

The Shifting Psychology of the Canadian Consumer:

Why B.C. Leads the Way

Leger

Steve Mossop, Executive Vice-President
September 25, 2025



Presented to:

RCC | Retail West
Conference

Presentation Outline

The Leger logo, featuring the word "Leger" in a bold, sans-serif font. The "e" is stylized with a red dot and a red tail that loops around the "g".

1

Introduction
to Leger



2

The
Economic
Environment



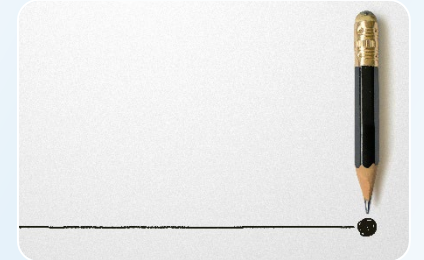
3

Political
Landscape



4

Shopping
Differences
across Canada



5

Conclusions

A little bit about Leger

8

offices in **Canada** coast to coast and the **USA**, and over

300

employees, including

235

consultants.

Last year, we conducted

5,626,037

online surveys and

249,523

telephone surveys.

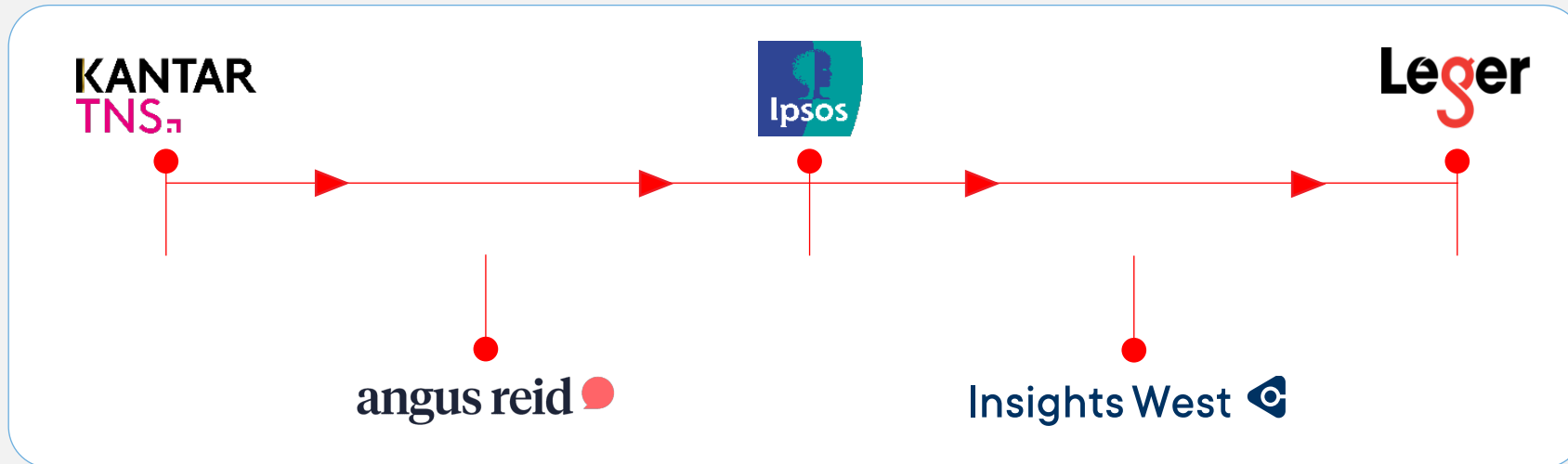
LEO is the **largest proprietary online panel**, with over

500,000

members in North America.

- Most Accurate Polling Firm In Canada
- Largest and Best Panel in Canada
- Diverse Clients With Complex Mandates
- One-stop Shop-Full Service
- Efficient Operational Structure

I've Been in the **Research Industry** for
40 Years, and I Learned the **Key To Success**
is **Asking The Right Questions**

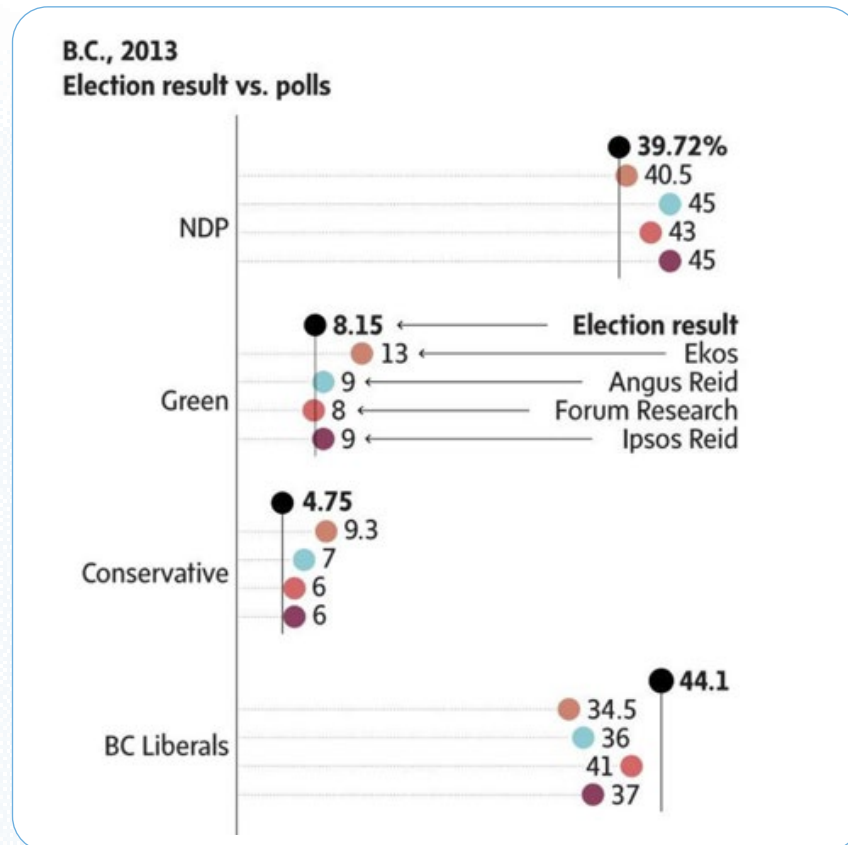


Remember The **Coke Marketing Disaster Of The** Mid-80's?



THEY DIDN'T
**ASK THE
RIGHT
QUESTION**
EITHER

I Experienced the **Failed Election Call** of Pollsters in the 2013 BC Election?
THEY DIDN'T **ASK THE RIGHT QUESTION** EITHER








The **Most Accurate** Polling Firm in Canada

CANADA 2025

LEGER POLL
Published on
April 26, 2025




OFFICIALS RESULTS
2025 Canada
Federal Election

	43%	43.7%
	39%	41.3%
	8%	6.3%
	6%	6.3%
	2%	1.2%

BRITISH COLUMBIA 2024

LEGER POLL
Published on
August 29, 2020



OFFICIAL RESULTS
2020 New Brunswick
Provincial Election

	46%	45%
	42%	43%
	9%	8%
Others	3%	4%

ALBERTA 2023

LEGER POLL
Published on
May 31, 2023







OFFICIAL RESULTS
2023 May
Provincial Election

	49%	52.56%
	46%	44.00%

ONTARIO 2022

LEGER POLL
Published on
June 1, 2022






OFFICIAL RESULTS
2022 Ontario
Provincial Election

	40%	41%
	25%	24%
	24%	24%
	5%	6%
	3%	3%
	2%	2%
Others	1%	1%

QUEBEC 2022

LEGER POLL
Published on
October 2, 2022







OFFICIAL RESULTS
2022 Quebec
Provincial Election

	38%	40.97%
	15%	15.42%
	15%	14.60%
	17%	14.37%
	14%	12.92%

CANADA 2021

LEGER POLL
Published on
September 18, 2021






OFFICIAL RESULTS
2021 Canadian
Federal Election

	33%	33.7%
	32%	32.6%
	19%	17.8%
	7%	7.7%
	6%	5.0%
	2%	2.3%

NEW BRUNSWICK 2020

LEGER POLL
Published on
August 29, 2020







OFFICIAL RESULTS
2020 New Brunswick
Provincial Election

	40%	39%
	32%	34%
	13%	15%
	7%	9%
	6%	2%

CANADA 2019

LEGER POLL
Published on
October 20, 2019

OFFICIAL RESULTS
2019 Canadian
Federal Election

	33%	33%
	33%	34%
	18%	16%
	8%	8%
	6%	7%
	2%	2%

HYPOTHESIS:

Is the
BC Shopper
Different?

“Driving up in an e-bike clad in Lululemon & \$400 Arc'teryx jacket, the B.C. shopper glides into Whole Foods hemp totes in hand, reusable bamboo straw poking out of their \$9 oat-milk matcha. Their cart is a curated shrine to virtue: carbon-neutral kombucha, cruelty-free dog treats, east-van rooftop-grown kale, vegan cheese alternatives, and wildcrafted mushroom tinctures. Every purchase is weighed for its sustainability credentials, fair-trade story, and Instagram potential—because shopping isn't consumption, it's identity. They're not just buying groceries, they're broadcasting values—proud to pay more if it means they can hashtag it #plantbasedlife #zerowaste #shoplocal











What is on the Minds of Canadians?



*“The **economic crisis** is the worst in a decade, driven by high inflation/interest rates, but Trump/Tariffs have dominated the agenda recently, but there appears to be some hope on the horizon.*”

Most Important Issue Facing Canadians

(Ranked 1&2)

	FEB 2025 (n=1,548)	JUNE 2025 (n=1,603)	SEP 2025 (n=2,452)
 Housing affordability/ accessibility	42%	42%	38% ↓
 Tariffs/Trump	0	32%	35% ↑
 Healthcare	41%	37%	35%
 Inflation	38%	34%	32%
 Immigration	23%	20%	23% ↑
 Government debt	16%	12%	16% ↑
 Taxes	20%	17%	16%
 Climate change	16%	16%	16%
 Homelessness	19%	15%	15%
 Poverty	17%	15%	13%

↑↓ Statistically significantly higher/lower than previous wave

How **British Columbians** are different

→ **Housing affordability is the ONLY differentiating factor in the list of national priorities (43%)**



Current Economic Perceptions

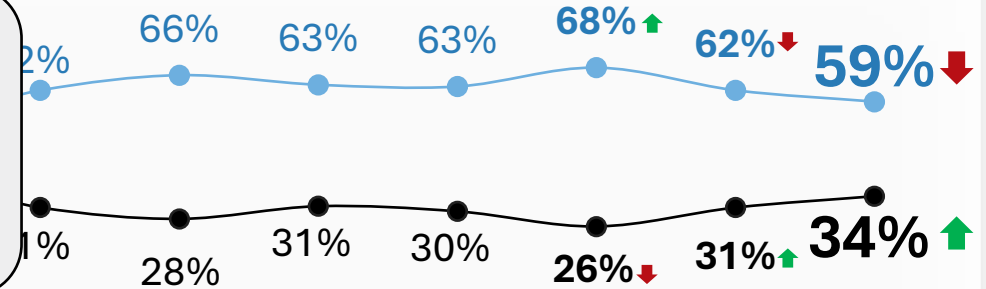
Economic confidence for the country and for households are at **all-time lows**.



Canada Economy



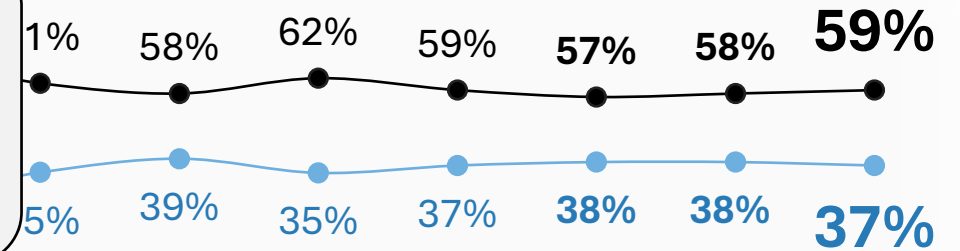
BC - 35%
Good/Very good



Household Finances



BC - 58%
Good/Very good



Mar 2017 Jan 2019 Feb 2020 Feb 2021 Jan 2022 Jan 2023 Sep 2023 Jan 2024 Jul 2024 Jan 2025 Jun 2025 **Sep 2025**

Leger Economic Confidence Study.
Base: 2,452 Canadian adults aged 18+
Q. How would you describe the economic conditions in Canada today? How would you describe your own household's finances today?

Future Economic Confidence

Future economic confidence shows **a bleak outlook**

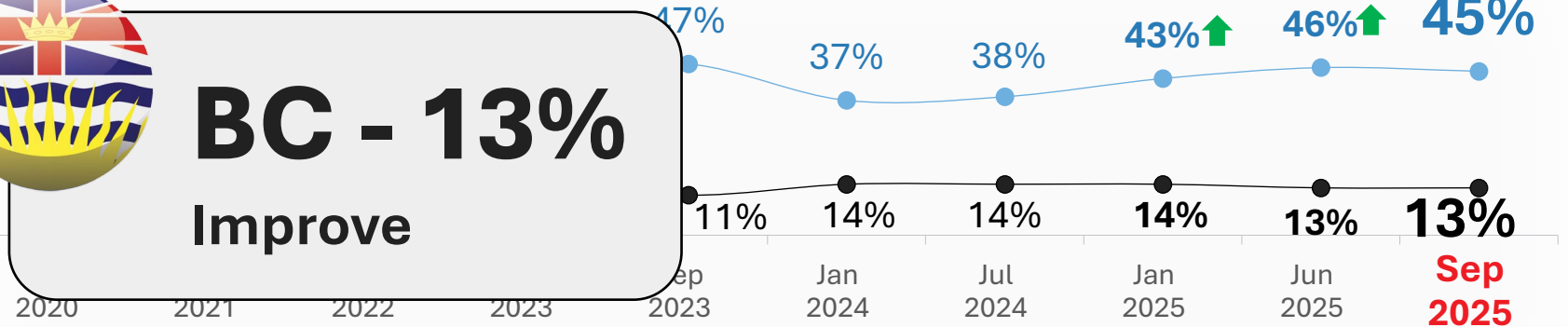
- **46%** are living paycheque to paycheque
- **50%** believe we are in a recession



Canada Economy



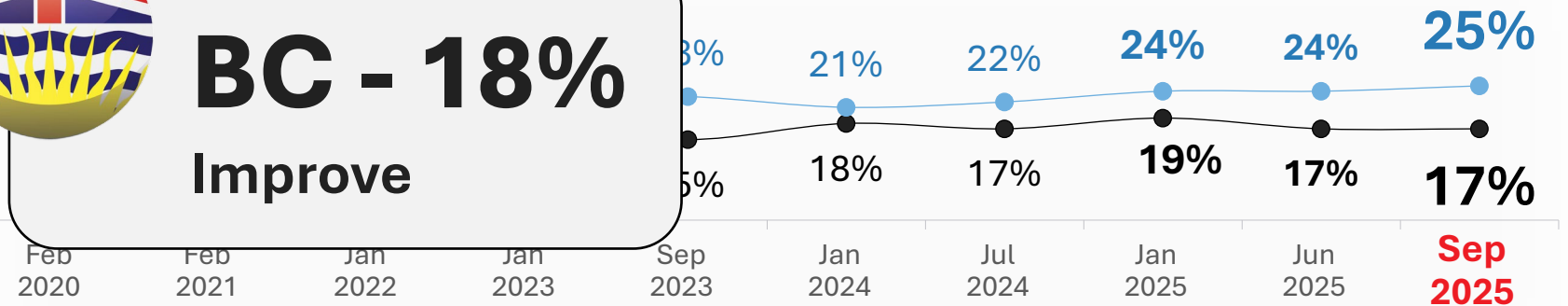
BC - 13%
Improve



Household Finances



BC - 18%
Improve



Economic Confidence Study. Base: 2,645 Canadian adults aged 18+.

Q. Over the next six months, do you expect the Canadian economy to improve, remain the same, or decline?

Q. Over the next six months, do you expect your own household's finances to improve, remain the same, or decline?

↑↓ Statistically significantly higher/lower than previous wave

Patriotism on the Rise, and Shopping Patterns Impacted Immensely



*“The announcement of **Trump/Tariffs** and insinuations of the **51st state** have **enraged** Canadians, changed our political landscape and unleashed a deluge of consumer purchase patterns & choices that will **continue** to have a **dramatic impact** on businesses on both sides.”*

Overall Impression of President Donald Trump



Total
CANADA



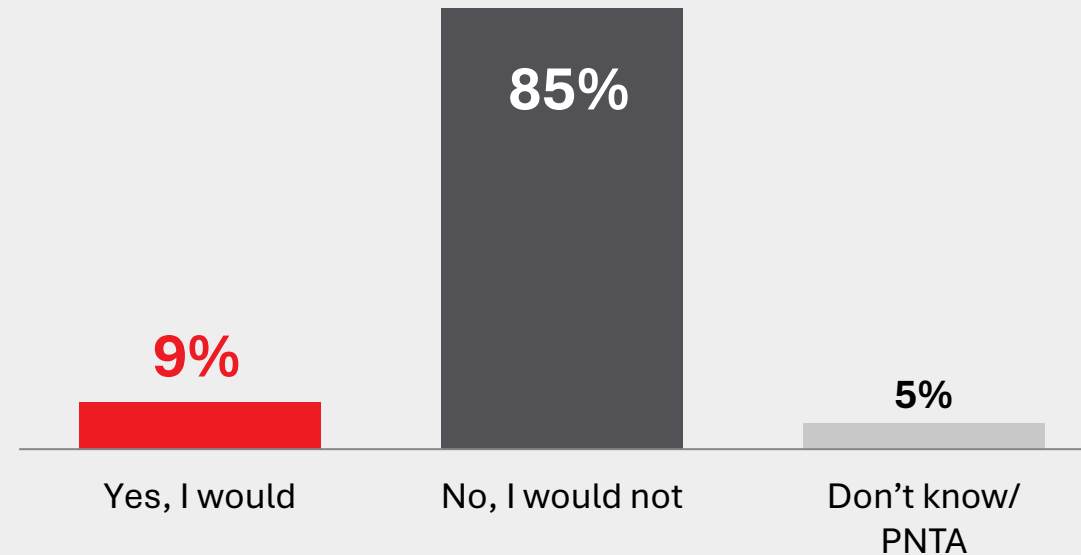
Total
USA

Weighted n=	1,534	1,007
Unweighted n=	1,534	1,007
Favourable*	10%	37%
Unfavourable	81%	51%

On Canada Becoming the 51st State...



Interest in
becoming
**the 51st
state**





Q. Would you or would you not like Canada to become the 51st state of the United States?

Base: All respondents (n=1,599)

Perception of the United States/Canada as an **Ally**, **Neutral**, or **Enemy**



	 Total CANADA	 Total USA
	Weighted n= 1,534	1,007
	Unweighted n= 1,534	1,007
An ally	31%	56%
A neutral country	25%	29%
An enemy country	27%	1%
DK / Refusal	16%	14%

China: 36%
Russia: 60%

Base: All respondents

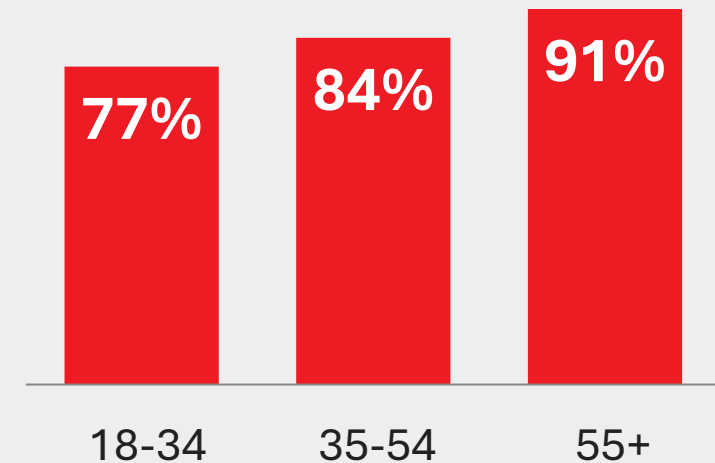
Q. Do you consider the United States/Canada to be an ally, a neutral country, or an enemy country?

Proud to be **Canadian**

*BC Least Proud Province

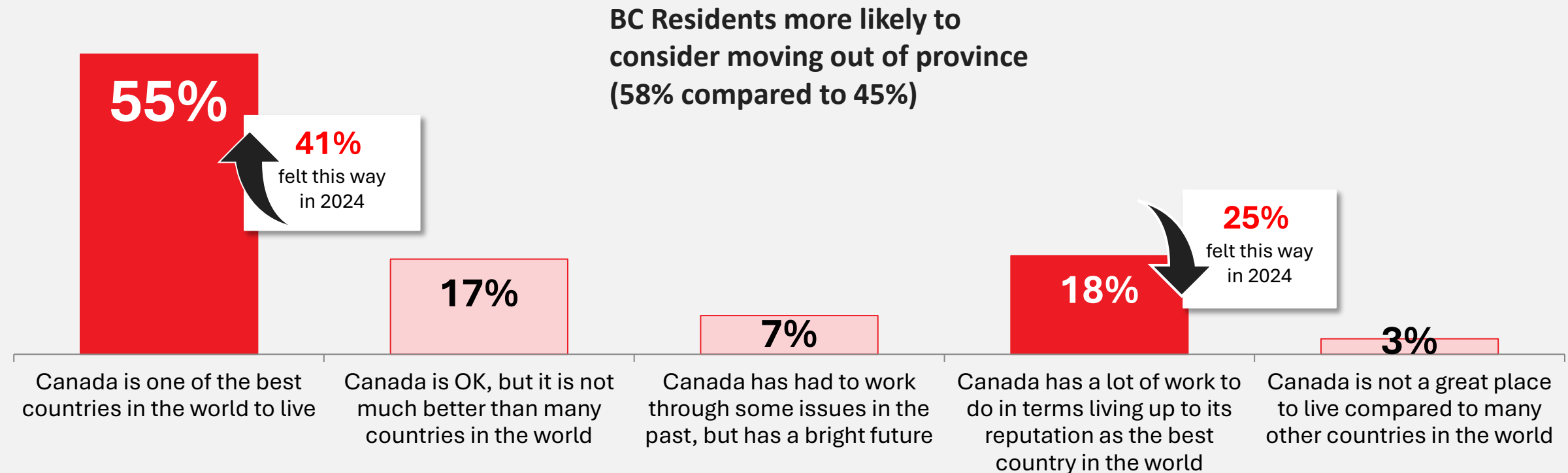


% who are proud to be Canadian
by age



Q. To what extent are you proud to be Canadian?
Base: All respondents (n=1590)

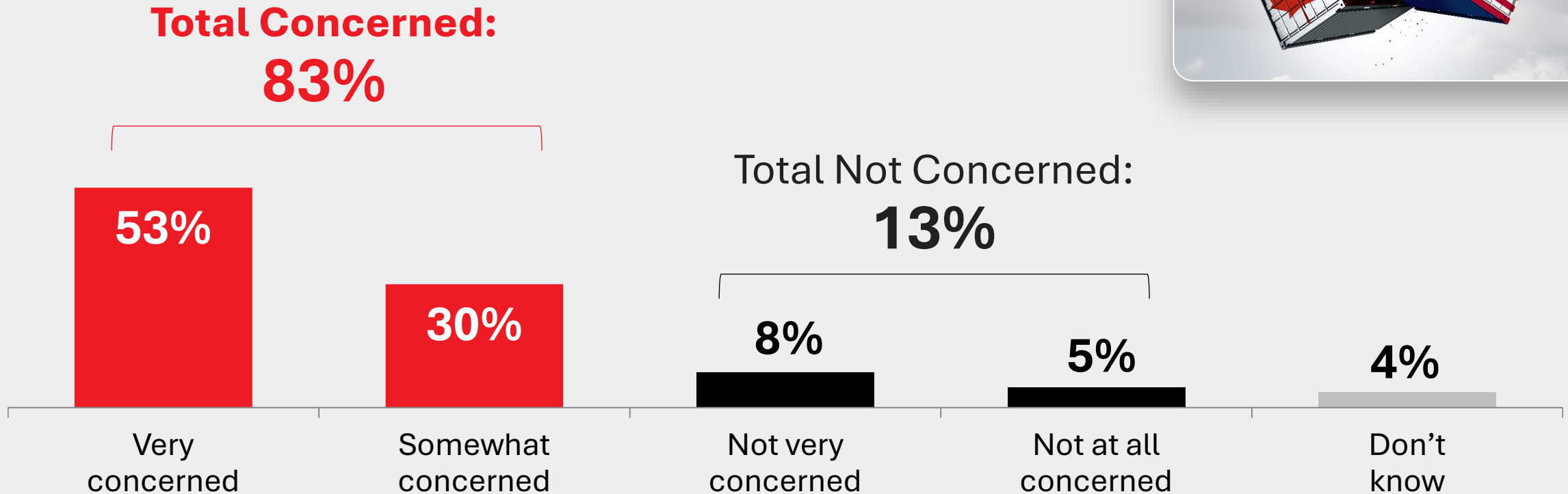
Feelings About **Living in Canada**



Q. How do you feel about living in Canada and/or being Canadian?
Which of the following best describes your current feelings?

Base: All respondents (n=1590)

Concerns About U.S. Tariff Pressure



Base: All respondents (n=1,534)

Q. How concerned are you that President Trump will use various means, such as tariffs and trade sanctions, to try and force Canada into a much closer and more formal union with the United States?

Canadians are **Angry** and are **Dramatically Changing Purchase Decisions** to Punish the USA



American products bought in stores

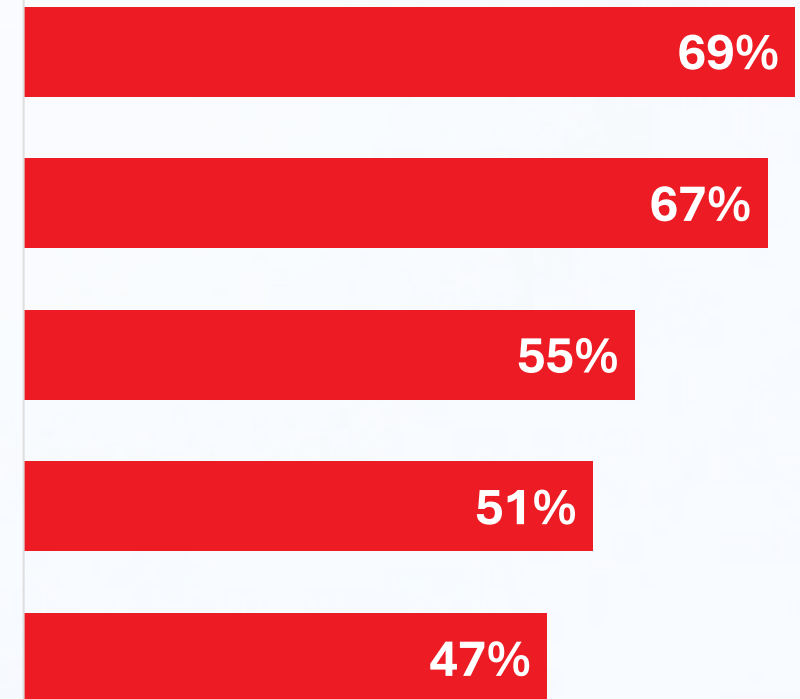
American products bought online

Products in general purchased on the Amazon platform

American fast-food restaurants
(McDonald's, Starbucks, KFC, Burger King, Subway, etc.)

American retail chain stores
(Walmart, Costco, Winners, etc.)

% YES Decreased Purchasing



Base: Canadian respondents (n=1,603)

Q. In the past few weeks, have you decreased your purchases of...?

Canadians' Change in Leisure Travel Destinations: 2025 vs. 2024



↓ **Less Likely**
to Travel in 2025

More Likely ↑
to Travel in 2025

DIFF

13%



Within my home province

38%



+25

25%



Within Canada –
outside of my home province

30%



+5

59%



To the United States

15%



-43

41%



Outside Canada /
United States

24%

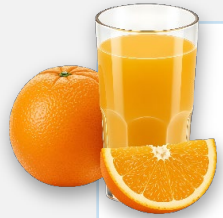


-17

Base: Canadian adults 18 years of age and older. 2025 (n= 1,533)

Q. How is your likelihood of travelling for leisure to the following destinations in 2025 compared to last year?

Examples of Actual Spending Changes:

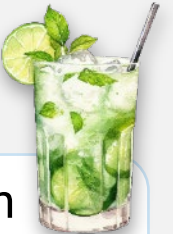


U.S. fresh orange juice import value dropped from about **US\$12 million in June 2024** to **~US\$5.78 million in June 2025**.

In May and **June 2025**, wine exports from the USA to Canada were down **90% compared to June 2024**.



Sales of U.S. spirits in Canada dropped **66.3%** between early March and end of April in 2025, while overall spirits sales fell **~12.8%**.



In **July 2025**, Canadian-resident return trips *by air* from the United States were down **25.8%** compared with July 2024.



Forward bookings between Canada and the U.S. are reported to be **down by ~70-75%** compared to the same period last year.

320,000 seats across Canada-U.S. routes have been removed in schedule filings (for flights through to October) in response to lower demand

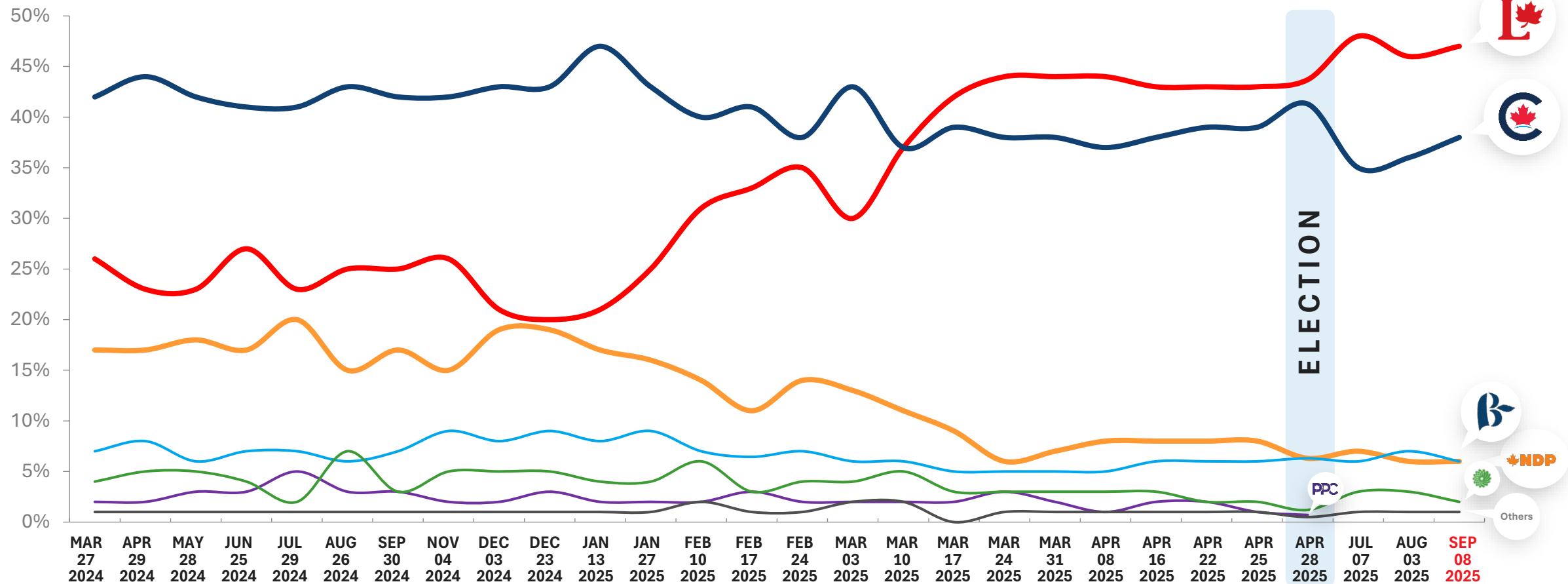


The numbers on California produce are not yet available





Evolution of Voting Intentions in Canada

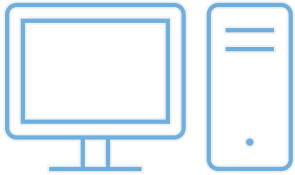


Shopper differences across Canada: **Do British Columbians stand out**



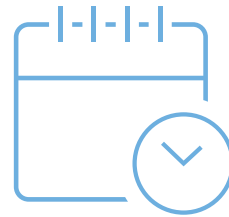
*Based on a recent
Leger Survey of
Shopping Behaviours
across Canada*

Methodology



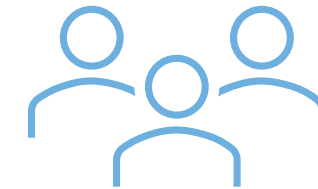
Method

Online survey among
Canadian respondents
18 years of age or
older (**n= 2,452**)



When

Sept 12-16,
2025



Purpose

To collect custom data
for this conference
about how BC
residents are different

Key Shopper Findings



BC Shoppers are different yes, **but not as different** as you'd think

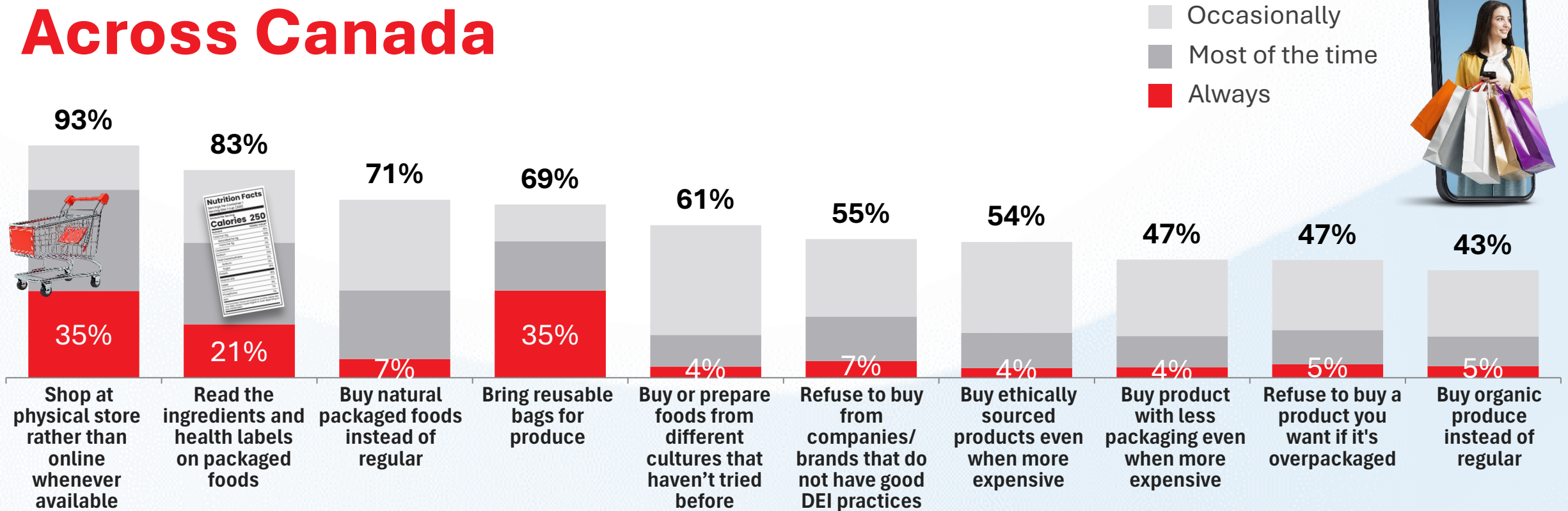
BC residents are more likely to try ethnic foods, shop organic, buy ethically sourced, look at environmental record of companies, but the differences are less than 10 points the way we measured it

BC residents are also slightly more likely to read ingredients of health labels, buy natural foods, watch for over-packaging, hold brands accountable, but differences are 5 points or less

Age differences are more of a factor than regional differences, as youth 18-34 are vastly over-indexed on everything from packaging, ethical sourcing, DEI, & organics

Urban rural splits also provide some insights as well, as the more urban, the more socially responsible they are

Shopping Behaviours Across Canada





BC (Always/Most/Occasionally)

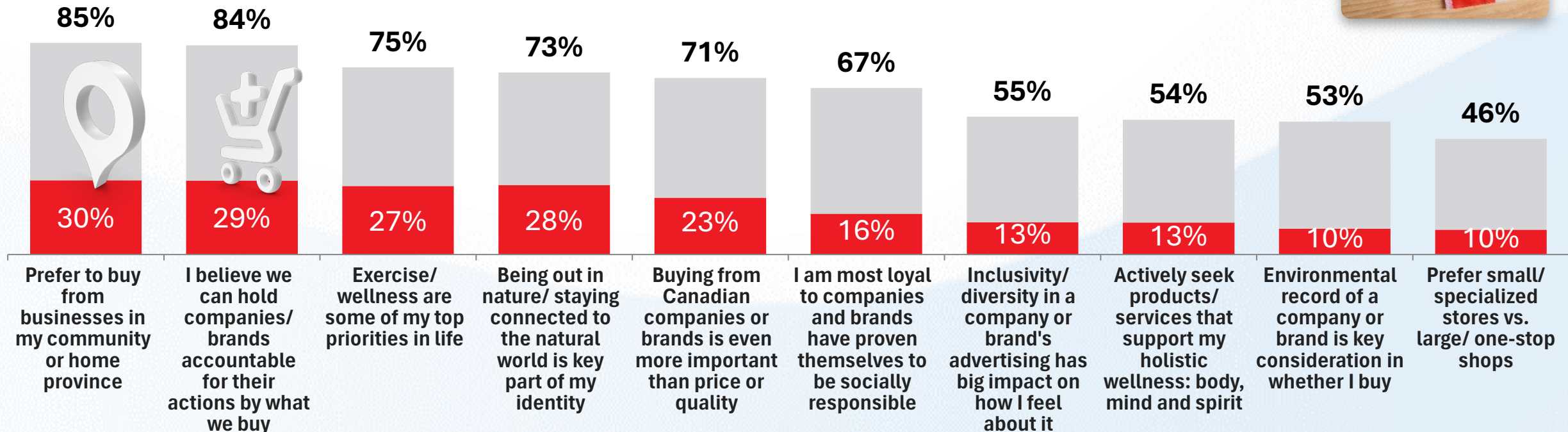
93% 86% ↑ 75% ↑ 71% 67% ↑ 58% 62% ↑ 48% 53% ↑ 50% ↑

Differential (BC – National Average)

0 +3 +4 +2 +6 +3 +8 +1 +6 +7

Shopping Attitudes

 Somewhat agree
 Strongly agree



BC (Strongly/somewhat agree)



85% 86% ↑ 75% 74% 71% 69% ↑ 57% 56% 57% ↑ 48% ↑

Differential (BC – National Average)

0 +2 0 +1 0 +2 +2 +2 +4 +2

Shopping Behaviours

(By Age Group)



18-34

35-54

55+

Always/Most of the time/Occasionally

Shop at physical store rather than online whenever available

No Differences

Read the ingredients and health labels on packaged foods

Higher

Buy natural packaged foods instead of regular

No Differences

Bring reusable bags for produce

No Differences

Buy or prepare foods from different cultures that haven't tried before

Much Higher

Higher

Refuse to buy from companies/ brands that do not have good DEI practices

Much Higher

Buy ethically sourced products even when more expensive

Much Higher

Higher

Buy product with less packaging even when more expensive

Much Higher

Refuse to buy a product you want if it's overpackaged

Much Higher

Buy organic produce instead of regular

Much Higher

Higher

Shopping Attitudes

(By Age Group)



18-34

35-54

55+

Strongly/Somewhat agree

Prefer to buy from businesses in my community or home province

Much Higher

I believe we can hold companies/ brands accountable for their actions by what we buy

No Differences

Exercise/ wellness are some of my top priorities in life

Higher

Being out in nature/ staying connected to the natural world is key part of my identity

No Differences

Buying from Canadian companies or brands is even more important than price or quality

65%

66%

Higher

I am most loyal to companies and brands have proven themselves to be socially responsible

No Differences

Inclusivity/ diversity in a company or brand's advertising has big impact on how I feel about it

Much Higher

Higher

Actively seek products/ services that support my holistic wellness: body, mind and spirit

Much Higher

Environmental record of a company or brand is key consideration in whether I buy

Much Higher

Prefer small/ specialized stores vs. large/ one-stop shops

Higher

Shopping **Behaviours**

(By Area Canada-wide)

Always/Most of the time/Occasionally



Urban



Rural

Shop at physical store rather than online whenever available

No Differences

Read the ingredients and health labels on packaged foods

No Differences

Buy natural packaged foods instead of regular

No Differences

Bring reusable bags for produce

No Differences

Buy or prepare foods from different cultures that haven't tried before

Much Higher

Refuse to buy from companies/ brands that do not have good DEI practices

Higher

Buy ethically sourced products even when more expensive

Higher

Buy product with less packaging even when more expensive

Higher

Refuse to buy a product you want if it's overpackaged

No Differences

Buy organic produce instead of regular

Higher

Shopping **Attitudes**

(By Area Canada-wide)

Strongly/Somewhat agree



Urban



Rural

Prefer to buy from businesses in my community or home province

No Differences

I believe we can hold companies/ brands accountable for their actions by what we buy

No Differences

87%

Exercise/ wellness are some of my top priorities in life

No Differences

74%

Being out in nature/ staying connected to the natural world is key part of my identity

Higher

Buying from Canadian companies or brands is even more important than price or quality

No Differences

I am most loyal to companies and brands have proven themselves to be socially responsible

No Differences

Inclusivity/ diversity in a company or brand's advertising has big impact on how I feel about it

Higher

Actively seek products/ services that support my holistic wellness: body, mind and spirit

No Differences

Environmental record of a company or brand is key consideration in whether I buy

Higher

Prefer small/ specialized stores vs. large/ one-stop shops

No Differences

Segment Profile



Conscientious Eco-Elites

25% of the population in BC,
5 points higher than the national average

PROFILE

- Equally M/F
- Younger overall
- Lower ethnic diversity
- Higher Education
- All income levels
- More urban

ECO-ATTITUDES

- Environmental (2X)
- Organics (2X)
- Natural foods (2X)
- Packaging conscious (2X)
- Buy Socially responsible
- Ethically sourced (2X)

LIFESTYLE

- Shop Local (2X)
- Shop Canadian (3X)
- DEI (3X)
- Holistic (3X)
- Exercise (2X)
- Outdoors (2X)

Overall Conclusions

#1

Overall **consumer sentiment is rather bleak**, but there is hope on the horizon as sentiment has shown an uptick in our latest wave

#2

The **tariff issue dominates the public agenda**, but consumers are becoming slightly weary of it, and the top issues that have been resurrected are inflation/housing and social issues

#3

BC residents stand out in only one arena: The importance of the **housing crisis** in the overalls scheme of what's most important

#4

Anti-American sentiment as a result of **Trump/Tariffs** have had a **dramatic** impact on consumer **purchasing intentions**, and shows no sign of abating.

#5

BC Consumers are different in some respects relative to in other provinces, but the **differences** are not as massive as people in this room might have expected

#6

The **youth of this country** are more defined by their ethical shopping attitudes and behaviours, and are a better target for differentiation among brands

#7

The **Eco-conscious Elite** segment is a driving force behind consumer purchases, and the size of this segment is not insignificant (26%), making it a driving force in the marketplace

Free Resources/Downloads from Leger



**Tariff/Trump
Tracker**



**Economic Confidence
Report Card**



**Impact of Trump
on Investing**



**Federal Voting
Intentions**



WOW



**2023
Youth Study**



Reputation



**Climate
Change**



**Newcomers
to Canada**



**Government
Report Card**

Contact Us

For more information, please contact our experts:



Steve Mossop

Executive Vice-President

smossop@leger360.com

604-424-1017





Data-driven intelligence for a changing world.

leger360.com