

CROSS-BORDER CONVICTIONS:

Analyzing the Drivers of Buying Canadian





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On May 5, Prime Minister Mark Carney made his first visit to the White House to meet with President Trump

As usual, tariffs and annexation were on the menu. Canadians, however, have not been waiting for our political leaders to resolve this crisis. They are taking actions into their own hands, and continue to “buy Canadian” whenever and wherever possible, especially Boomers, as our Nuanced Nationalism paper argued. Today, we want to explore what’s driving that persistent behaviour change, as the “buy Canadian” moment inches towards being a movement.

Using a MAPS Framework for Behavioural Change, we examined Canadians’ shopping behaviours, including buying Canadian products or services, avoiding American products or services, avoiding shopping at American retailers, and avoiding travel to the U.S. These are all things Canadians tell us they have been doing over the past two months. It’s one thing for Canadians to loudly declare their patriotism – and even demonstrate it with their purchasing habits – in a fury of anger at the tariffs and annexation threat. But anger is a surface emotion. We set out to establish what might be motivating them below the surface. The results are surprising.

What we found

Overall, patriotism, guilt, and a desire to support Canadians drive the “buy Canadian” movement. This is hardly a surprise. However, inconvenience and price play an outsized role here as the main barriers to taking this action, along with the feeling that doing so won’t make a meaningful difference. “Buy Canadian” when convenient, unless you’re a cynic.

What we found

For those avoiding American products, it's about national pride and retaliation against U.S. policies. But some Canadians aren't really sure it's making much of a difference. As Canadians are making an effort to alter their purchasing habits, especially when it comes to travel, financial pressures are starting to test how long this patriotic consumption behaviour can be sustained. We may be in a moment, and not in the midst of a movement, after all, but we even find variations by "buy Canadian" or "avoid American." What are they?

Buying Canadian products or services

The biggest motivator for those who say they are buying Canadian products or services was that they felt doing so supported Canadian jobs and workers. People doing this also felt that it helped send a message to President Trump, and that if they would feel guilty if they didn't. For those not prioritizing Canadian goods and services, the biggest driver was cost and affordability. This aligns with our previous findings that patriotic behaviour can only stretch as far as consumer's budgets. We also found a lot of respondents said that it was too inconvenient, or that they didn't believe it made a difference, or simply wasn't a priority.

Avoiding American products or services

We found very similar motivators for those who were avoiding American products or services, with one exception: pride. Those avoiding American products or services were more likely to say that "every proud Canadian needs to be avoiding American products or services right now".

As with the "buy Canadian" consumers, those who aren't avoiding American goods and services cited inconvenience, cost and a belief that doing so didn't make a difference in the grand scheme of things.

Avoiding American retailers

When asked about a more specific behaviour, namely avoiding American retailers – which requires more effort – we found that sending a message to the President was the biggest motivator, followed closely by guilt. Among those who said they weren't avoiding American retailers, we again found cost and inconvenience were the main factors but also saw a higher level of agreement that avoiding U.S. retailers was more effort than it's worth.

Avoiding Travel to the U.S.

Alignment with values and beliefs was the biggest factor for those avoiding travel to the U.S. However, we also see guilt as a contributor. For those who weren't consciously avoiding travel to the U.S., it was because it wasn't seen as a priority, required more effort than it was worth, and wouldn't make a difference in the grand scheme of things. Finally, peer alignment was a factor here – those who were not consciously avoiding travel to the U.S. were more likely to agree that no one else they knew was avoiding travel. It's important to note that we conducted this analysis prior to widespread reports of travellers encountering problems at U.S. borders, and so the fear of a bad experience there may be an additional factor motivating those who are avoiding travel to the U.S. now.

Conclusion



Price sensitivity and convenience remain powerful barriers - patriotic messaging alone won't overcome significant cost premiums.

We caution brands against exaggerating their Canadian claims.

Based on these findings, it's clear that Canadian consumer sentiment has shifted significantly in response to political tensions with the United States. For marketers and brands, these insights present both challenges and opportunities. Canadian brands can leverage the patriotic momentum by highlighting their national identity, emphasizing how purchases support local jobs, and aligning with consumers' desire to "send a message."

However, they must also recognize that price sensitivity and convenience remain powerful barriers - patriotic messaging alone won't overcome significant cost premiums. For American brands operating in Canada, addressing these sentiments requires nuanced strategies: they might consider downplaying U.S. associations, highlighting Canadian employees or suppliers, or demonstrating commitment to the Canadian market through local initiatives. We caution brands against exaggerating their Canadian claims though, as our research finds that Canadians will punish brands that are seen - or caught - making false claims about Canadian connections.

Retailers and travel companies should be particularly attentive to these shifts, potentially developing targeted loyalty programs or value

propositions that acknowledge financial constraints while still appealing to national sentiment. As consumer patriotism encounters economic realities, brands that can align with Canadian values while offering competitive pricing and convenience will likely navigate this complex landscape most successfully.

About the MAPS Framework for Behavioural Change

MAPS looks at four factors in behaviour change:

1. Motivation: Do I want to do it?
2. Ability: Am I able to do it?
3. Physical: Does the context encourage it?
4. Social: What do other people do / value?

What's Next for Your Organization?

For more Ipsos research on the evolving political and social landscape, please contact the author:



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