

CANADA'S ENDURANCE ECONOMY 2026 TO ?

Endurance Economy (n.)

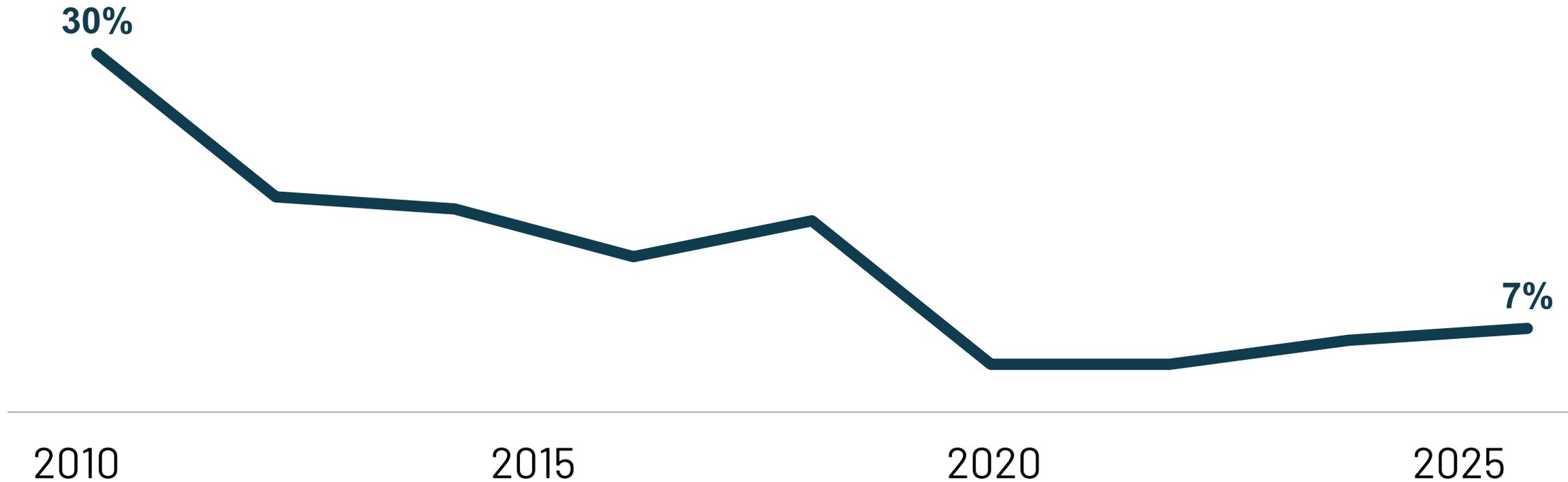
A period in which households, institutions, and brands operate under sustained pressure (high costs, uncertainty, and slower growth) not as a temporary disruption, but as the defining backdrop for the next decade. A mindset shift from optimism and expansion to coping, adaptation, and resilience. Shaped by structural forces like climate transition, demographic change, geopolitical instability, and AI-driven disruption, moving at uneven speeds, some too fast for societies to absorb and others too slow to resolve. In the Endurance Economy, success is defined less by acceleration and disruption, and more by stability, trust, affordability, and the ability to help people “get through” rather than “get ahead.”

THE AFFORDABILITY CRISIS IS OVER ... FOR MOST CANADIANS AFFORDABILITY WORRIES DO NOT HAVE AN END POINT



Affordability and Inflation Concerns that Rose Post Pandemic were Rooted in a Long Decline in Lower Personal Financial Expectations

Canadians' Personal Financial Situation. Will the Next 6 Months be better or worse. (Net Better - Worse)



Beyond Affordability: Canada Faces a Crisis Of Crises Requiring Long Term Structural Change

- Death of US-led period of economic and geopolitical stability
- Defending Our Sovereignty
- National Unity
- Generational Division
- Political Representation
- Infrastructure For Prosperity
- Housing, Immigration, Climate, AI

What to Expect as We Move From an Affordability Crisis to an Endurance Economy

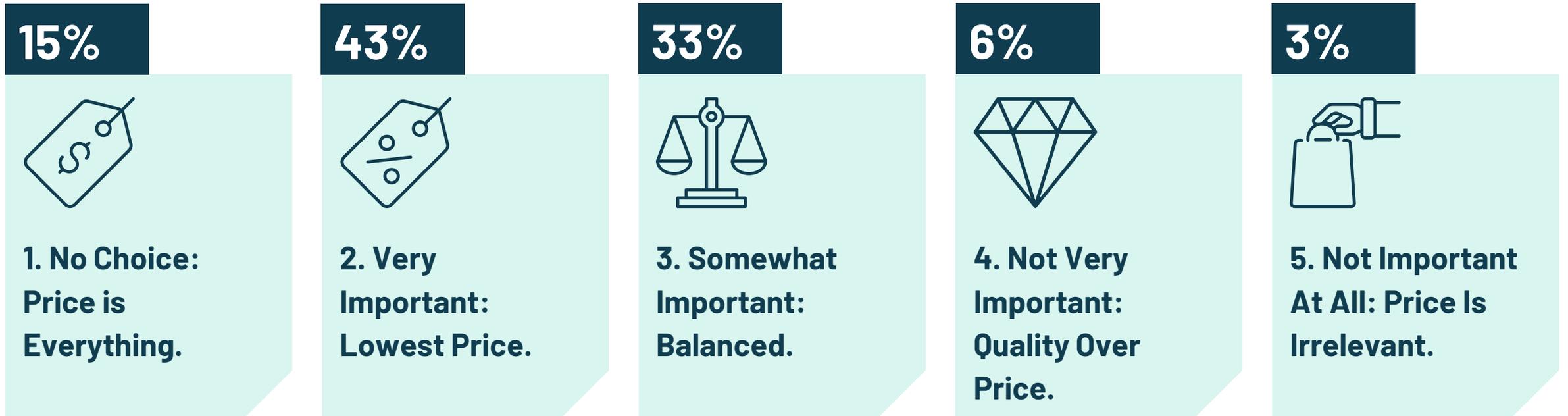




The Endurance Mindset Isn't Just A 2026 Challenge

It's The Next Decade's
Design Brief

Price Is A Purchase Gate For The Majority of Canadians



Price is the determining factor for **six in ten Canadians**

Source: Trump, Tariffs and Turmoil (November 2025)

Base: All respondents (n=2002)

Q. Thinking about your overall purchase decisions over the last three months, no matter the product or service, how much of a factor is price in your choices? [Choose One]

An Endurance Mindset Reshapes The Market

- /// Consumers pull back and postpone
- /// Price disqualifies options before deeper evaluation
- /// Risk avoidance rises, novelty-seeking declines
- /// Defaults and familiar choices gain power
- /// Previously excluded value options become acceptable
- /// Tone sensitivity intensifies
- /// Trust becomes a form of value
- /// Keeping customers becomes more critical than winning new ones

But Endurance Is Not Deprivation – It's Adaptation Over Time

People don't live in permanent austerity. They rebuild meaning, pleasure, and progress inside constraint.

AI Generated Image

© Ipsos The Endurance Economy

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People Still Want Things –
Even Under Constraint

People Still Look Forward –
Even Under Constraint



Assume It's A Chronic Condition And We Are In An Endurance Mindset ...

Brands Must Decide
What Role They Play

A brand that helps Canadians say any of the following ...

- *"At least I can still afford this."*
- *"This will do."*
- *"I don't have to think too hard."*
- *"I'm being responsible."*
- *"This is normal for people like me."*

can ...

- Benefit from affordability stress persistence
- Win by validating constraint, not denying it
- Gain loyalty without love
- Help Canadians manage stress

Brands That Thrive Share Common Traits

1

Trust Before Aspiration

A solid track record of supporting

people.

Dependability and follow-through matter more than bold promises.

2

Everyday Embeddedness

Part of regular life, not occasional indulgence. They **enable living** rather than symbolize success.

3

Perceived Fairness – Not Cheapness

A clear, defensible value exchange – “you get what you pay for.” Judged by how they behave when conditions are tight.

4

Human Reassurance & Earned Optimism

They acknowledge pressure without dramatizing it. They **offer small signals of progress people can feel good about.**

5

Institutional Gravity

They feel permanent and dependable. **Brands people plan their lives around.**

If you are looking to thrive in the Endurance Economy contact:



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