

# CANADA CHATS 2025

## The Consumer Clash



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## 11<sup>th</sup> Edition of Consumption Habits and Attitudinal Trends Report

### The Consumer Clash

Connecting authentically with Canadians today means simultaneously delivering on a multitude of complex, and often clashing, needs, while also striving to balance a growing desire for simplicity.

Consumers expose a longing for ‘the way things used to be’ – a nod to both nostalgia and traditionalism. A rising willingness to spend time in the kitchen, honing our skill set is contrasted with leveraging technology that provide enhanced efficiency, along with the demand for clean-comfort meal solutions.

Our needs are also expanding, demonstrating an increasing range of table stake requirements such as added functional health benefits layered with permissible indulgence, juxtaposed with greater label transparency and fewer, simpler ingredients. Prioritizing health, however, does not mean we forego indulgence, as we continue to turn to foods and beverages to satisfy emotional and experiential requirements, reflecting our craving for hedonistic pleasures.

Canadian consumption continues to be shaped by greater macro forces like polarizing societal shifts, economic uncertainty, growing pressures around climate change and waste reduction, and keeping pace with rapidly evolving technology in a ‘constantly-connected-culture’.

In the 11<sup>th</sup> edition of the **Canada CHATS 2025 Trends Report**, we harness the insights from our robust food and beverage syndicated tracking studies to assess the impacts of evolving macro trends and clashing consumer needs to decode the course for the future.

## Macro Trends

**New Age Heritage** – Our post-pandemic lifestyles are well established, and consumers have adapted to balancing life at home while being pulled back to out-of-home routines. Digital connectivity and cost-of-living pressures continue to shift modern situational dynamics, highlighting the need for ‘eatertainment’ at home and underline continued challenges at foodservice. In contrast, we see a rising desire to retreat to old systems and seek greater authenticity in our dining experiences. This is demonstrated with signals like ‘tradwives’ who give a nod to traditionalism as it relates to rituals in the kitchen, as well as a pull toward comfort cuisines that reflect the diversity of our palates. We explore the convergence of modernity vs. traditionalism as it relates to consumption habits today.

**Balancing Health vs. Hedonism** – Concern for our health has risen since the pandemic, and particularly the desire to adopt new behaviours like eating well for longevity. We examine the movement beyond sustenance to the complex requirement for ‘more’ as it relates to our needs driving choice. Analyzing modern health priorities emphasizes emotional wellbeing in addition to a plethora of functional benefits. We examine the growth of signals like unique dietary regimens and alcohol moderation. Clashing with conscientious health is the retreat to the pleasures we have been deprived of, like social

connection, enjoyment and indulgence as it relates to food and beverage experiences.

**Polarizing Population Shifts** – Our overarching population shifts are multifaceted and require further understanding, from the continued growth and influence of a youthful multicultural Canadian demography, in contrast with an aging population presenting their own unique set of needs. These polarizing demographic changes coincide with economic pressures affecting consumption habits across generations.

**Conscious Consumer Dilemma** – We’ve entered a time of climate agreement; the rising importance of ESG factors is well accepted. However, in a period of economic uncertainty, consumers are faced with the dilemma to make choices based on affordability and value. We explore nuanced differences of conscious consumption drivers along with decoding the ‘what I say vs. what I do’ gap.

**The Technological Divide** – We’re peaking at a time of infinite access to information and rapidly evolving technology, yet simultaneously experiencing a trust deficit and growing information skepticism. We examine the role of technology as it relates to influencing consumer choice, to providing meal inspiration, online purchase channels, to digital experiences at retail and leveraging technology in the kitchen.





## The Dayparts

As our population continues to grow, we're investigating daypart preferences and priorities in the context of nuanced contrasting differences among Canada's multicultural consumer cohorts. Within this segment, we delve into essential daypart need states, venue dynamics, prominent food and beverage categories, preparation dynamics, nutritional considerations, situational dynamics and the evolving foodservice channel, viewed through the lens of:

- Breakfast – Mindful Morning Rituals
- Lunch – Packed vs. Purchased Provisions
- Dinner – Modern Kitchen Renaissance
- Snacking – The 'Better-For-You' Boom

## Main Report Sources

**Ipsos FIVE** – FIVE is a daily online diary capturing everything an individual ate and drank yesterday across all categories, brands, all dayparts and all venues (including out of home channels). We also track situational dynamics, item preparation, motivations, health statuses, lifestyle habits and purchase dynamics driving item choice. The study is a strategic targeting tool launched in 2013 that provides an unparalleled view of consumption among 23,000 individuals annually aged 2+ years.

**Ipsos Foodservice Monitor (FSM)** – FSM is an on-going daily market measurement tool detailing what individual consumers purchased from all foodservice channels (e.g., Quick-Service Restaurants, Full-Service Restaurants and Home Meal Replacement Retail channels) yesterday. It captures detail related to industry size and channels, visit details, party dynamics, menu choice and demographics among other metrics. FSM tracks over 35,000 individuals annually and links consumer needs with behaviour to offer a 360 degree look at the commercial foodservice experience in Canada.

**Ipsos ACT Canada (ACT)** – The Alcohol Consumption Tracker (ACT) is an online consumption diary that offers a detailed and nuanced understanding of alcohol consumption behaviours in Canada, since September 2011. ACT covers consumption across all alcohol categories and non-alcohol substitutes, in both On Premise and Residential channels. By continuously tracking consumer habits, ACT provides invaluable data on what consumers drink, where and when they consume alcohol, their motivations for drinking, and their social contexts. This data is supplemented by insights into their shopping experiences, lifestyle choices, and attitudes and perception towards alcohol.

## Launch Date and Deliverables

Launch Date: December 5<sup>th</sup>, 2024

CHATS 2025 Deliverables Include:

**CHATS 2025 Standard Package: \$42.5K**  
(Early bird pricing \$38.5K\*)

Resource report and 1-hour presentation

**CHATS 2025 Premium Package: \$55K**  
(Early bird pricing \$50K\*)

Standard deliverables plus an additional bank of 15 client service hours for report/presentation follow-ups only. Hours must be used by Dec 31<sup>st</sup>, 2025.

*\*Early Bird pricing available until October 31<sup>st</sup>, 2024.*

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