Consumer Trends Tracker (CTT)

Canada

dunnhumby Customer Strategy & Insights

February 2026

dunnhumby

What the CTT is, how does it work and what is the objective of this report?

Consumer Solution

The CTT is a consumer dashboard designed to uncover shopper needs, perceptions and behavior over time.

Framework

Provides a framework for understanding trends and learnings to help teams inform client conversations.

Wave-Specific Insights

This edition of the CTT explores the use of AI in shopping, while still reporting on our usual metrics.

1,500 respondents per quarter

7th wave for this country

National representativeness
(Age, income, region, gender)

Multiple formats evaluated
(Mass, club, traditional, discounter, dollar, pureplay, drug, specialty)

Report sections

- Market Context
- Channel Metrics
- Consumer Needs & Behaviors
- Needs & Behaviors by theme
- Wave 12 specific questions: Using AI in everyday home shopping
- Appendix

Editorial Summary

Convenience and Digital needs show the highest growth in importance during the Holiday season

The latest data from December's Canada edition of dunnhumby's Consumer Trends Tracker, is summarized below.

'Food purchased from stores' inflation is at 5.0%* driven in particular by rising meat and beverage prices. **Perceived** food inflation remains elevated at 23.5%, as Mass channel retailer penetration is on par with the Conventional supermarkets.

Convenience rules – Very few consumer needs and behaviors increased in this December wave of data. Those that did, included having a *physical store in a convenient location,* up 1.8 ppts to 77%, and having easy ways to pay online, up 2.4 ppts to 75%. While not rising this wave, having *items always in stock* remains the most important consumer need at 79%. Taken together, this suggests consumers are prioritizing convenience. This is especially true in the Atlantic region of Canada, where these measures are significantly higher.

Local sentiment reverts – The 'buy local' sentiment we saw highly elevated last wave (in the wake of U.S. tariffs), has dropped right back down suggesting it was temporary behavior despite the feeling at the time. Consumer needs to *Shop at stores that support the local community* is down 5 ppts, and those that *Support local farmers/businesses* most or all the time they shop, is down 7.8 ppts.

Online as an unmet need – Online shopping needs increased for 5 out of 6 attributes of our Digital attributes this wave. However, online shopping behavior dropped. This rare divergence shows consumers were looking for digital convenience, but this didn't translate to behavior, suggesting a potential unmet need for retailers to capitalize on.

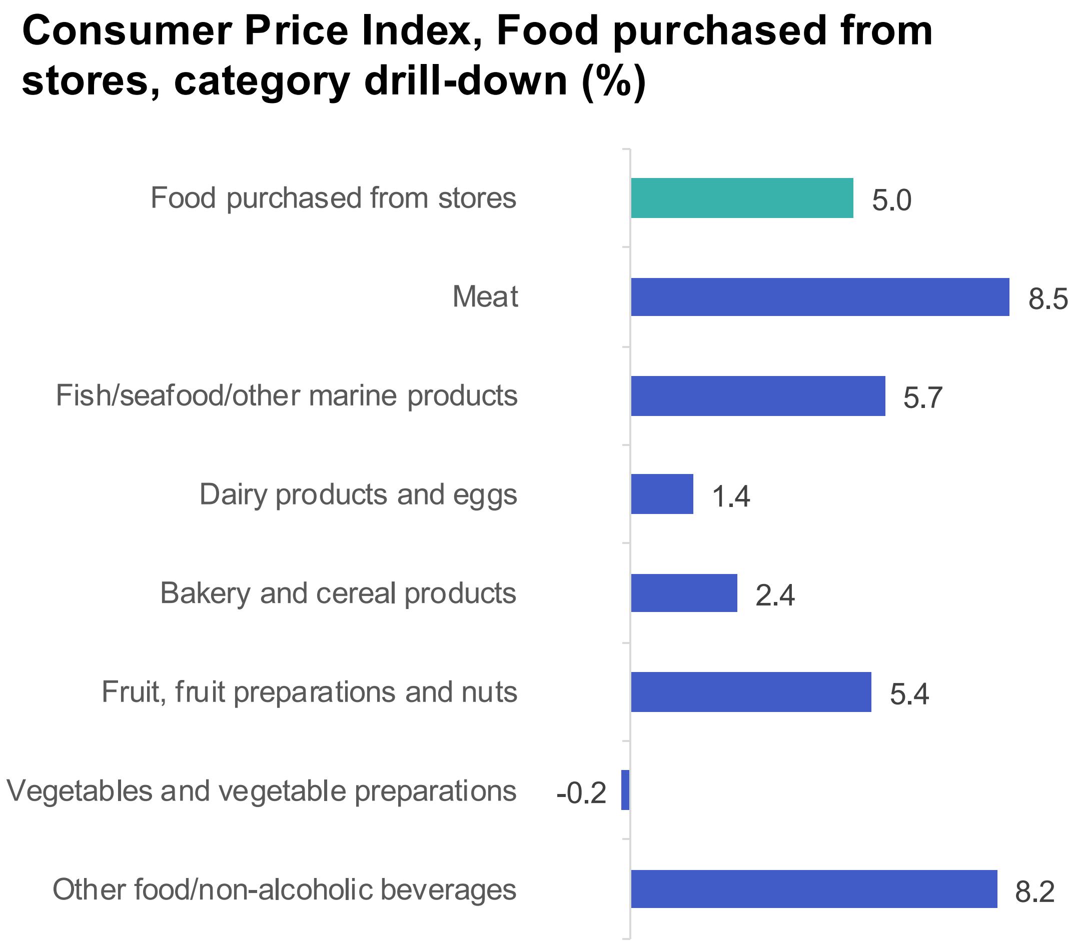
Lagging AI adoption – Only 9% of Canadians use AI tools to help with their grocery shopping, the lowest in the Americas**. In terms of the barriers to AI, 85% are either 'satisfied with their own shopping methods' or 'prefer to make their own decisions'. Retailers or CPG's seeking to build AI tools to help shoppers will first need to convince them of the benefits.

Sources: dunnhumby's Consumer Trends Tracker, wave 12, Dec 2025 n= 1,500;
*Statistics Canada
**Americas average consists of research across Canada, USA, Mexico, Colombia, Brazil, Chile

Market context

Food at home inflation is at 5% in Canada, driven in particular by rising meat and beverage prices

Saskatchewan has the highest inflation and Whitehorse, Yukon the lowest



Source: Statistics Canada

Perceived inflation and financial insecurity (a measure of those living paycheck to paycheck) have increased this wave. Food insecurity has dropped very slightly.

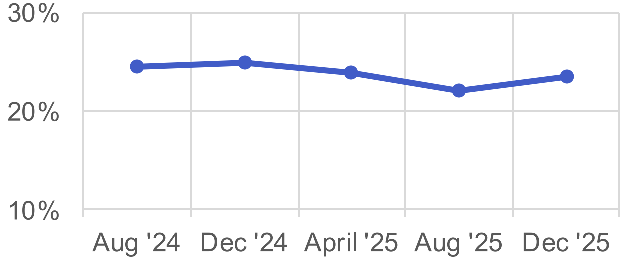
23.5%

+1.7%

Perceived inflation

Perceived Food-at-home Inflation

*Actual 'Food purchased from stores' inflation 5.0%**

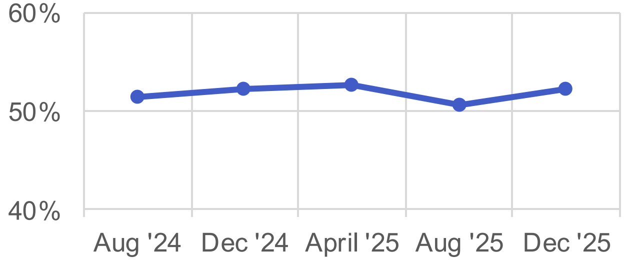


52.3%

+1.9%

Financial insecurity

Difficulty covering an unexpected expense of $400

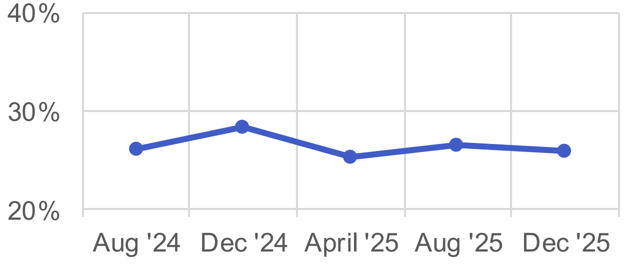


25.9%

-0.7%

Food insecurity

Skipped or cut size of meals for financial reasons

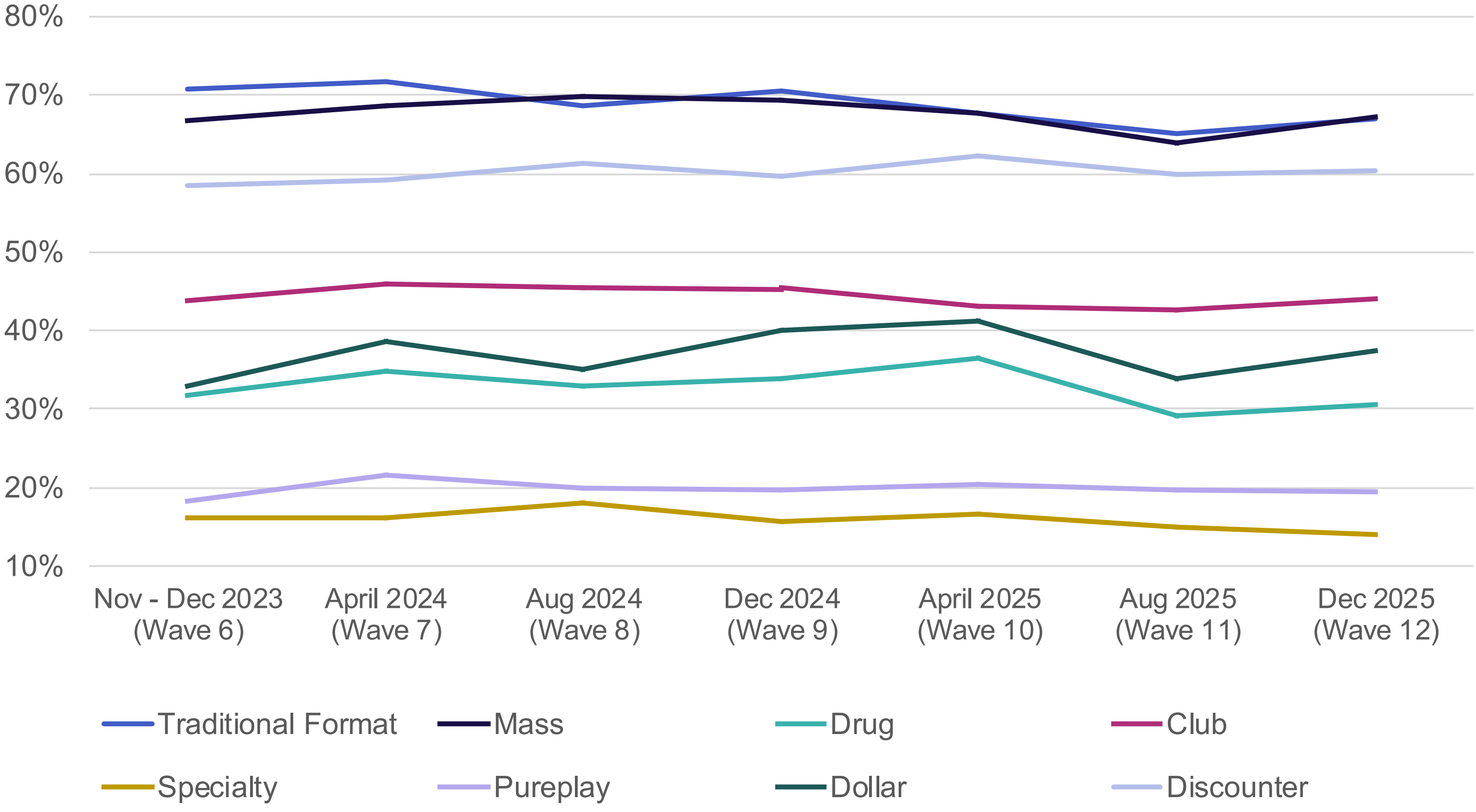


dunnhumby's Consumer Trends Tracker, wave 12, Dec 2025 n= 1,500
*Source: Statistics Canada

Channel Metrics

Mass channel penetration is on par with Traditional grocers

The specialty format continues to lose shoppers



Channel Mix

63% In-store only

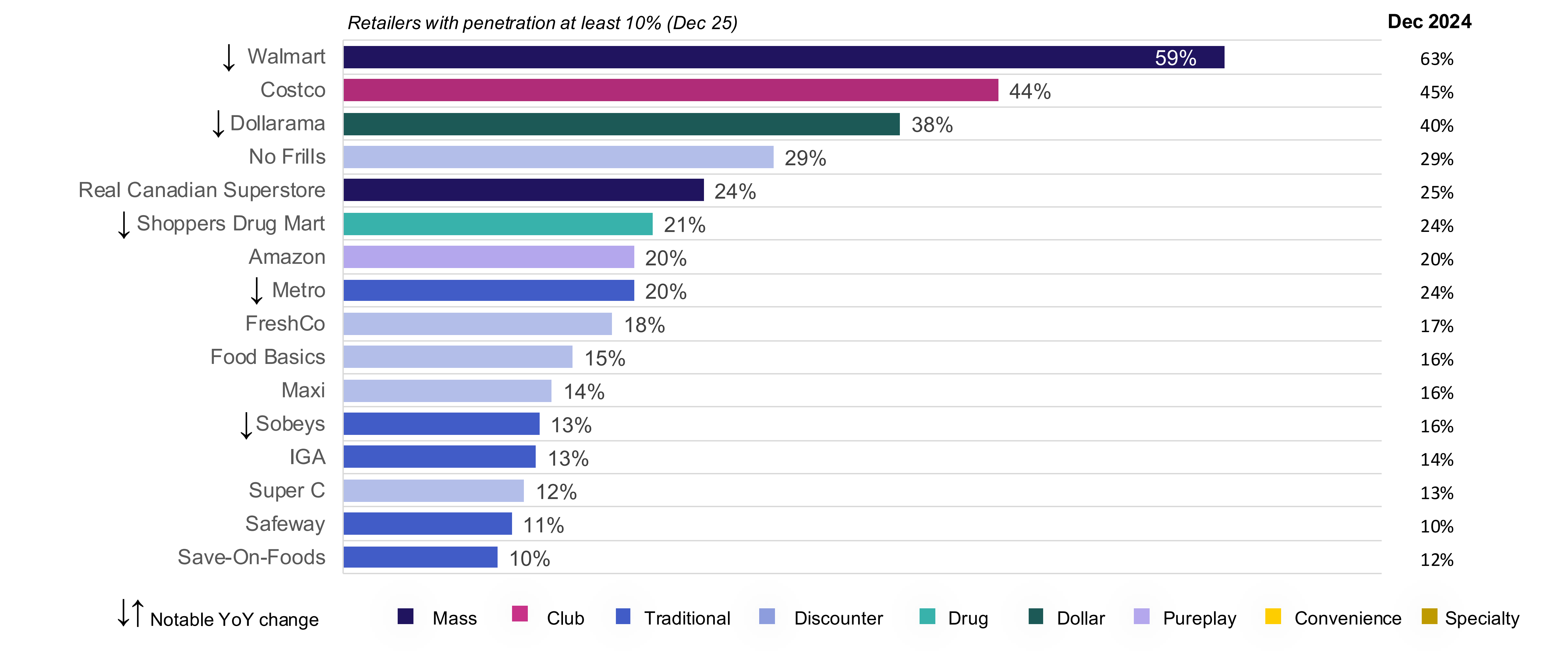
3% Online Only

35% Omnichannel

dunnhumby's Consumer Trends Tracker, wave 12, Dec 2025 n= 1,500
Penetration numbers based on trailing 30 days

Walmart has the highest penetration in Canada, but is down 4% YoY

A few key retailers have dropped in penetration, with no notable increases, suggesting customers are shopping around a little less than last year.



dunnhumby's Consumer Trends Tracker, wave 12, Dec 2025 n= 1,500
Penetration numbers based on trailing 30 days

Consumer needs & behaviors

Having a physical store in a convenient location and easy ways to pay online, suggest consumers are prioritizing convenience this wave, especially in the Atlantic region

Needs with highest importance for consumers

Theme	Client Needs	Importance	Variation (Vs. previous wave)
Supply Chain	Items are always in stock	79%	-1.0%
Store Experience	Physical store in a convenient location	77%	1.8%
Store Experience	Clean & well-maintained store	76%	-2.9%
Digital	Easy to shop on the website/app	75%	-2.0%
Digital	Easy to pay online	75%	2.4%

More important for:	%	Less important for:	%
Quebec	85%	Prairies	70%
Atlantic	86%	18-34	73%
65+	83%	18-34	70%
Atlantic	82%	British Columbia	64%
Atlantic	89%	British Columbia	66%

Most frequent consumer behaviors

Theme	Client Behaviors	Frequency	Variation (Vs. previous wave)
Health & Sustainability	Buy food for home, rather than eating out	72%	0.0%
Price	Shop at stores with low base prices	58%	-2.7%
Assortment	Shop at stores with the best quality products	57%	-2.3%
Promo & Loyalty	Identify myself in order to redeem rewards	56%	-3.3%
Supply chain	Buy shelf-stable foods to keep at home	53%	-1.9%

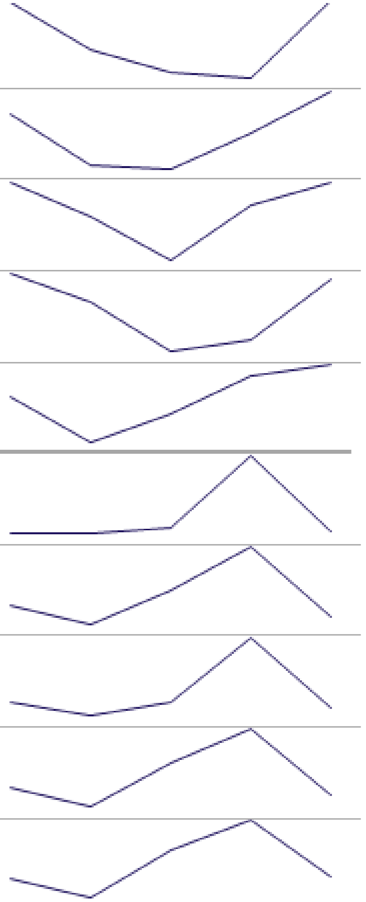
More frequent for:	%	Less frequent for:	%
65+	84%	18-34	60%
45-54	64%	65+	52%
$100k or more	64%	Quebec	51%
65+	64%	18-34	44%
Ontario	57%	Quebec	46%

dunnhumby Consumer Trends Tracker. Wave 12: Dec 2025 Vs. Wave 11: Aug 2025. n= 3000

Online shopping needs have increased the most this wave, and health and sustainability needs have shown a sharp reversal

Needs with highest variation

Theme	Needs with higher variation (+/-)	Variation (Vs. Last wave)	Importance	Longer trend
Digital	Retailer picks products as well as I would	4.0%	70%	
Digital	Convenient delivery/pick-up time slots	2.4%	72%	
Digital	Easy to pay online	2.4%	75%	
Store Experience	Physical store in a convenient location	1.8%	77%	
Digital	Convenient pick up location	1.1%	66%	
Private Brand	Private brand love	-4.1%	46%	
Assortment	Variety of private/store brand products	-4.6%	47%	
Health & sustainability	Retailer helps me make healthy choices	-4.7%	40%	
Health & sustainability	Retailer cares about food waste	-7.0%	49%	
Health & sustainability	Supports local farmers/ businesses	-7.8%	51%	

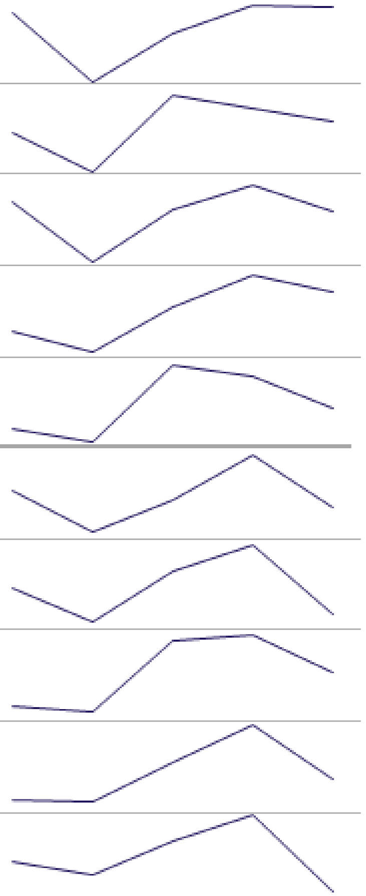


dunnhumby Consumer Trends Tracker, Waves 8-12. Aug 2024 to Dec 2025, n= 7,500

The reversal in health and sustainability needs, has carried through to shopping behavior

Behaviors with highest variation

Theme	**Behaviors with higher variation** (+/-)	**Variation** (Vs. Last wave)	Frequency	Longer trend
Health & Sustainability	Buy food for home, rather than eating out	0.0%	72%	
Private Brand	Choose private brands over name brands	-0.6%	38%	
Supply chain	Shop around to get all the products I need	-1.0%	41%	
Health & Sustainability	Choose organic/natural products	-1.1%	23%	
Digital	Order groceries to collect at the store	-1.6%	16%	
Price	Check prices online before/during shop	-3.8%	44%	
Promo & Loyalty	Redeem coupons or deals from a store's loyalty scheme	-4.1%	40%	
Health & Sustainability	Shop at stores that support local community	-5.0%	37%	
Health & Sustainability	Select sustainable products/packaging	-5.5%	30%	
Health & Sustainability	Read diet/nutrition information on pack	-6.5%	37%	



dunnhumby Consumer Trends Tracker, Waves 8-12. Aug 2024 to Dec 2025, n= 7,500

Needs and Behaviors by theme

Pricing

Low base price needs/behaviors decreased this wave, likely related to more indulgent Christmas shopping.

Needs

Behaviors

Dunnhumby US Consumer Trends Tracker. Wave 12: Dec 2025 Vs. Wave 11: Aug 2025. n= 3000

Assortment

Assortment needs were less top-of-mind this wave, with decreasing scores for all attributes

Needs

Behaviors

Dunnhumby US Consumer Trends Tracker. Wave 12: Dec 2025 Vs. Wave 11: Aug 2025. n= 3000

Promo & Rewards

Customers were keen to see discounts on their regular purchases, but less engaged with retailer loyalty programs

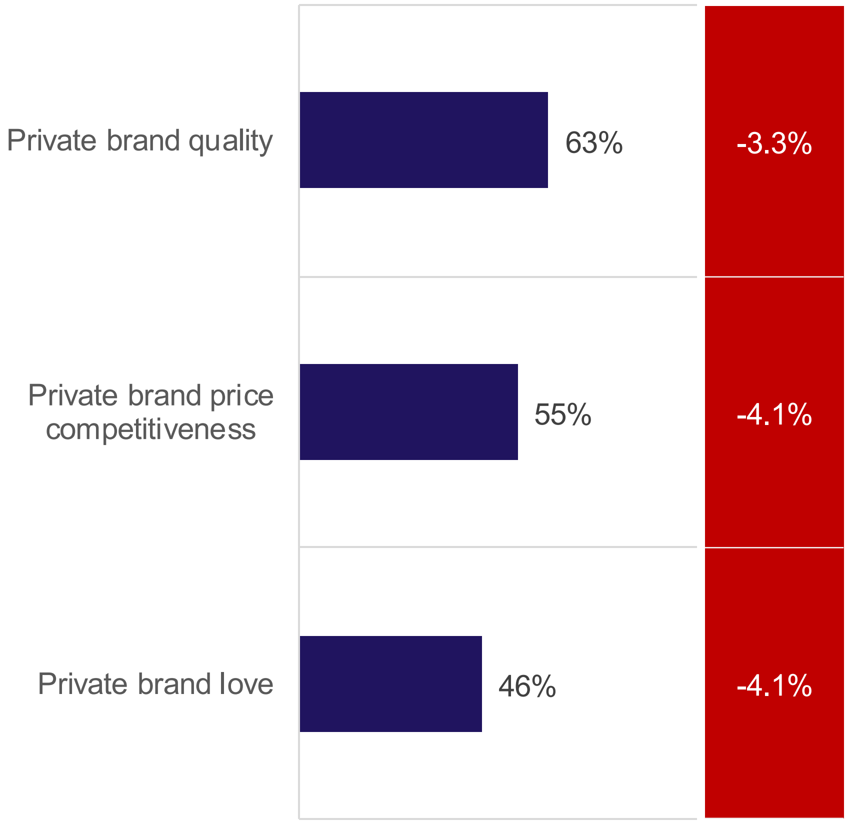
Needs

Behaviors

Dunnhumby US Consumer Trends Tracker. Wave 12: Dec 2025 Vs. Wave 11: Aug 2025. n= 3000

Private brand needs and behaviors decreased this wave

Needs



Behaviors

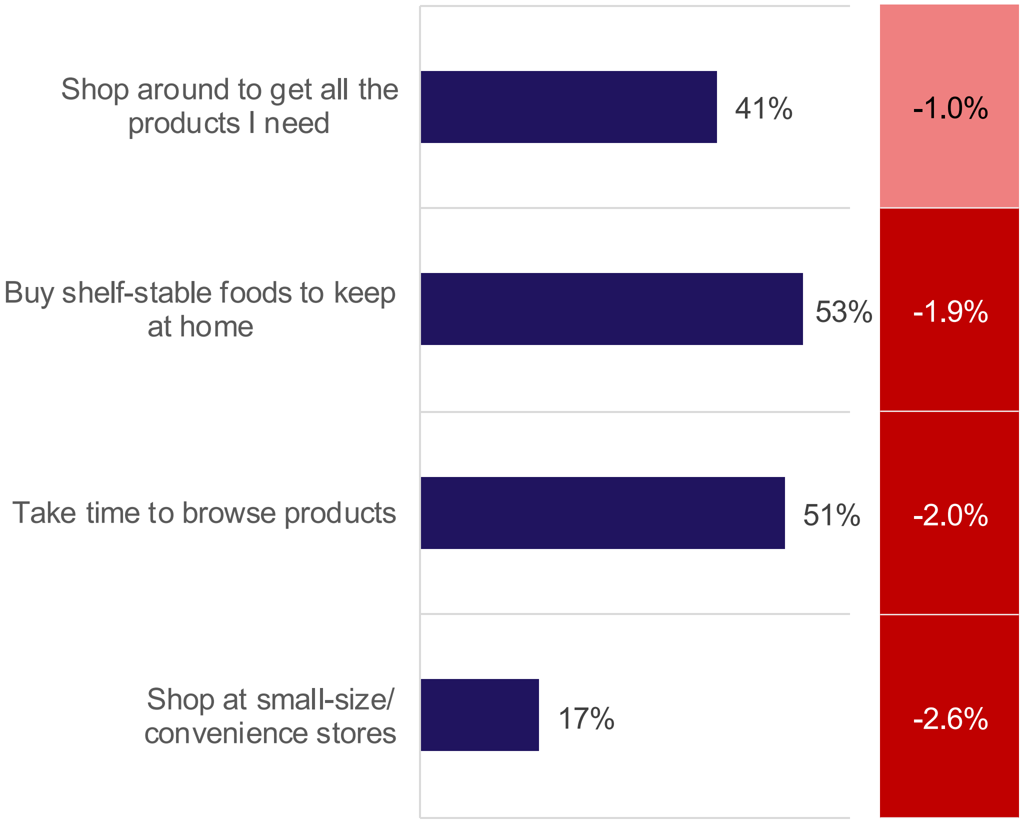
Dunnhumby US Consumer Trends Tracker. Wave 12: Dec 2025 Vs. Wave 11: Aug 2025. n= 3000

Store Experience & Supply Chain

The top store experience needs for consumers this wave were simply a convenient store location with items in stock

Needs

Behaviors

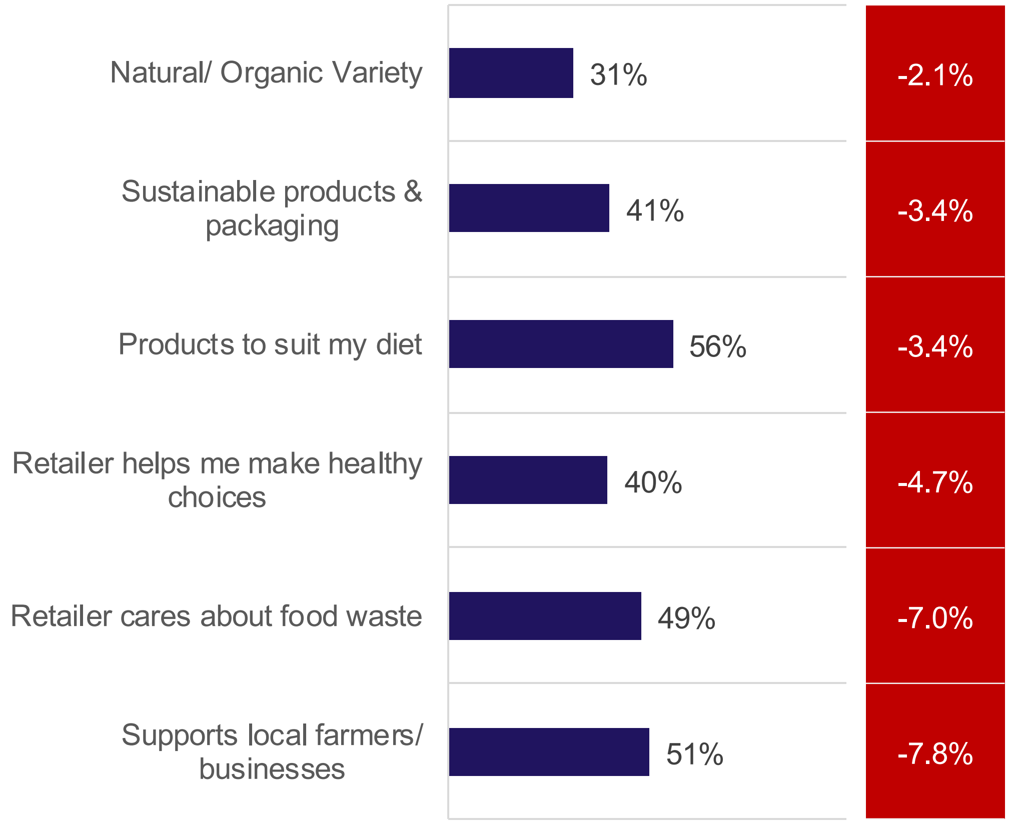


Dunnhumby US Consumer Trends Tracker. Wave 12: Dec 2025 Vs. Wave 11: Aug 2025. n= 3000

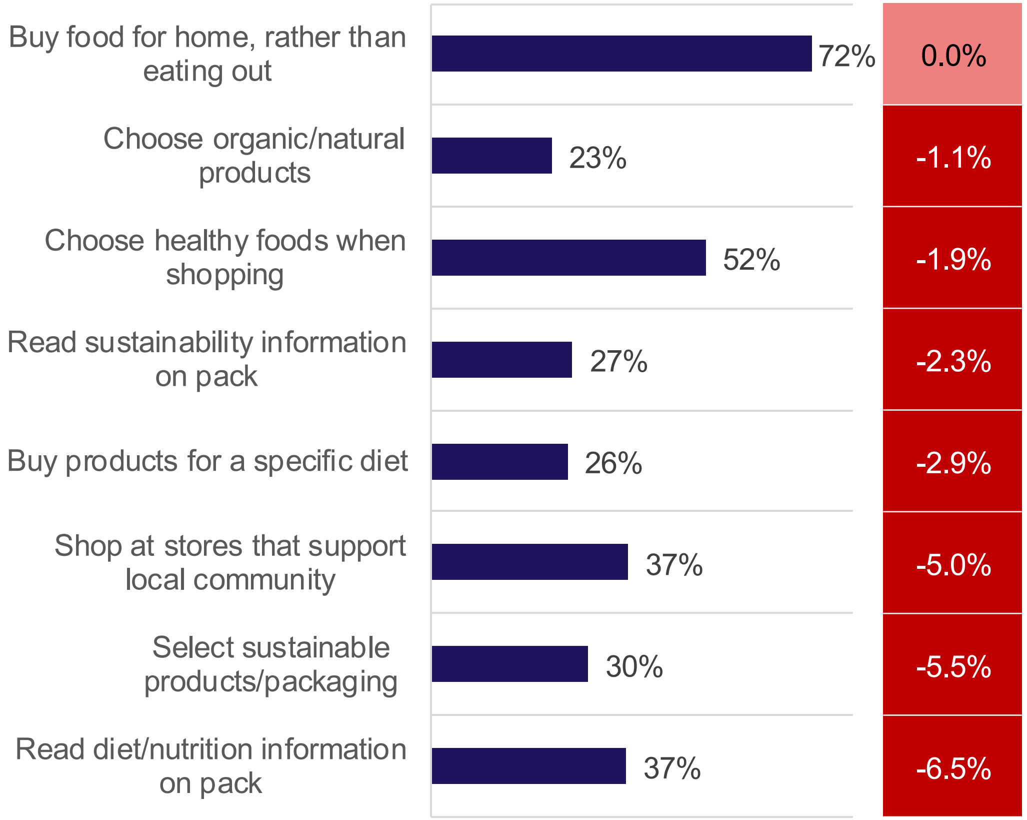
Health & Sustainability

Health and sustainability need and behaviors decreased this wave. Supporting local was down 7.8% (need) and 5% (behavior), signaling that the tariff-driven ‘buy local’ sentiment from August 2025, didn’t last.

Needs



Behaviors

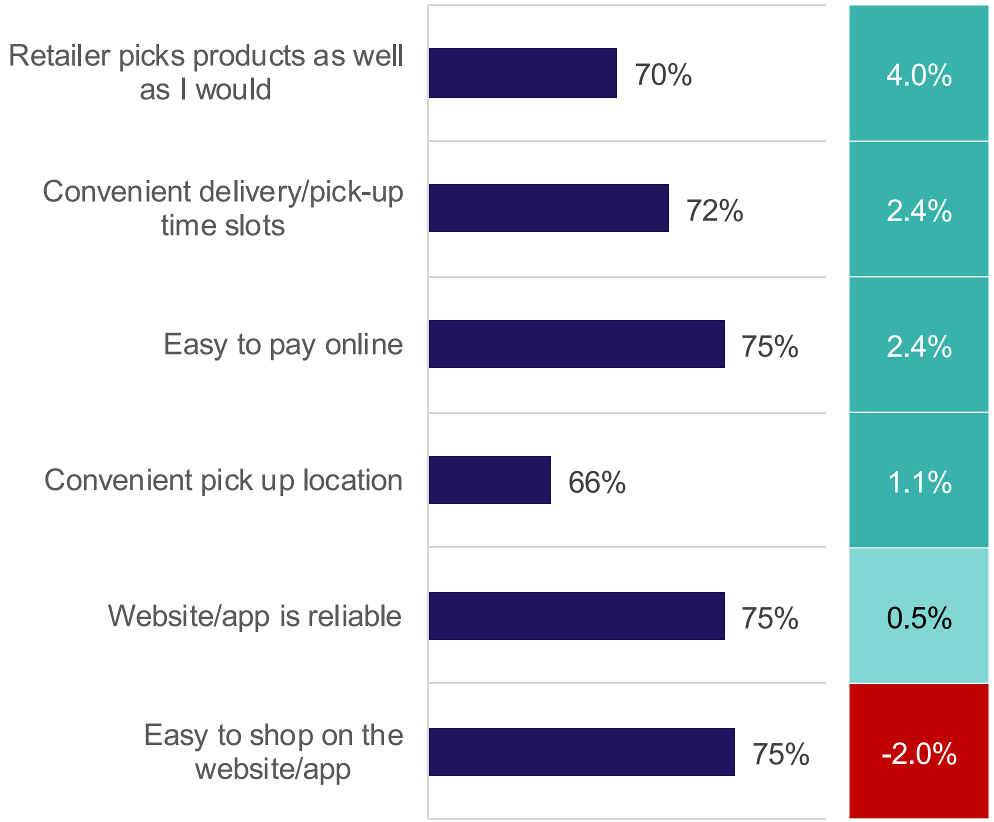


Dunnhumby US Consumer Trends Tracker. Wave 12: Dec 2025 Vs. Wave 11: Aug 2025. n= 3000

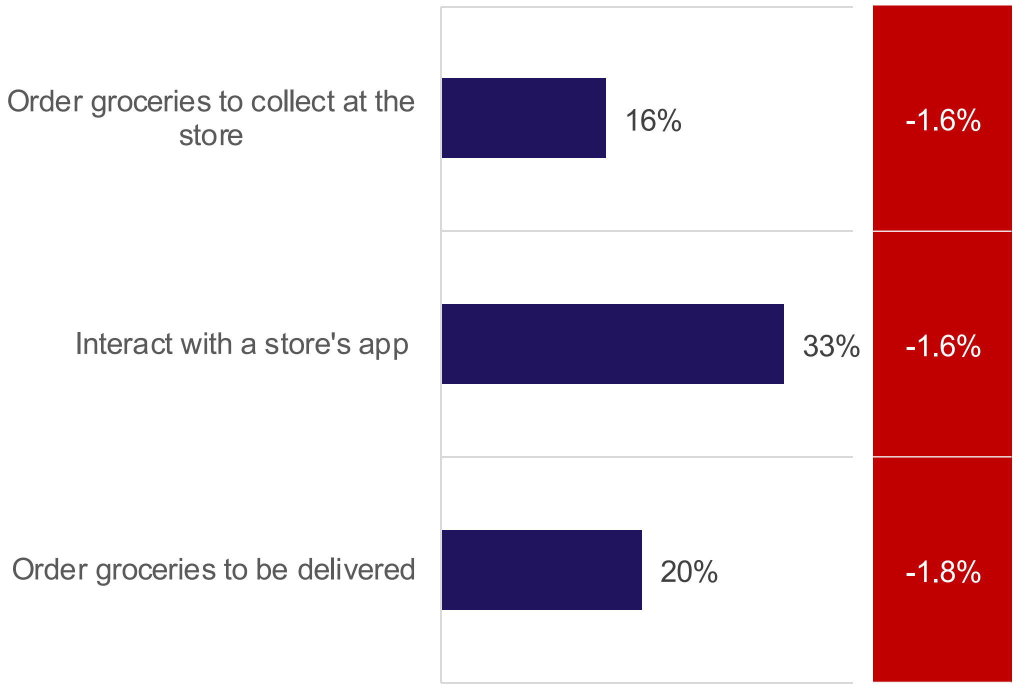
Digital*

Online shopping needs increased across 5 out of 6 attributes, but behavior dropped, suggesting an unmet need in Digital

Needs



Behaviors



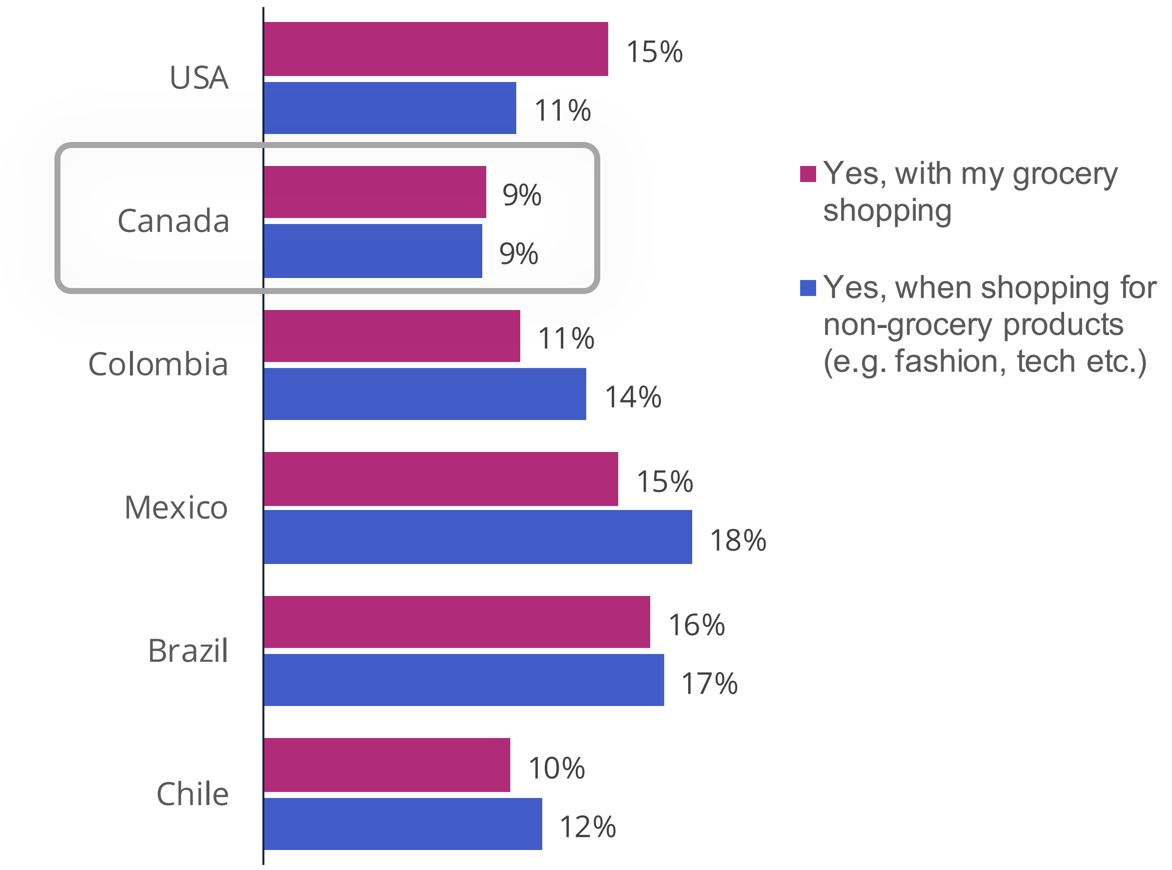
Dunnhumby US Consumer Trends Tracker. Wave 12: Dec 2025 Vs. Wave 11: Aug 2025. n= 3000
*eComm attributes asked only to those shopping online

Wave specific questions:
Using AI in everyday home shopping

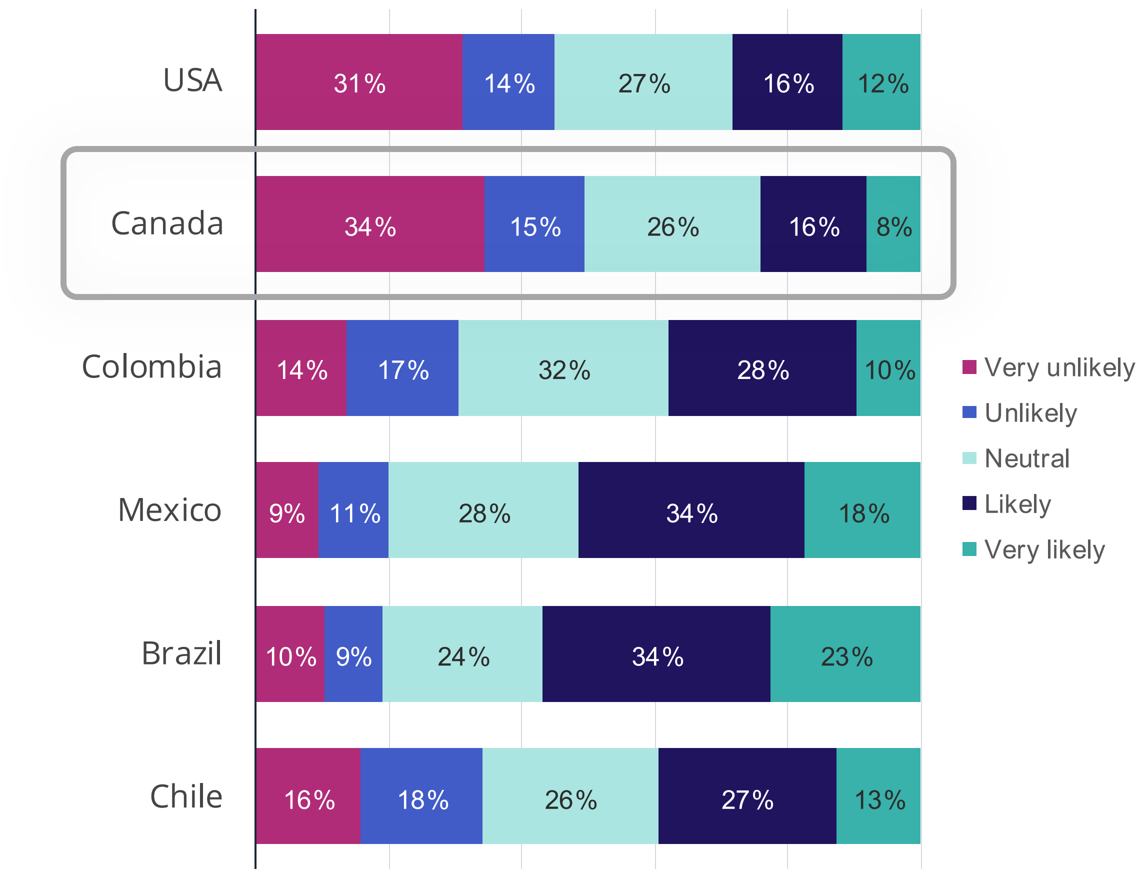
All responses collected from November 26th to December 18th, 2025

Canadian shoppers are the least likely to use AI to help with their shopping, across the Americas

In the last year have you used AI tools, like ChatGPT, to help with your shopping?



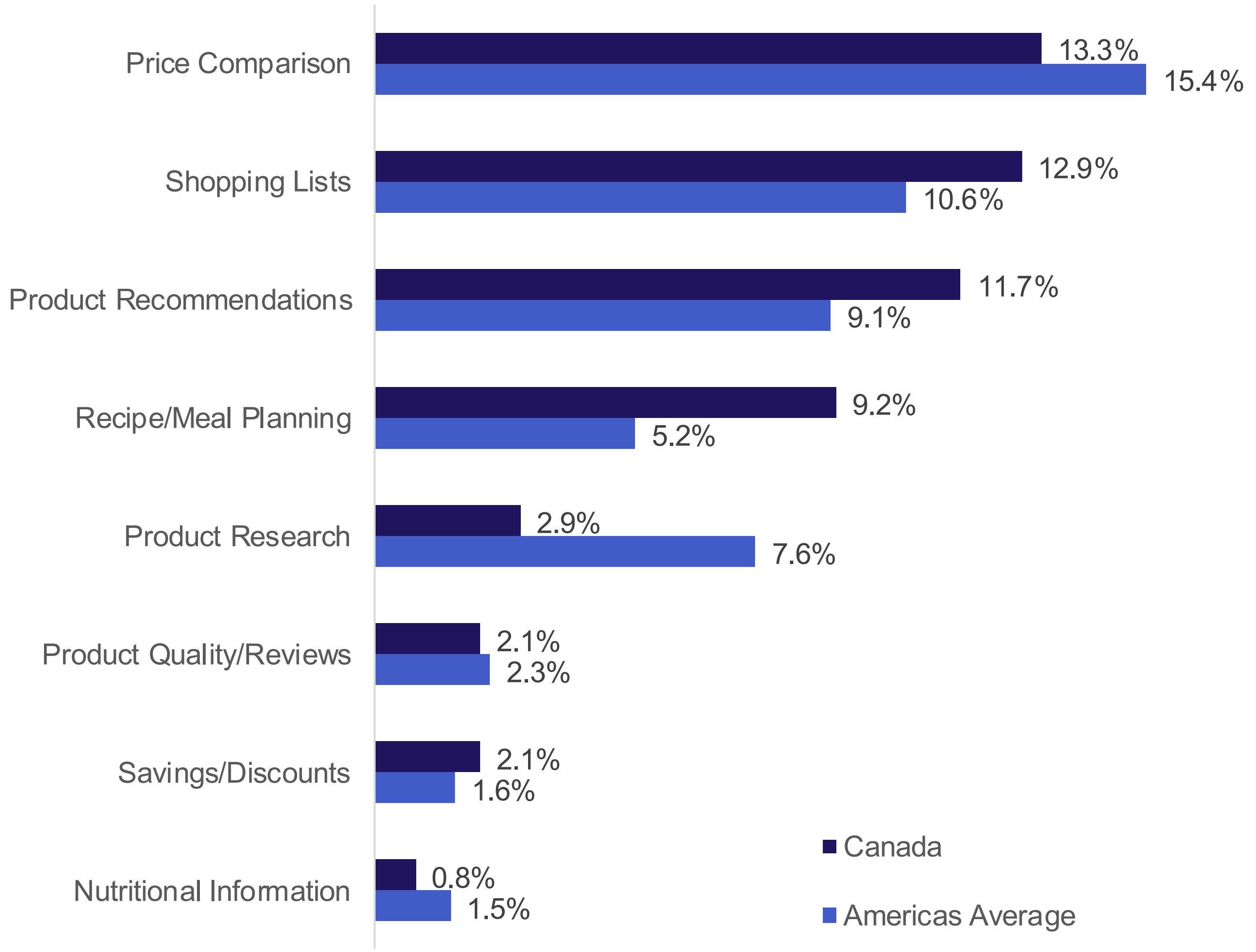
How likely or unlikely are you to use AI tools to help with your shopping in the next year?



dunnhumby's Consumer Trends Tracker, wave 12, Dec 2025 n= 8,500

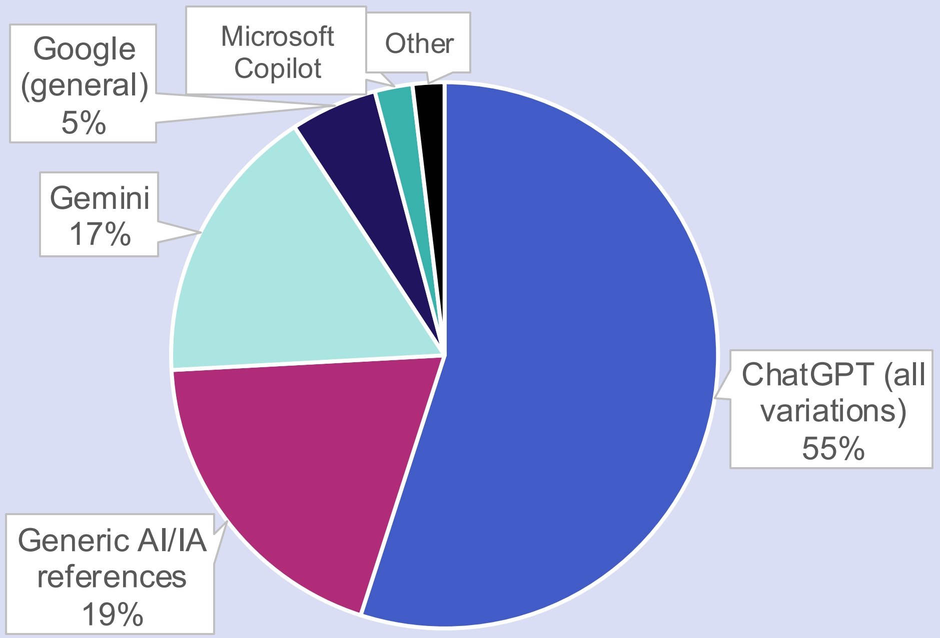
Top reasons for using AI are for price comparison and creating shopping lists

Top **reasons for using AI** to help with shopping; Open text responses grouped into themes:



Canadians are nearly twice as likely as the Americas average to use AI for recipe ideas and meal planning

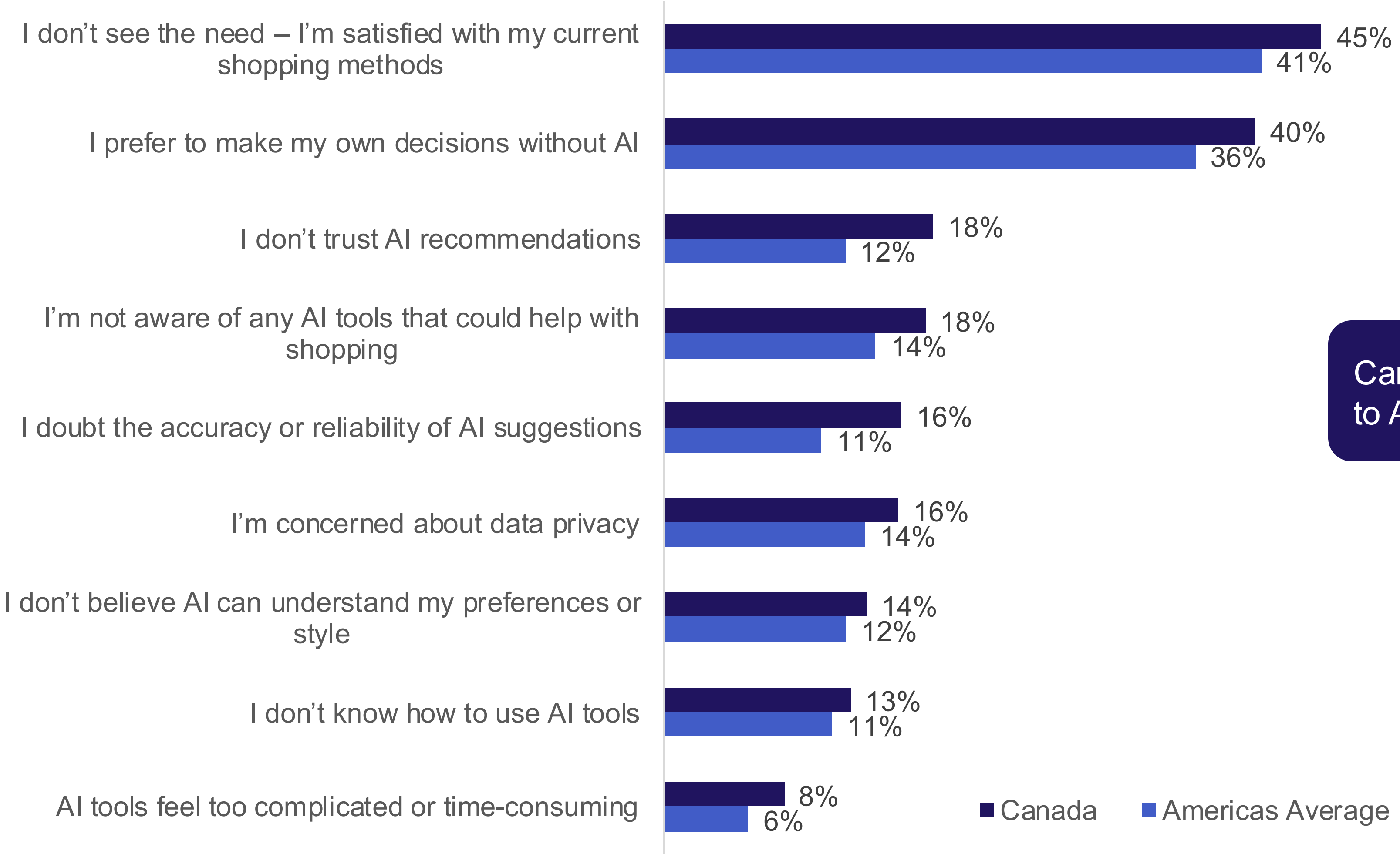
AI Tool Mentions (unprompted, Americas)



dunnhumby's Consumer Trends Tracker, wave 12, Dec 2025 n= 1,910

The vast majority of shoppers do not see the need, or prefer not, to use AI

Barriers to using AI to help with shopping



Canadian respondents see more barriers to AI than the Americas average

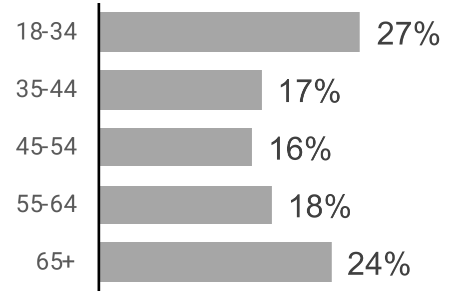
dunnhumby's Consumer Trends Tracker, wave 12, Dec 2025 n= 6,590

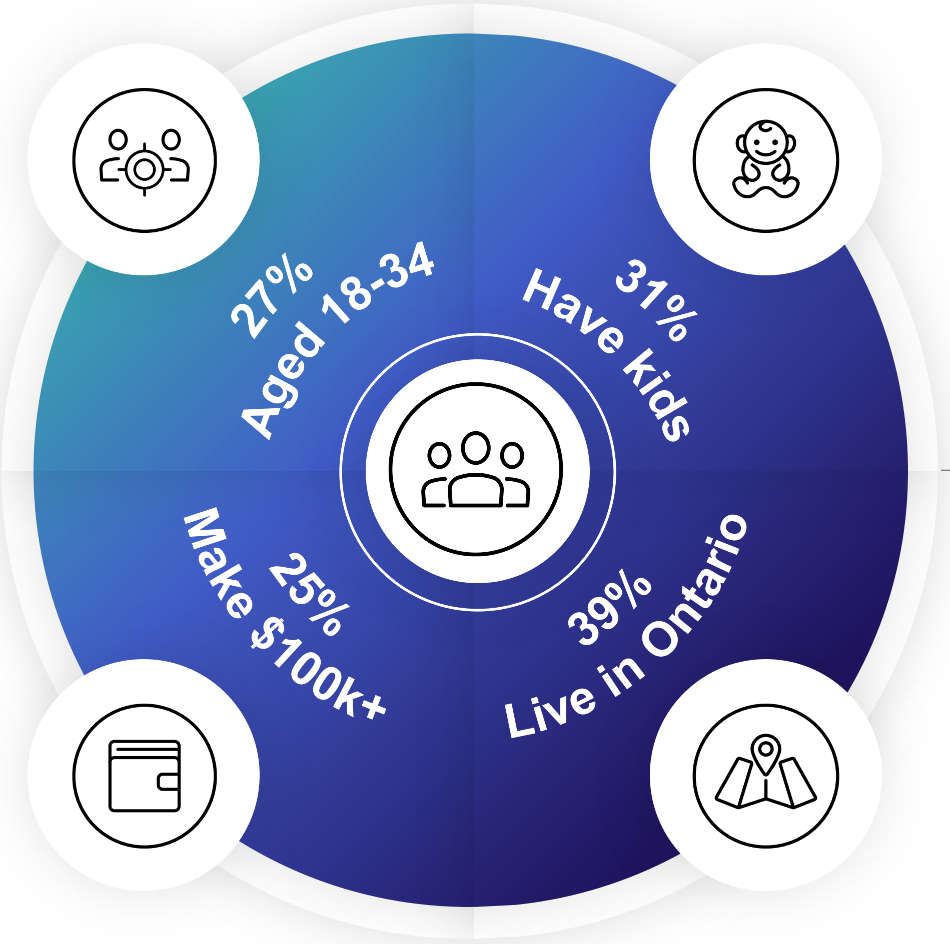
What’s next

How is the Canadian shopper represented in our survey?

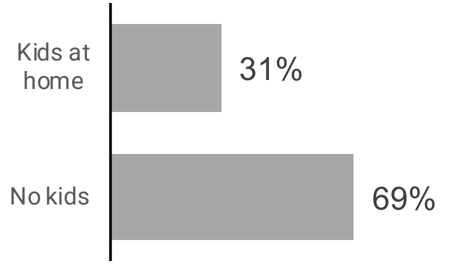
% shoppers - age, Income, Family, Region segments

Age

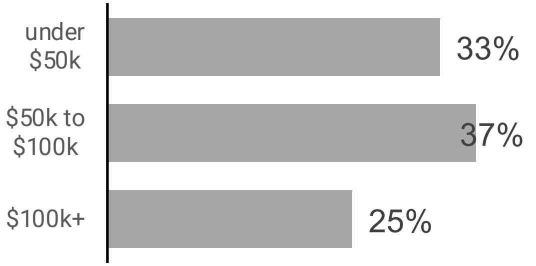




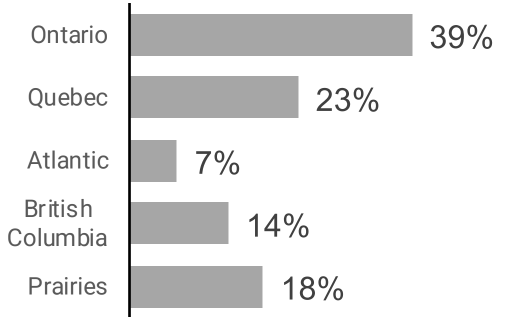
Family



Income



Region



dunnhumby's Consumer Trends Tracker
Sample is matched to Census targets and consistent wave-on-wave for trending purposes

There's more!

All CTT Insights Available

- We're constantly improving our Consumer Trends Tracker.
- Please reach out to your dunnhumby representative or contact us at dunnhumby.com if you'd like to find out more.

Data Filters Available

- Channel Penetration
- Share of Wallet, by Channel (Brick and Mortar)
- Share of Wallet, by Channel (Online)
- Market Share, by Channel (Brick and Mortar)
- Market Share, by Channel (Online)
- Private Brand Needs & Behaviors
- Pricing Needs
- Pricing Behaviors
- Promotions & Loyalty Needs
- Promotions & Loyalty Behaviors
- Assortment/Range Needs
- Assortment/Range Needs/Behaviors (page 2)
- Health & Sustainability Needs
- Health & Sustainability Behaviors
- Store Experience/Format Needs
- Store Experience/Format Needs/Behaviors (page 2)
- Supply Chain Needs & Behaviors
- eCommerce Needs
- eCommerce Behaviors
- Food Insecurity Measures
- Financial Insecurity Measures
- Perceived Food Inflation Map of Canada
- Difficulty covering an unexpected expense of $400, by state
- Skipped or Reduced the size of a meal for Financial Reasons, by state
- Diet word cloud
- All Customer Needs (Total rank)
- All Customer Needs (Trended)
- All Customer Behaviors (Total rank)
- All Customer Behaviors (Trended)
- Retailer to Channel mapping

Channel

(All)

Age

18-34
35-44
45-54
55-64
65+

Income

Under $50k
$50k to $100k
$100k or more

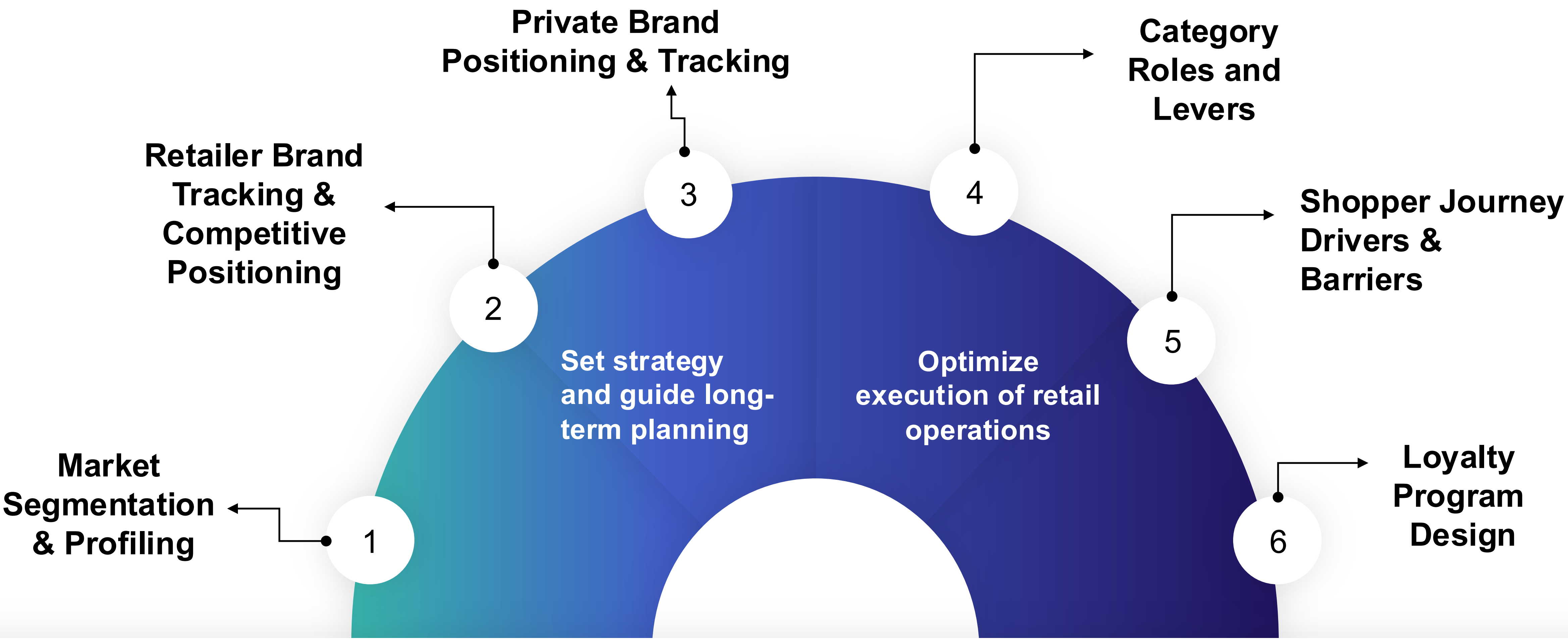
Family

Kids at home
No kids

Region

North East
Mid West
South Atlantic
South Central
West

dunnhumby offers retail-focused primary research to help you set a strategy, guide long-term planning, and optimize execution of retail operations



Thank you.

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