



Canada-U.S. Relations 360

WEBINAR – MARCH 13 2025

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ARG has been tracking the issues surrounding Canada-US relations since the first threats by Trump about tariffs:

- Benchmark -- N=1800 Canada Gen Pop, February 1-3, 2025
- 1st Tracking -- N=3300 Canadian Gen Pop, February 14-16, 2025
- 2nd Tracking – N=3300 Canadian Gen Pop + N=1000 US Gen Pop + N=800 Canadian Businesses, March 5-8, 2025

We will be tracking Canadian Gen Pop every two weeks, Canadian Business every month moving forward.

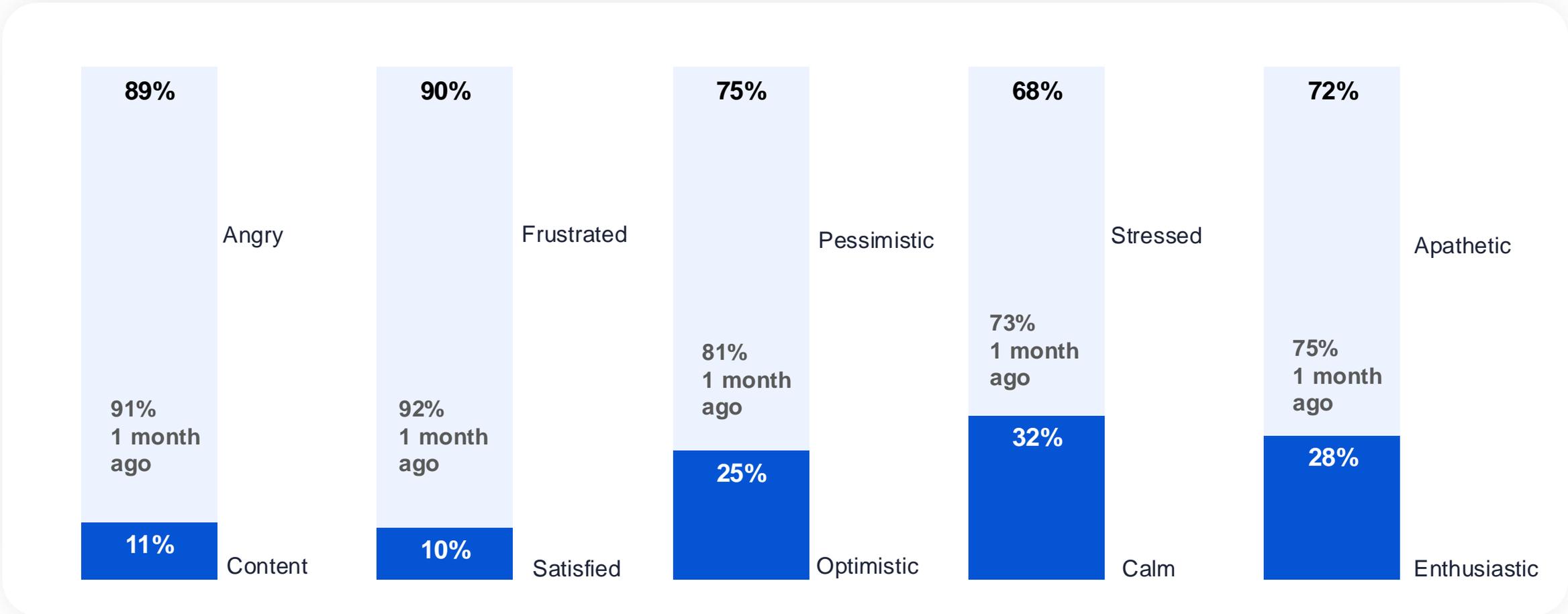
**The citizen
perspective...**

**Canadians and
Americans**



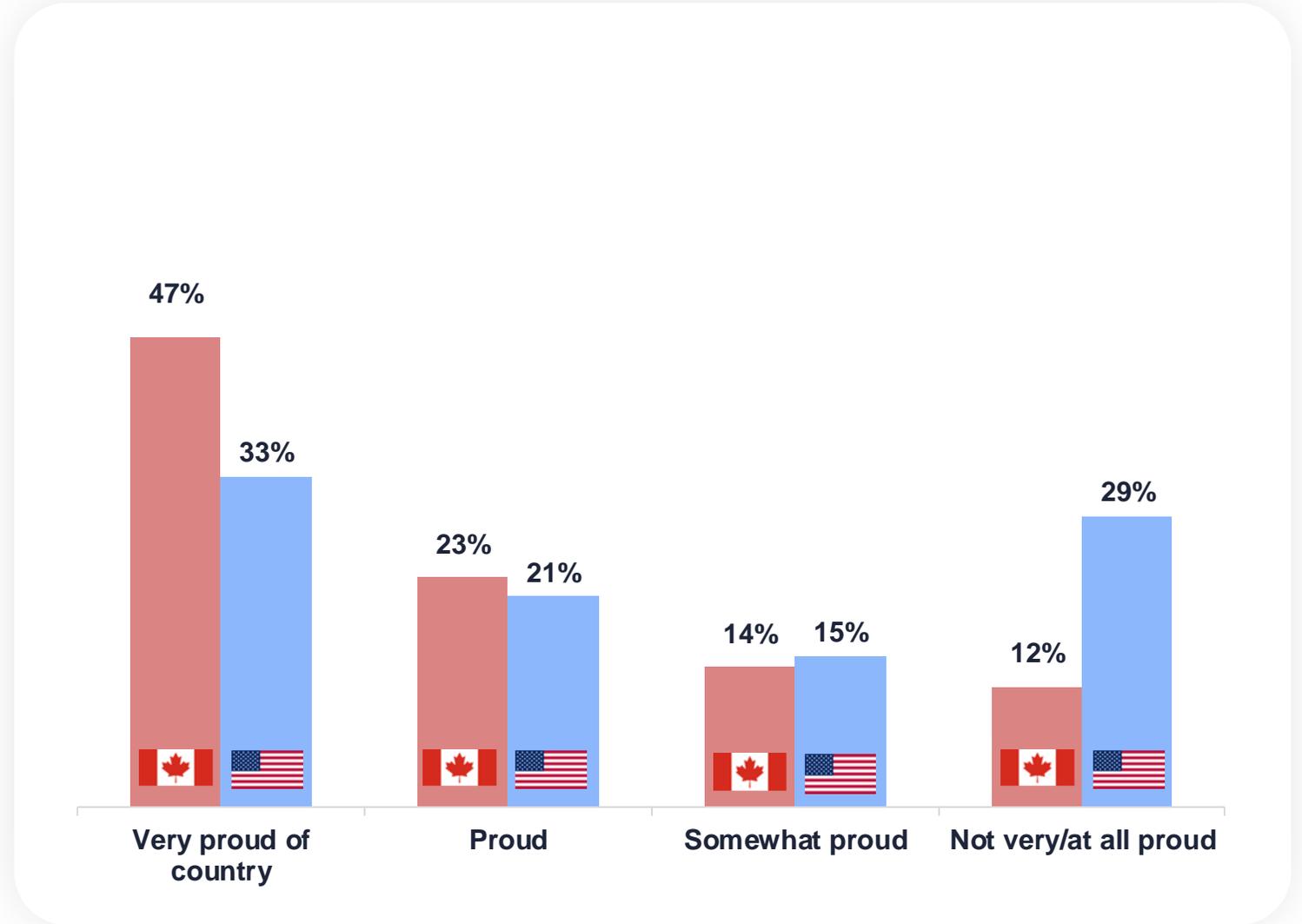


Setting the tone... negative emotions dominate



March 5-8, 2025, n=3300 Canada, n=1000 US, n=800 Canadian Business

Despite this angst, pride in Canada is on the rise, outpacing American pride

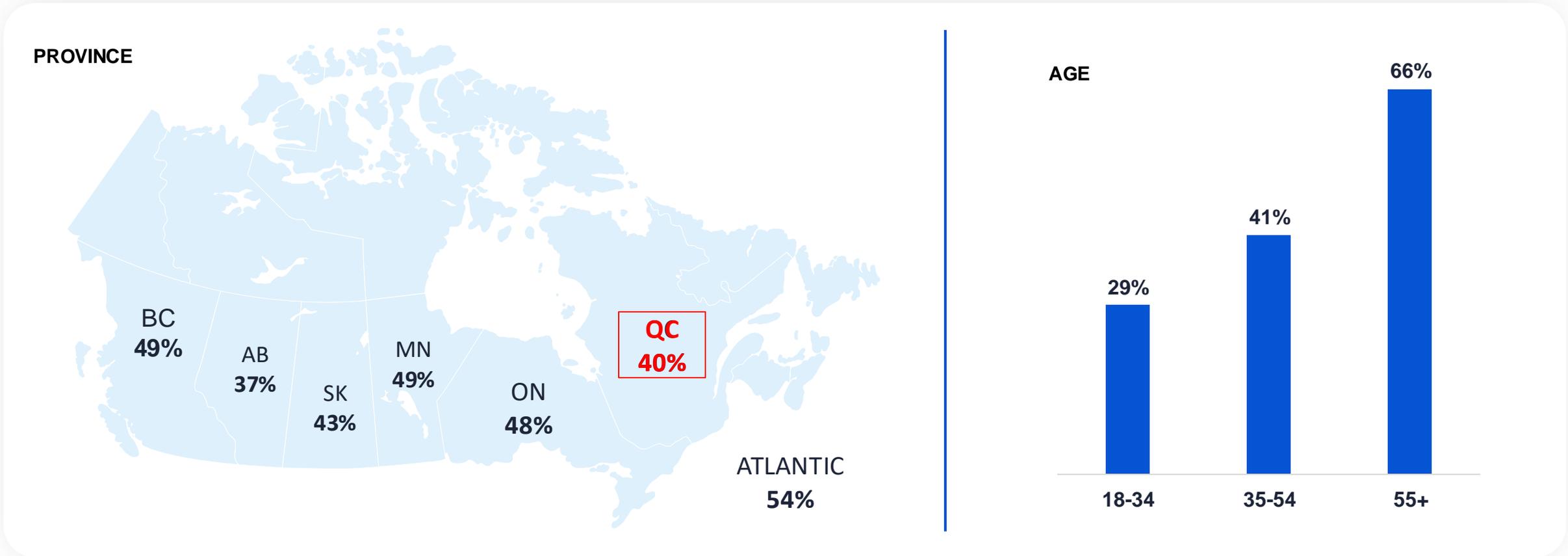


March 5-8, 2025, n=3300 Canada, n=1000 US, n=800 Canadian Business



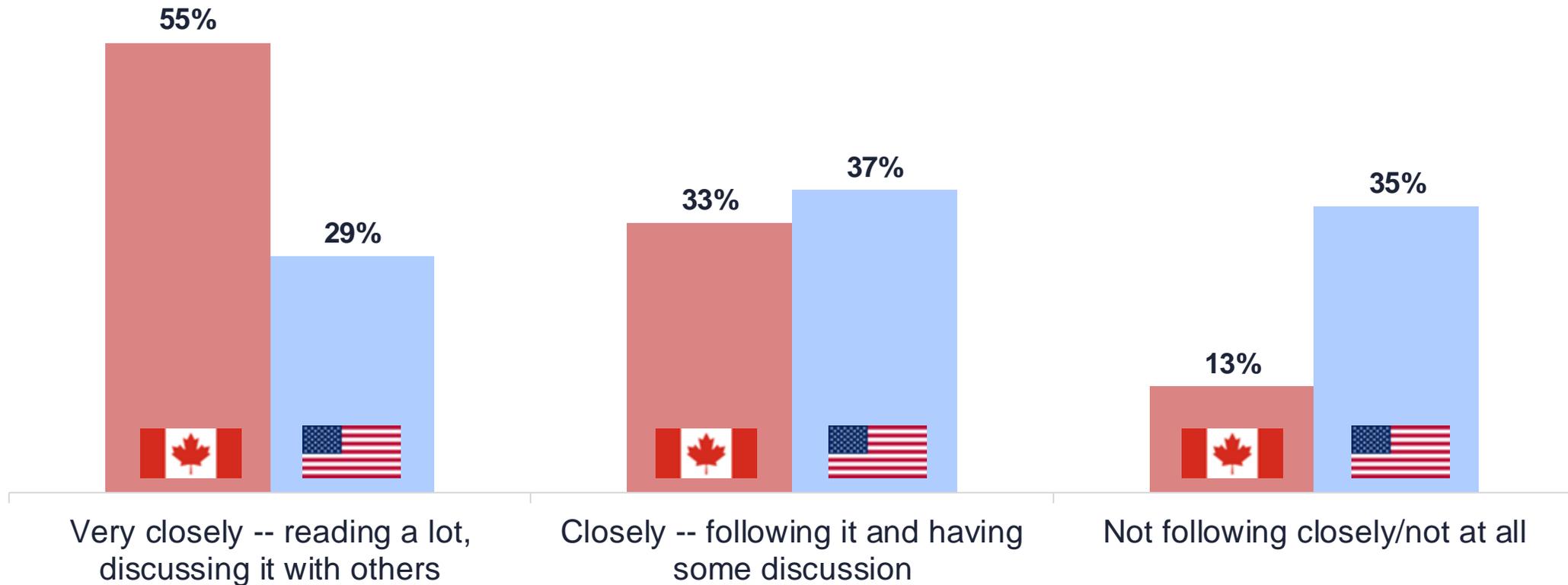
Is there a cohesive “Team Canada”? The answer is no

Nothing encapsulates the differences among Canadians better than pride in the country – **Very proud**



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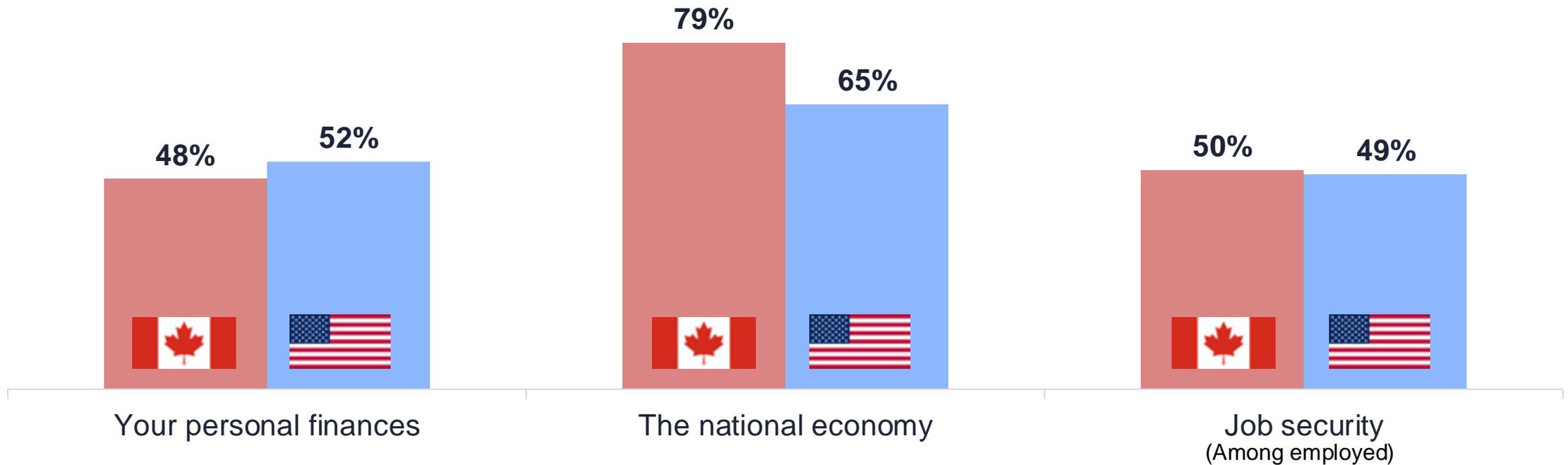
The rollercoaster of US/CDN relations is being followed closely on both sides of the border



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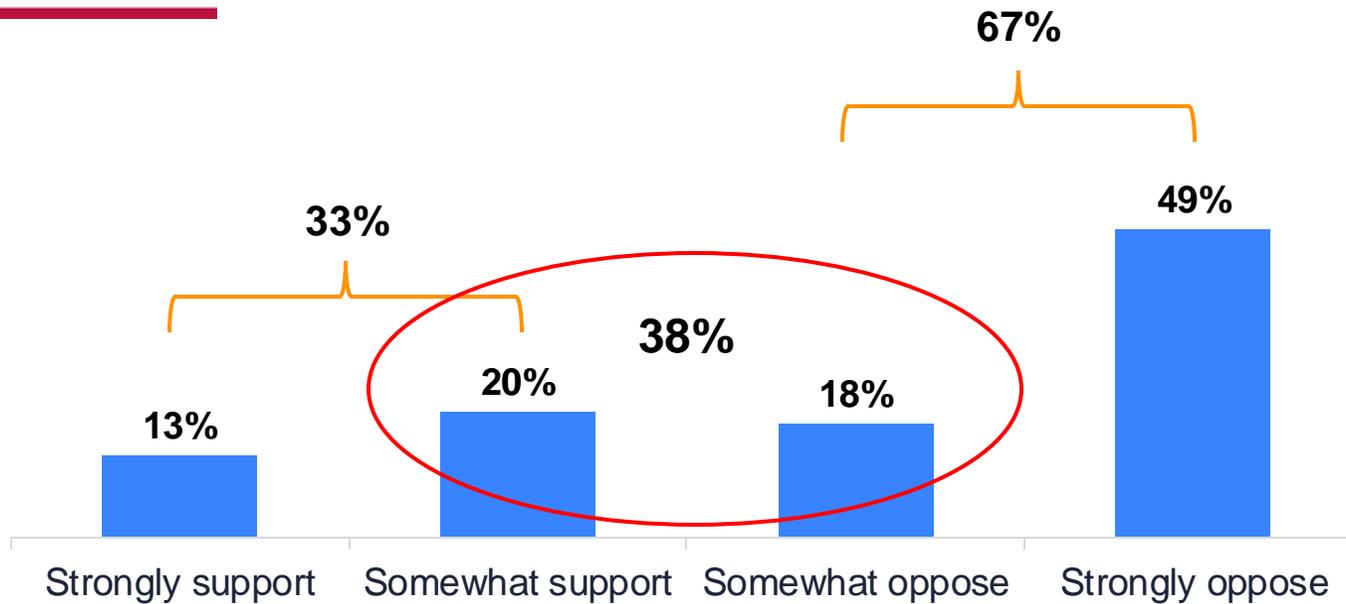
And both Americans and Canadians are feeling the impact

The tariffs **have already had** a negative impact on....



March 5-8, 2025, n=3300 Canada, n=1000 US, n=800 Canadian Business

A majority of Americans are not supportive of the US stance on tariffs – though a third support it



Support is higher among...

Men (38%) vs women (27%)

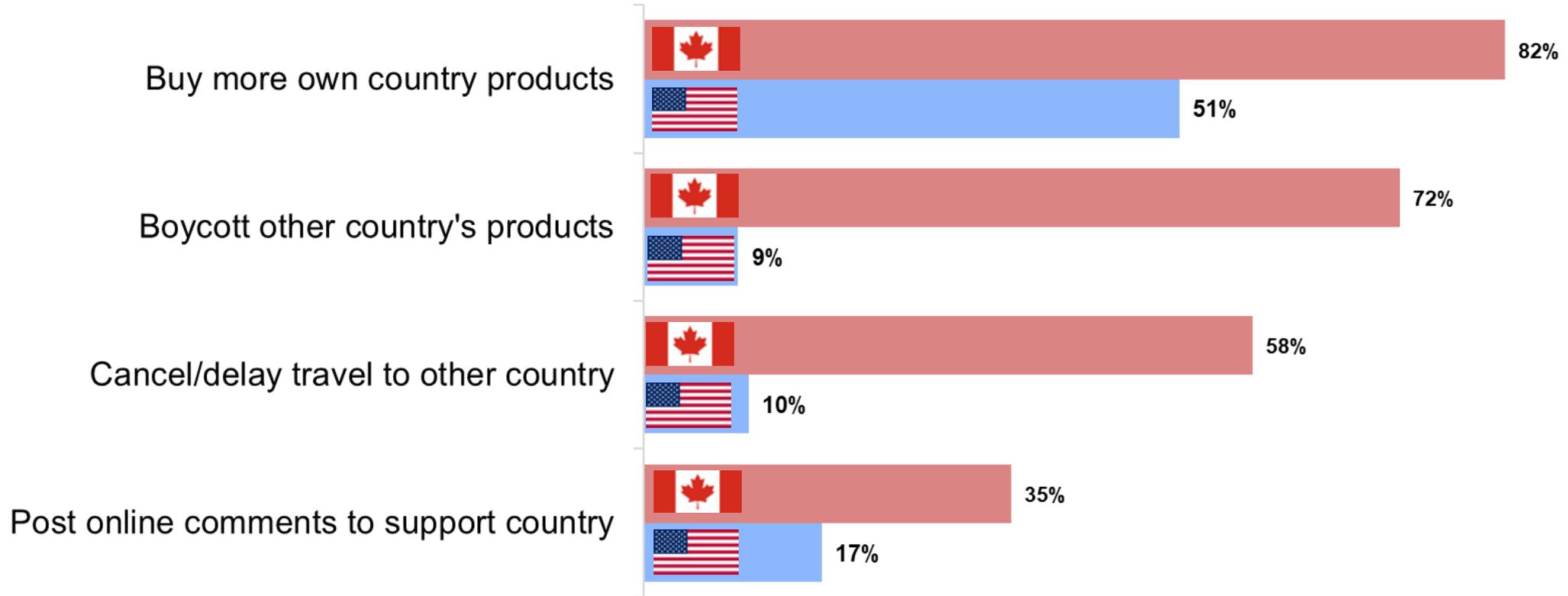
Boomers (40%) vs Gen Z (21%)

Lower education (42%) vs higher education (25%)

Midwest (36%) vs Northeast (26%)

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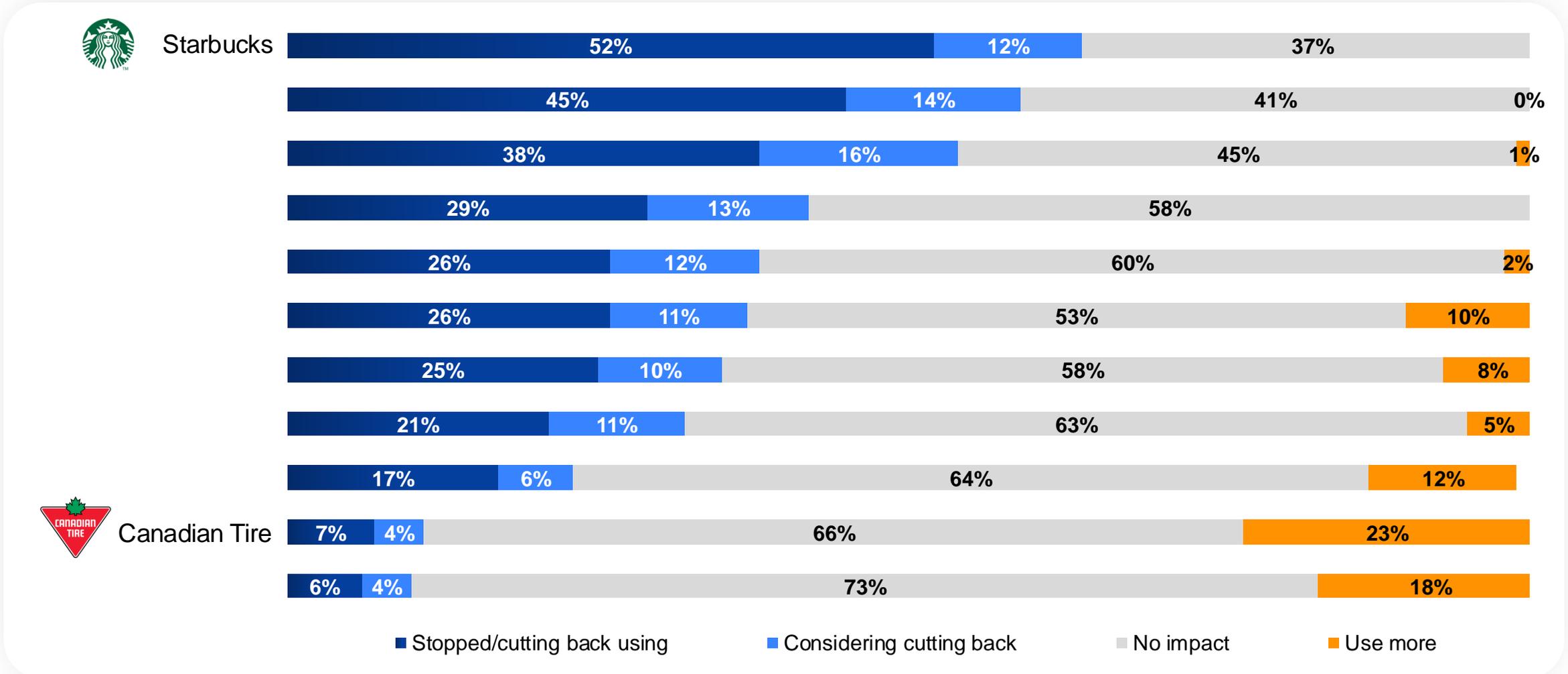
What are we doing about it? Buying local



March 5-8, 2025, n=3300 Canada, n=1000 US, n=800 Canadian Business



And brands are feeling the effect



March 5-8, 2025, n=3300 Canada, n=1000 US, n=800 Canadian Business



The cost of pride: despite the angst, impact and concern, pride doesn't trump finances

57%

Say that their resolve about relations with the US is challenged if prices increased by...

+20%

BUT

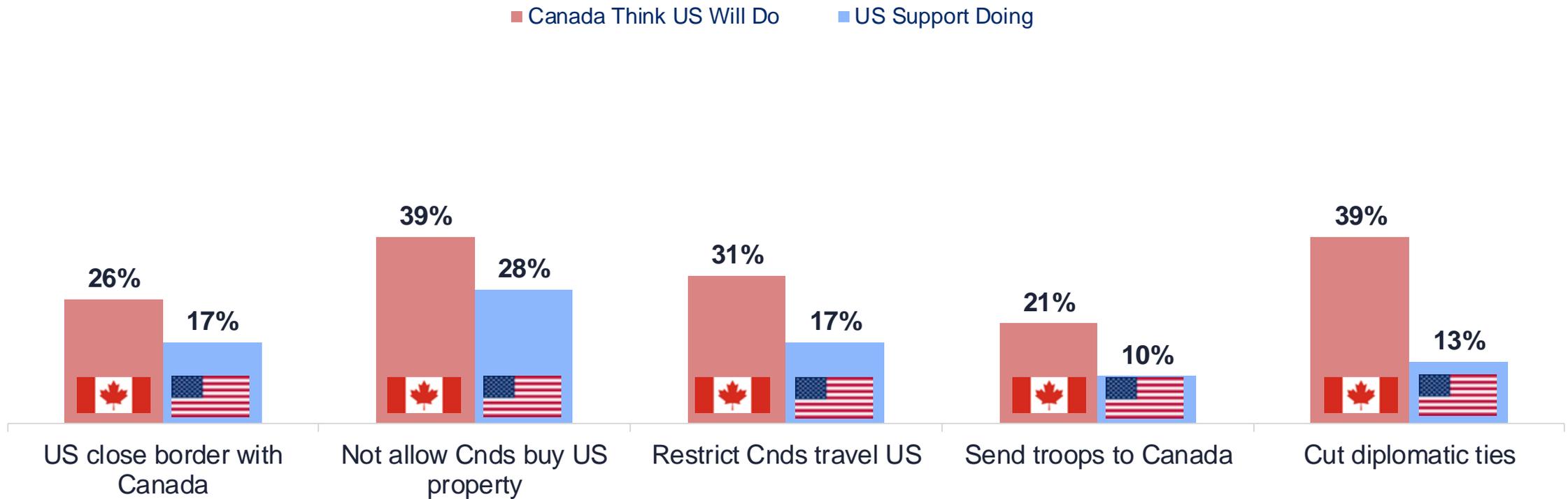
15%

Want Canada to stick to its guns even if prices increased by...

50%+

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What next? Reactions to some worst-case scenarios



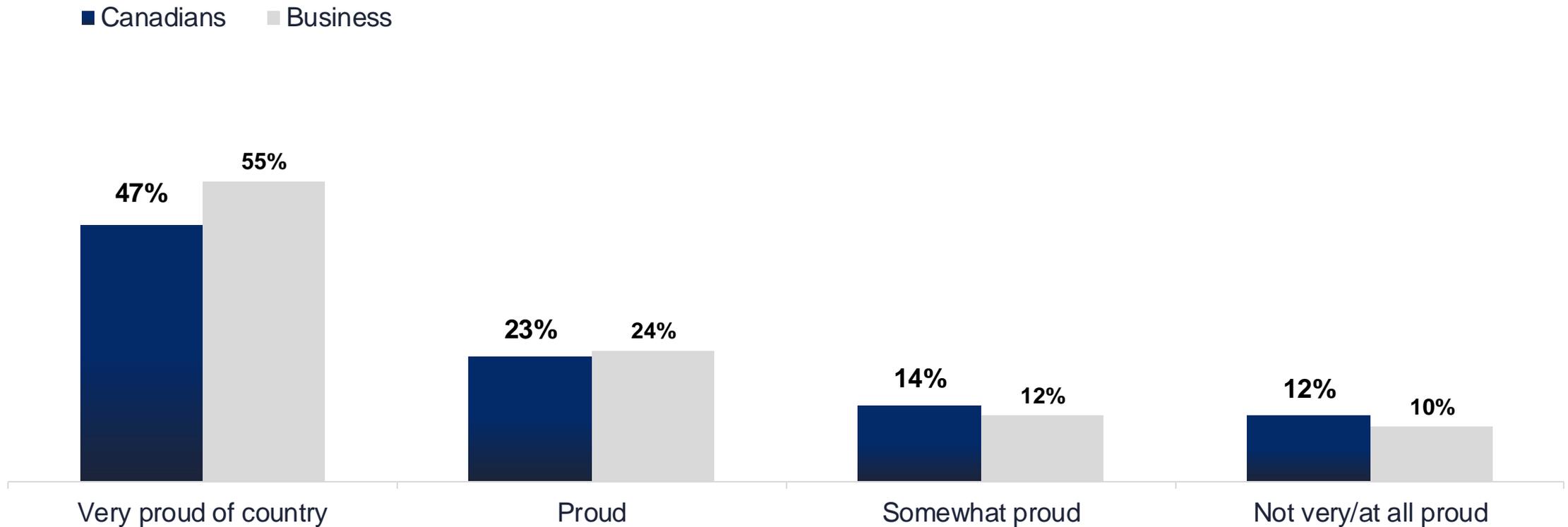
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Canadian Business perspective





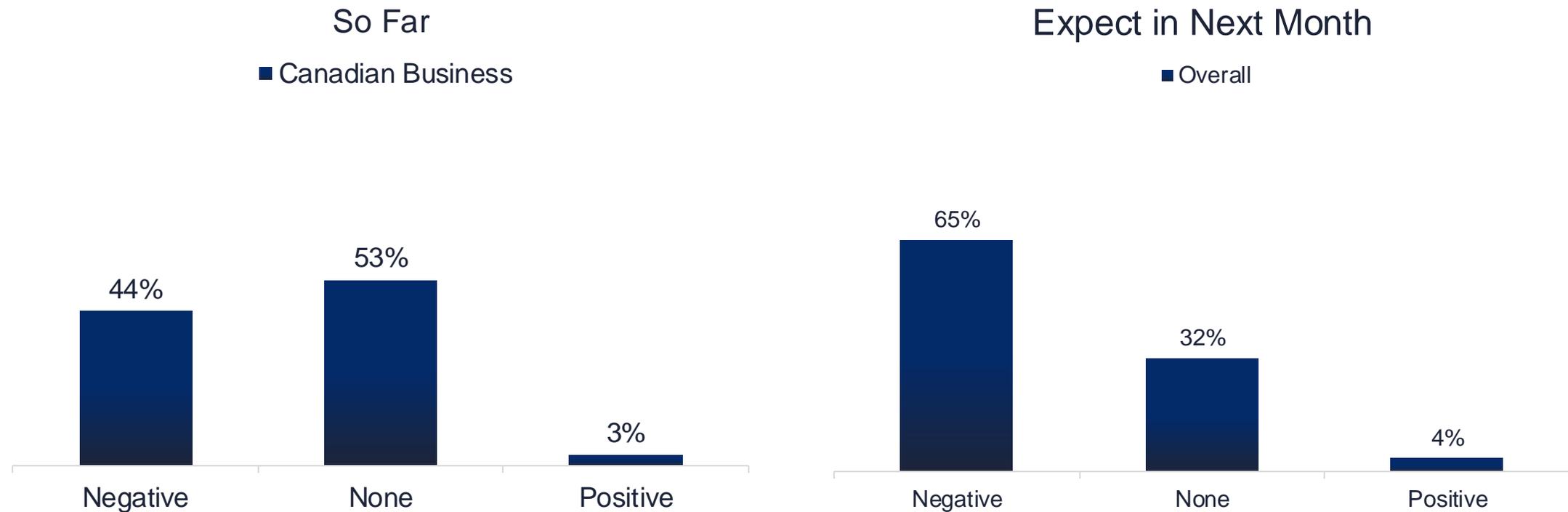
Canadian business has caught the pride bug as well



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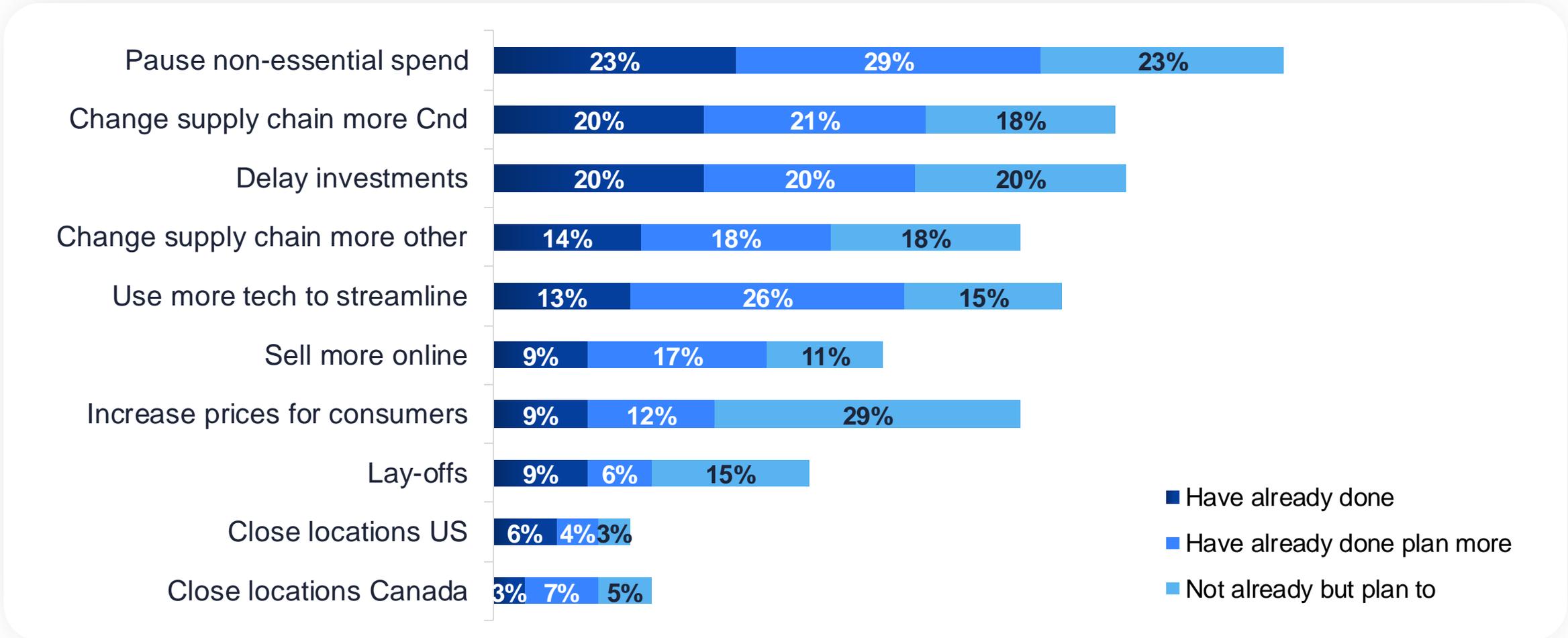
That said, some are already seeing the impact of the trade war and they see a rough ride in the coming weeks



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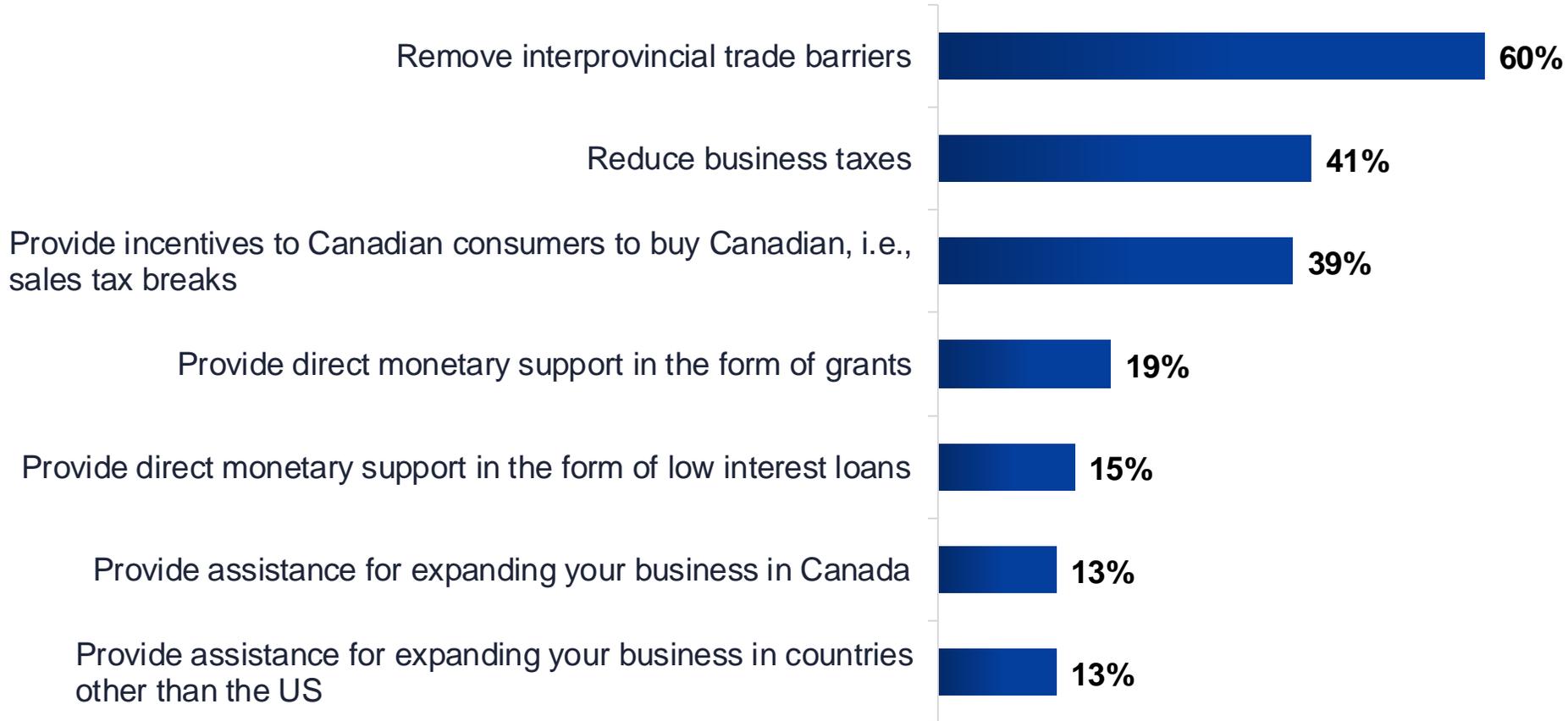
Business is already taking action



March 5-8, 2025, n=3300 Canada, n=1000 US, n=800 Canadian Business



Interprovincial trade barriers are the silver bullet for businesses – Top 2 choices



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Business bravado also quickly dissipates when the rubber hits the road

51%

at +20%

Say that their resolve about relations with the US is challenged if operating costs increased by 20%

64%

at +30%

Say that their resolve about relations with the US is challenged if operating costs increased by 30%

26%

at +50%

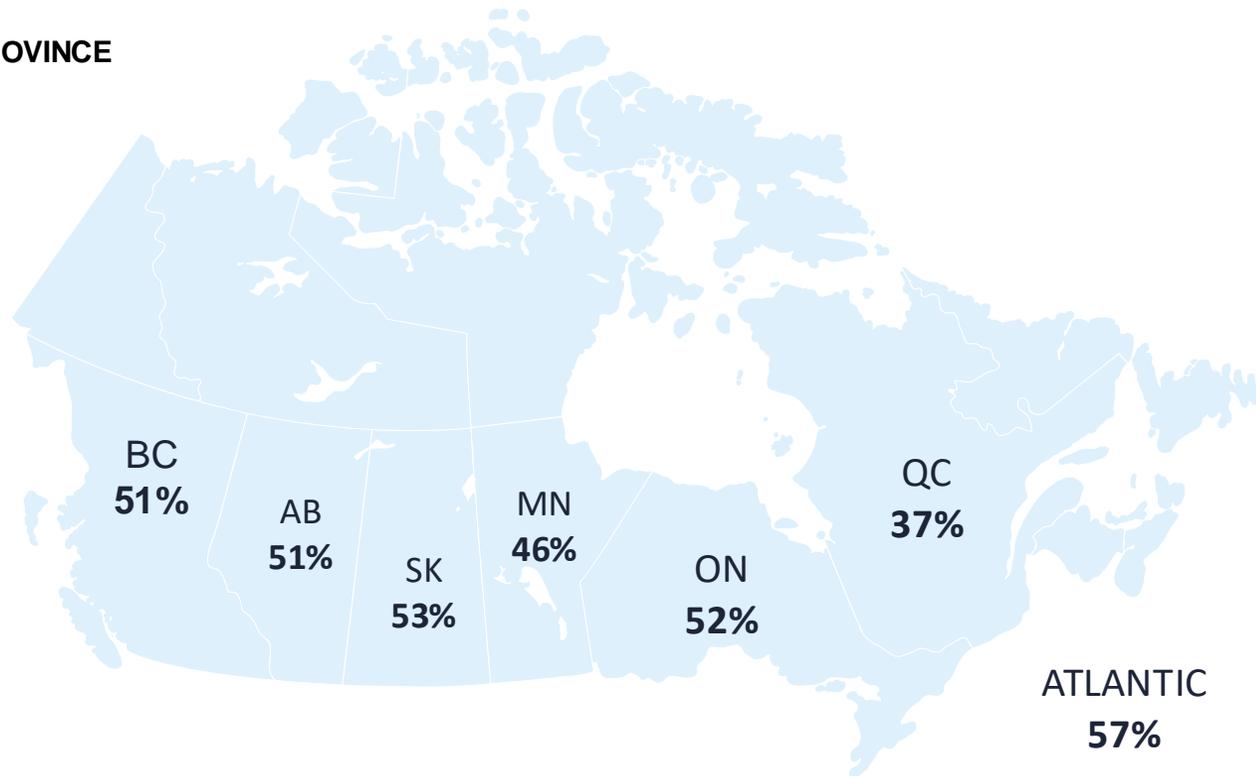
Want Canada to stick to its guns even if operating costs increased by 50%+

March 5-8, 2025, n=3300 Canada, n=1000 US, n=800 Canadian Business

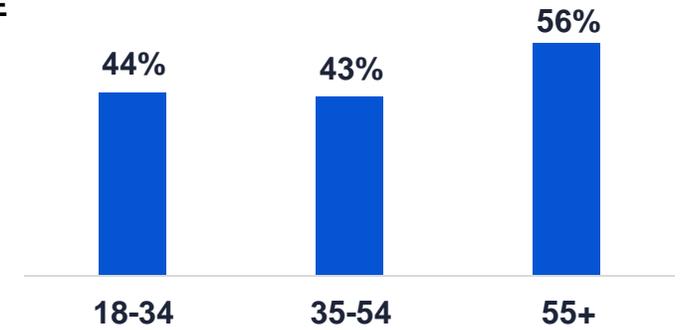


Can we end on some optimism? Sort of...

PROVINCE



AGE



Feeling Hopeless



Feeling Hopeful

March 5-8, 2025, n=3300 Canada, n=1000 US, n=800 Canadian Business

Key takeaways

1

Citizens on both sides of the border are paying attention, feeling the impact and making real behaviour changes.

2

While the recent surge in pride among Canadians continues, pride is price sensitive and may not hold when the real impacts are felt.

3

Canadian businesses are proud and playing defence at this stage – a holding pattern while we see the effects. That said, if operating costs increase 20%, this resolve is challenged.

Q&A

| THANK YOU!

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