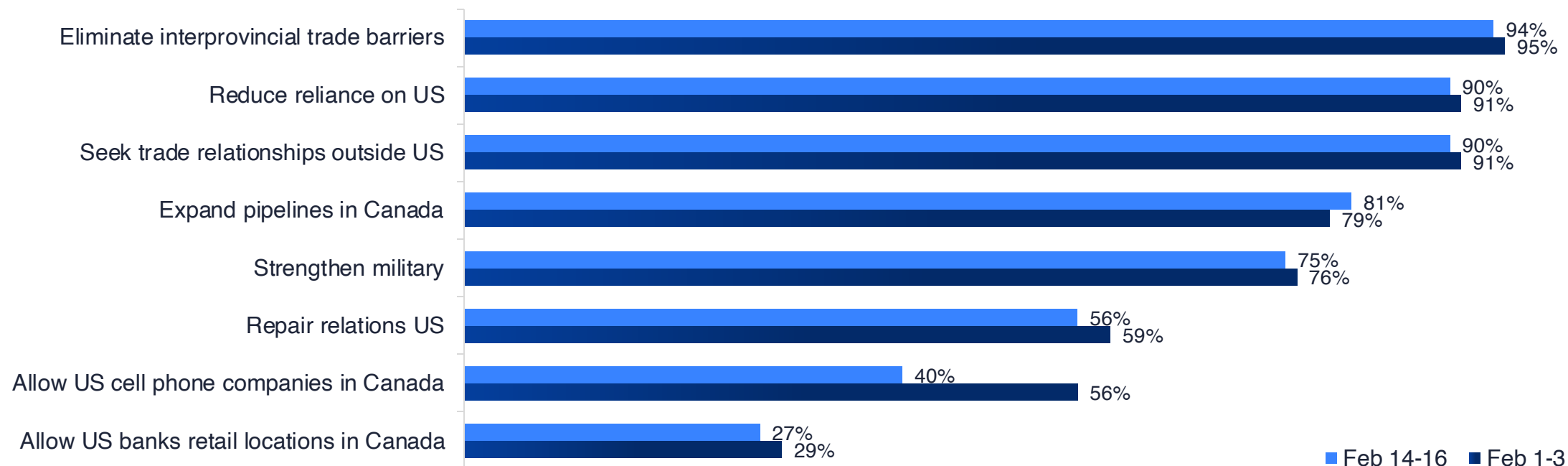
High Concerns

More Canadians see the threat of annexation as a concern than say the same about tariffs, although opinion is largely split.



Canada Moving Forward

Canadians remain open to changing the status quo to ensure the country is better positioned to absorb future shocks. There remains very strong support for everything from reducing interprovincial trade barriers and expanding pipelines to strengthening our military. That said, they continue to take an increasingly protectionist stance on allowing US companies, banks to operate in Canada.



Pride in Canada

We know that pride in the country had been deteriorating prior to the tariffs issue. But the tariffs issue has clearly reversed this trend.

An increasing proportion of Canadians are very proud of the country, although it is notable that three-in-ten are only somewhat or not proud.



**Up from 34%
in Dec '24**

■ Feb 1-3 ■ Feb 14-16

44% 45%



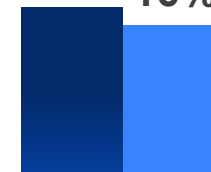
**Very Proud
of Canada**

23% 24%



**Proud
of Canada**

18% 16%



**Somewhat Proud
of Canada**

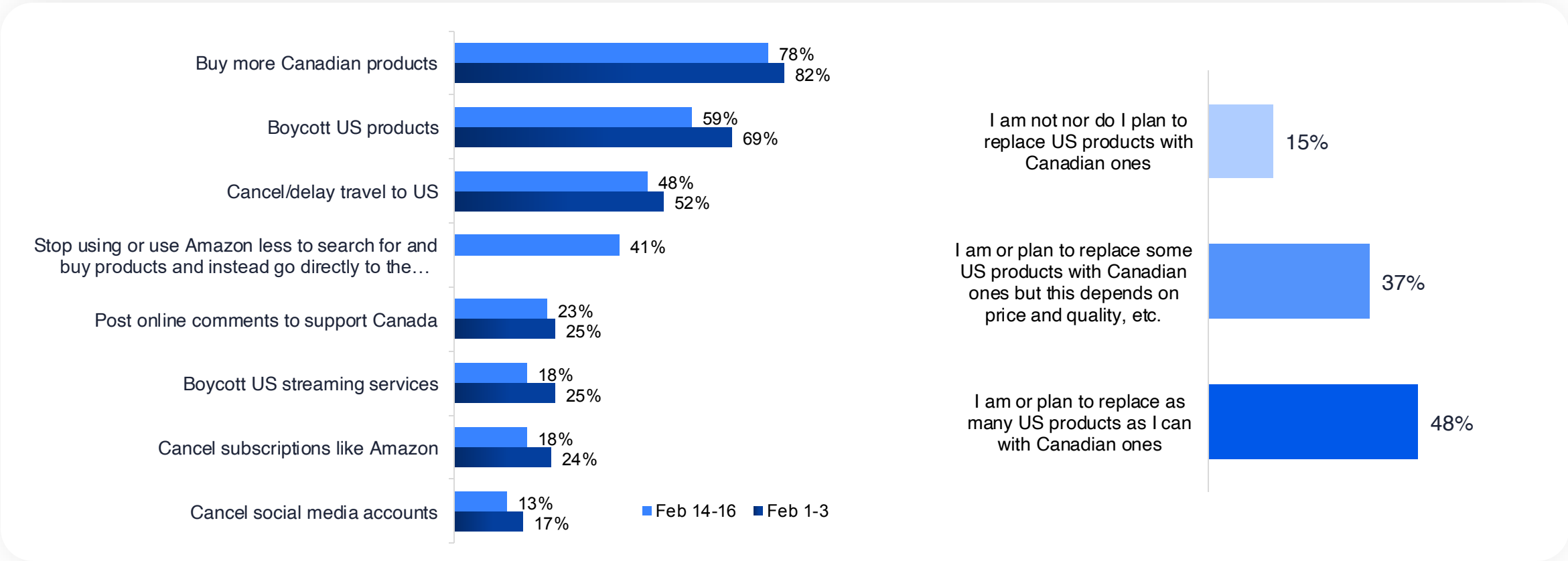
15% 12%



**Not very/ at all
Proud**

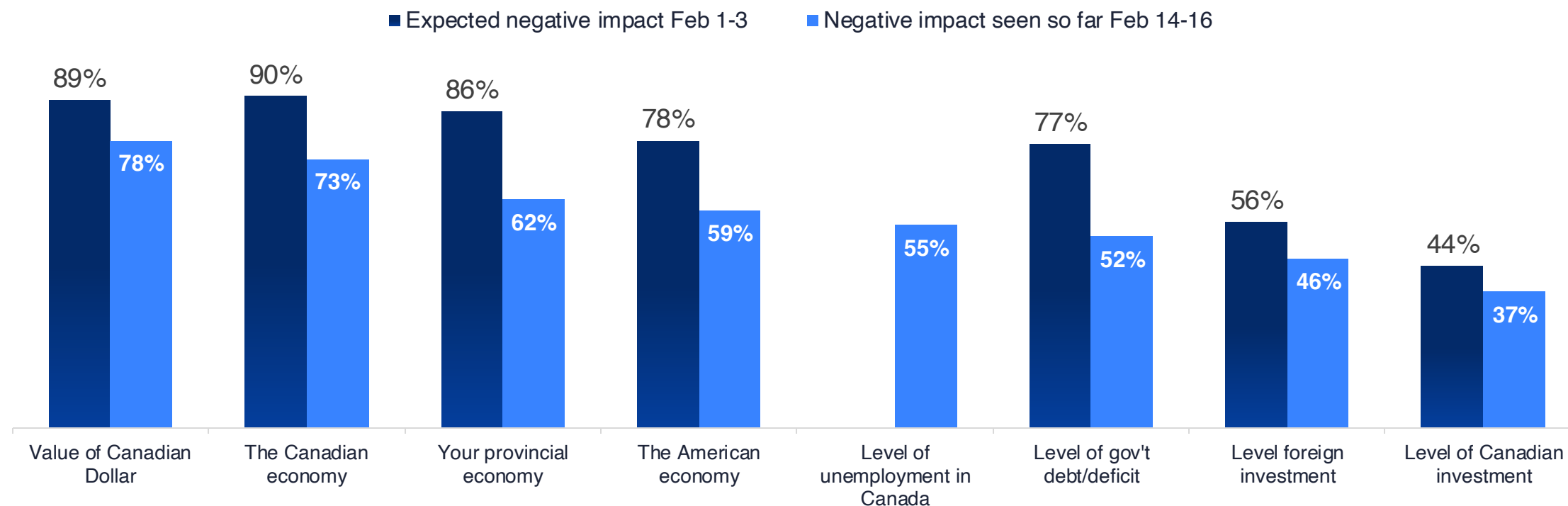
Personal Actions

Canadians were already doing or about to start several behaviours in reaction to the tariffs. 'Buy Canadian' continues to rank as the top action and represents a continuing opportunity moving forward -- half of Canadians are hard core "Buy Canadian." Travel ranks second.



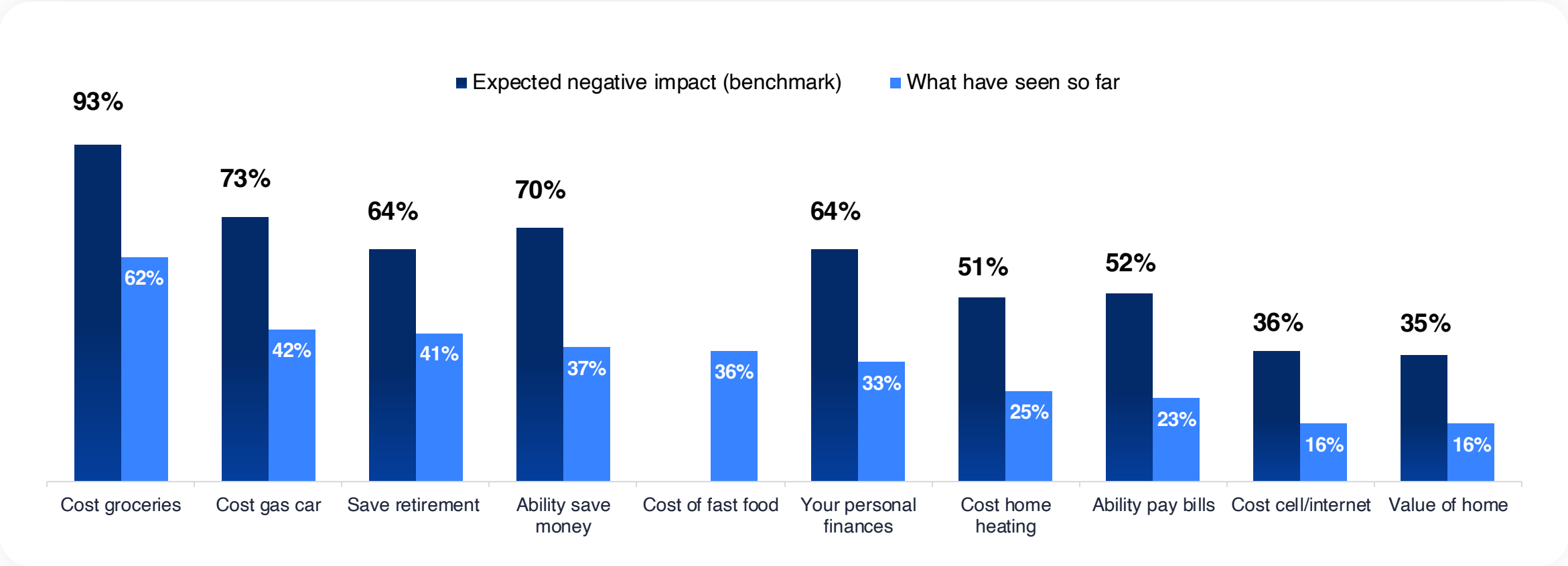
Perceived Impact Macro I Country, Economy

Canadians say that they have not yet seen the extent of negative impacts of the tariffs on the economy and related macro issues that they expected in our benchmark survey. The exceptions are on the economy overall and value of the Canadian dollar.



Perceived Impact Micro | Personal

Even more than the macro, Canadians say that they have not yet seen the extent of negative impacts of the tariffs on them personally that they expected in our benchmark survey. The possible exception is on the cost of groceries.

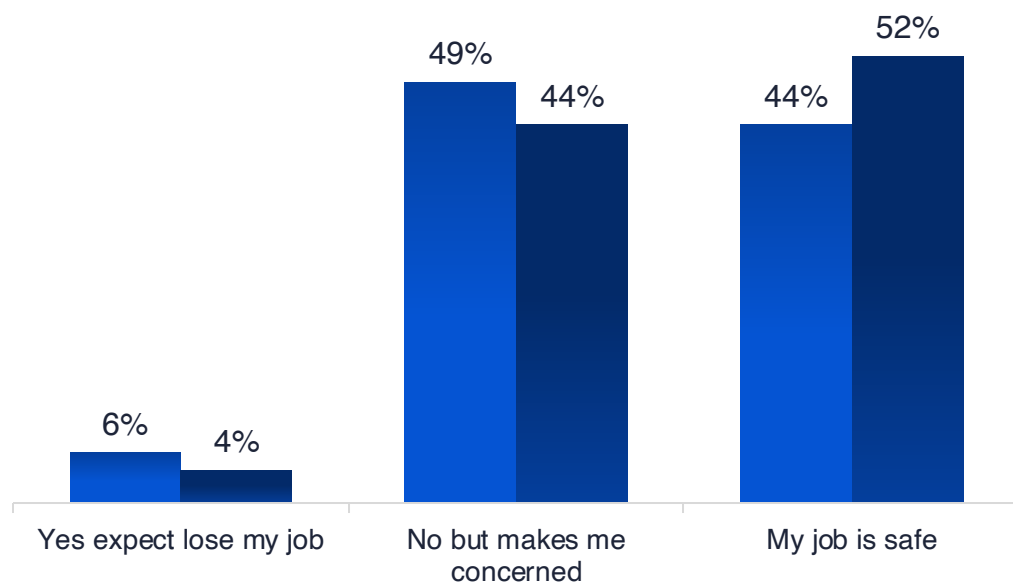


Perceived Impact Micro I Job Security

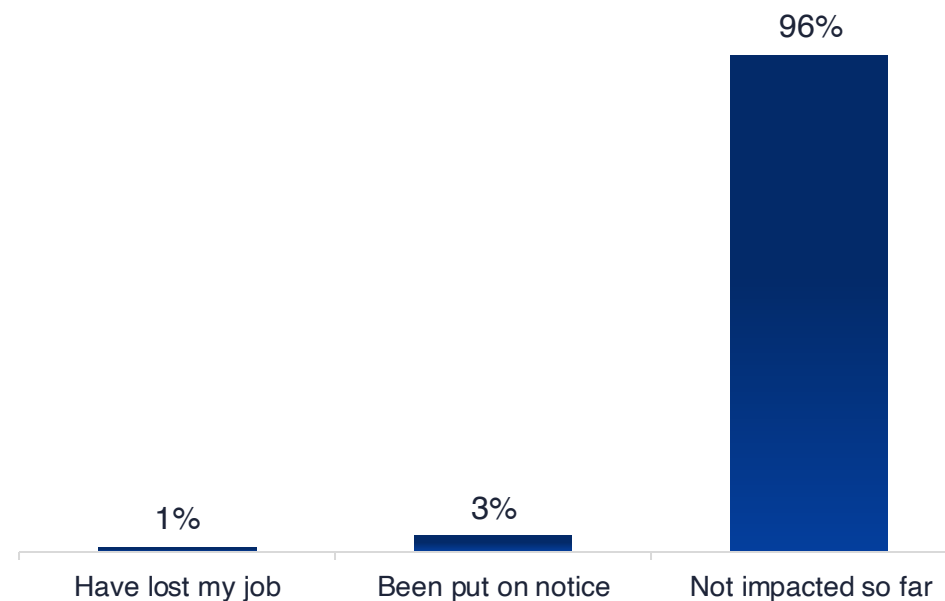
Fewer Canadians expect to lose their jobs as a result of the tariffs now than two weeks ago. This is based on the fact that almost no one says that they have experienced job loss so far and very few have been put on notice.

Expect Personal Job Security

■ Feb 1-3 ■ Feb 14-16



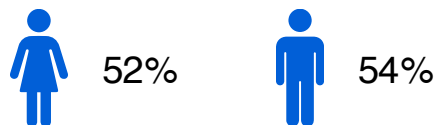
Experienced Personal Job Security



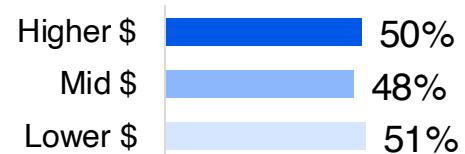
Hard Core Buy Canadian | Age – Sex – Income - Region

Women are more likely than men to be hard core “Buy Canadian,” Alberta and Saskatchewan a bit lower. But by far the biggest difference is between younger and older Canadians.

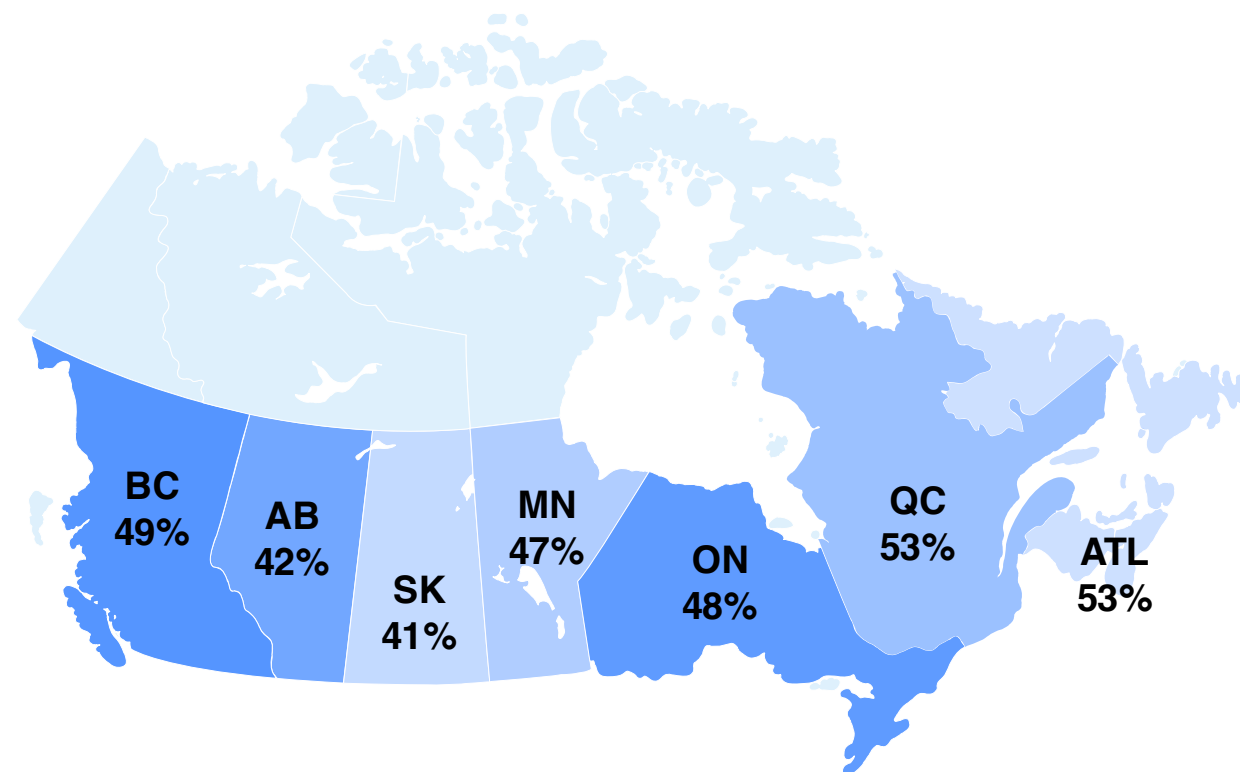
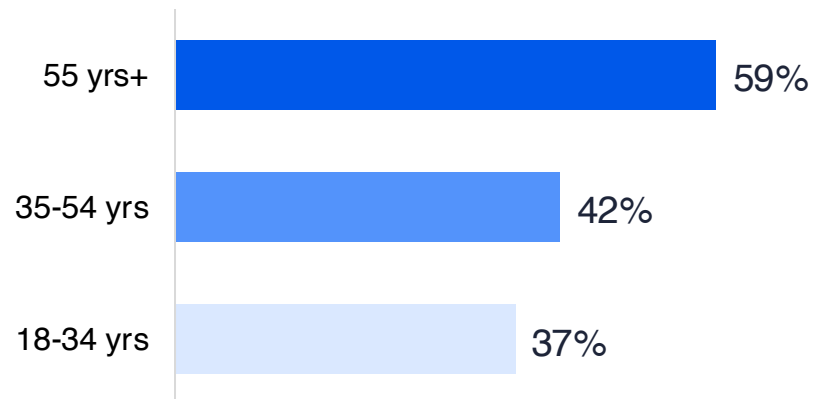
GENDER



INCOME



AGE



READY FOR ANSWERS?

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