

# CANADA VANTAGE 2025

## CANADIAN FOODSERVICE TRENDS

**Come Together**





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## 10<sup>th</sup> Edition of Foodservice Sales, Traffic, and Behavioural Trends Report

### Come Together

Dining is about connection. The foodservice industry understands this deeply, adapting to unprecedented challenges to continue serving its guests. In 2025, as the landscape shifts, this year's Vantage report examines how restaurants are fostering these vital connections.

This year's report will introduce the 2025 Foodservice Trends that represent pockets of growth and opportunity for Canada's Foodservice Industry.

- Welcoming back lapsed users and growing the pool of daily foodservice guests
- Understanding local-restaurant enthusiasts and planning for "buy Canadian"
- Hosting EaterTainment occasions at Dine-In and Off-Premise channels
- Easing tensions and lifting the mood with emotional eating

### Business Applications

In the Canada Vantage 2025 report, we will provide an overview of how big picture trends can be used strategize in an industry where guests are second guesting restaurant visits and spend. Report outputs will aid our clients in shaping a successful path forward by:

- Ensuring annual plans and long-term strategies are on trend
- Shaping marketing plans and initiatives
- Uncovering innovation and growth opportunities
- Enhancing customer communication by understanding the "why behind the buy": consumer needs triggers and tensions

## Macro Trends

**Foodservice Market Fundamentals** – Trend key performance indicators and market dynamics

- Market sizing and trend on incidence, dollars, traffic, and average eater cheques by region
- Segments and operator types: Quick-Service, Full-Service, Retail, and On-Premise
- Channel dynamics: the recovery of Dine-In and the new status quo for digital ordering
- Daypart shifts: changing dynamics of meals and snacking occasions
- Demographic focus on household income groups to navigate impact of rising cost of living
- Performance of top entrées, sides/apps, beverages, and snacks

**Welcome Back, Lapsed Diners!** – Canadian restaurants are facing a challenging landscape as they navigate the post-pandemic world. While they have achieved remarkable success despite a shrinking pool of daily diners, attracting these "lapsed users" back to restaurants is crucial for sustained growth. We delve into the factors keeping these potential customers away, examining their demographics, dining preferences, and the barriers they face. By understanding these lapsed users, the report aims to equip restaurants with the insights needed to create targeted marketing strategies and compelling dining experiences that entice them back into restaurants more frequently.

**Canadian Loyalists** – The growing trend of "buying local" presents a significant opportunity for Canadian restaurants. Consumers are increasingly

interested in supporting local businesses, creating a potential customer base for restaurants that highlight their local sourcing and ownership. Understanding the demographics, motivations, and dining habits of these "local enthusiasts" will be crucial for restaurants looking to capitalize on this trend and Inform strategies to act on and plan for possible scenarios of the "Made in Canada" movement.

**EaterTainment** – The dine-in experience is making a strong comeback in the Canadian foodservice industry, offering a valuable opportunity for both quick-service and full-service restaurants. By understanding what's driving consumers back to restaurants for social dining experiences, restaurants can tailor their strategies to capitalize on this trend and attract a larger share of diners. At the same time, socializing hosts are cutting down on the costs of going out and serving restaurant food at home. To get your fair share of this "EaterTainment" trend, consider strategies that cater to both dine-in and at-home dining experiences.

**Easing Tensions** – In today's stressful world, more Canadians are turning to foodservice for emotional comfort and escape. Restaurants can tap into this trend by understanding what drives these "emotional eaters," what kind of experience they seek, and how to best reach them. This includes recognizing the demographics and occasions that influence emotional eating, as well as the role of convenience and atmosphere in attracting these customers.



## Main Report Sources

**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 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.

## Launch Date and Deliverables

Launch Date: May 12<sup>th</sup>, 2025

Vantage 2025 Deliverables Include:

### **Vantage 2025 Standard Package: \$30.5K**

(Early bird pricing \$27.5K\*)

Resource report and 1-hour presentation

### **Vantage 2025 Premium Package: \$42.5K**

(Early bird pricing \$39.5K\*)

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 May 6<sup>th</sup>, 2025.*

### For more information, please contact:

#### **Asad Amin**

Senior Vice President, Head of Syndicated Solutions  
Market Strategy & Understanding

[Asad.Amin@Ipsos.com](mailto:Asad.Amin@Ipsos.com)

#### **Mauricio Vieira**

Vice President,  
Market Strategy & Understanding

[Mauricio.Vieira@Ipsos.com](mailto:Mauricio.Vieira@Ipsos.com)

#### **Emma Balment**

Director,  
Market Strategy & Understanding

[Emma.Balment@Ipsos.com](mailto:Emma.Balment@Ipsos.com)