



United States This Month

Insights into Tariff and Trade Attitudes

Public Opinion Research
Release Date: July 25, 2025

Key Findings

01

Respondent opinions about the country's direction are sharply divided along partisan lines.

A majority of Americans feel the nation is on the wrong track. Republican respondents have become more optimistic, whereas Democratic respondents remain overwhelmingly negative.

02

A substantial portion of the Republican base prioritizes nationalism over traditional free-market beliefs.

While free trade is seen as economically beneficial by a majority (65%), Republicans are likely to endorse protectionist measures aligned with President Trump's economic policies.

03

A majority of Americans support the import of oil and electricity from Canada.

Support for importing electricity has grown by 4 points since 2024 to 56%, and support for importing oil has increased by 3 points over the past year to the same level.

Setting the stage



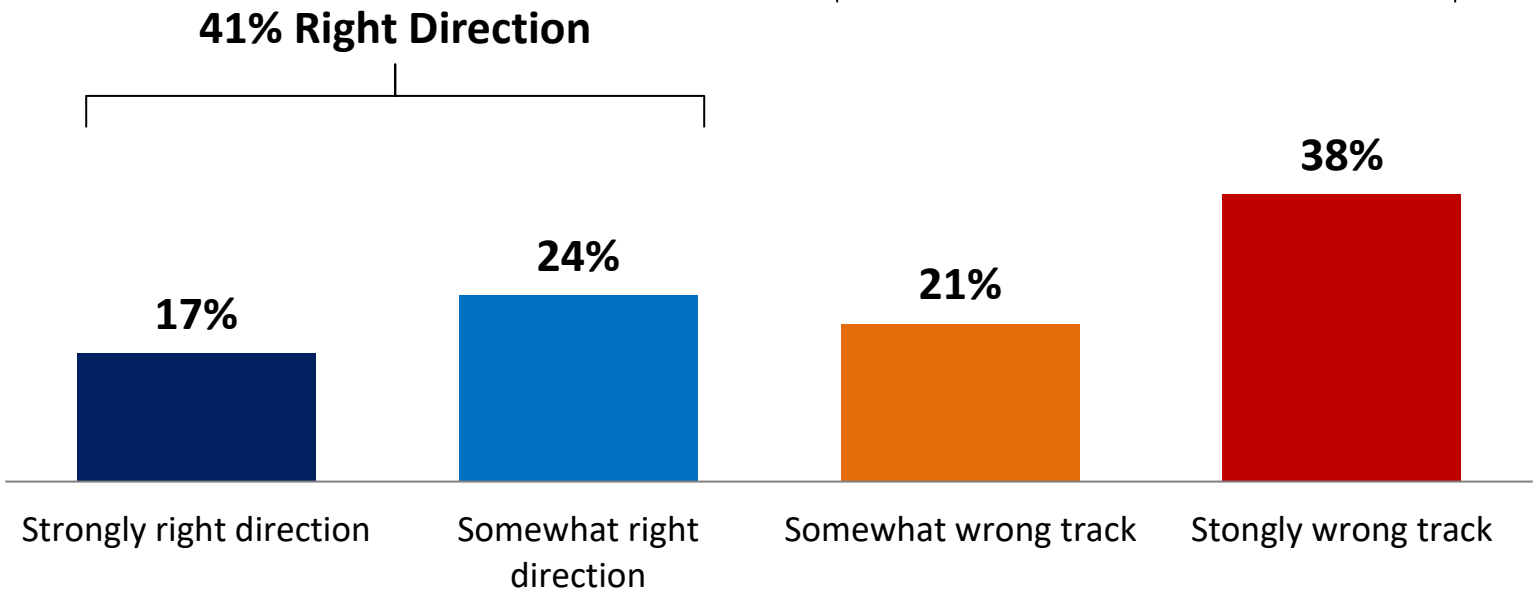
Right/Wrong Direction: 59% of respondents feel the US is going in the wrong direction, including 4-in-5 African Americans and 2-in-3 women



Generally speaking, do you feel things in the United States are going in the right direction, or do you feel things have gotten off on the wrong track?
[asked of all respondents; n=2,000]

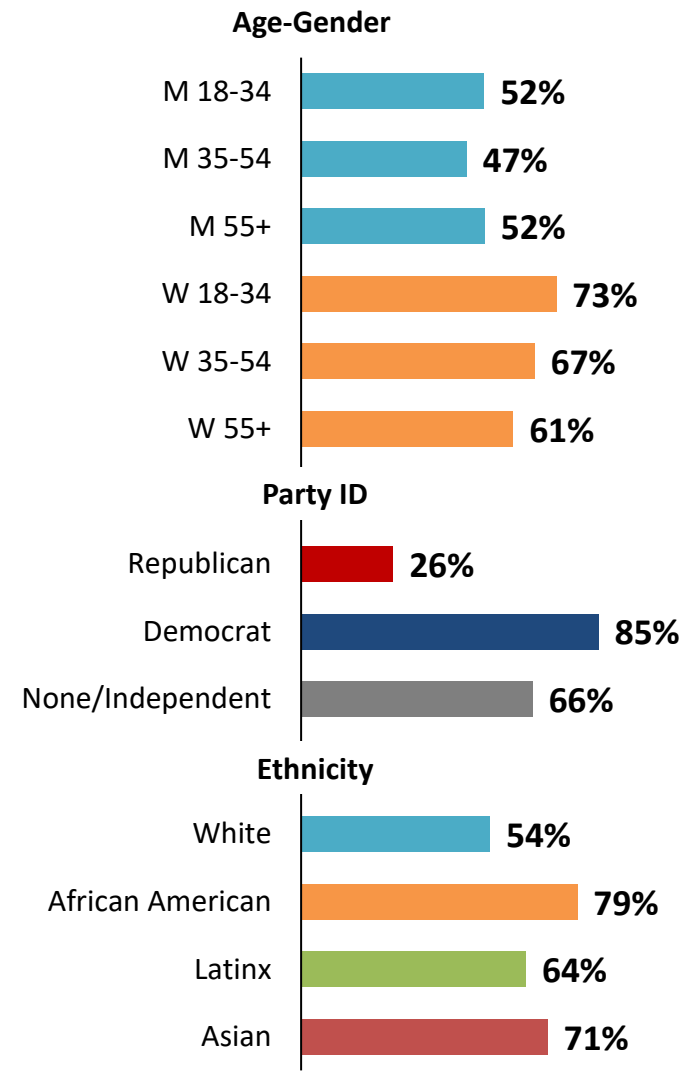


-18%
Net Score



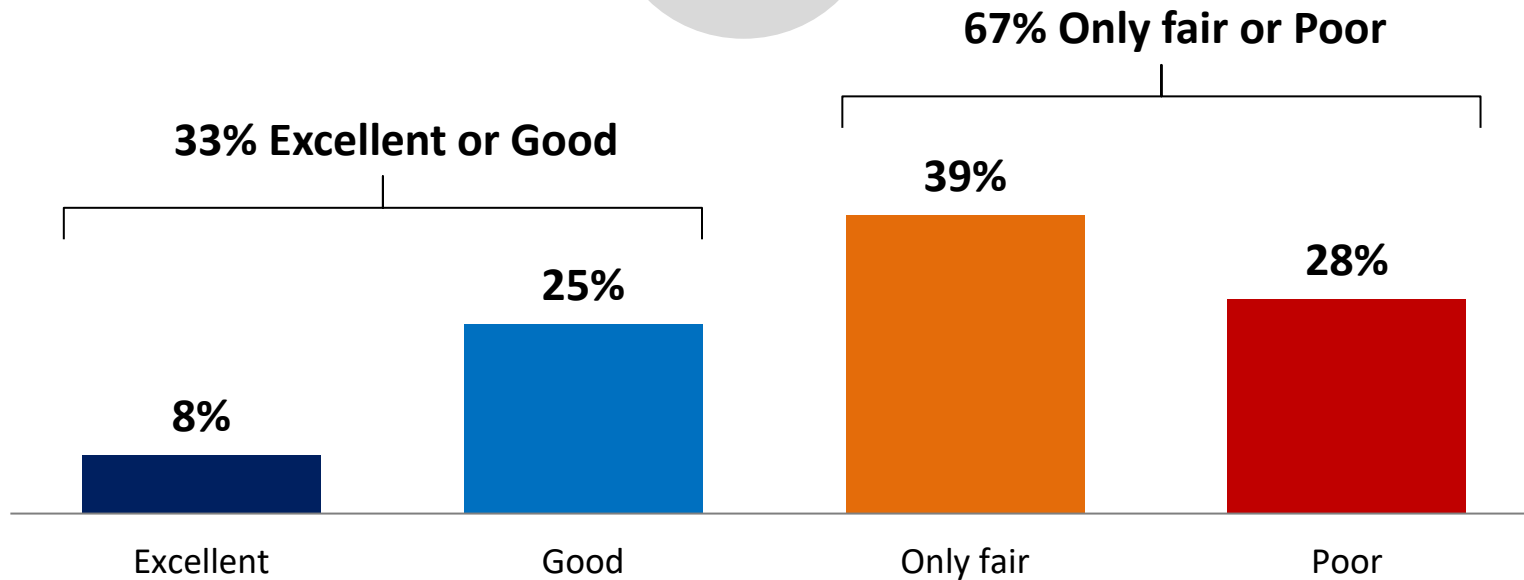
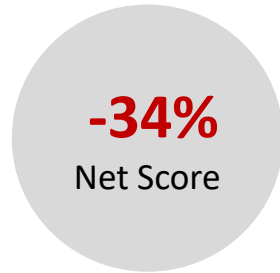
Segmentation

Respondents who say "Wrong Track"



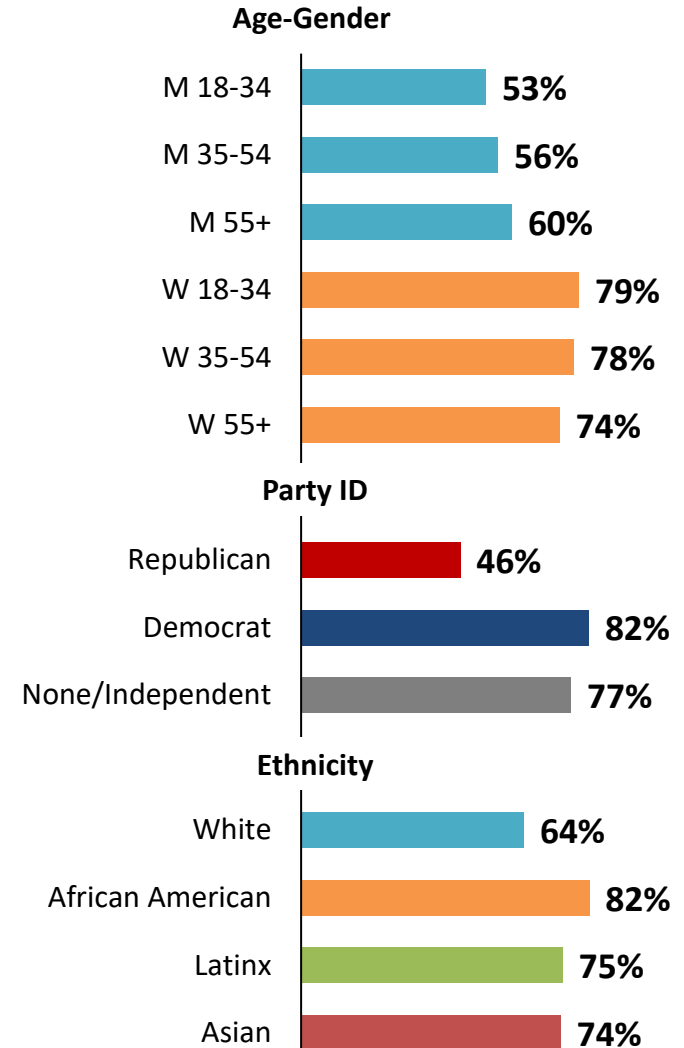
US Economy: With a net score of -34%, 2-in-3 respondents rate the economy is only fair or poor – including 82% of Democrats and African Americans

Q How would you describe the economy today in the United States? Would you say it is...
[asked of all respondents; n=2,000]



Segmentation

Respondents who say "Only fair or poor"

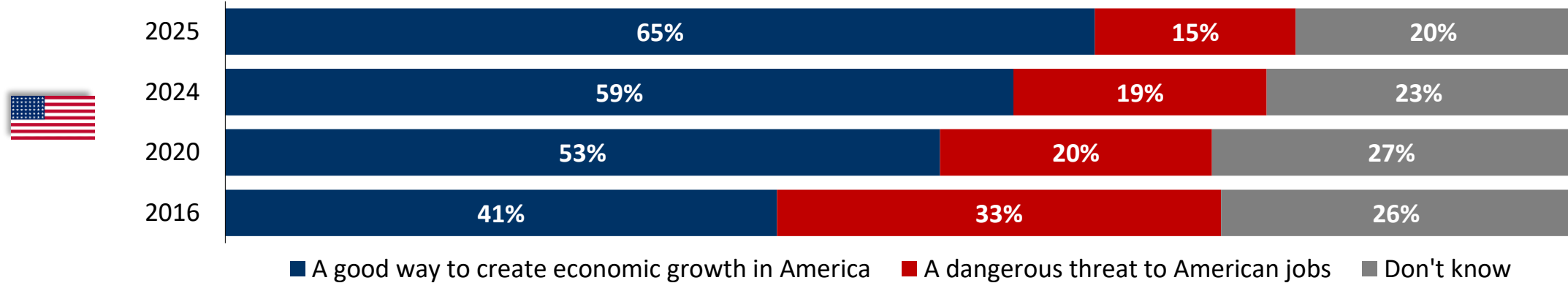


Trade - Canada vs. U.S.

Free Trade: About 2-in-3 (65%) Americans believe FTAs are good for economic growth; 65% think free trade with Canada has been good

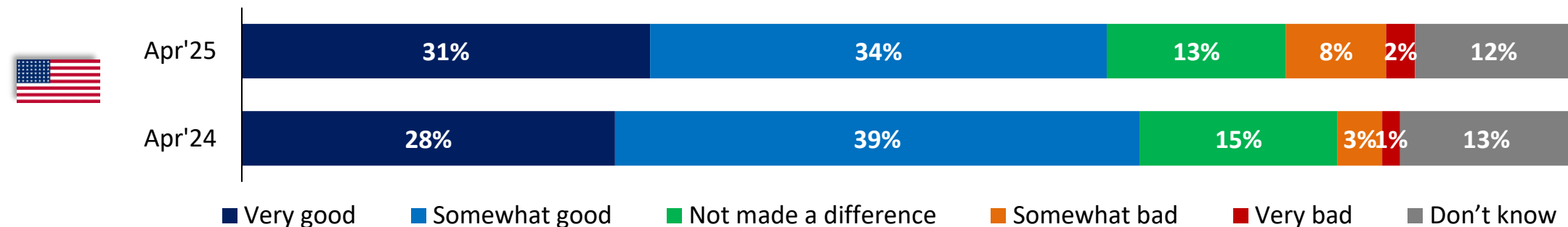
Q Which statement is closer to your point of view? **Free trade agreements are...**

[asked of all respondents; United States n=2,000]



Q The United States currently has a free trade agreement with Canada. **Do you think free trade with Canada has generally been a good thing for America or a bad thing for America?**

[asked of all respondents; United States n=1,000]



Free Trade: Over half of Americans think importing electricity and oil from Canada is a good thing for the US; both increasing from 2024



The United States currently imports electricity from Canada. ***Do you think importing electricity from Canada has generally been a good thing for America or a bad thing for America?***

[asked of all respondents; United States n=2,000]



June '25



Apr '24



■ Very good ■ Somewhat good ■ Not made a difference ■ Somewhat bad ■ Very bad ■ Don't know



The United States currently imports oil from Canada. ***Do you think importing oil from Canada has generally been a good thing for America or a bad thing for America?***

[asked of all respondents; United States n=2,000]



June '25



Apr '24



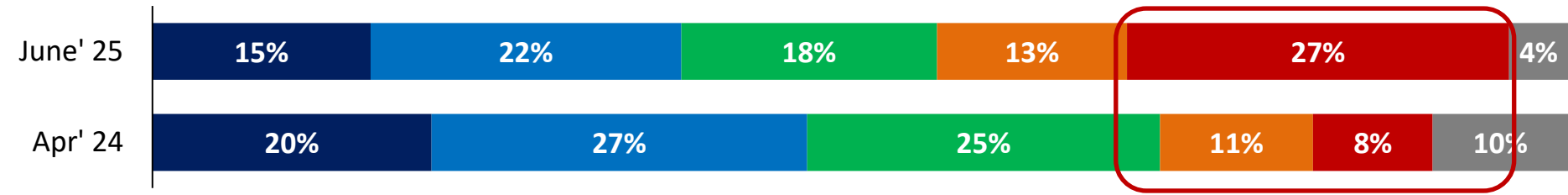
■ Very good ■ Somewhat good ■ Not made a difference ■ Somewhat bad ■ Very bad ■ Don't know

Free Trade: Strong opposition to a 10% tariff increase on foreign and Canadian imports has nearly or fully tripled since April 2024



Below is a list of policies the federal government could adopt. For each policy, please indicate if you support or oppose that.
[asked of all respondents; United States n=2,000]

Raise tariffs on all foreign imports by 10% across the board

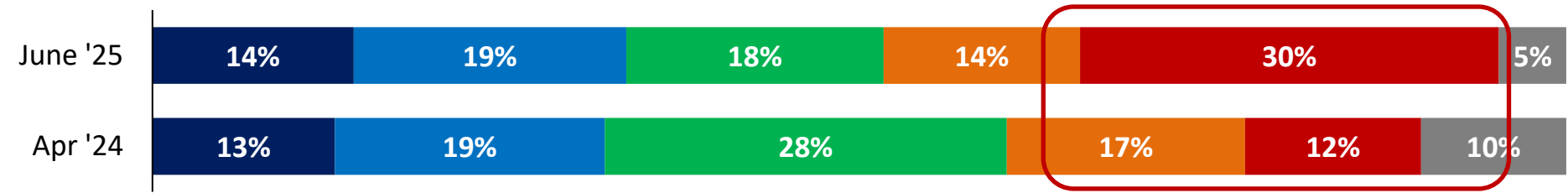


■ Strongly support ■ Somewhat support ■ Neither support nor oppose ■ Somewhat oppose ■ Strongly oppose ■ Don't know



Below is a list of policies the federal government could adopt. For each policy, please indicate if you support or oppose that.
[asked of all respondents; United States n=2,000]

Raise tariffs on imports from Canada by 10% across the board



■ Strongly support ■ Somewhat support ■ Neither support nor oppose ■ Somewhat oppose ■ Strongly oppose ■ Don't know ■

Trade Policies BY Voting Habits: Republican voters support a 10% tariff on foreign/Canadian imports; Democrats oppose

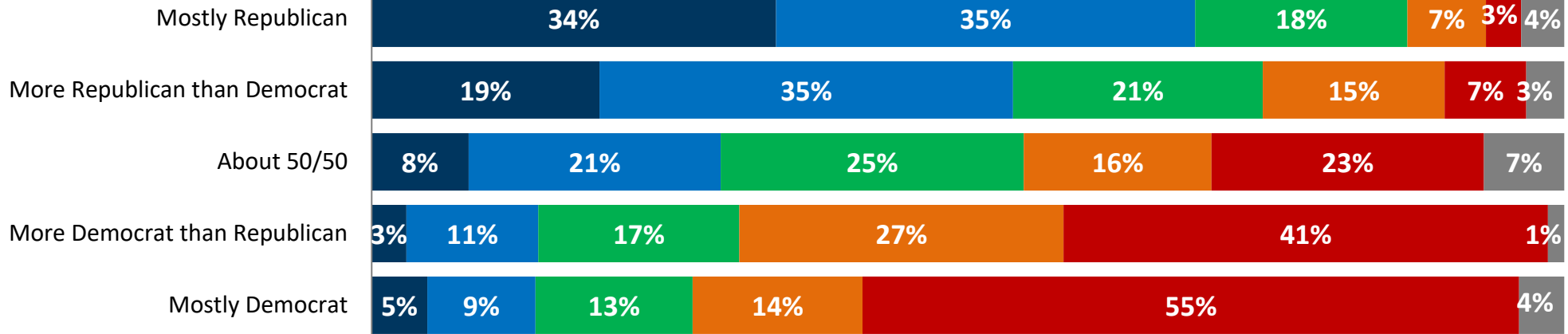


Below is a list of policies the federal government could adopt. For each policy, please indicate if you support or oppose that.

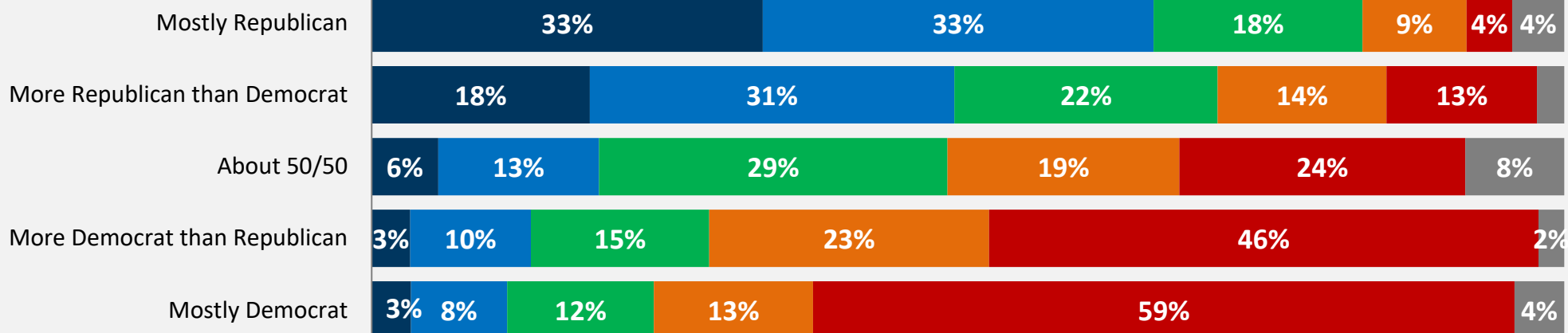
[asked of all respondents; United States n=2,000]



Raise tariffs on all foreign imports by 10% across the board



Raise tariffs on imports from Canada by 10% across the board



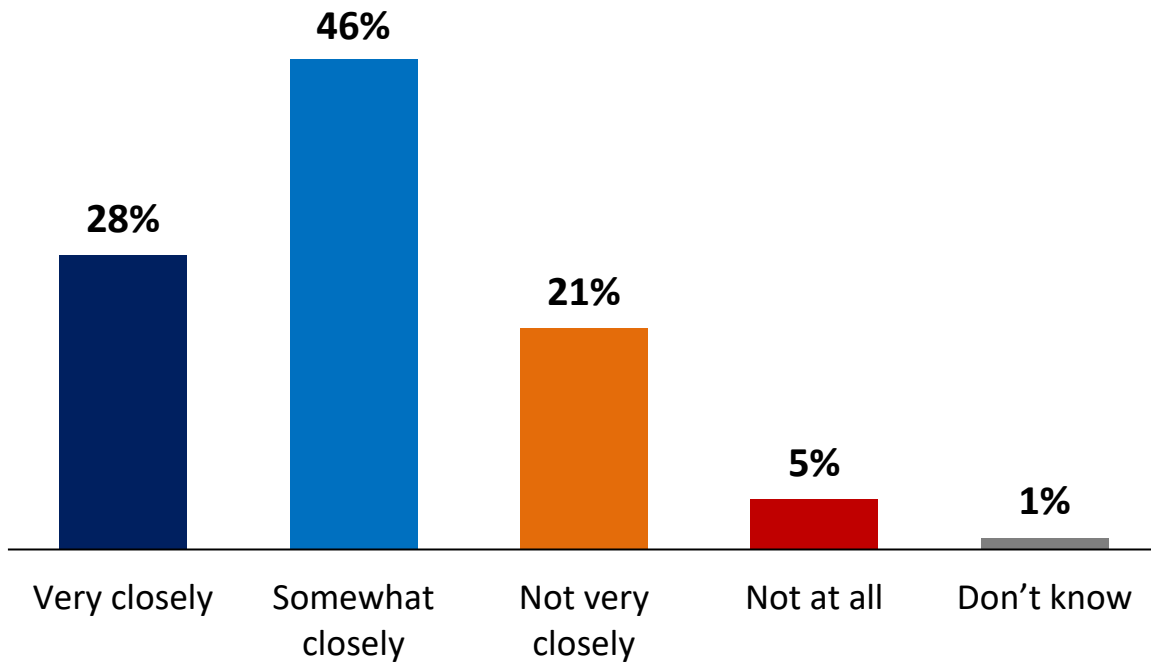
■ Strongly Support ■ Somewhat Support ■ Neither support nor oppose ■ Somewhat oppose ■ Strongly oppose ■ Don't know

Tariffs

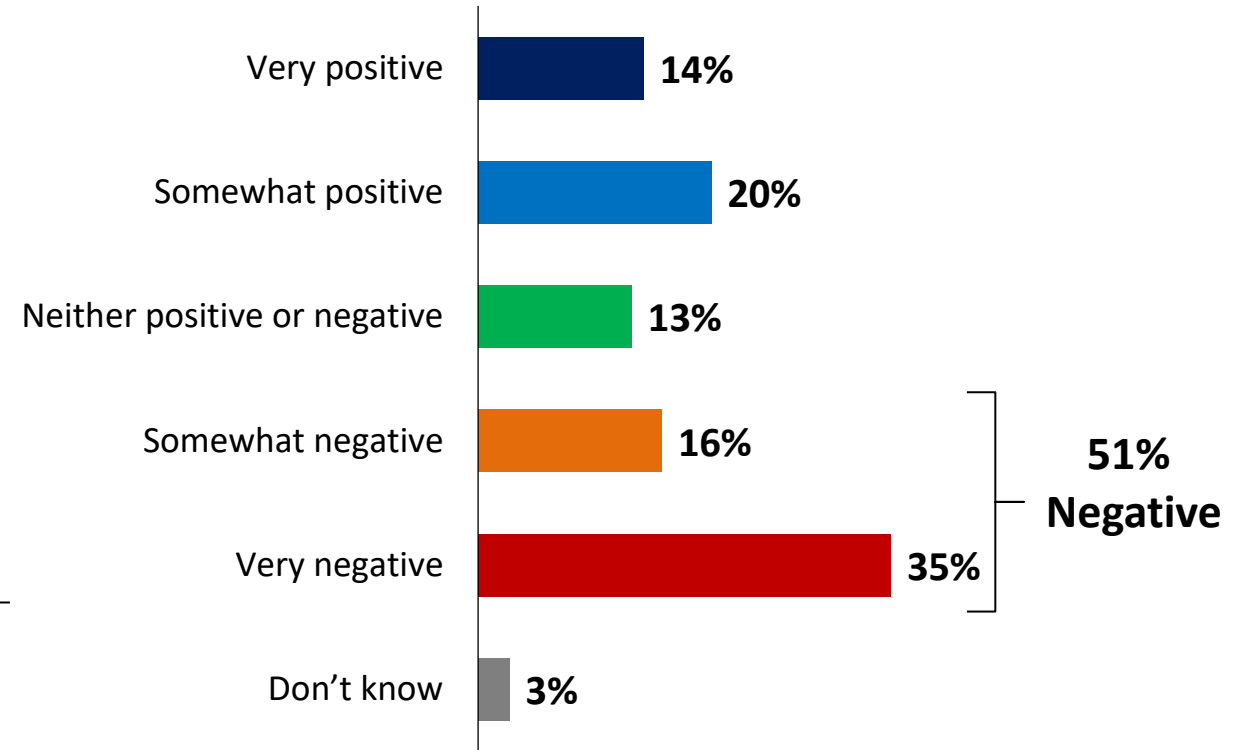


Federal Read, Seen, Heard: 73% of Americans closely follow the news about tariff policies; 35% have a very negative reaction to them

Q How closely are you following the news about President Trump's tariff policies?
[Asked of all respondents; United States n=2,000]



Q From what you have read, seen or heard, do you have a positive or negative reaction to President Trump's tariff policies?
[Asked of those who have RSH; United States n=2,000]

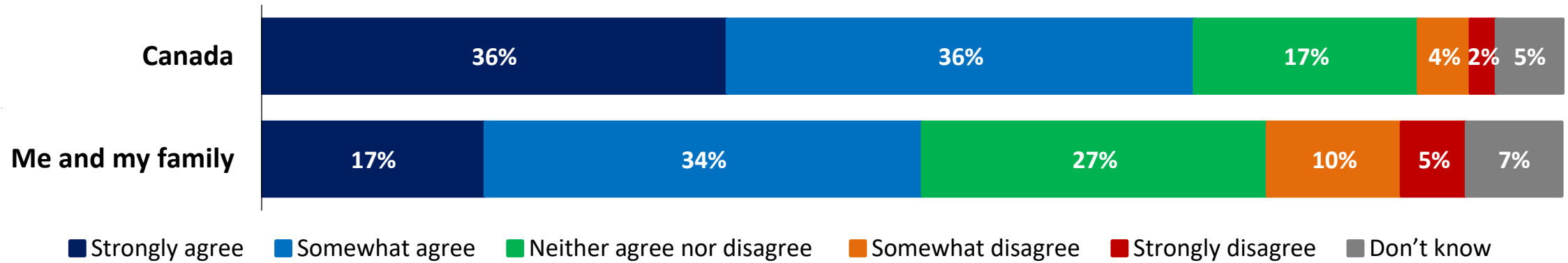


Impact of Tariffs: 72% of Canadians and 53% of Americans think Trump's trade policies will have a serious impact on their countries



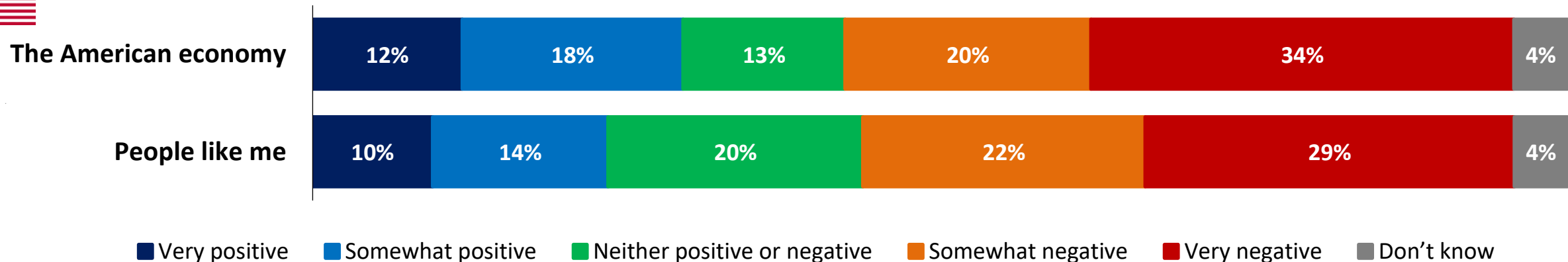
Do you agree or disagree with the following statements? *The Trump Administration's trade policies will have a serious impact on...*

[asked of all respondents; Canada May '25 W1+W2 n=1,500]



In your opinion are *President Trump's tariff policies having a (rotate) negative or positive (end rotation) impact on...*

[asked of all respondents; United States n=2,000]



Tariffs BY Voting Habits: Nearly 3-in-4 Republicans say tariffs will benefit America long-term; highest among Trump/Christian Republicans¹⁴

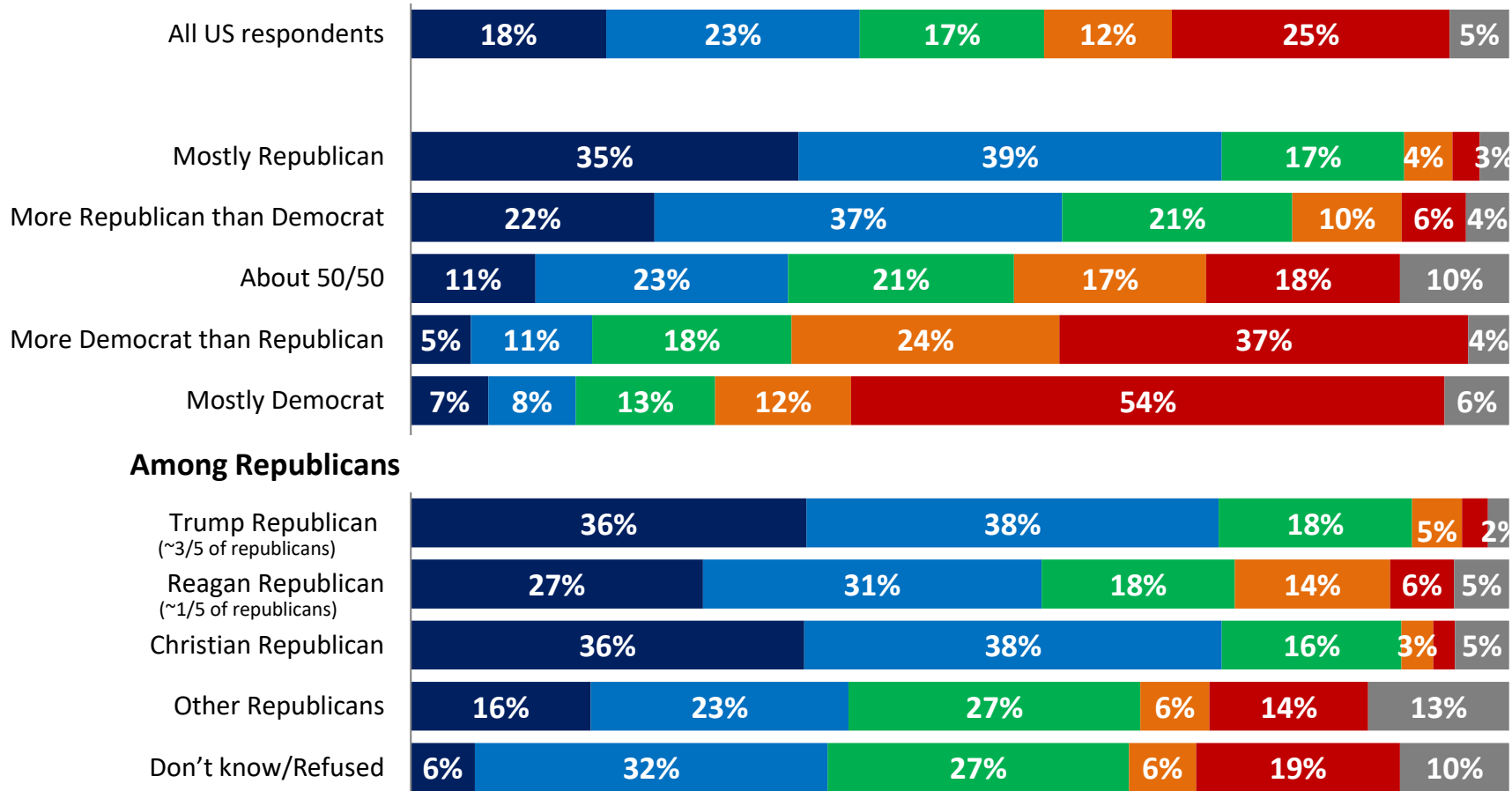


Would you agree or disagree with the statement that “Tariffs will hurt in the short run but are good for America in the long run”?

[asked of all respondents; United States n=2,000]



“Tariffs will hurt in the short run but are good for America in the long run”



■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree or disagree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

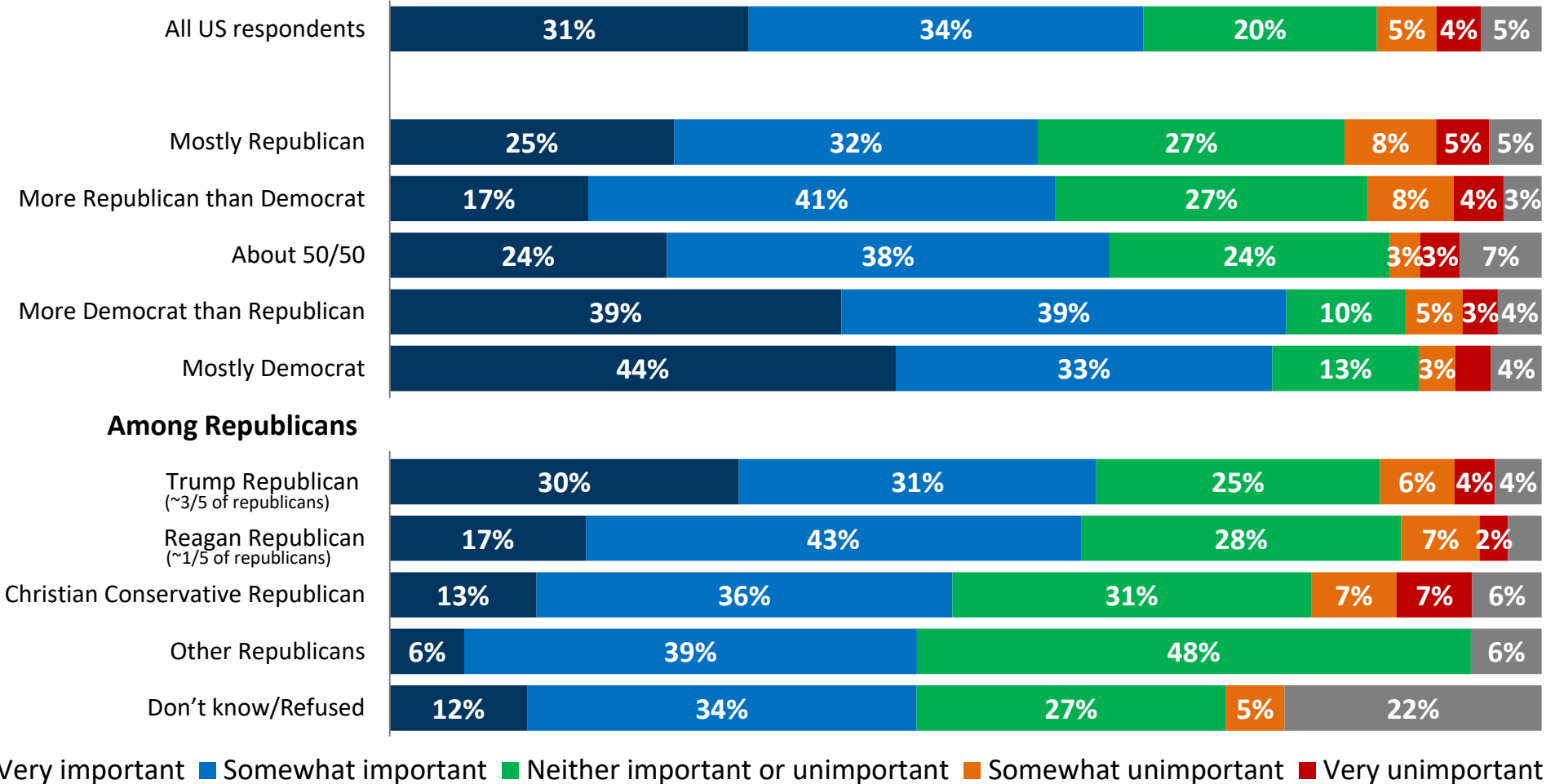
Note: N size for Libertarian too small (n<10) - excluded

Tariffs and Voting BY Voting Habits: Over half of Republicans (56%) and 77% of Democrats say tariffs are important to their vote



Thinking about the 2026 elections for state and federal offices, how important is the tariff issue to your decision about how to vote?

[asked of all respondents; United States n=2,000]



Very important Somewhat important Neither important or unimportant Somewhat unimportant Very unimportant Don't know

Note: N size for Libertarian too small (n<10) - excluded

Free Trade and Tariffs: Many support free trade, but those of Republican partisan are conflicted with their support for Trump

Q Would you agree or disagree with the statement that “Tariffs will hurt in the short run but are good for America in the long run”? [asked of all respondents; United States n=2,000]

Q The United States currently has a free trade agreement with Canada. Do you think free trade with Canada has generally been a good thing for America or a bad thing for America? [asked of all respondents; United States n=2,000]



Results shown for those who say “Tariffs are good for America in the long run” AND “Free trade with Canada is a good thing” [n=393]

% NET Good	Age-Gender						Party ID			Race				Religious Service Attendance			
	M 18-34	M 35-54	M 55+	W 18-34	W 35-54	W 55+	Republican	Democrat	Independent	White	Black	Hispanic	Asian	Weekly	At least once a month	At least once a year	Never
Those who say both	26%	26%	21%	12%	14%	20%	34%	9%	15%	22%	10%	17%	11%	29%	20%	19%	13%

Methodology

The background of the slide is a solid dark blue color. It features several faint, light blue circles of varying sizes scattered across the surface, creating a subtle pattern.

Survey Methodology – USA National

These are the results of an online survey conducted between June 17th and June 23rd, 2025.

Method: This online survey was conducted using Dynata, a leading provider of online sample with additional respondents from INNOVATIVE’s Canada 20/20 national research panel. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual American population according to Census data to provide results that are intended to approximate a probability sample.

Sample Size: n=2,053 registered voters, 18 years or older. The results are weighted to n=2,000 based on Census and Current Population Survey data for all adults, with those who report not being registered screened out.

Field Dates: June 17th to June 23rd, 2025.

Weighting: Results for all American adults are weighted by age, gender, education, race, past presidential vote, and region to ensure that the overall sample’s composition reflects that of the actual population according to Census and population survey data; in order to provide results that are intended to approximate a probability sample. Respondents who report not being registered to vote were screened out of the final sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability-based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Men 18-34	184	9.0%	176	8.8%
Men 35-54	414	20.3%	400	20.1%
Men 55+	391	19.1%	367	18.4%
Women 18-34	312	15.3%	307	15.4%
Women 35-54	266	13.0%	264	13.3%
Women 55+	477	23.3%	478	24.0%
Region				
Northeast	332	16.2%	320	16.0%
Midwest	447	21.8%	443	22.1%
South	828	40.3%	810	40.5%
West	446	21.7%	426	21.3%

Survey Methodology – Canada Comparison Study



These are the results of an online survey conducted between June 5th and June 16th, 2025.

Method: This online survey was conducted and sponsored by Innovative Research Group Inc. using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online sample. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data.

Sample Size: n=2,012 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,500 based on Census data from Statistics Canada.

Field Dates: June 5th to June 16th, 2025.

Weighting: Results for Canada are weighted by age, gender, region, education, and self-reported federal past vote to ensure that the overall sample's composition reflects that of the actual population according to Census data. Weighted and unweighted frequencies are reported in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability-based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Men 18-34	232	11.6%	200	13.4%
Men 35-54	295	14.7%	238	15.9%
Men 55+	484	24.1%	295	19.8%
Women 18-34	212	10.6%	194	12.9%
Women 35-54	296	14.7%	247	16.5%
Women 55+	489	24.4%	321	21.5%
Region				
British Columbia	278	13.8%	213	14.2%
Alberta	237	11.8%	166	11.1%
Prairies	151	7.5%	96	6.4%
Ontario	777	38.6%	579	38.6%
Québec	411	20.4%	345	23%
Atlantic	158	7.9%	101	6.7%



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