

Tariffs: A Main Street View

Insights & Implications Across North America
among the General Public

Corporate Strategy & Reputation

April 2025

Tariff Fears Run High Across North America

- Most Americans—and even more Canadians and Mexicans—believe U.S. tariffs will hurt the economy and local companies.
- Despite confusion over the strategy, 95% think tariffs will drive up costs, with top concerns including groceries, auto, and electronics.

1

Key Findings

Research fielded April 2025
among Gen Pop 18+.

- US (N=2118)
- Canada (N=1531)
- Mexico (N=1022)

2

So Far, So Bad: U.S. Image Falters—and American Companies Are Feeling It

- Tariffs are seen as a long-term strain, with lasting damage to U.S. ties in the eyes of nearly half or more Canadians and Mexicans.
- The fallout from tariffs is spilling over to U.S. companies, with 61% of Canadians and 25% of Mexicans saying they have already boycotted American products or brands in response.

4

American Consumers Expect Companies to Speak Up (and Act!) on Tariffs

- While 60% believe brands will raise prices more than necessary, the vast majority also expect leadership and transparency: 83% say they have a right to know where companies stand, 81% want CEOs to publicly address tariff impacts, and 81% want help navigating the effects.

3

Consumers See an Upside for Their Countries – Innovation and Self-Reliance

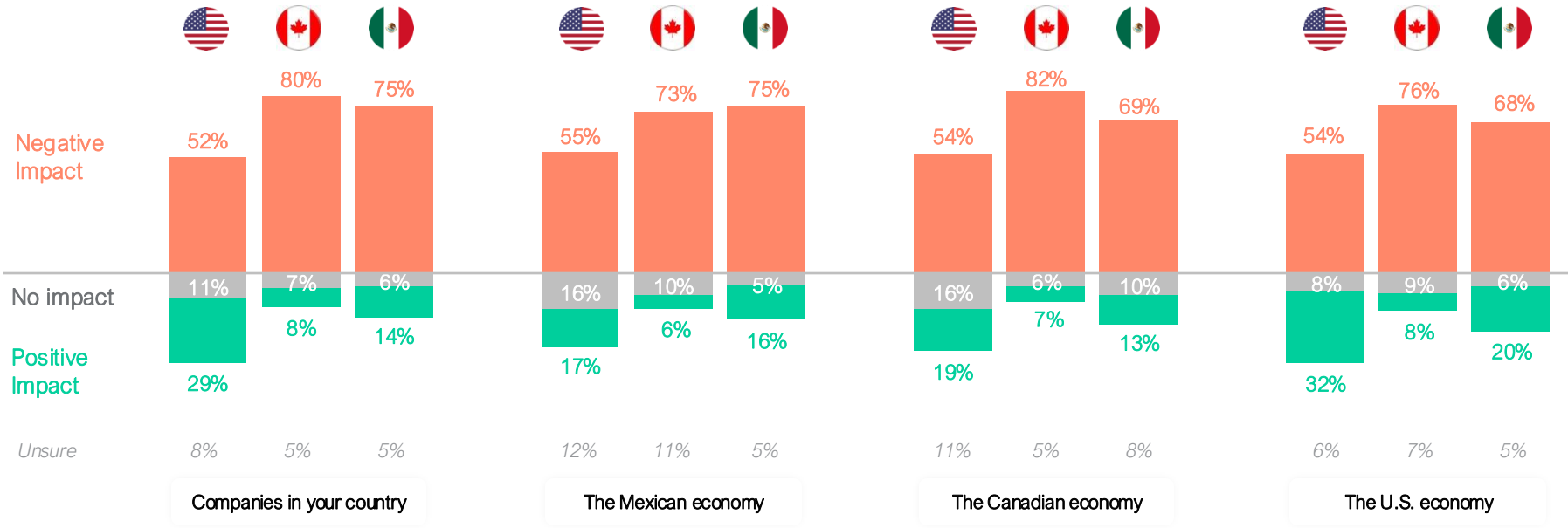
- Despite widespread concern, many view tariffs as a catalyst for innovation and self-reliance. Majorities across the U.S., Canada, and Mexico believe their countries will see increased innovation, stronger manufacturing, and reduced economic reliance on others in the next decade.

Tariff Fears Run High Across North America



The Perceived Negative Impact of Tariffs is High Across North America; Canadians and Mexicans Are Most Alarmed

The U.S. government recently implemented broad tariffs on imported goods from various countries. Do you believe these actions will impact any of the following?

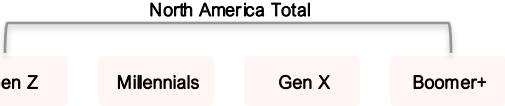


Q1. The U.S. government recently implemented broad tariffs on imported goods from various countries. Do you believe these actions will impact any of the following?
Source: Harris Poll April 10-15, 2025, Gen Pop 18+ US (N=2118), Canada (N=1531), Mexico (N=1022)

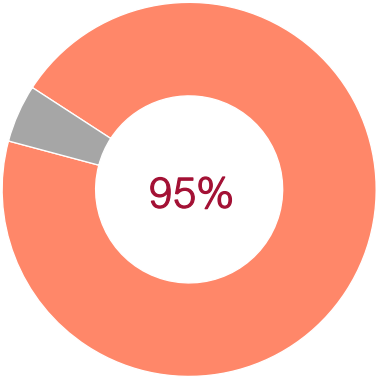


Near-Universal Agreement Across North America that Tariffs Will Increase Costs; Groceries, Auto, Electronics Top Concerns; Gas #2 in Mexico

Where do you expect the new tariffs to **increase costs** for consumers most in 2025? (Top 5 Rank)



95% across North America expect the new tariffs to INCREASE costs for consumers

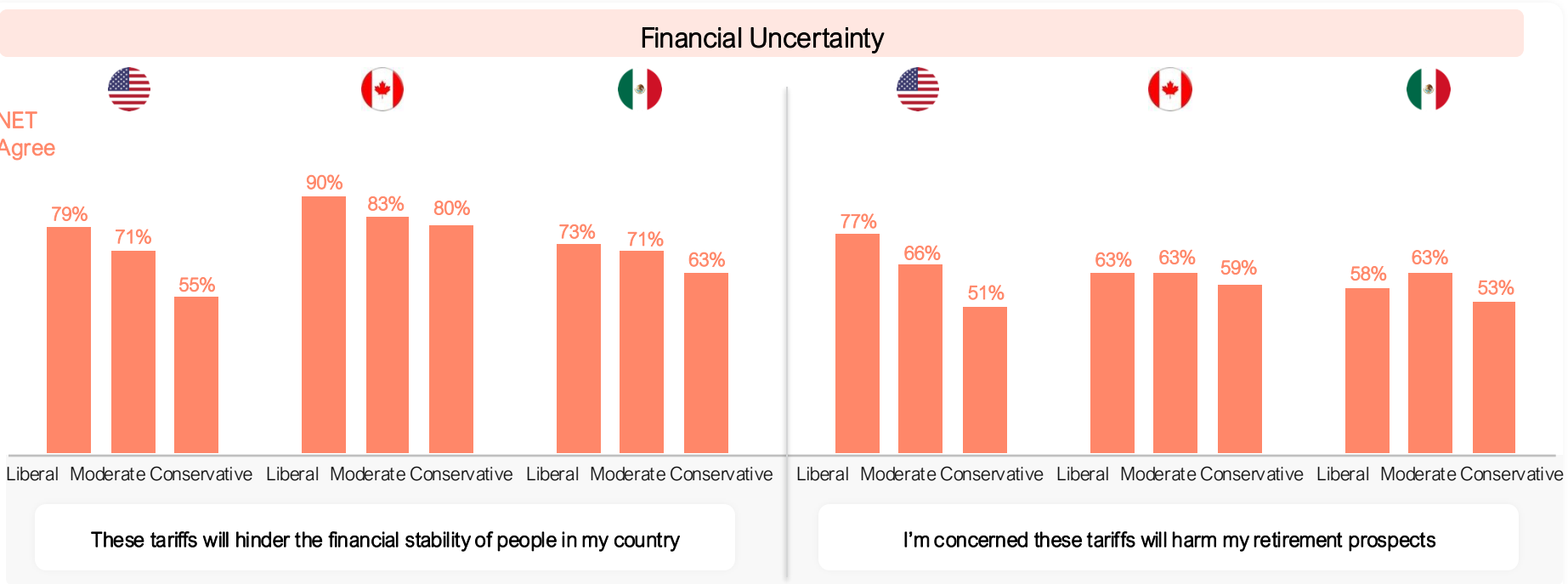


	USA	Canada	Mexico	Gen Z	Millennials	Gen X	Boomer+
Groceries	1	1		1	2	2	4
Automotive	2	2	1	4	1	1	1
Electronics	3	3	3	3	3	3	2
Clothing and apparel	4				4		
Appliances	5	5	4	5	4	4	3
Construction materials		3	5		4	4	5
Gas			2	2	4		
Restaurants							
Alcohol							
Utilities							
Airfare							

Q4. Where do you expect the new tariffs to increase costs for consumers most in 2025? Please select all that apply.
Source: Harris Poll April 10-15, 2025, Gen Pop 18+ US (N=2118), Canada (N=1531), Mexico (N=1022)



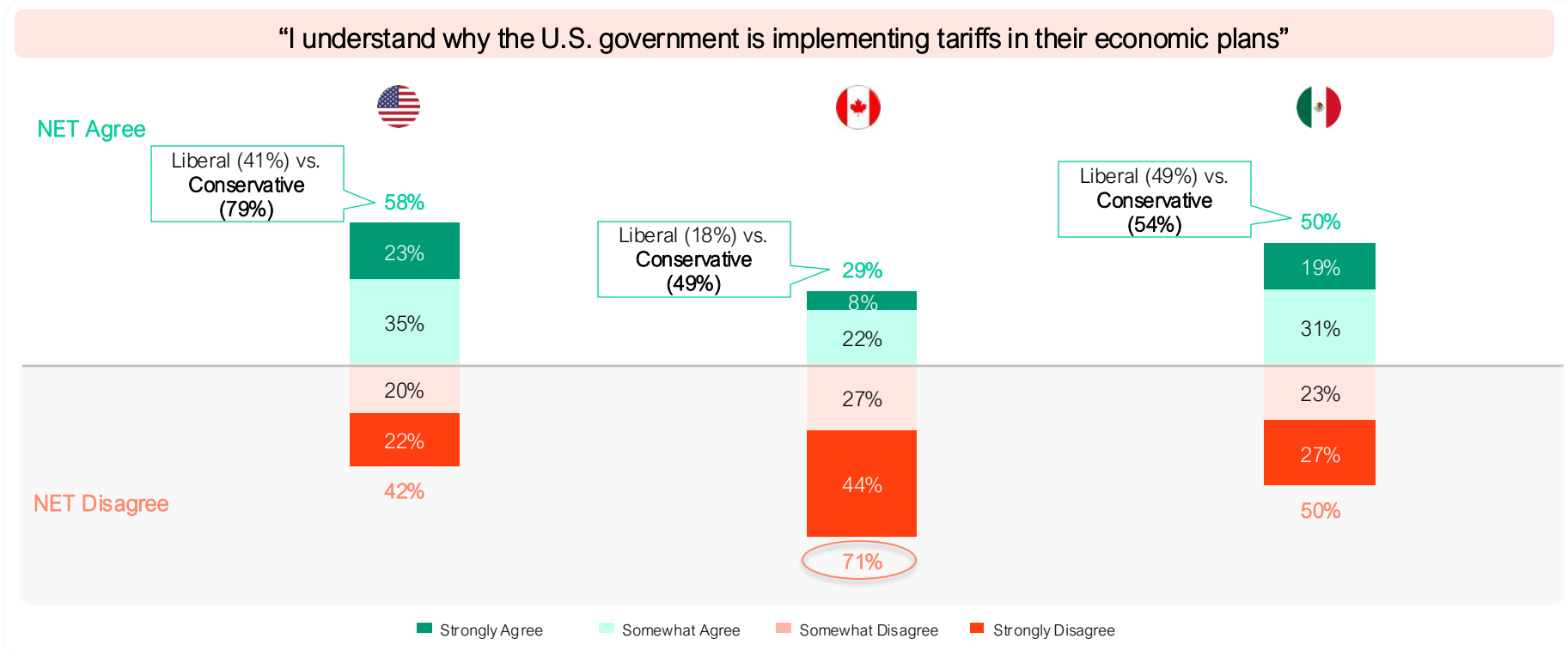
Financial Stability and Retirement Outlook Worries Span Across the North American Political Spectrum



Q2. Thinking about the tariffs, how much do you agree or disagree with the following statements?
Source: Harris Poll April 10-15, 2025, Gen Pop 18+ US (N=2118), Canada (N=1531), Mexico (N=1022)
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The Reality is Many Don't Really Understand U.S. Tariff Strategy, Canadians Especially; US Conservatives – Strongly – Say They Do

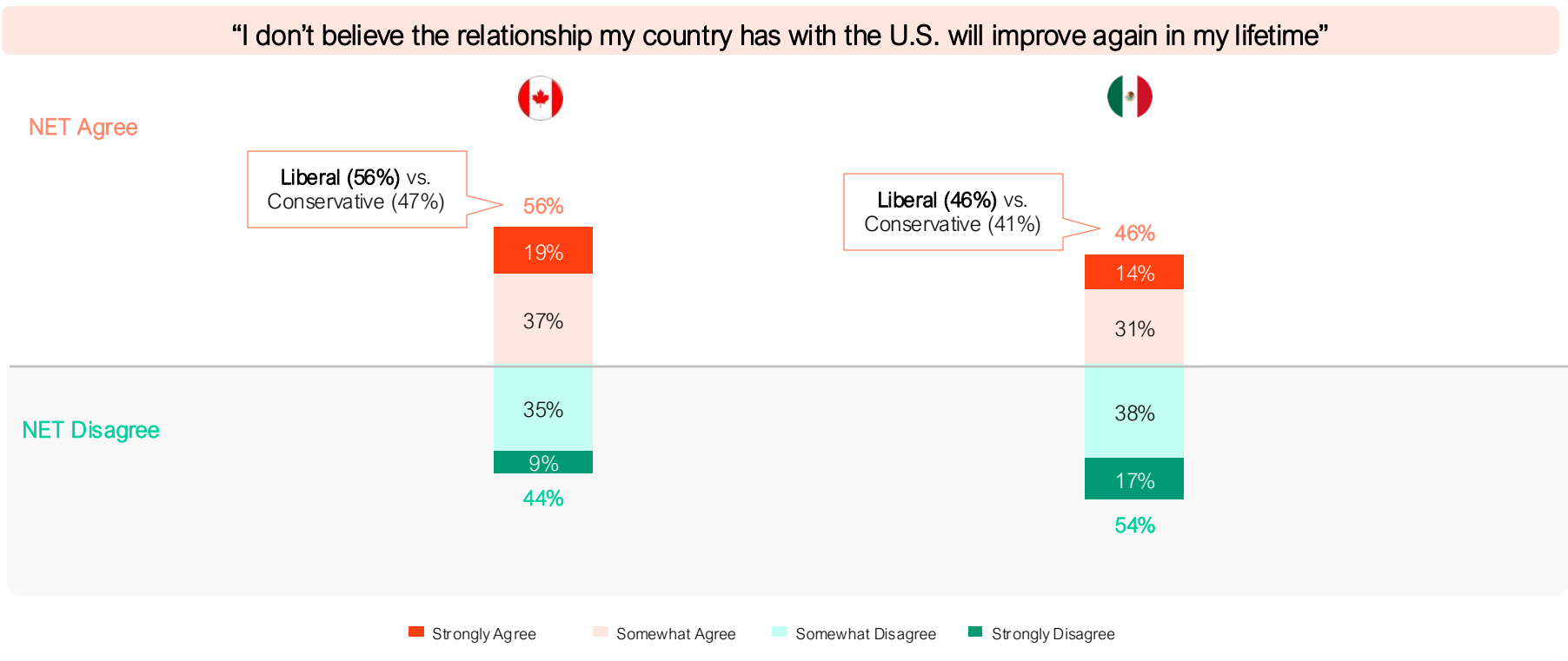


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So Far, So Bad: U.S. Image Falters—and American Companies Are Feeling It



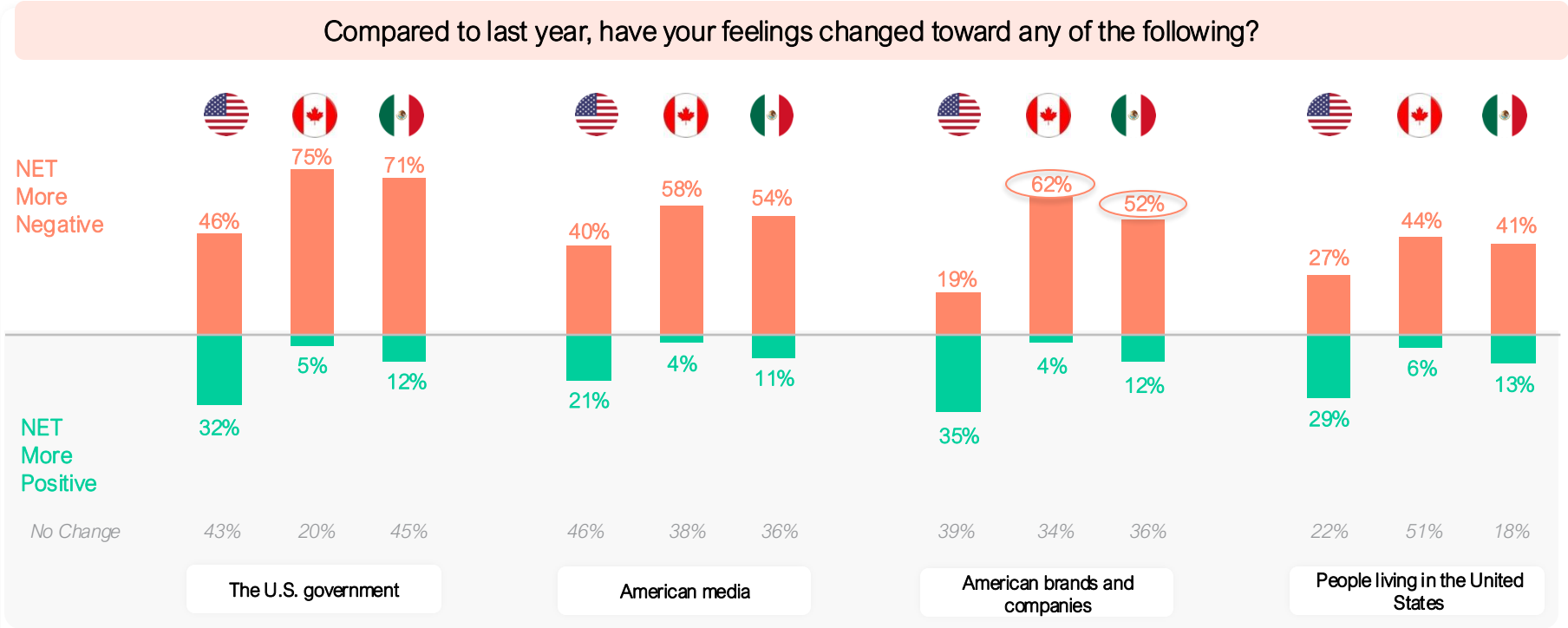
Nearly Half of Canadians and Mexicans Do Not Believe Their Relationship With The U.S. Will Improve Again in Their Lifetime



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The Ripple Effect – In Canada and Mexico, Perception of American Companies Take a Big Hit

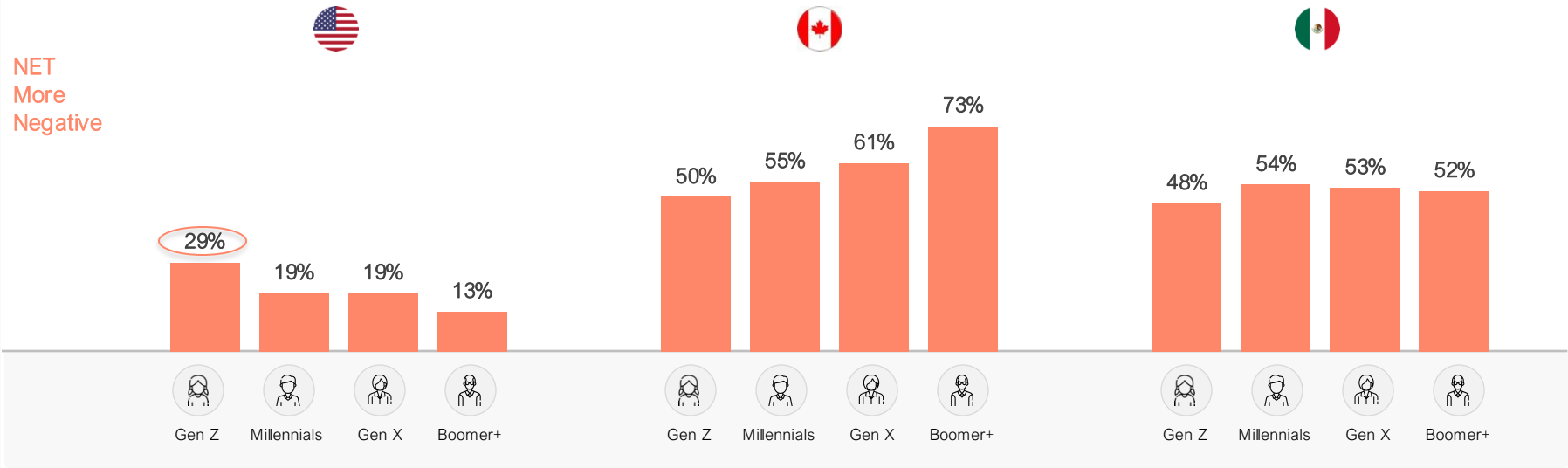


Q8. Compared to last year, have your feelings changed toward any of the following?
Source: Harris Poll April 10-15, 2025, Gen Pop 18+ US (N=2118), Canada (N=1531), Mexico (N=1022)



Negative Sentiment of American Brands Runs High Across Generations in Canada and Mexico; In the U.S., Nearly 1 in 3 Gen Z Say Their Views Have Worsened

Compared to last year, have your feelings changed toward any of the following?
American brands and companies

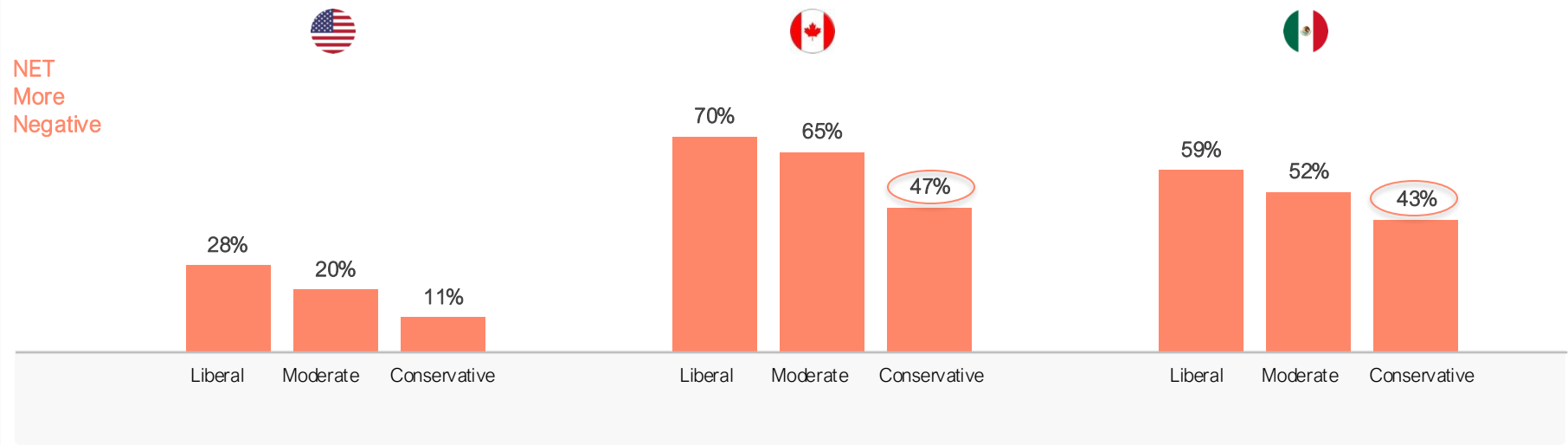


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Its Not Just Liberals; Many Conservatives in Canada and Mexico Are Feeling More Negative

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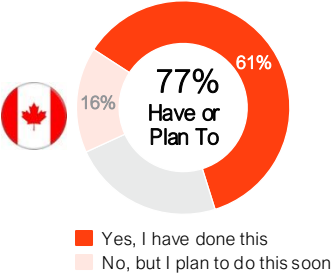


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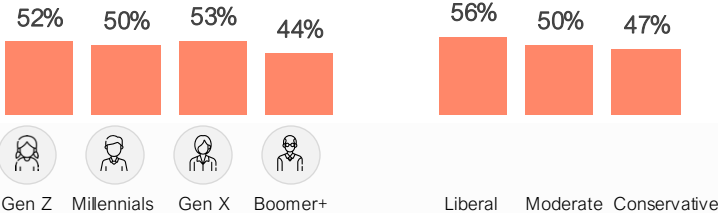
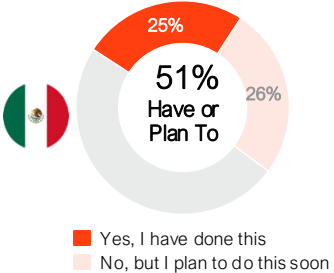
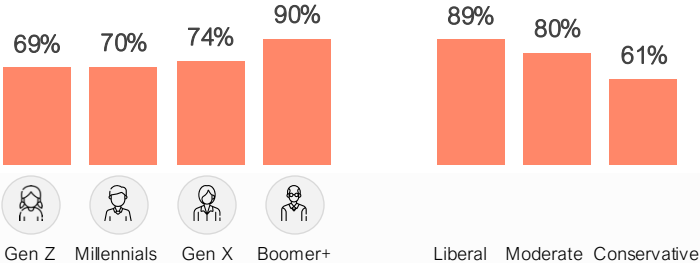


A Staggering 6 in 10 Canadians Have Already Boycotted American Products/Brands, 1 in 4 Mexicans

“Boycotted American products/brands when you’re able to”



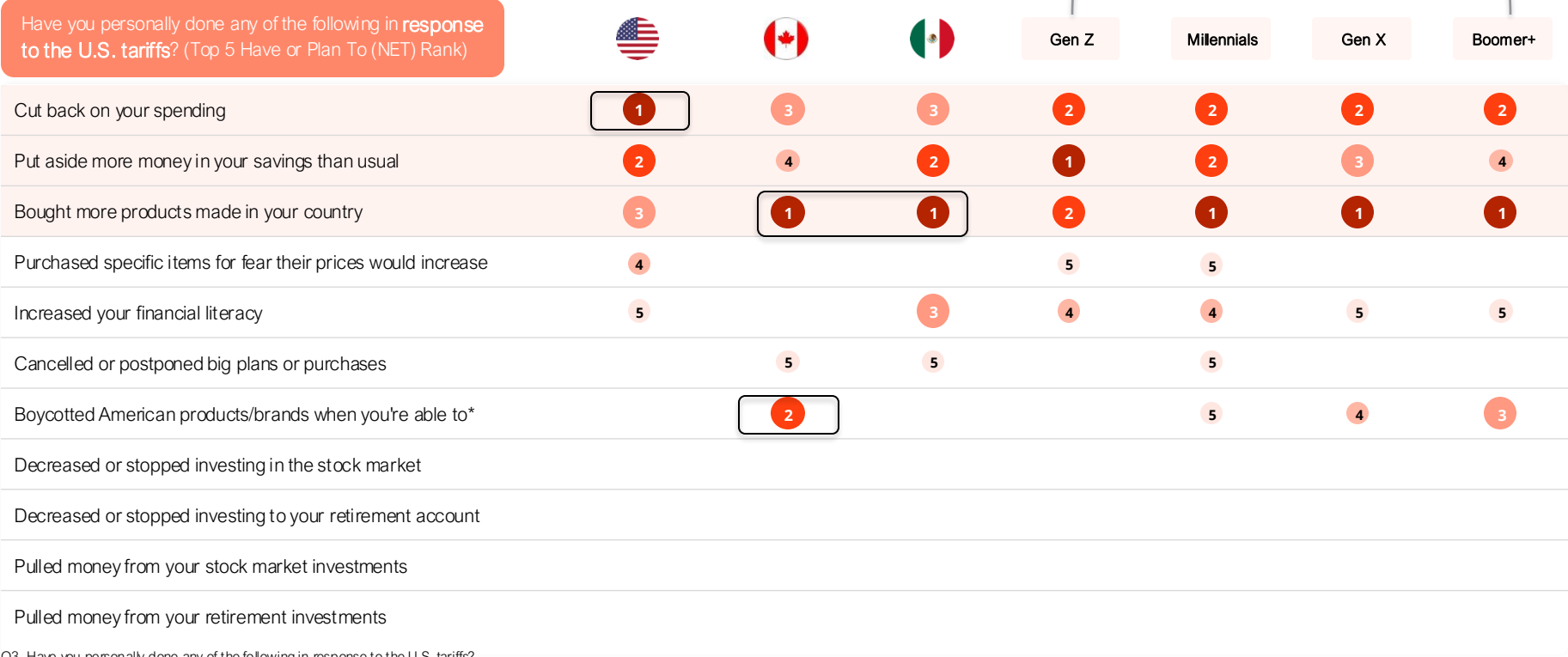
% Have or Plan To



Q3. Have you personally done any of the following in response to the U.S. tariffs?
Source: Harris Poll April 10-15, 2025, Gen Pop 18+ Canada (N=1531), Mexico (N=1022)



Canadians and Mexicans Are Shopping More Domestic; In the US, Americans Top Response Has Been Cutting Back on Spending

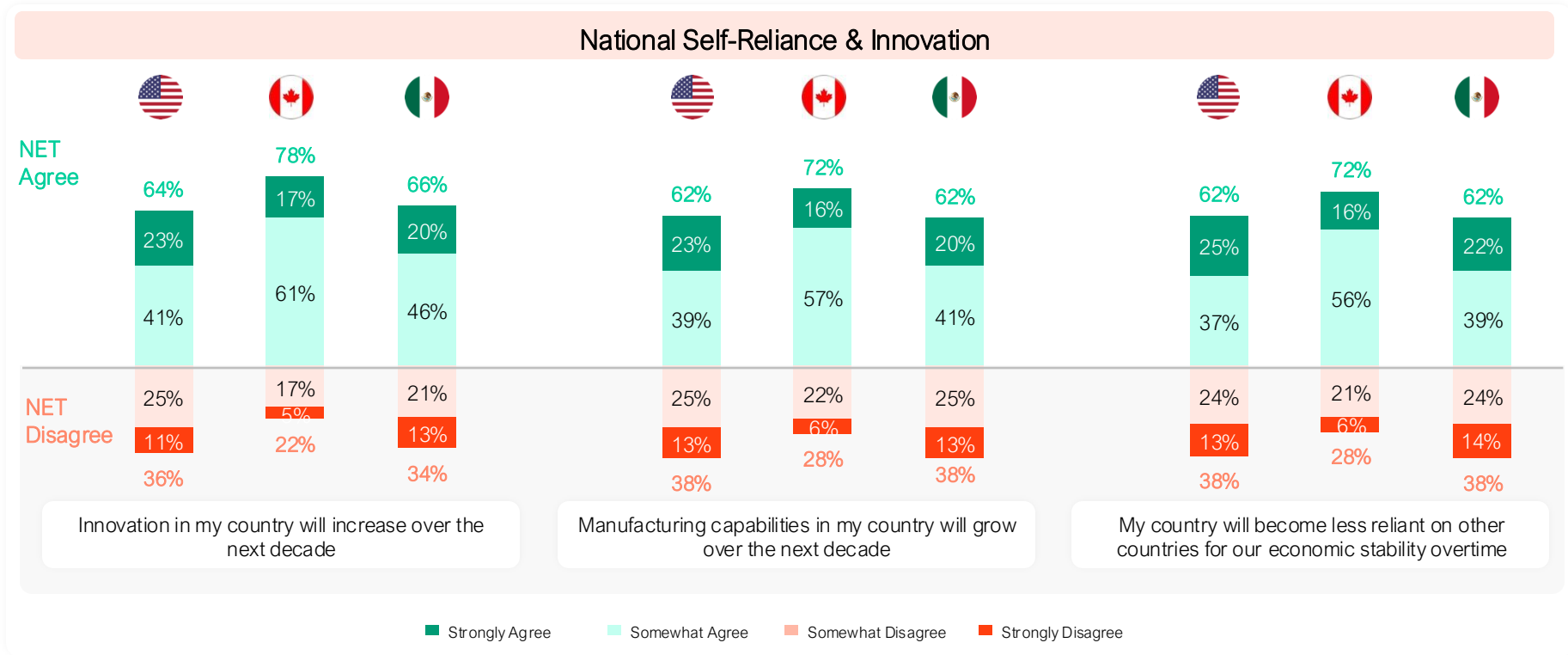


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*Canada & Mexico ONLY

Consumers See an Upside for Their Countries – Innovation and Self-Reliance



Despite Widespread Concerns, Many See Tariffs as a Catalyst for Innovation and Self-Reliance, Especially Those in Canada

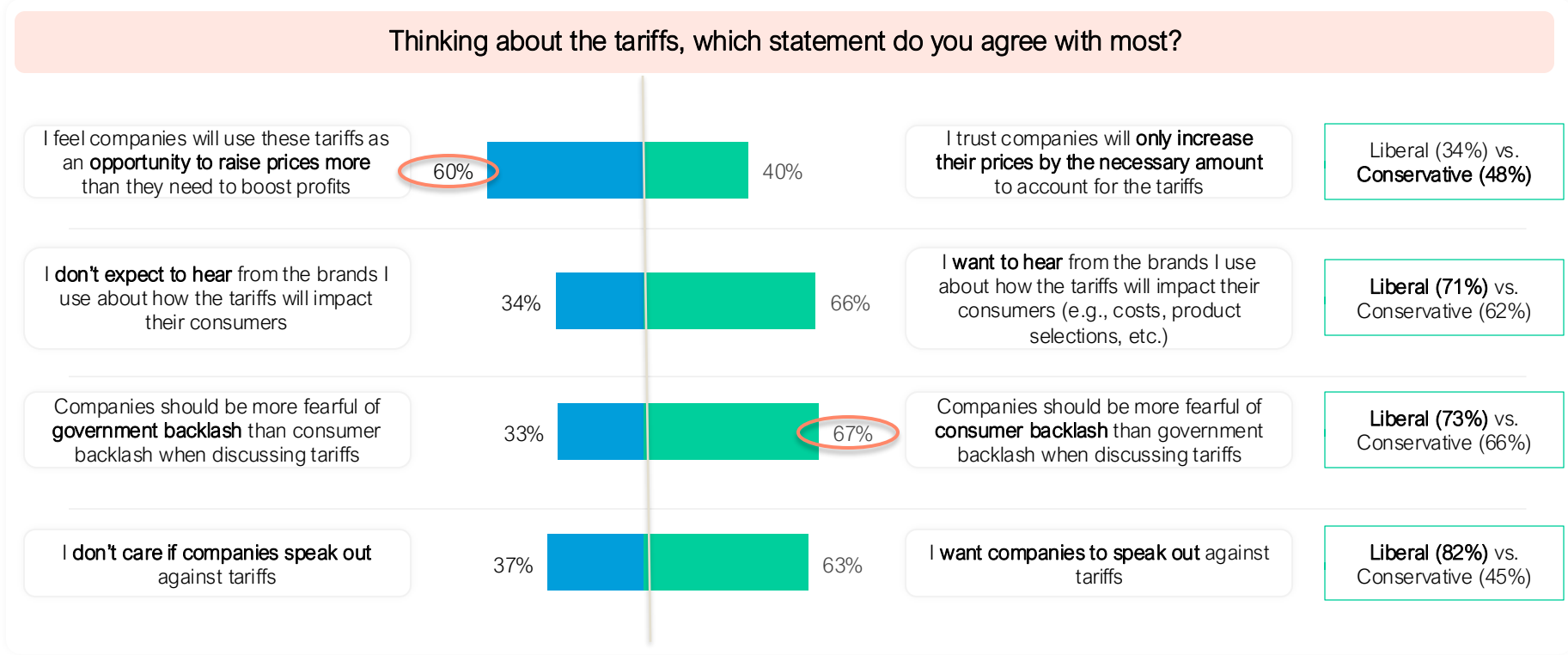


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American Consumers Expect Companies to Speak Up (and Act!) on Tariffs



Majority of Americans Feel Companies Will Exploit Tariffs to Hike Prices. Expectations of Consumer Backlash is High

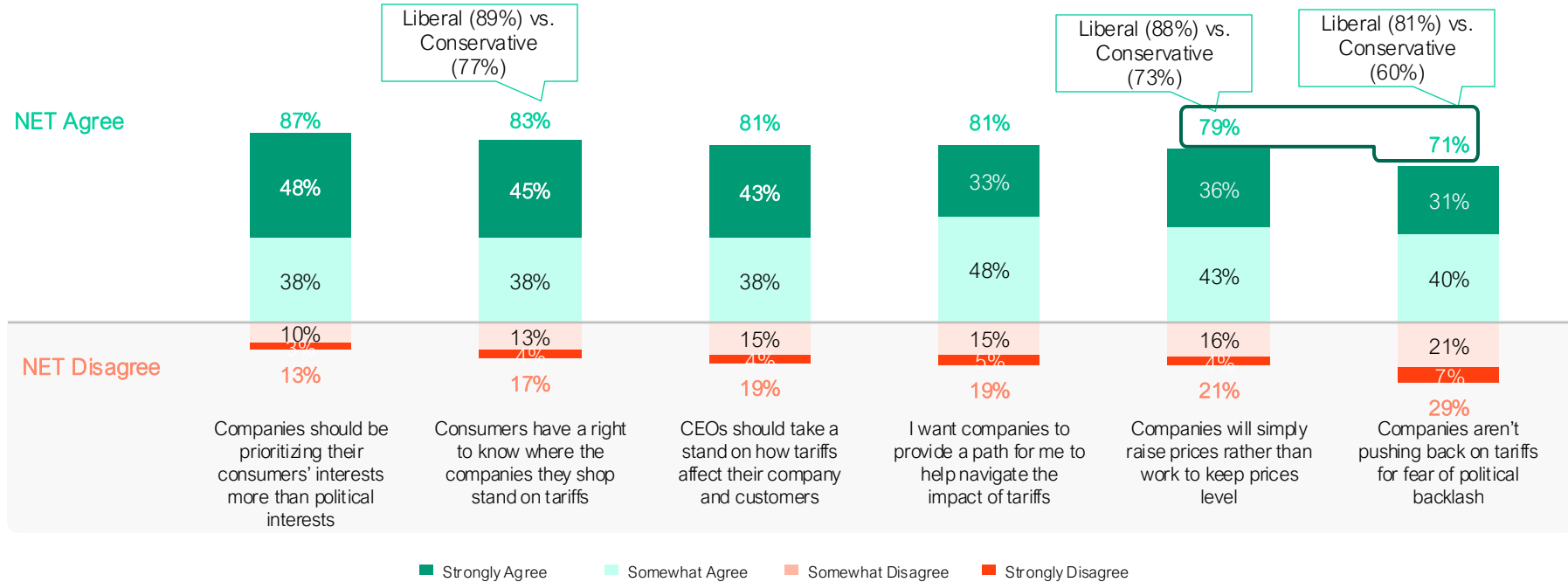


Q5. Thinking about the tariffs, which statement do you agree with most?
Source: Harris Poll April 10-12, 2025, Gen Pop 18+ US (N=2118)



Where Do the Brands I Shop From Stand? Consumers Expect an Answer, and Many Expect Brands to Provide a Path to Help Navigate

Transparency and Accountability

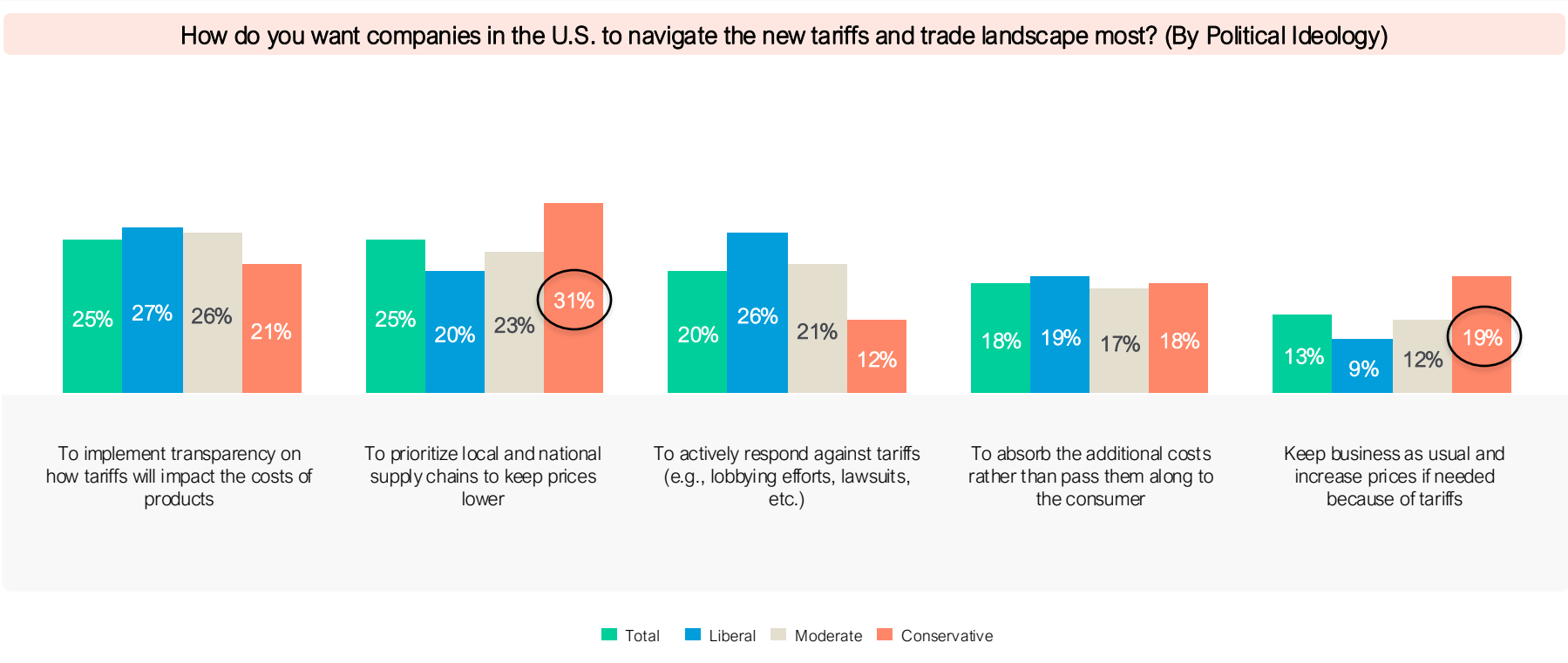


Q7. How much do you agree or disagree with the following statements?
Source: Harris Poll April 10-12, 2025, Gen Pop 18+ US (N=2118)



As Navigation of Tariffs Divide Opinions, Conservatives Stand Firm: Stick with Local and National Supply Chains; Liberals Want Action

How do you want companies in the U.S. to navigate the new tariffs and trade landscape most? (By Political Ideology)



Q6. How do you want companies in the U.S. to navigate the new tariffs and trade landscape most? Please select one.

Source: Harris Poll April 10-12, 2025, Gen Pop 18+ US (N=2118)



What This Means for Communications and Marketing Leaders

1

Clearly communicate the company's approach in the current environment

83% of Americans say they have a right to know where brands stand, and 81% believe CEOs should speak up.

This is an opportunity to clarify how the company is responding and what customers and stakeholders can expect.

2

Be transparent about pricing decisions

60% of US consumers believe companies will raise prices beyond what is necessary.

Communicating the rationale behind pricing changes can help maintain trust.

3

Adapt messaging by market

Reputational fallout is already visible, with 61% of Canadians and 25% of Mexicans reporting they have boycotted American brands.

Localized messaging should reflect regional sentiment and adapt to concerns.

4

Use this moment as a storytelling opportunity

Consumers are looking for signs of progress—innovation, domestic manufacturing, and economic resilience.

Highlighting how the company is already delivering in these areas can reinforce brand relevance and deepen connection with values-driven audiences.

5

Align communications, marketing, and policy around a unified message

With 95% of consumers expecting rising costs and tariffs dominating headlines, this is not a one-time story.

Teams should develop coordinated messaging that explains pricing changes and reinforces brand values.



Exploring Partnership Opportunities

Harris is a custom research consultancy with deep expertise, unmatched reputation advisory capabilities, and a pulse of the public's zeitgeist like no other.

We look forward to deeper conversation about expanding your company's license-to-operate and developing a better understanding of trust.

- Setting aside time to connect on the ideas presented here
- Get a better understanding of your unanswered questions and research needs
- Identifying areas where Harris can support your understanding & success



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