

# Inside the 'Buy Canadian' mindset

A guide to why Canadians are  
spending their dollars at home  
and its impact on ecommerce.





# Inside this report

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# Adapting to Canada's new shopper reality

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**A profound shift is taking place in the Canadian marketplace.**

Increasingly, consumers are demonstrating a distinct preference for businesses, products and services identified as 'Canadian,' ushering in a new era of patriotic purchasing. This complex, evolving trend is driven by a mix of heightened political tensions with our neighbours to the south, global trade dynamics and a deep-seated desire to strengthen our national economy.

**For brands and retailers, understanding this nuanced shift is critical.**

This report provides a comprehensive look at where Canadian shoppers and businesses stand today, exploring their current attitudes, concerns and expectations regarding this burgeoning mindset. Through our exclusive research, we aim to equip you with the knowledge needed to navigate these changing tastes and capitalize on the opportunities presented by a more nationally minded consumer.

86%

Of businesses are seeing a shift in shopper preferences toward buying Canadian, driven largely by a desire to support local businesses and jobs.





INSIDE THE 'BUY CANADIAN' MINDSET

# Voice of the Canadian Shopper

# 01





## What drives the Canadian consumer?

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The shift toward 'Buy Canadian' is fundamentally driven by the evolving attitudes and priorities of Canadian shoppers. To effectively navigate this new landscape, businesses must first understand the motivations behind these changing preferences, how shoppers define 'Canadian' and their expectations for retailers and delivery services.



Let's listen to words and sentiments taken directly from the Canadian shopper.



## Why shoppers prioritize Canadian

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'Buy Canadian' reflects deeply held values and concerns among shoppers. Understanding these core motivations is key to connecting with this increasingly patriotic base.

Canadian shoppers are worried about the impact of global uncertainty on their finances.

**87%**

Express concern about current tensions with the U.S.

**83%**

Are making different spending choices because of U.S.-Canada tensions.

**39%**

Have cut back on spending, largely due to the rising cost of living, economic uncertainty and concerns about recession.

**33%**

Have cancelled cross-border day trips.



Canadian shoppers have already changed their spending behaviour.

**89%** Using more products labelled 'Made in Canada.'

**89%** Using more products labelled 'Product of Canada.'

**89%** Using more products sold by Canadian companies.

**89%** Paying more attention to where products are made.

**70%** Seeking Canadian sellers on U.S.-owned online marketplaces.

**69%** Seeking alternatives to U.S.-made products, regardless of where they are made.

**57%** Shopping less at U.S.-owned retailers operating in Canada.

**56%** Shopping less on U.S.-owned marketplaces.





Canadian shoppers plan to keep supporting Canadian brands, products and retailers for the long run.

88%

Will support Canadian businesses long term, regardless of trade or tariff changes.

87%

Are more likely to choose Canadian brands in the future than they were previously.

88%

Will seek Canadian retailers, even if the 'Buy Canadian' mindset fades.

81%

Will prioritize Canadian products in the future, even if price or availability change.

87%

Will continue to seek Canadian products, even if 'Buy Canadian' fades.



## How shoppers define 'Canadian'

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The term 'Canadian' holds diverse meanings for consumers, extending beyond simple country of origin. Businesses must understand these nuances to authentically communicate their Canadian identity and avoid perceptions of 'Canadian washing.'

60%

Canadian shoppers are concerned about brands 'Canada washing' or 'maple washing.'





## How shoppers define 'Canadian'

90%

One where almost all (~90%) materials, parts and labour come from Canada.

52%

One made or finished in Canada but may include up to 49% imported materials or parts.

31%

Packaged or assembled in Canada, but most of the materials or parts are from other countries.

46%

Say they know the difference between 'Made in Canada' and 'Product of Canada' labels, while more than one-third recognize a difference but aren't sure what it is (38%).



## Made in Canada

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This label indicates that more than half (at least 51% but less than 98%) of the total direct costs were incurred in Canada. The Competition Bureau encourages qualifying statements for this label, such as “Made in Canada with imported parts.”

**VS.**

## Product of Canada

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This label signifies that at least 98% of the total direct costs of producing the item were incurred in Canada. Essentially, it means the product was made in Canada by Canadians, with only negligible imported elements.





## Shopper expectations of retailers' shipping choices

Beyond product origin, Canadian shoppers have clear expectations for how retailers operate and ship, particularly concerning their commitment to Canadian values. Meeting these demands is crucial for building trust and loyalty in the current market.

 **Canadian concerns** occupy seven of the top 10 considerations Canadian shoppers focus on when choosing a retailer.

**01** Easy returns (91%)

 **02** Carries Canadian-made products (90%)

 **03** Is a Canadian-owned business (89%)

**04** Brand reputation (89%)

 **05** Trying to source Canadian-made products (88%)

**06** Is a local business (88%)

 **07** Employs Canadian workers (87%)

 **08** Fulfills orders within Canada (87%)

 **09** Doesn't pass tariff costs onto customers (83%)

 **10** Is not a U.S.-owned business (81%)



Of Canadian shoppers say it's important they use a Canadian-owned delivery company when shipping a package.



Of Canadian shoppers prioritize Canadian-owned when selecting a delivery partner.



Canadian shoppers see the benefits in shipping Canadian.



Want to know who will be delivering their order before they make a purchase.



Want the option of a Canadian delivery service.



Say using a Canadian delivery service improves their opinion of a retailer.

Canadian shoppers strongly support the use of Canadian-owned delivery companies.

**87%**

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Think retailers that use Canadian-owned delivery companies should make it clear they're supporting Canadian businesses through their deliveries.

**86%**

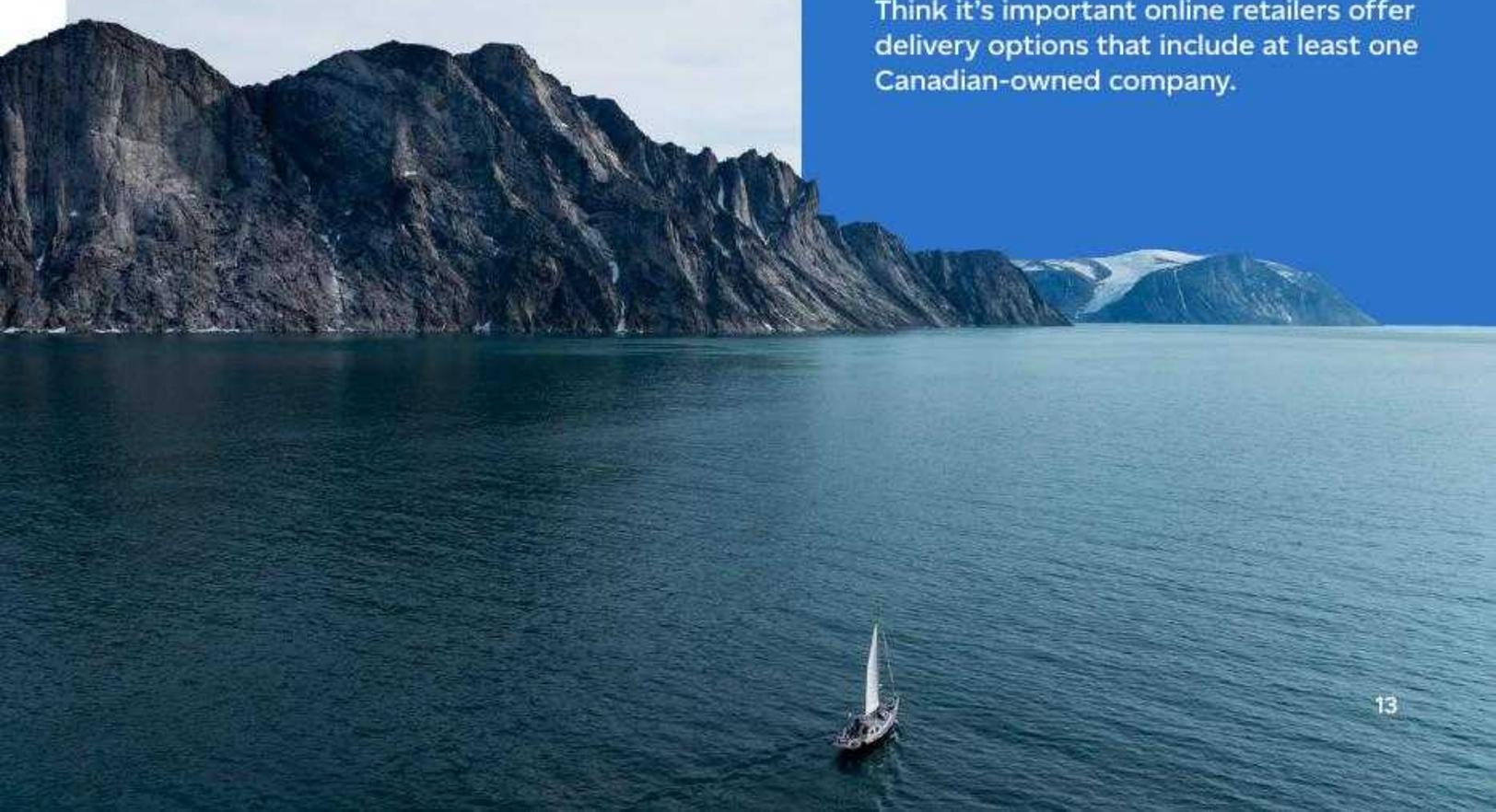
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Want online retailers to use Canadian delivery companies to truly support Canada.

**84%**

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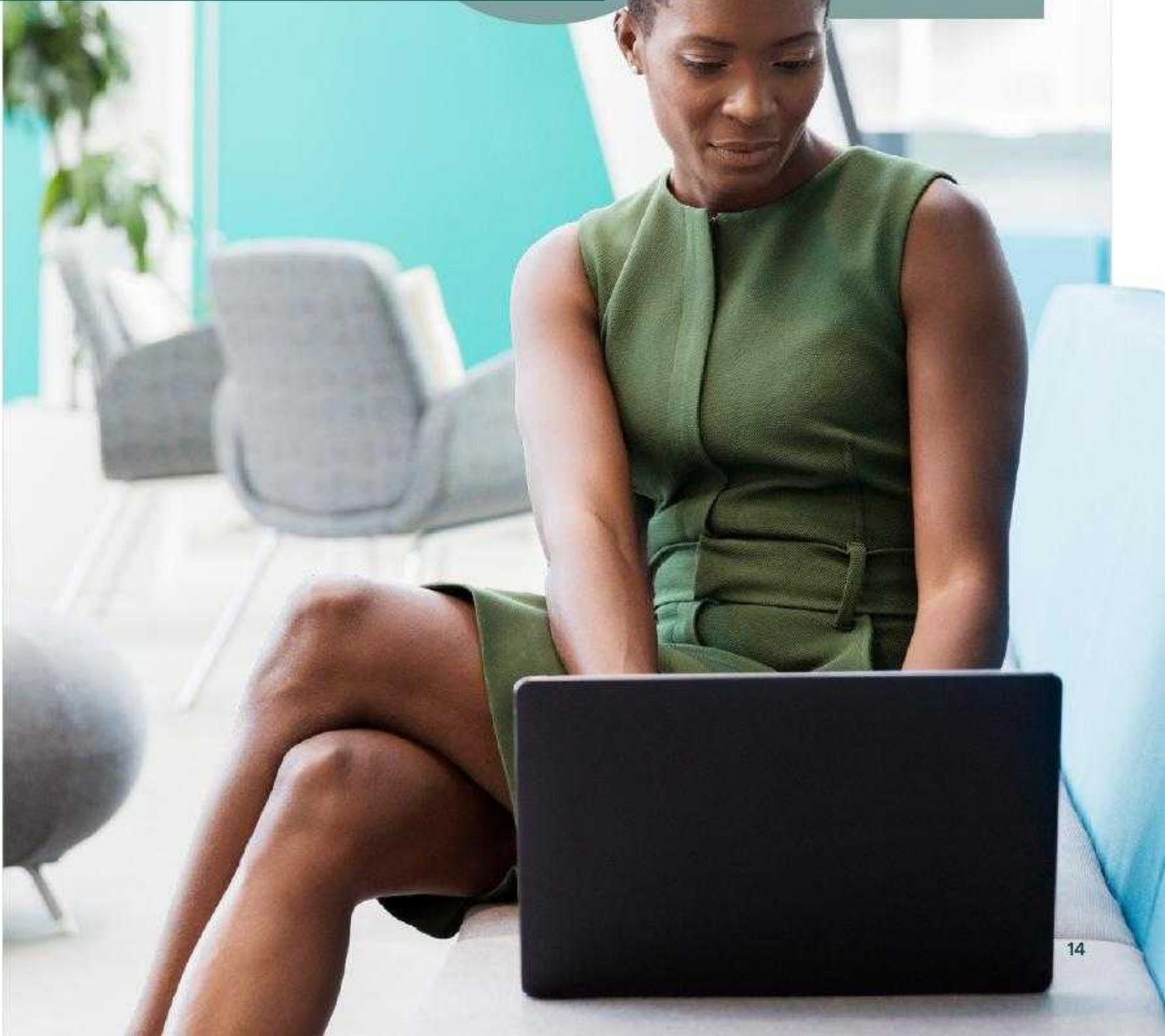
Think it's important online retailers offer delivery options that include at least one Canadian-owned company.





INSIDE THE 'BUY CANADIAN' MINDSET

# Perspective of Canadian businesses





# Navigating a new Canadian-coloured reality

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The shift in shopper preferences toward 'Canadian' has profound implications for businesses operating across the country. Understanding how these changes are perceived, and the challenges and opportunities they present, is crucial for strategic planning and sustained growth.



Let's explore the current landscape from the viewpoint of Canadian businesses.





## Business concerns and impacts

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Businesses in Canada are acutely aware of the evolving market dynamics and face unique challenges and opportunities stemming from the 'Buy Canadian' mindset and broader economic shifts. Their concerns range from trade tensions to market competition, directly influencing their operational strategies and outlook.

Top five concerns of businesses in Canada for the coming year.

**48%** Canada-U.S. trade war.

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**38%** Economic factors like inflation or recession.

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**36%** Increased competition from online marketplaces and retail giants.

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**23%** Less demand for our products/brands from U.S.-based consumers.

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**23%** Less demand for our products/brands from Canadian consumers.

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 Canadian concerns account for half of trade war's business impact.

**59%**

Increased costs, which may lead to higher prices for customers.

**32%**

A shift toward sourcing more Canadian products.

**41%**

Reduced profit margins.

**29%**

Reduced demand for our products to non-Canadian origins.

**34%**

Difficulty maintaining current product offerings due to sourcing challenges.

**33%**

Increased demand for Canadian products from customers.



## How businesses and shoppers define 'Canadian'

Shoppers and businesses don't exactly agree when it comes to what they consider 'Canadian.' While they share some common ground on more symbolic markers, some of the harshest divides focus on ideas around Canadian ownership and the extent of local sourcing.

### What is 'Canadian' anyway?

#### 'Canadian' products are

Manufactured in Canada using Canadian parts or raw materials.

**59%** Businesses

**76%** Shoppers

Designed in Canada but manufactured elsewhere.

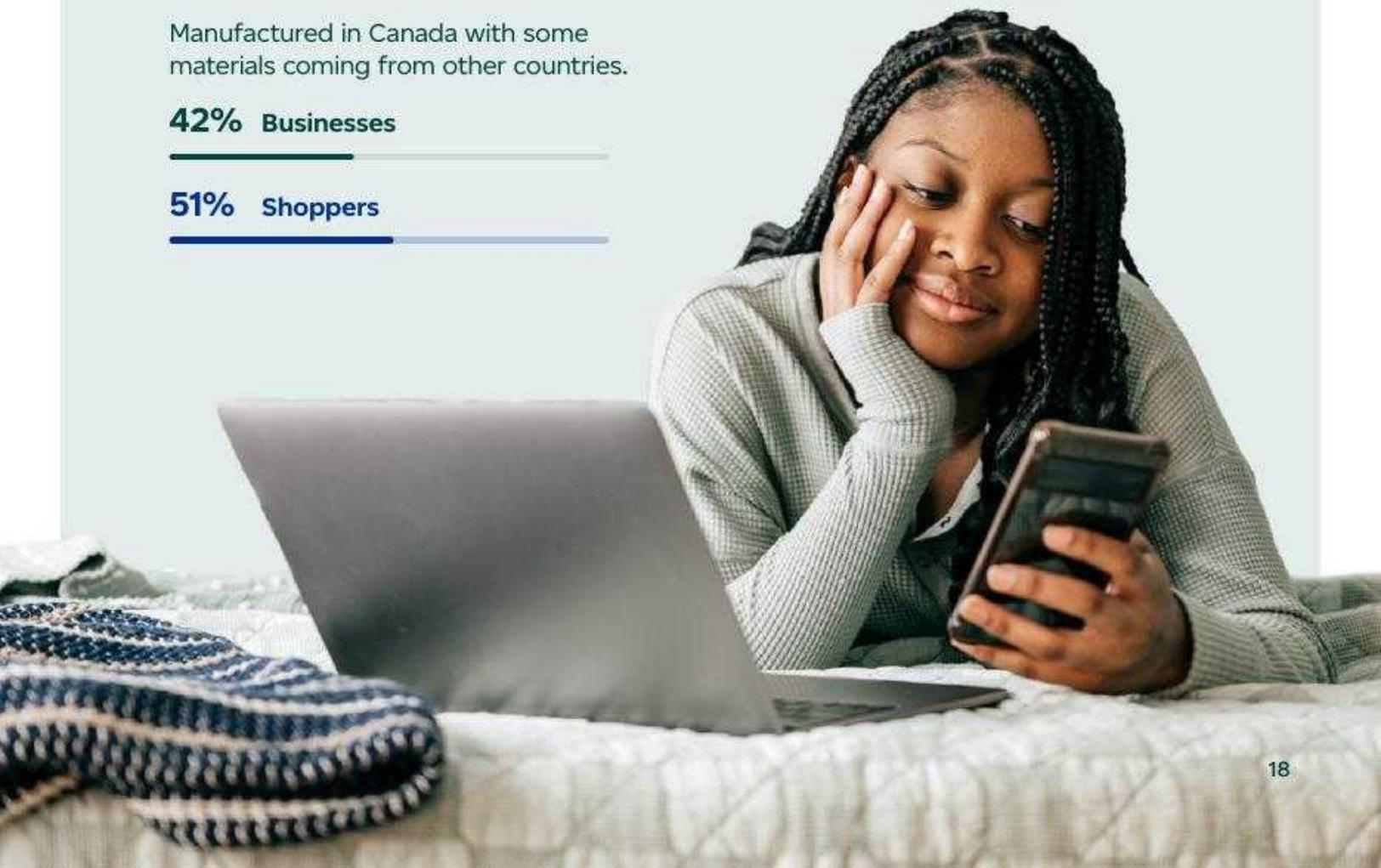
**22%** Businesses

**12%** Shoppers

Manufactured in Canada with some materials coming from other countries.

**42%** Businesses

**51%** Shoppers





**'Canadian' operations are**

Canadian-owned and operated, selling Canadian-made products only.

**45% Businesses**

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**77% Shoppers**

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Canadian-owned/operated, regardless of where products are sourced from.

**38% Businesses**

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**49% Shoppers**

---

Employs Canadian workers.

**37% Businesses**

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**57% Shoppers**

---

Sources products or materials from Canadian suppliers.

**34% Businesses**

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**58% Shoppers**

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Headquartered or has offices in Canada.

**32% Businesses**

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**48% Shoppers**

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Ships its products from within Canada.

**28% Businesses**

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**41% Shoppers**

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Operates a website that ends in ".ca".

**24% Businesses**

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**28% Shoppers**

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Shows Canadian \$ pricing on their website.

**24% Businesses**

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**26% Shoppers**

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Has brick and mortar stores in Canada.

**24% Businesses**

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**36% Shoppers**

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Uses Canadian branding/symbols (e.g., maple leaf, red/white colours).

**22% Businesses**

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**29% Shoppers**

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## Business priorities in a changing market

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In response to these market shifts and consumer demands, Canadian businesses are re-evaluating their operational priorities and strategic investments. Their focus extends beyond traditional metrics to include factors that align with the growing 'Buy Canadian' mindset, particularly in areas like supply chain and logistics.

Businesses are responding to the 'Buy Canadian' mindset in several ways.



Clearly labelled 'Made in Canada' products on their website.



Started or increased sourcing from Canadian suppliers and manufacturers.



Increased use of Canadian-owned logistics, fulfillment or delivery services.



Canadian businesses prioritize Canadian-owned companies when selecting delivery partners.



Participated in 'Buy Canadian' or 'Shop Local' initiatives.



Canadian businesses prioritize companies that employ Canadian workers when selecting shipping partners.



Launched marketing campaign that highlights their Canadian identity.



Businesses say it is important for their business to use a Canadian delivery company.



### Factors that influence businesses to ship Canadian.



Supporting Canadian businesses and local economy.



Desire to distance from U.S. shipping companies.



Customer preference for Canadian-based services.



Government or corporate policies favouring Canadian suppliers.



National pride or economic nationalism.

### Businesses see the benefits in shipping Canadian.



Offer the choice of a Canadian delivery company at checkout.



Say promoting a Canadian delivery company to their customers enhances their brand's appeal.





INSIDE THE 'BUY CANADIAN' MINDSET

# Adapting to the new Canadian shopper

# 03





# Strategic playbook for a Canadian market

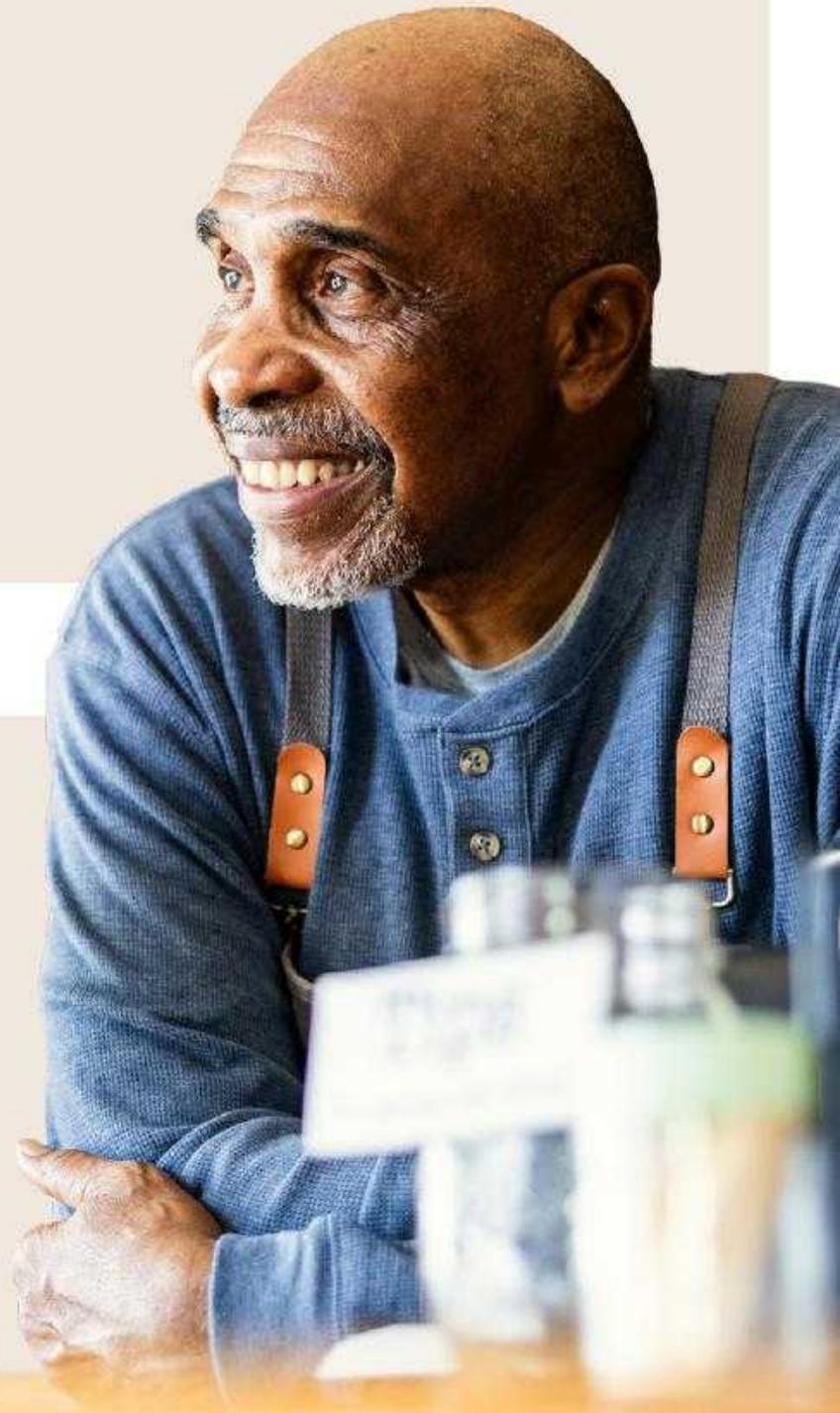
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The insights from Canadian shoppers and businesses reveal a clear mandate: Adapt to a market increasingly defined by Canadian preferences. But how do businesses go about that?

This section outlines the strategic and operational shifts necessary for brands and retailers to not only meet these evolving demands but to thrive within this new commercial reality.



**Let's explore some actionable strategies for success.**





## Strategic responses to 'Buy Canadian' mindset

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To effectively engage with the 'Buy Canadian' mindset, businesses must implement deliberate strategies that align with shopper values and address market challenges. This involves a proactive approach to how products are developed, sourced and presented to the Canadian consumer.

### Actionable strategies



#### Prioritize authenticity over appearance

Shoppers are discerning. A significant portion is concerned about 'Canada washing' or 'maple washing.' Superficial claims will likely backfire. Focus on genuine Canadian content and practices.



#### Align with consumer definitions of 'Canadian'

Meet shoppers where they are. Consumers often prioritize products manufactured with Canadian parts and raw materials. Ensure your product's Canadianness aligns with these expectations.



#### Proactively source Canadian components

Leverage the strategic advantage of Canadian suppliers. Many businesses are already increasing their sourcing that way. This not only meets consumer demand but can also build supply chain resilience.



#### Ensure clear and accurate labelling

Be transparent about your product's origin. Shoppers are increasingly paying attention to 'Made in Canada' and 'Product of Canada' distinctions. Adhere to official definitions and provide any necessary qualifying statements.





## Operational shifts and supply chain adjustments

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The demand for Canadian extends deep into operations, particularly supply chains and logistics. Adapting these foundational elements is crucial for meeting shopper expectations and building resilience in a changing economic climate.

### Actionable strategies



#### Embrace domestic fulfillment

A substantial number of shoppers expect their orders to be fulfilled within Canada. Consider establishing or expanding Canadian distribution centres to meet this demand and potentially attract new customers.



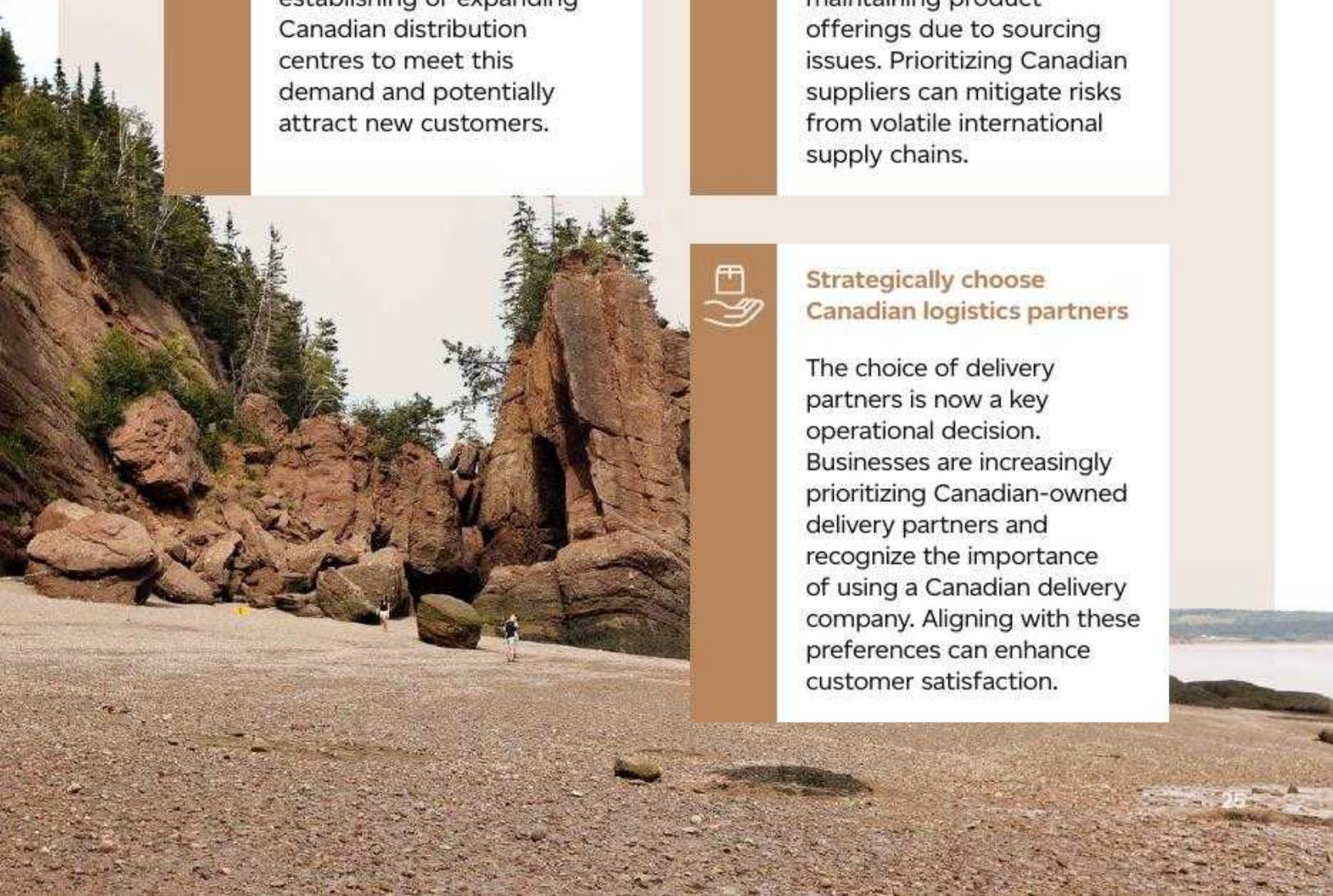
#### Strengthen supply chains with Canadian sourcing

Beyond shopper preference, Canadian sourcing offers strategic resilience. Many businesses face challenges maintaining product offerings due to sourcing issues. Prioritizing Canadian suppliers can mitigate risks from volatile international supply chains.



#### Strategically choose Canadian logistics partners

The choice of delivery partners is now a key operational decision. Businesses are increasingly prioritizing Canadian-owned delivery partners and recognize the importance of using a Canadian delivery company. Aligning with these preferences can enhance customer satisfaction.





## Marketing and branding for Canadian identity

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Effective communication of a business's Canadian identity is essential, but it must be done authentically and strategically. This is about more than slapping a maple leaf on ads and packaging.

### Actionable strategies



#### Go beyond superficial branding

While Canadian symbols have their place, consumers look deeper. Shoppers primarily define Canadian by factors like Canadian ownership, employment of Canadian workers and paying taxes in Canada. Your marketing should highlight these substantive contributions.



#### Leverage transparency in delivery

Make your Canadian logistics choices visible. A significant majority of shoppers want retailers to clearly communicate when they are supporting Canadian businesses through their deliveries. Businesses themselves recognize that promoting a Canadian delivery company enhances their brand's appeal.



#### Embrace authentic storytelling

Build trust by sharing genuine narratives about your Canadian sourcing, manufacturing processes and contributions to local communities. This approach counters 'Canadian washing' concerns and resonates deeply with the nationally minded consumer.



#### Align marketing with national identity

Join the growing number of businesses launching marketing campaigns to highlight their Canadian identity. Ensure these campaigns are rooted in genuine practices to maximize their impact and authenticity.



## 'Buy Canadian' doesn't need to mean 'Bye, American'

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For U.S.-based retailers looking to retain and grow their Canadian customer base, it's best not to ignore the 'Buy Canadian' mindset. While some strategies overlap with Canadian businesses, there are specific actions that can significantly enhance appeal and trust of U.S. businesses.

### Actionable strategies



#### **Prioritize Canadian product integration**

Actively stock Canadian brands and label them clearly. This demonstrates a direct commitment to supporting the Canadian economy and meeting consumer preferences for homegrown goods.



#### **Ensure fair and transparent pricing**

Keep Canadian prices fair. Try to avoid perceptions of price gouging or passing on disproportionate tariff costs, as this can quickly erode trust.



#### **Forge local partnerships**

Partner with Canadian farms, suppliers and artisans. This not only diversifies your product offering but also shows a genuine investment in the Canadian economy.



#### **Invest in Canadian infrastructure and employment**

Consider opening Canadian distribution centres and employing Canadian corporate leadership and workers. These actions signal long-term commitment and directly address consumer desires for job creation and local economic benefit.



#### **Leverage Canadian delivery services**

Utilize a Canadian-owned delivery company. This aligns with strong Canadian consumer preferences for supporting Canadian logistics and can significantly improve how a retailer is perceived.



#### **Engage authentically with Canadian consumers**

Beyond transactions, respond to Canadians on social media and take concerns seriously. Consider customized loyalty programs for Canadians and support Canadian charities to build deeper connections.



## Top ways Canadian shoppers say U.S.-based retailers can retain their business.





INSIDE THE 'BUY CANADIAN' MINDSET

# How Canada Post supports Canadian businesses





# Put more Canada in your business with Canada Post

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In a marketplace increasingly defined by Canadian preferences, businesses need partners who understand and can facilitate this shift. Canada Post is uniquely positioned to empower businesses, providing the infrastructure and services that allow them to authentically connect with Canadian consumers and authentically capitalize on the 'Buy Canadian' mindset.



**Let's delve into Canada Post's  
role in fostering Canadian  
business success.**





## Enabling Canadian delivery preferences

By choosing Canada Post, businesses align with shopper expectations for Canadian-owned delivery, naturally integrating a trusted national service into their operations. This choice directly enhances brand perception and customer loyalty.

### Nationwide delivery

As Canada's national postal service, our unparalleled network provides access to every Canadian address. This means businesses can reach online shoppers in every corner of the country with a truly Canadian delivery experience, meeting the strong consumer desire for Canadian-owned services and Canadian-rooted commitment.

**17.6 million** addresses

Unparalleled reach with access to every Canadian address.

**4.9 million**  
lobby boxes

**22,500**  
indoor lockers

Exclusive access to 4.9 million lobby boxes and 22,500 indoor parcel lockers in condos and apartments nationwide.

**7 in 10**  
Addresses served by secure delivery points.

**\$0**  
No residential, rural or remote surcharges for delivery from coast to coast.



### Canadian workforce

Our operations are powered by a dedicated Canadian workforce woven deeply into every community. This commitment to local employment resonates with consumers and businesses alike, allowing your brand to align with businesses that prioritize partners employing Canadians.

### Canadian retail network

With a vast network of retail outlets, Canada Post offers businesses a ubiquitous and convenient Canadian touchpoint for shipments, returns and pickups. This extensive presence underscores a commitment to Canadian communities, making it easier for businesses to serve customers across the country.

# 62,000+

Employees dedicated to serving every community in Canada.

# 5,700

Retail outlets

Unmatched convenience for outgoing shipments and consumer pickups and returns.



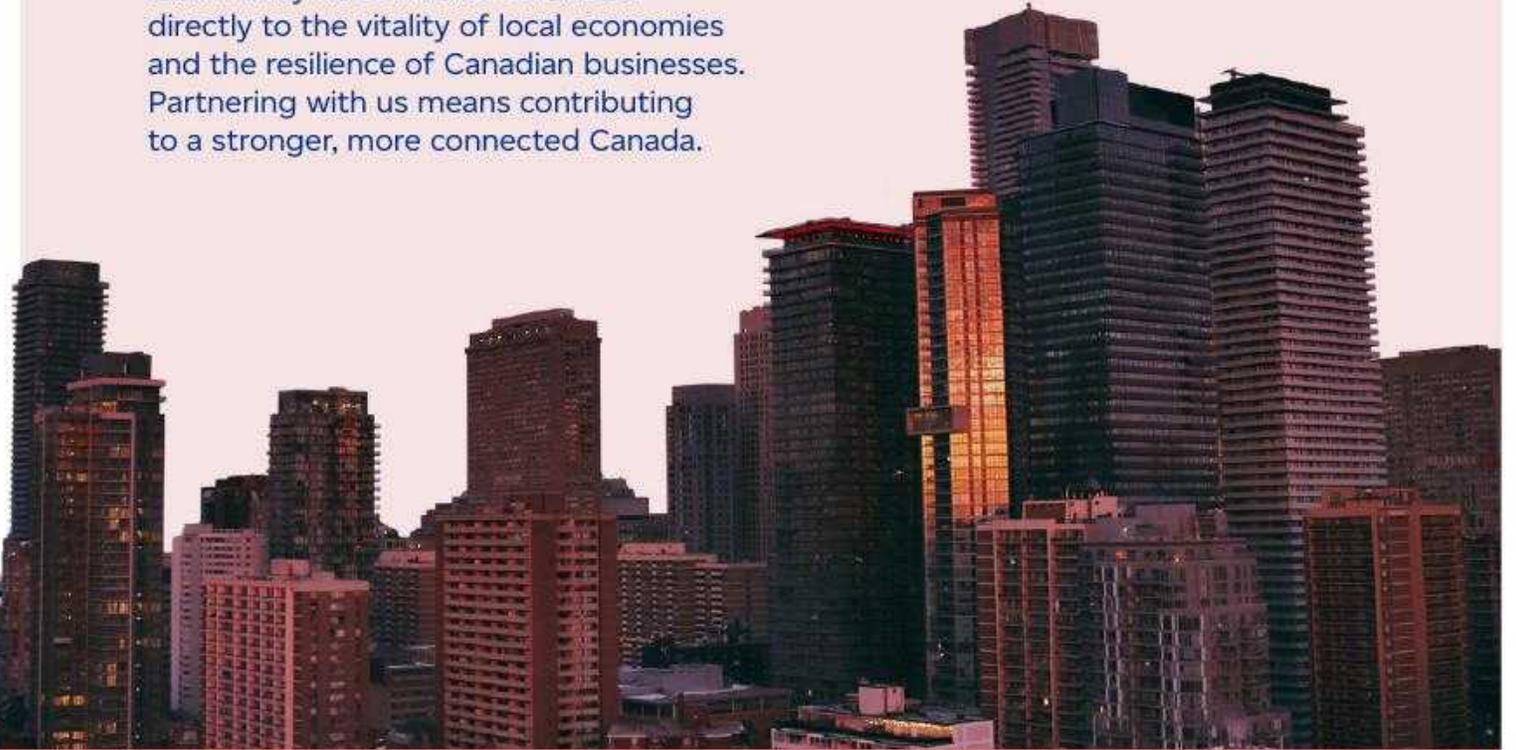
## 9 in 10

Canadians live within 5 km of a Canada Post outlet.



## Empowering Canadian businesses

Canada Post's inherent structure and community investments contribute directly to the vitality of local economies and the resilience of Canadian businesses. Partnering with us means contributing to a stronger, more connected Canada.



### Shipping and receiving experience

Our robust network provides businesses with secure and comprehensive Canadian infrastructure for their logistics. This ensures reliable connections across the country, strengthening domestic supply chains and supporting economic activity in every region.



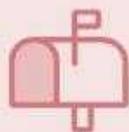
**21,800+**  
routes



**447**  
depots



**22**  
processing plants



### Marketing expertise

We offer expertise in direct mail and digital campaigns, enabling businesses to reach Canadian consumers in a trusted and impactful way. This leverages a medium that resonates uniquely within the Canadian market, helping businesses build stronger relationships with their customer base.



### Canadian research and thought leadership

We're committed to empowering businesses with the uniquely Canadian insights they need to grow, optimize and succeed. That's why we regularly commission in-depth research, exploring the ever-shifting mindsets of Canadian consumers and businesses.



### Solutions for Small Business

This free program provides Canadian small businesses with essential tools, exclusive discounts and guidance. It's designed to help them save time and money, directly contributing to the resilience and success of Canadian entrepreneurship.



### Community investment

Through initiatives like the Canada Post Community Foundation and the Community Hub program, we actively invest in Canadian communities. This direct support for local programs and infrastructure helps foster economic vitality and strengthens the social fabric across Canada, creating a more robust environment for all businesses.



#### Canada Post Community Foundation

**1,300+**  
funded projects.

**> 2 million**  
youth helped.

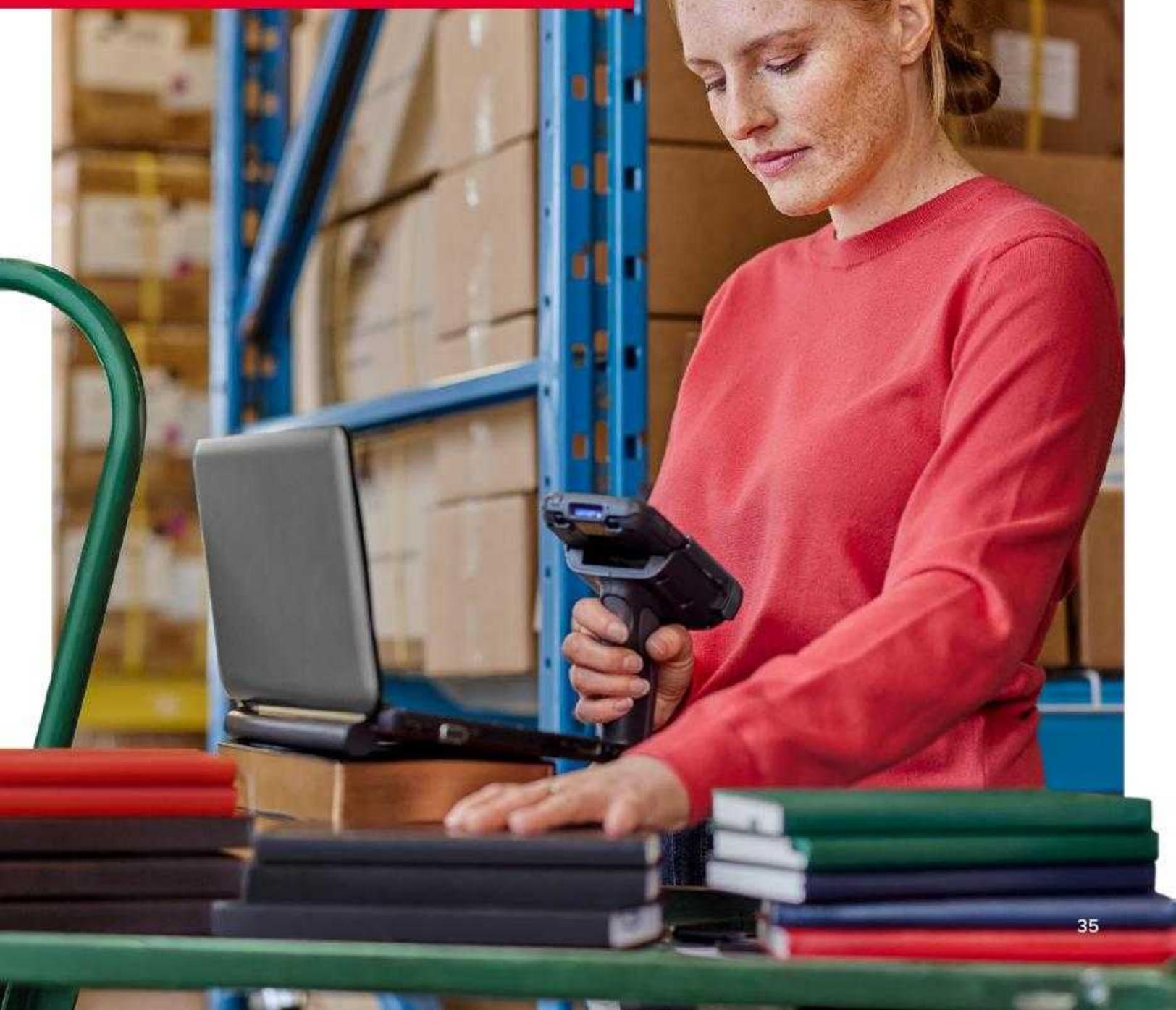
**19,000+**  
communities served.



INSIDE THE 'BUY CANADIAN' MINDSET

# Key takeaways

# 05





# The enduring power of Canadian preference

## Key takeaways from this guide

01

### **This is a fundamental shift, and not a fleeting trend.**

The 'Buy Canadian' mindset is deeply rooted in evolving shopper values and global political realities. It is here to stay – a lasting transformation in the Canadian marketplace rather than a temporary reaction. Businesses must recognize this in their strategic planning.

02

### **Authenticity is the new currency of trust.**

Shoppers are highly discerning about 'Canadianness,' looking beyond superficial branding to genuine contributions like Canadian ownership, employment and local investment. Brands that prioritize authentic integration of Canadian values will build deeper trust and loyalty.

03

### **Your supply chain is a strategic asset.**

How businesses source, fulfill and deliver products is now intrinsically linked to their Canadian appeal. Optimizing domestic supply chains and choosing Canadian logistics partners are powerful brand statements that resonate with shoppers.

04

### **Understanding 'Canadian' is a competitive advantage.**

The varied definitions of 'Canadian' among shoppers and businesses present both challenges and opportunities. Brands that clearly understand and align with consumer perceptions will gain a significant edge in relevance and appeal.

05

### **Partnerships drive Canadian success.**

You cannot go at it alone. Collaborate with partners like Canada Post, whose infrastructure, workforce and community ties provide businesses with a powerful platform to meet consumer demands and contribute to a stronger national economy.



# This guide is just the beginning!

Let us show you how Canada Post provides the infrastructure and services you need to authentically connect with Canadian consumers.

Let's talk

## Before you go!

Stay up-to-date with all the latest ecommerce news and insights.



**A note about this research:** At Canada Post, we're committed to empowering businesses with the uniquely Canadian insights they need to thrive. That's why we regularly commission in-depth research, exploring the ever-shifting mindsets of Canadian consumers and businesses. This document draws on key findings from the *Spring 2025 Consumer and Business OMNI Surveys* conducted by [Leger](#).