

# Brands in Uncertain Times: The Citizen Consumer Project

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May 29, 2025

# Tourists from countries badly hit by Trump tariffs are staying away from US

## Trump Tariffs - Europe Claps Back While Tourists Avoid US

Trump's tariff threats spark EU retaliation, trigger tourism dip and economic jitters. The transatlantic tiff is already costing the US big.

Reuters

## Trump tells Walmart

Walmart's CEO said the war  
19 hours ago

Global News

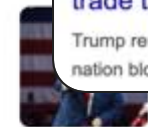
## Trump's tariffs on EU delayed after call with bloc chief on trade talks

Trump restored a July 9 deadline to allow for talks between Washington and the 27-

Global News

## Trump's tariffs on EU delayed after call with bloc chief on trade talks

Trump restored a July 9 deadline to allow for talks between Washington and the 27-nation bloc to produce a deal after what he said was "a..."



Guardian

## A pause in the trade war will be brief. Small businesses, however, accordingly



The Hill

## Volvo to cut 3,000 jobs as Trump tariffs rattle auto market

Volvo announced it plans to cut 3000 positions as President Trump's tariffs continue to rattle the Swedish-based car company...



CNN

## Trump says the clock is ticking for 150 countries to deal or face higher tariffs

If you thought President Donald Trump's trade war was over, he has you. Tariffs are going up again.

## Tourists from countries badly hit by Trump tariffs are staying away from US

Data from hotel site Trivago shows fewer US bookings by holidaymakers from Canada, Japan, Mexico and Germany.

CNBC

RETAIL

## Target cuts sales outlook as retailer blames tariff uncertainty and backlash to DEI rollback

WATCH LIVE

## Trump threatened 50% tariff on the EU

Trump threatened a 50% tariff on the European Union from June 1...



## Canada's economy appears in crisis; job data at its lowest almost in years

Tech News : Canada faces economic challenges under Prime Minister Mark Carney.



Bloomberg

## Grim Economic Outlook Overtakes S&P 500 Disruptions Surface

One thing is clear as the first-quarter earnings season begins: The economic outlook for the global economy is superseding...

CTV News

## Trump says he'll delay a threatened 50% tariff on the European Union until July

U.S. President Donald Trump said Sunday that the U.S. will delay implementation of a 50% tariff on goods from the European Union from June 1...



## Trump is chewing into Canada's

...inflation price increases as key data to tank. Read on.



RETAIL

## Target cuts sales outlook as retailer blames tariff uncertainty and backlash to DEI rollback

Bloomberg.com

## EU Focus on Critical Sectors in Bid to Avoid Trump's

The European Union is seeking to accelerate trade talks with the US just six weeks after President Donald Trump's threatened 50% tariffs...



# Speakers



**Shelley Brown**  
FCB Canada  
Chief Strategy Officer



**Jennifer Birch**  
Angus Reid Group  
Head of Public Affairs

# A Major New Study

The **Angus Reid Group** has conducted ongoing tracking of the evolving environment in Canada and the US since the first threat of tariffs.



Now, in collaboration with **FCB**, we have completed a large-scale study exposing the **emotional volatility reshaping people's views as citizens** and their **behaviour as consumers**.

*Study Date: April 26-May 2, 2025*





# Tariffs: Weighing On Their Minds

# Tariffs: Weighing On Their Minds

A significant majority of Americans and an even larger proportion of Canadians are **closely following the tariffs issue**.

The issue has them worried.

66%



Americans worried about the impact of tariffs on the American economy

84%



Canadians worried about the impact of tariffs on the Canadian economy

# Tariffs: Feeling it personally

This is not simply a general worry - a majority in both countries is **feeling the pinch in their daily lives** and in how they manage their finances for the future.

## Over 50%



Say that tariffs are making it harder to pay for groceries, plan for retirement, save money.



# Worried about their **jobs**





# 1 in 2

**Canadians and Americans are worried about  
job security as a result of tariffs**

# Tariffs aren't the only issue, in fact aren't #1

#6

in USA

#3

in Canada

Country	Tariffs Charged in the U.S.A., Including Customs Modernization and Trade Barriers	U.S.A. Discounted Reciprocal Tariffs
China	67%	34%
European Union	39%	20%
Vietnam	90%	46%
Taiwan	64%	32%
Japan	46%	24%
India	52%	26%
South Korea	50%	25%
Thailand	72%	36%
Sweden	61%	31%
Indonesia	64%	32%
Malaysia	47%	24%
Philippines	97%	49%
U.K.	10%	10%
Canada	60%	30%
Mexico	10%	10%
Colombia	74%	37%
Peru	10%	10%
Chile	33%	17%
Costa Rica	34%	17%

A woman is seen from the waist up, pushing a shopping cart and holding a box. She is in a grocery store aisle with shelves of products. The entire image is covered with a semi-transparent blue filter.

**Cost of living is #1 North and South**

**9 in 10**

**are worried about the  
cost of living**

# Concerned about the affordability of everything

Rising cost of everyday items

9 in 10



A horizontal row of 10 white human icons. The first 9 are solid white, and the 10th is an outline.

Major Expenses

8 in 10



A horizontal row of 10 white human icons. The first 8 are solid white, and the last 2 are outlines.

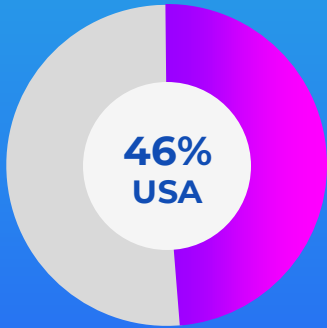
Saving and Investing

7 in 10

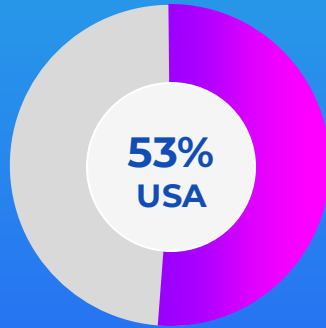


A horizontal row of 10 white human icons. The first 7 are solid white, and the last 3 are outlines.

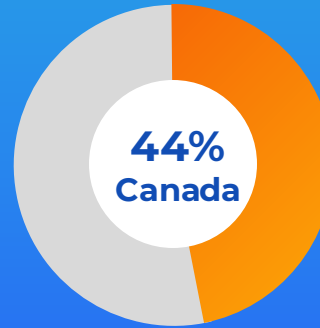
# Cutting Back: Now and Looking Ahead



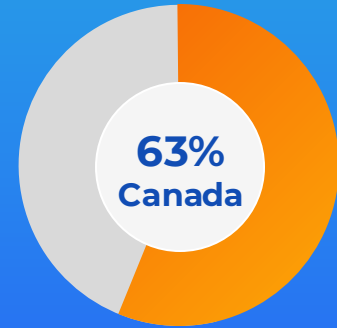
Cutting back now



Expect to cut back  
in the future



Cutting back now



Expect to cut back  
in the future

# Cutting more than the fluff

At least  
**30%**  
of Americans  
and Canadians are  
cutting back on:



# Implications

Deliver value in both **emotional and rational terms**



## Rational

Price and value will be relevant and compelling in the short term



## Emotional connection

Best long-term protection against price sensitivity

**Don't push them** into a purely rational space.  
Unless you know you have the **lowest price** in the category.

# Heavy Emotional Toll

**63%**

**Americans**

are Distressed &  
Disengaged

**51%**

**Canadians**

are Distressed &  
Disengaged

## **Distressed & Disengaged:**

Mostly, if not totally, hopeless, apathetic, stressed,  
overwhelmed and pessimistic.



# Disengagement is Toxic

Among the majorities who are Distressed & Disengaged:

>70%

believe democracy  
is under threat

2 in 3

expect to cut back  
on their spending

**Distressed & Disengaged** are 63% of the sample in the US; 51% in Canada

# Implications

## Engage the disengaged



### Control

- Shifting to discount
- Choosing private label
- Looking for offers & promotions
- Getting the most out of loyalty programs



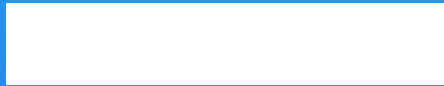
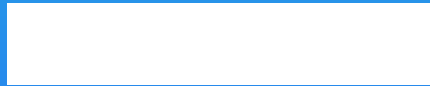
### Empathy

- Parallel with COVID
- Reward brands that get it
- Brands can provide reassurance, even a dose of badly needed optimism
- We all need a laugh

# Split Identities: Citizens vs Consumers



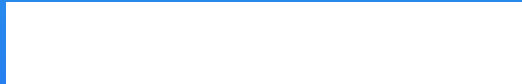
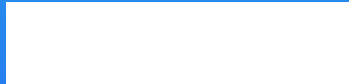
49%



51%



40%



60%

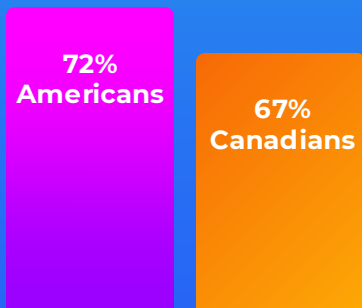
Most power as  
**Citizen**

Most power as  
**Consumer**

# Citizen & Consumer Concerns

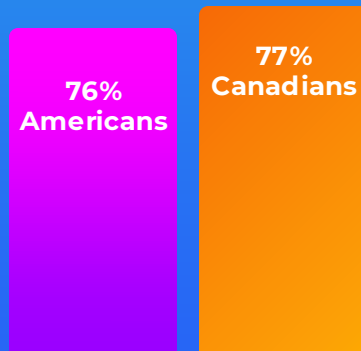
**Democracy  
is under threat**

**2:3**



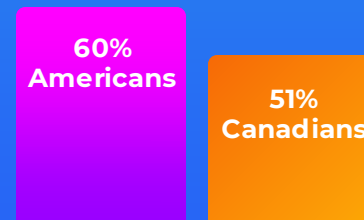
**Direction  
of the country**

**3:4**



**My finances  
out of my control**

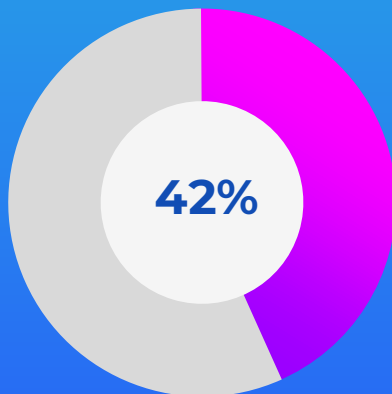
**Majority**



# Politics matters

## In the US, more than demographics

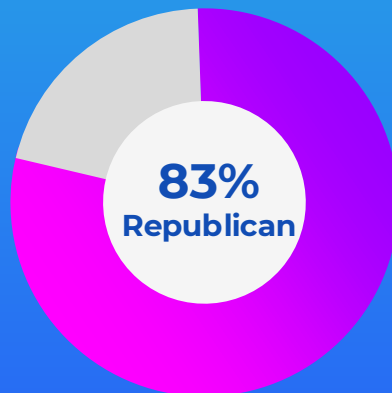
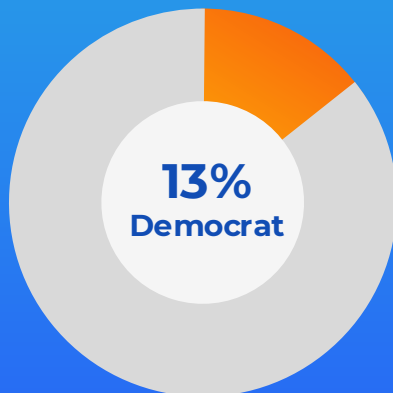
### Feeling Hopeful



# Two Americas

Politics matters more than demographics in the US

## Feeling Hopeful





**According to our analysis, America is splitting into two different economies and markets:**

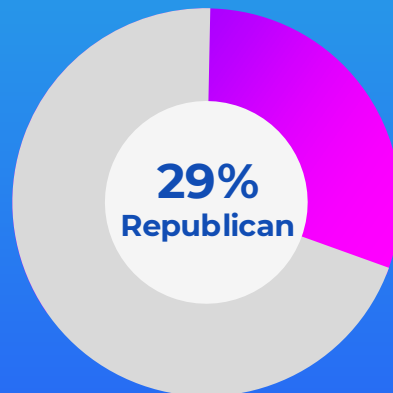
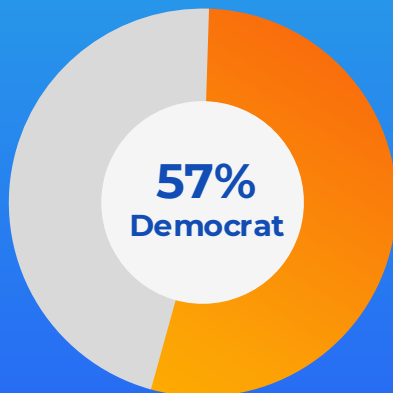
**One conservative, the other liberal. People on each side think about the economy differently, they buy different things and work in increasingly different industries.**

**The Economist**

# Two Americas

Politics matters more than demographics in the US

Spending Less

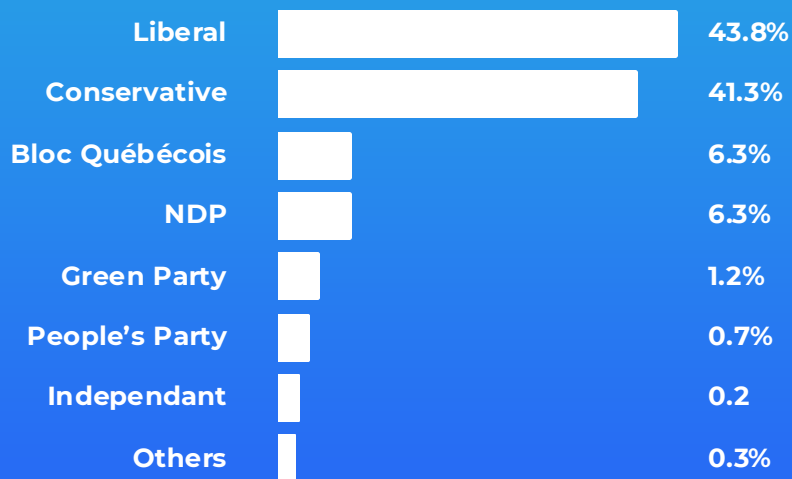




# Partisan Canada

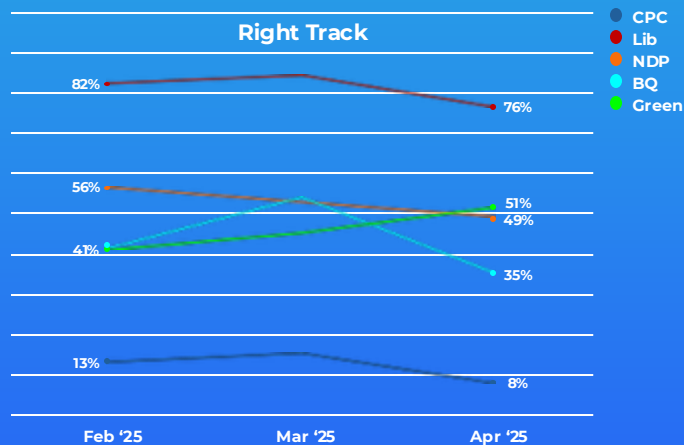
The political divide is growing in importance in Canada too as the Liberals and Conservatives effectively split the vote and public opinion.

## Vote Share



Source: Elections Canada

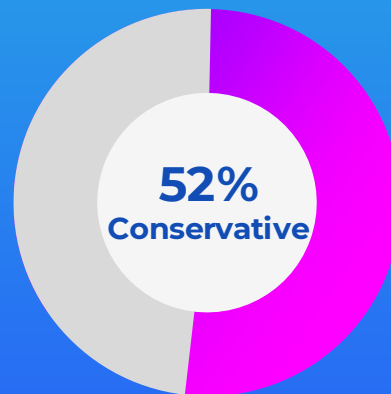
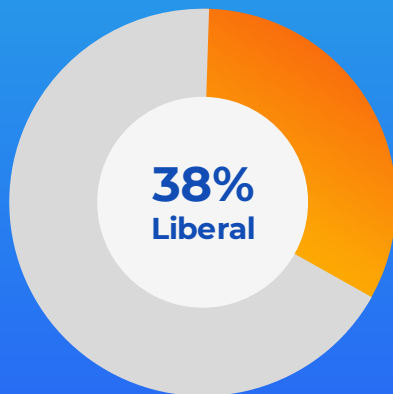
## Public Opinion



Source: ARG Socio-Economic Pulse

# Partisan Canada

## Spending Less

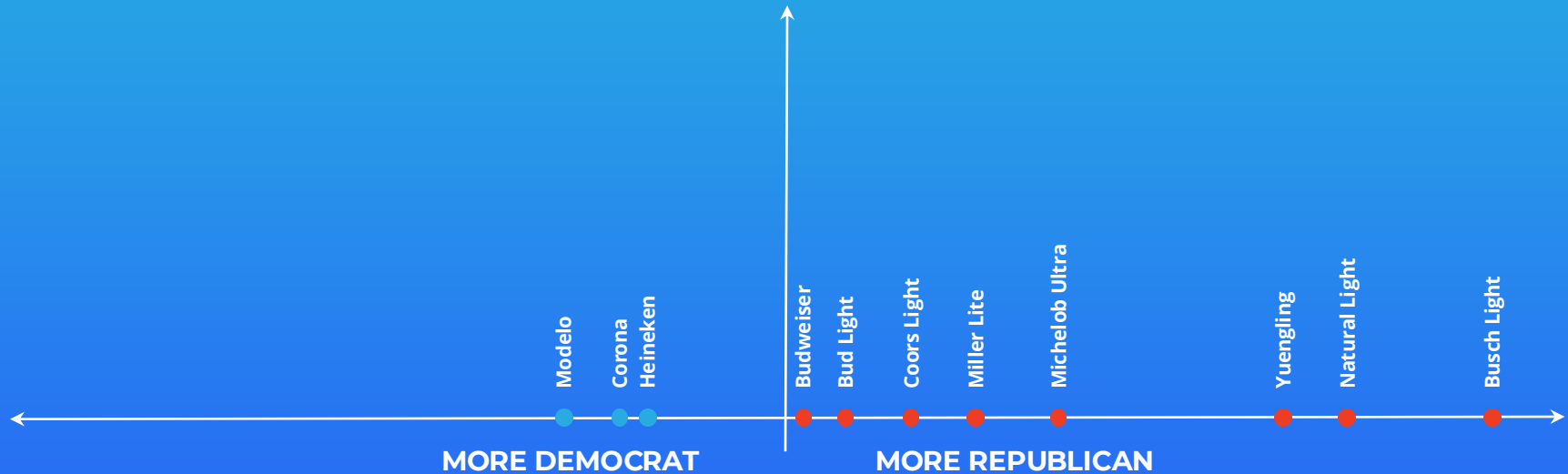


# Implications

## Know their politics



# The Politics of Beer



Source: Harvard Business Review, 2024

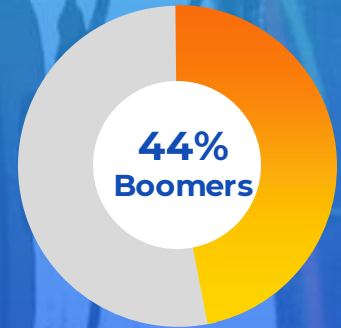
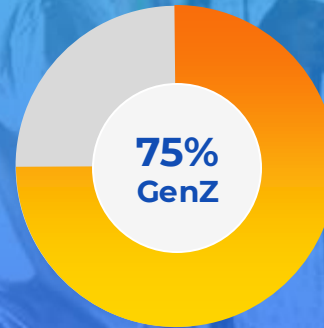
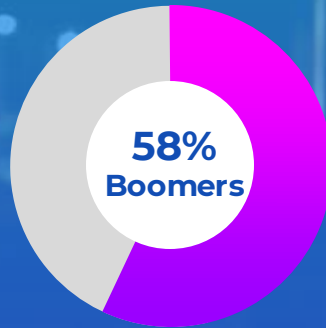
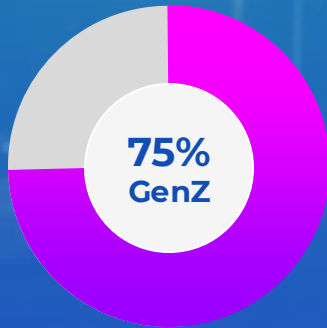
# Implications

Know their politics



# The kids are not alright

## Distressed and Disengaged



# Implications

## Beware of averages

Specific strategies for young adults that address their constrained finances, prospects and emotional resources. And their interests and passions.

Meet them on their terms, in their spaces. **Earn your right to be there.**



**FORTNITE**



# Northern Pride

**Canadians are feeling more proud** of their country than Americans are about theirs.

**45%**  
USA

**70%**  
Canada

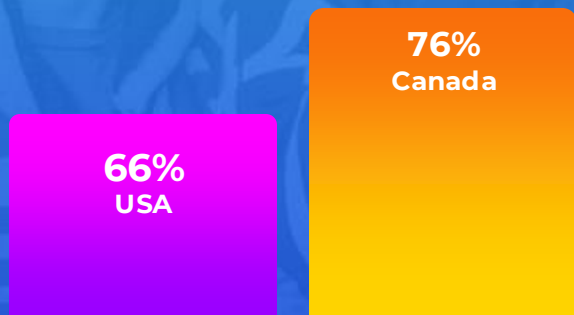


# Angry Pride

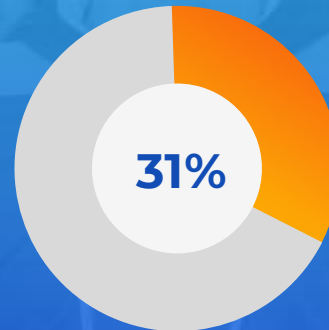
Canadian pride is on the rise, but it is **tinged with anger and anti-American sentiment.**

Canadians are still booing during the American anthem.

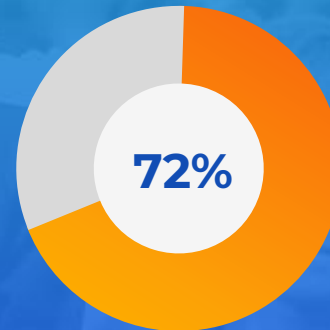
## Angry



## Buy Canadian Motivation

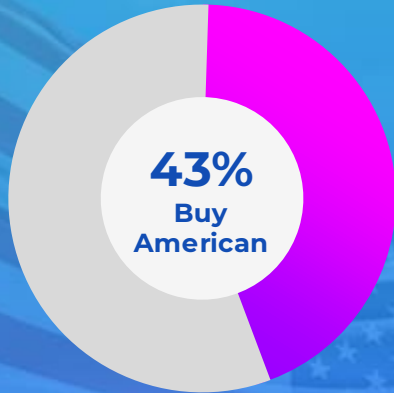


Sending a message to the US government

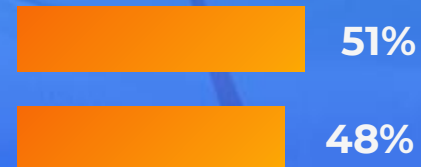
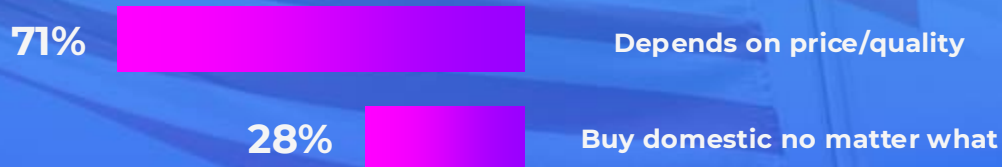


Boycott US products

# Spending with Pride



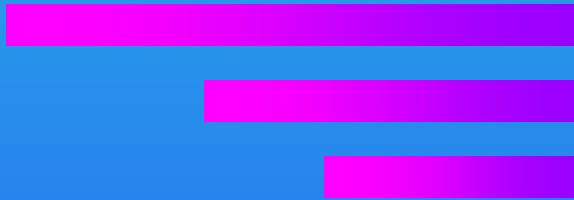
## Not pride alone



# Showing up as Canadian / American



## Top 3



Headquarters in America

Produces, sources from US suppliers

Employs lots of Americans

Produces, sources from Cdn suppliers

Headquarters in Canada

Majority Canadian owned



## Bottom 2



Uses American symbols



Involved US community causes

Uses Canadian symbols



Involved CDN community causes



# Implications

Know when to show the flag (or not)



**Canadian brands  
in Canada:**

Loud and proud.

**American brands  
in Canada:**

Sell a good product  
at a good price.

Don't maple wash.

## Mixed supply chain:

In a modern economy, most  
brands involve inputs from all  
over the world:

Heinz buys tomatoes grown in  
Ontario, does that make it a  
Canadian brand?

Identity is not simple.



**Import brands  
in the US:**

Price and quality  
matter most

**American brands  
in the US:**

Know your target's  
politics.

# Takeaways

- **Engage the disengaged**
- **Know their politics**
- **Help them gain control; show empathy**
- **Avoid maple-washing**
- **Mind the generation gap**
- **Stay tuned**

# Questions?

# Thank you!

