

hello



CANADA'S MOST SOUGHT AFTER AND INFLUENTIAL POLLING FIRM



Founded in 2010

16 Research Professionals

Official pollster for the
Toronto Star

Located in Ottawa, Toronto,
Halifax London, Hamilton and
Edmonton

SOME OF THE BRANDS AND
ORGANIZATIONS WHO TRUST US



Loblaw
Companies
Limited



NETFLIX



Deloitte.



UNIVERSITY OF
TORONTO

**Every 2 weeks I ask Canadians
what's keeping them up at night.**

**Here's what I've been watching
happen since January.**

The Age of Reassurance

And what it means for Ontario's dairy sector

David Coletto, PhD
Founder & CEO

June 2026









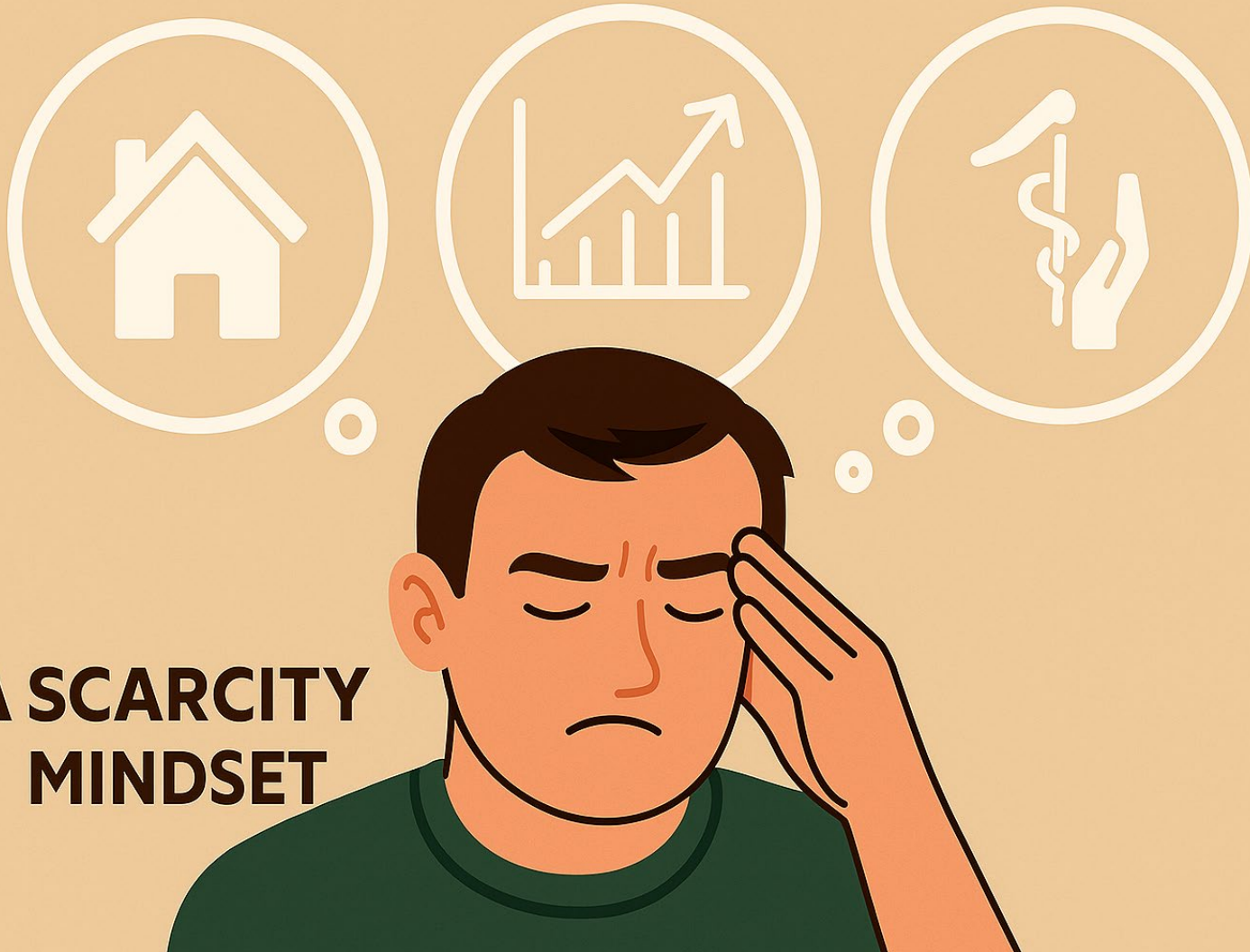
**RAPID POPULATION
GROWTH**



**AN AGING
POPULATION**



**A HOUSING
AFFORDABILITY
CRISIS**



**A SCARCITY
MINDSET**

**A state of mind where
limitations on resources
(real or perceived)
dominate attention.**

**SCARCITY CREATED A DEEP
DESIRE FOR POLITICAL CHANGE.**

**INCUMBENT
GOVERNMENTS WERE IN
TROUBLE EVERYWHERE**



FAIRNESS FOR EVERY GENERATION

**UNE CHANCE ÉQUITABLE POUR
CHAQUE GÉNÉRATION**



PRIME MINISTER
PREMIER MINISTRE

12%

**Believed the Liberals
deserved to be re-elected.**

FEDERAL VOTE INTENTION

THE WEEK JUSTIN TRUDEAU ANNOUNCED HIS RESIGNATION

NATIONAL

CONSERVATIVE

47%

LIBERAL

20%

NDP

17%



SCARCITY —————→ **PRECARITY**

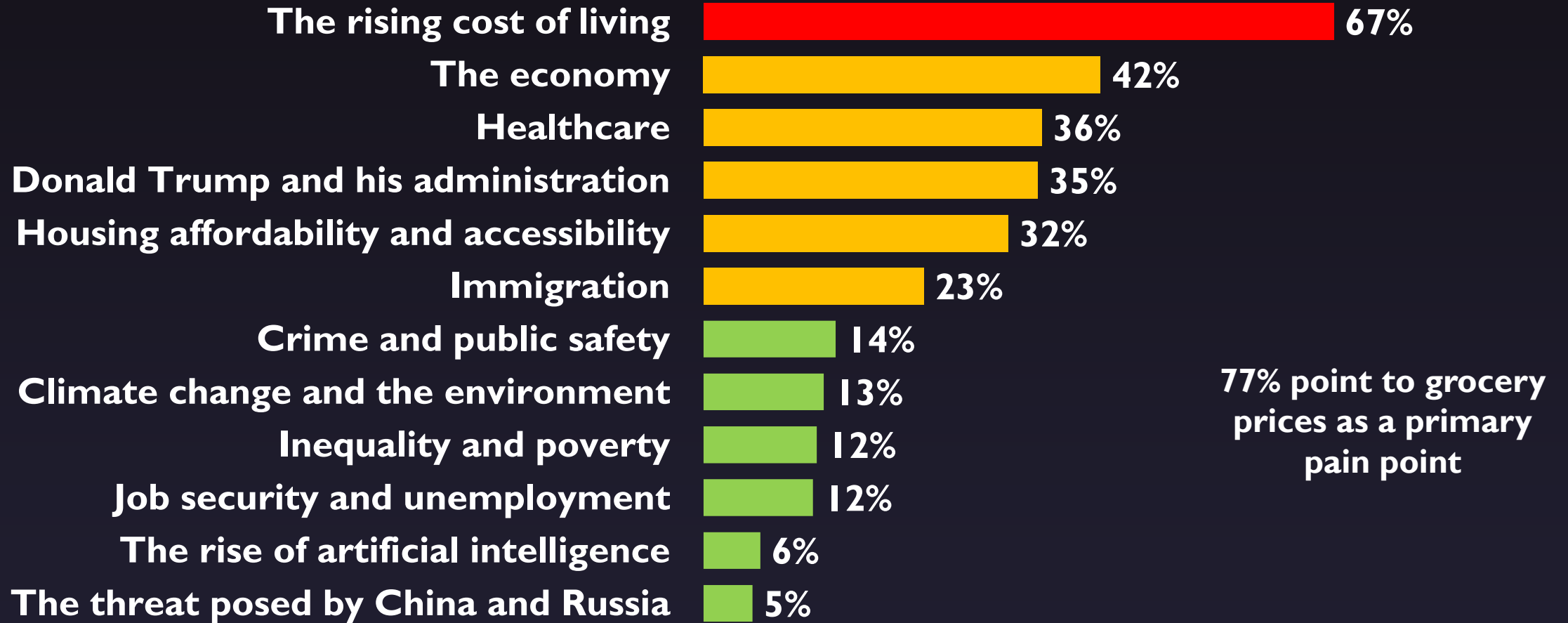


A PRECARITY MINDSET

A mindset shaped by unpredictability – where people feel the future is unstable, institutions are unreliable, and personal resilience is always being tested.

WHAT DOES A PRECARITY MINDSET LOOK LIKE?

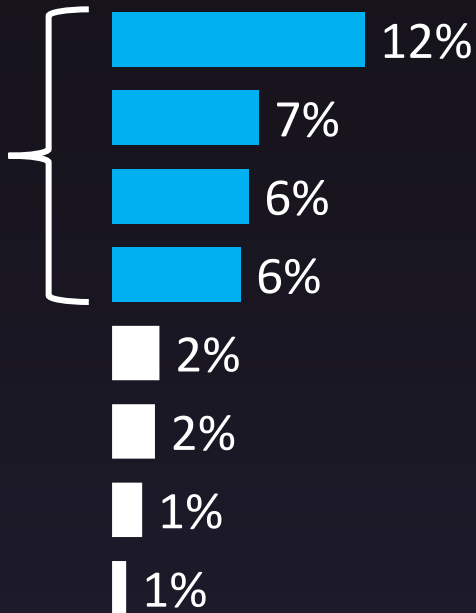
THE TOP ISSUES



THE TOP ISSUES – Younger vs. Older

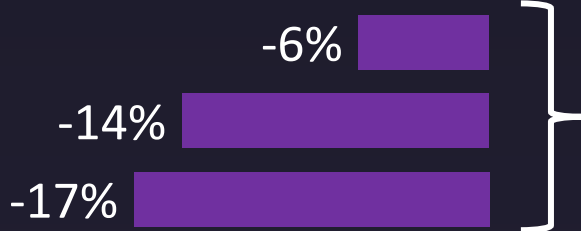
- Housing affordability and accessibility
- Job security and unemployment
- Inequality and poverty
- Immigration
- Indigenous reconciliation
- The rising cost of living
- Crime and public safety
- The threat posed by China and Russia
- The rise of artificial intelligence
- Climate change and the environment
- The economy
- Donald Trump and his administration
- Healthcare

Canadians Under 44 More Focused On:



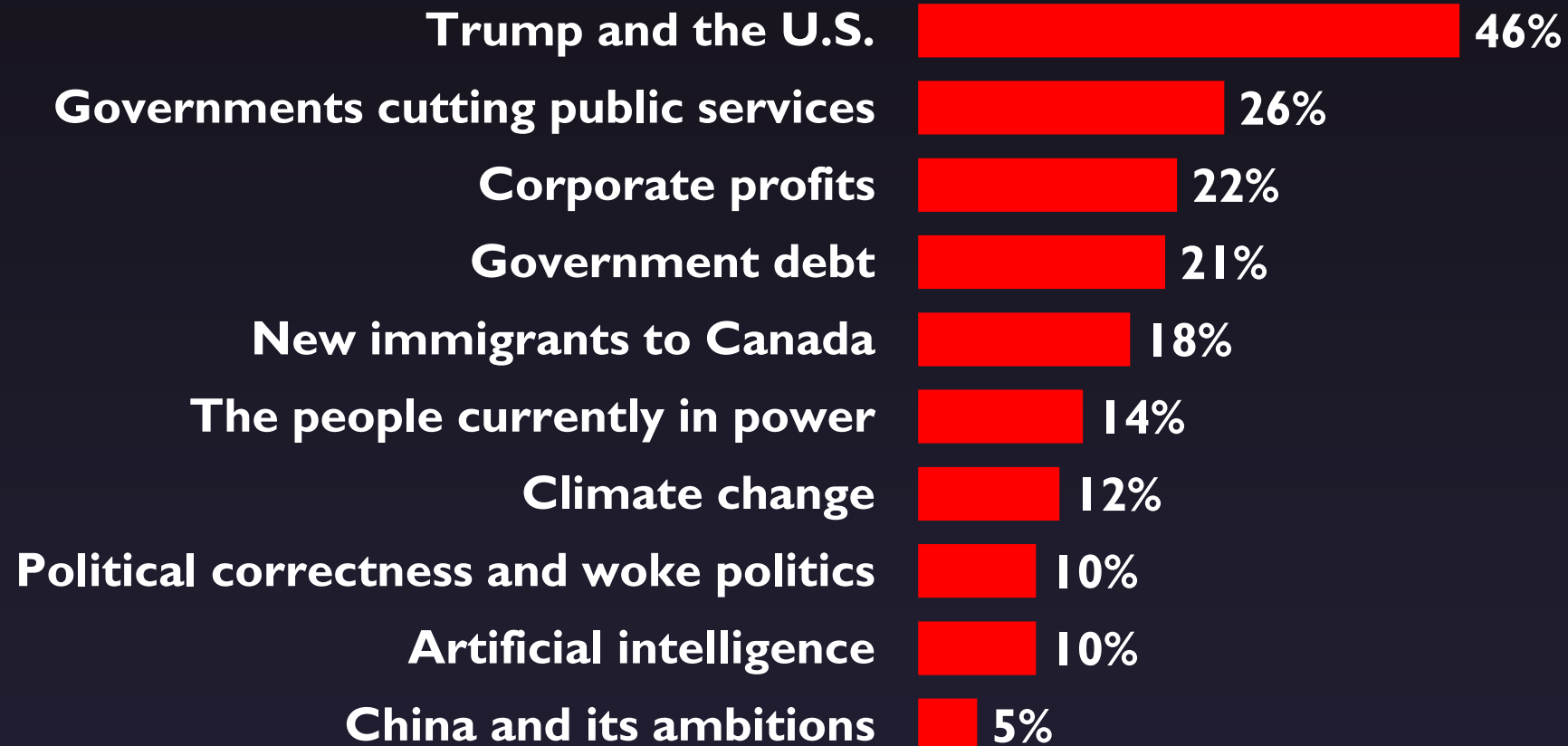
0%

0%



Canadians 45+ More Focused On

Which TWO of the following do you believe poses the greatest threat right now? (Top 2 Ranked)



External Pressure

A stylized map of Canada is shown in dark blue and white. A large, bold, gold-colored percentage '79%' is overlaid on the map. The map has a torn-paper effect at the edges.

79%

Canadians say Donald Trump is creating stress about the future of Canada.

Internal Stagnation

A person in a dark jacket stands with their back to the camera on a long, straight road that stretches into the distance. The road is shrouded in thick fog, and the trees on either side are barely visible. A large, blue percentage '70%' is overlaid on the scene.

70%

Likely to delay major life decisions due to financial uncertainty.

The Daytime Consumer

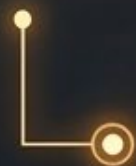
Trusting the road, moving fast, taking risks.



When the future is **illegible**, consumers don't stop moving—they **pull in** and **defer**.

The Nighttime Consumer

Slowing down, pulling in, deferring big decisions.



GTA new home sales cratering



Delayed family formation



Deferred vehicle upgrades



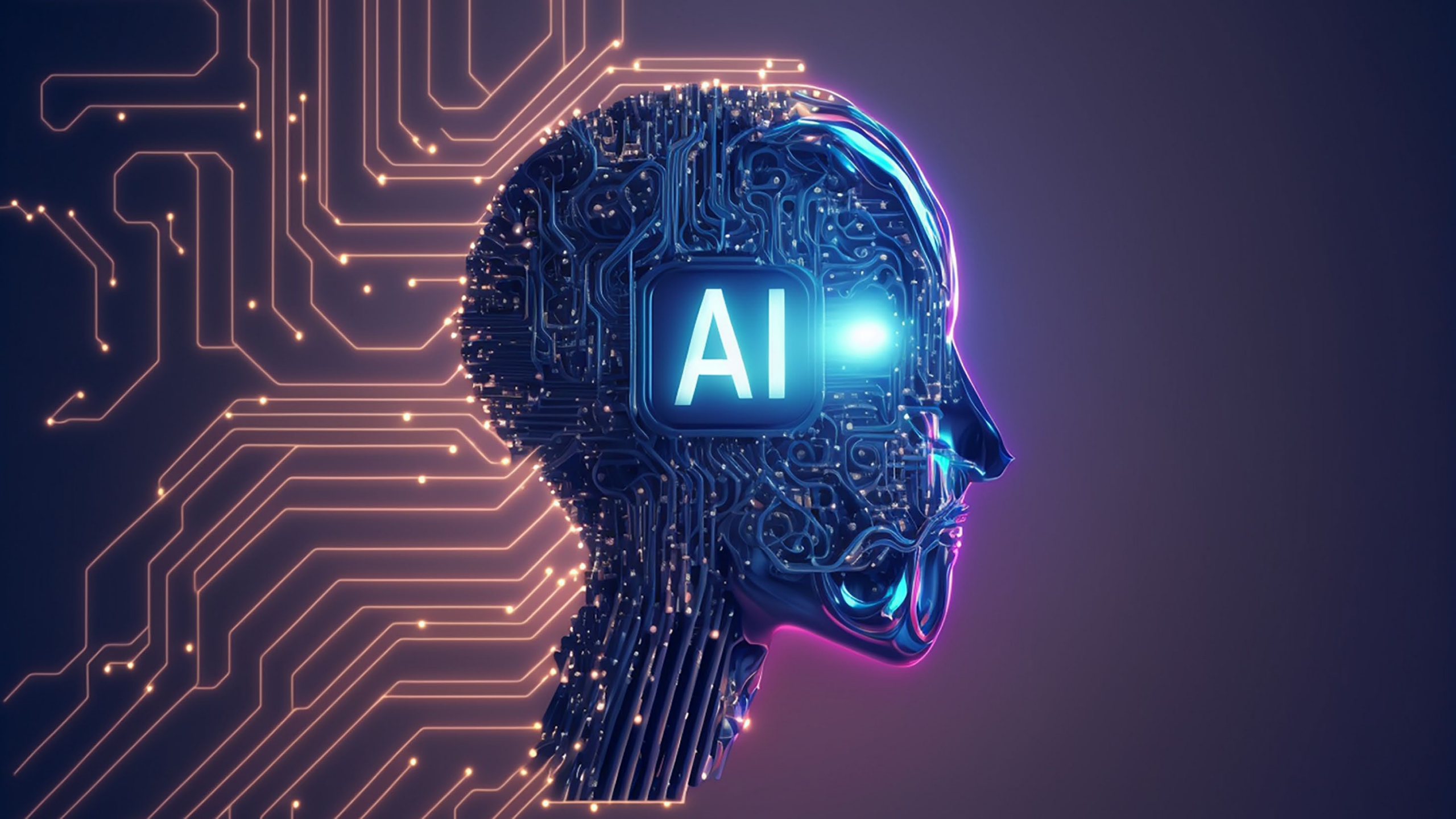


Maslow's hierarchy of needs

What do Canadians say they are focused on?

abacus
data





AI

HOPEFUL BENEFITS OF AI



PRIMARY CONCERNS OF AI



6 in 10

BELIEVE **AI** WILL
ELMININATE MORE JOBS
THAN IT CREATES

News

Loblaw expanding driverless truck fleet to 50 through Gatik partnership

By [The Canadian Press](#)

Published: September 23, 2025 at 11:47AM EDT

89%

AGREE:

**Instability and uncertainty
are no longer temporary,
they are the new normal**

Scarcity is asking “Will there be enough?”

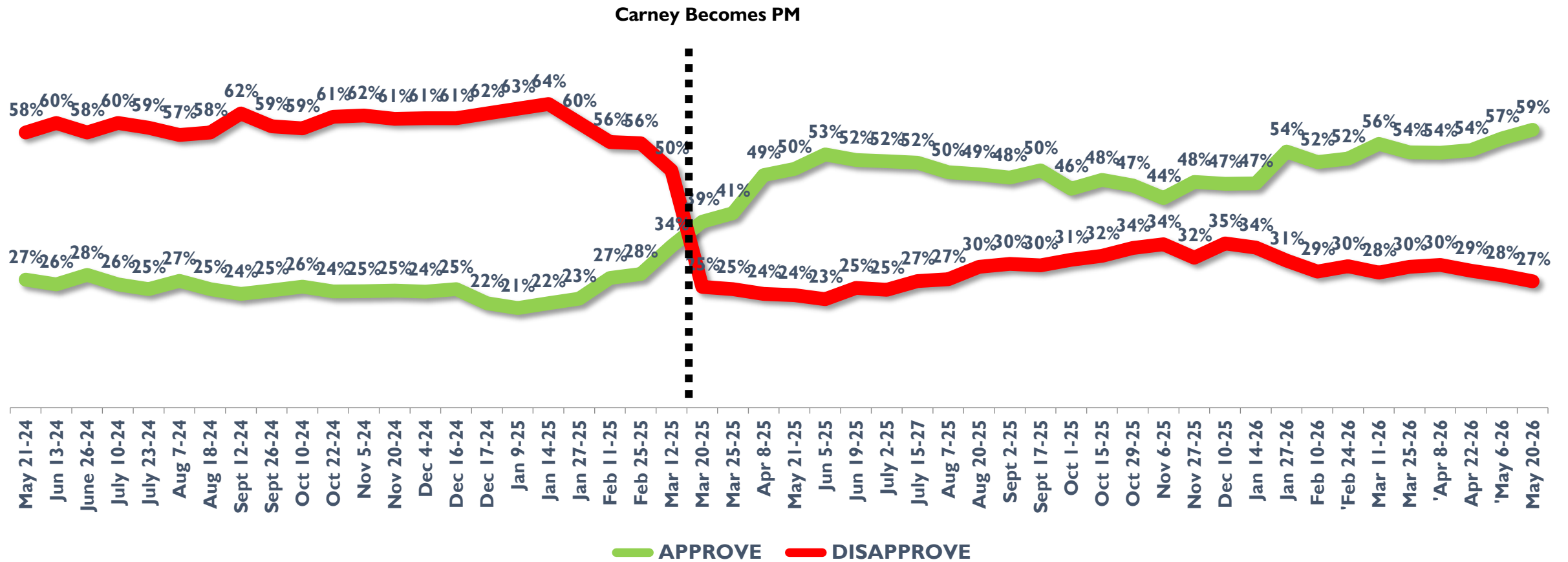
Precurity is asking “Will we be okay?”





OVERALL, DO YOU APPROVE OR DISAPPROVE OF THE JOB THE FEDERAL GOVERNMENT LED BY MARK CARNEY IS DOING?

GOVERNMENT APPROVAL





**WELCOME TO
THE AGE OF
REASSURANCE**

**Canadians need
reassurance that they
will be able to feed
their families, stay
healthy, and meet
their needs without
constant stress.**

How do Canadians feel about these countries/regions?



*The trade negotiations matter, but
Canada will manage fine regardless of
how they turn out.*

45%



Canada should take the time needed to get a deal that's good for Canada, even if the uncertainty drags on and hurts the economy in the short term.

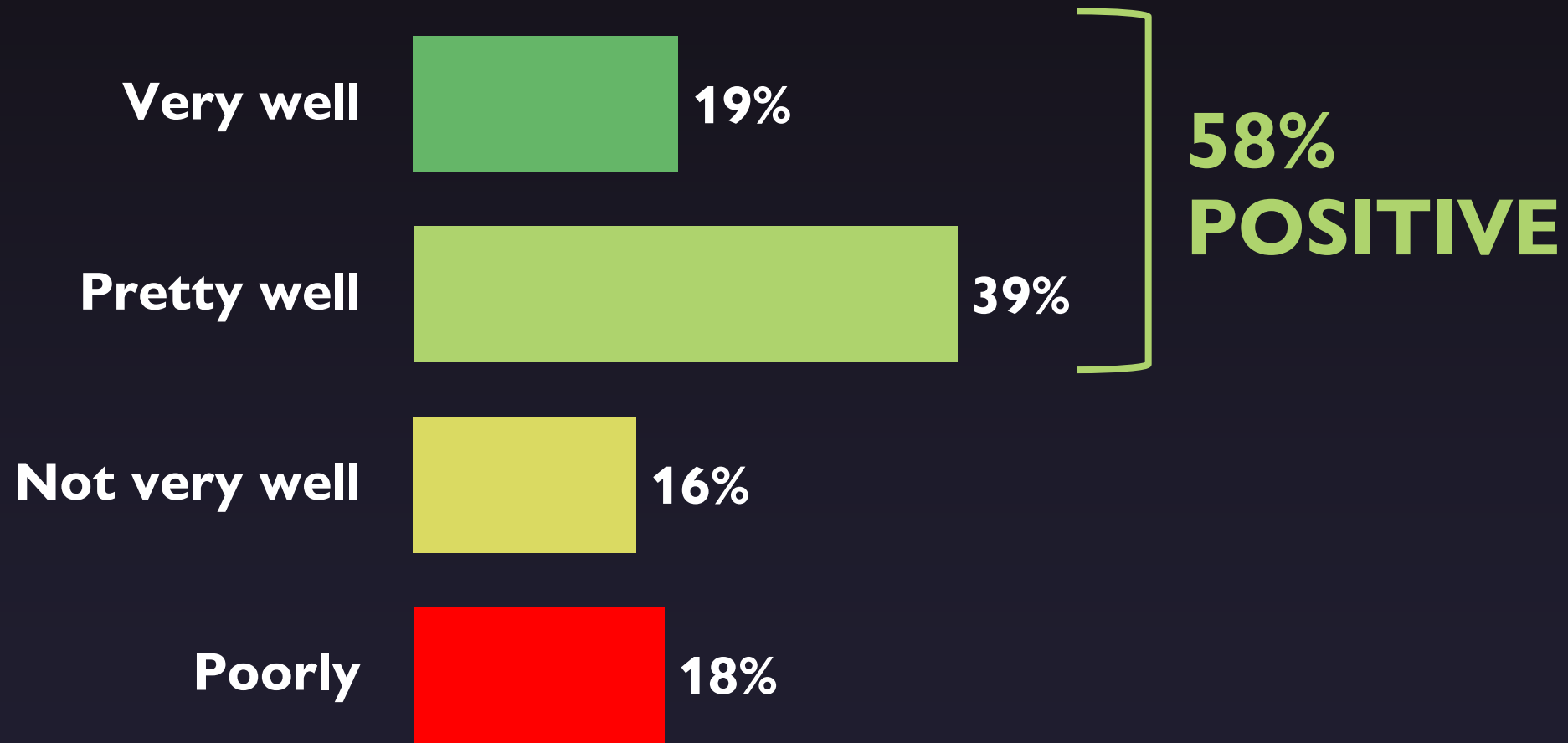
70%



***Not confident the Trump
administration would live by
the terms of a new trade deal***

66%

PM Carney's Performance on Trade



A GENERATIONAL CAVEAT

Not everyone wants reassurance.

BOOMERS & OLDER

Something to protect.

- Seeking stability
- Drawn to the protector narrative
- Respond to reassurance, continuity, institutional trust

UNDER 35

Nothing to lose.

- Still drawn to disruption
- Trump is just one more threat on a long list
- Populist instinct is tamped down, not gone

A bright, clean kitchen counter with a window and a potted plant. The scene is well-lit with natural light from the window, creating a warm and inviting atmosphere. The counter is white and appears to be made of a smooth material like quartz or marble. A small potted plant sits on the windowsill to the left. The background shows white kitchen cabinets and a sink area.

**We know the
world feels
precarious.
But what does
reassurance
actually look like
on a grocery shelf?**

The Split-Brain Consumer

Massive cutbacks
feel like surrender.



Small indulgences provide
evidence of control.

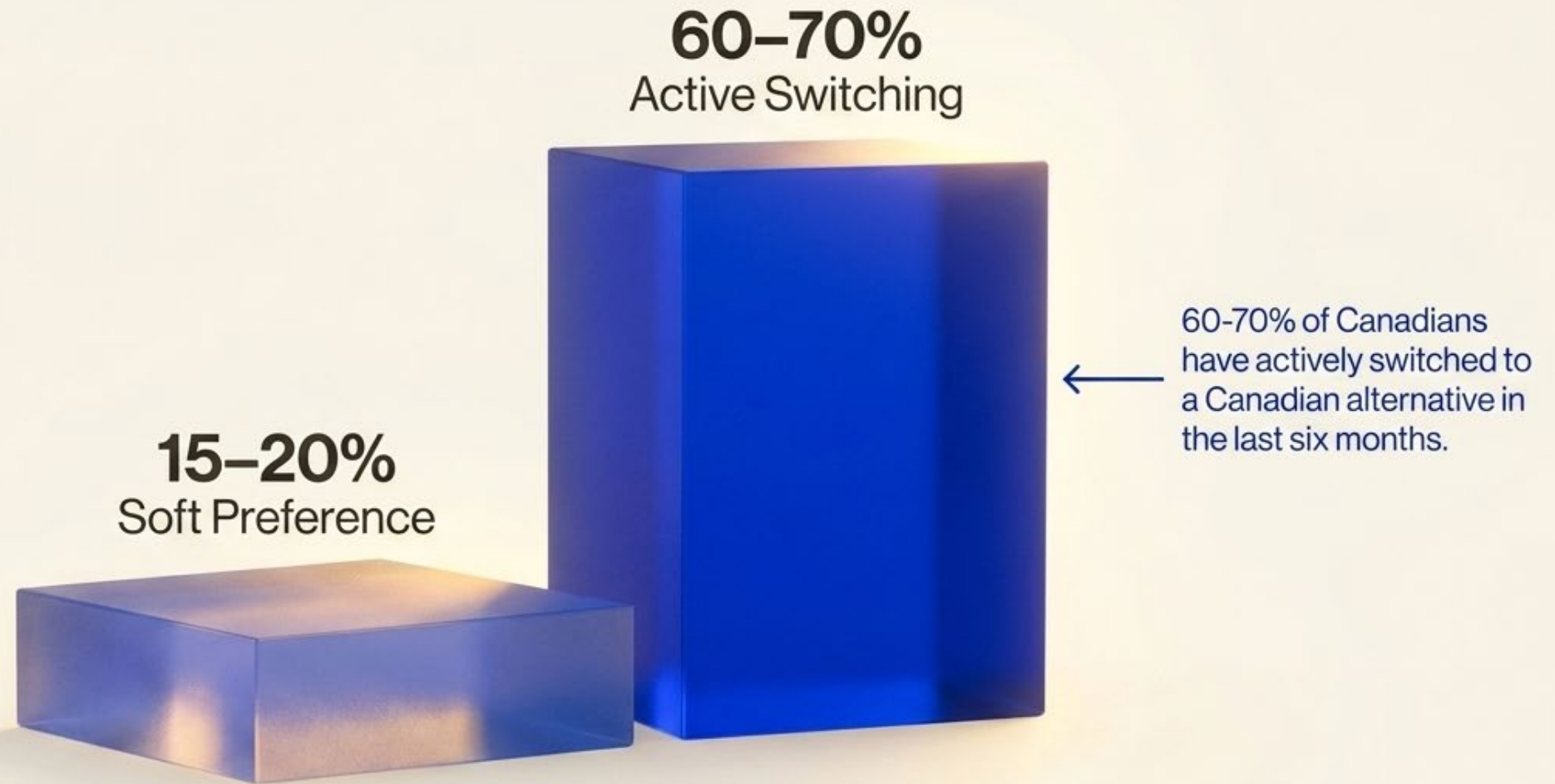


The Affordable Reassurance Vehicle

Butter on toast. Cheese on a Tuesday. A home latte instead of the \$7 cafe trip.

Dairy isn't losing the trade-down. It is the ultimate emotional offset.

The Canadian Shift



Boycotts decay. This has hardened into a habit.

Food is the New Energy



Canadians now view food production as a strategic national asset. The precarity dividend gives dairy unprecedented, cross-partisan political cover.

A serious country produces for itself.

The Vocabulary of Resilience

~~Supply
Management~~



**Made here so
we're never short.**

~~Quota~~



**Secure, sovereign
supply.**

~~Protected Industry~~



**Canadian resilience
solution.**

The Generational Diagnostic

	Boomers & Older	Under-35s
Product Role	Traditional Fluid Milk	Cheese, Yogurt, Protein-Forward
Core Emotion	Loyalty & Dependability	Budget-Constrained Precarity
Winning Message	Multi-generational Heritage	Absolute Honesty & Functional Clarity

The Reassurance Equation



Accessible
Indulgence

+



Honest
Nutrition

+



Sovereign
Supply

=

**The
Reassurance
Product.**

The GLP-1 Shockwave: A structural shift that outlasts economic and political cycles



This significant addressable market represents a long-term, structural shift in the Canadian consumer landscape.

The Behavioral Shift (-21% fewer calories consumed)

50%+

report decreased overall appetite.

40%

experience fewer food cravings.

35%

order smaller portions or leave food unfinished.

30%

reduce restaurant and takeout frequency.

36%

decrease alcohol consumption.

~33%

actively purchase more fresh produce and protein-rich foods.

“GLP-1s are no longer a niche health topic... The impact is showing up in shopping baskets and behaviours, not just prescriptions.”

AT RISK



Confectionery (-11% in U.S. GLP-1 households)

Sweet baked goods (-7%)



Sugary beverages



Alcohol



Large-format/family-pack indulgent SKUs



TAILWIND

High-protein (standout winner)



High-fiber/gut-health



Hydration (electrolytes, low-sugar)



Smaller portions/single-serve



Deli and fresh produce



Potential removal of **\$5B–\$9B** from Canadian F&B industry sales by 2030.

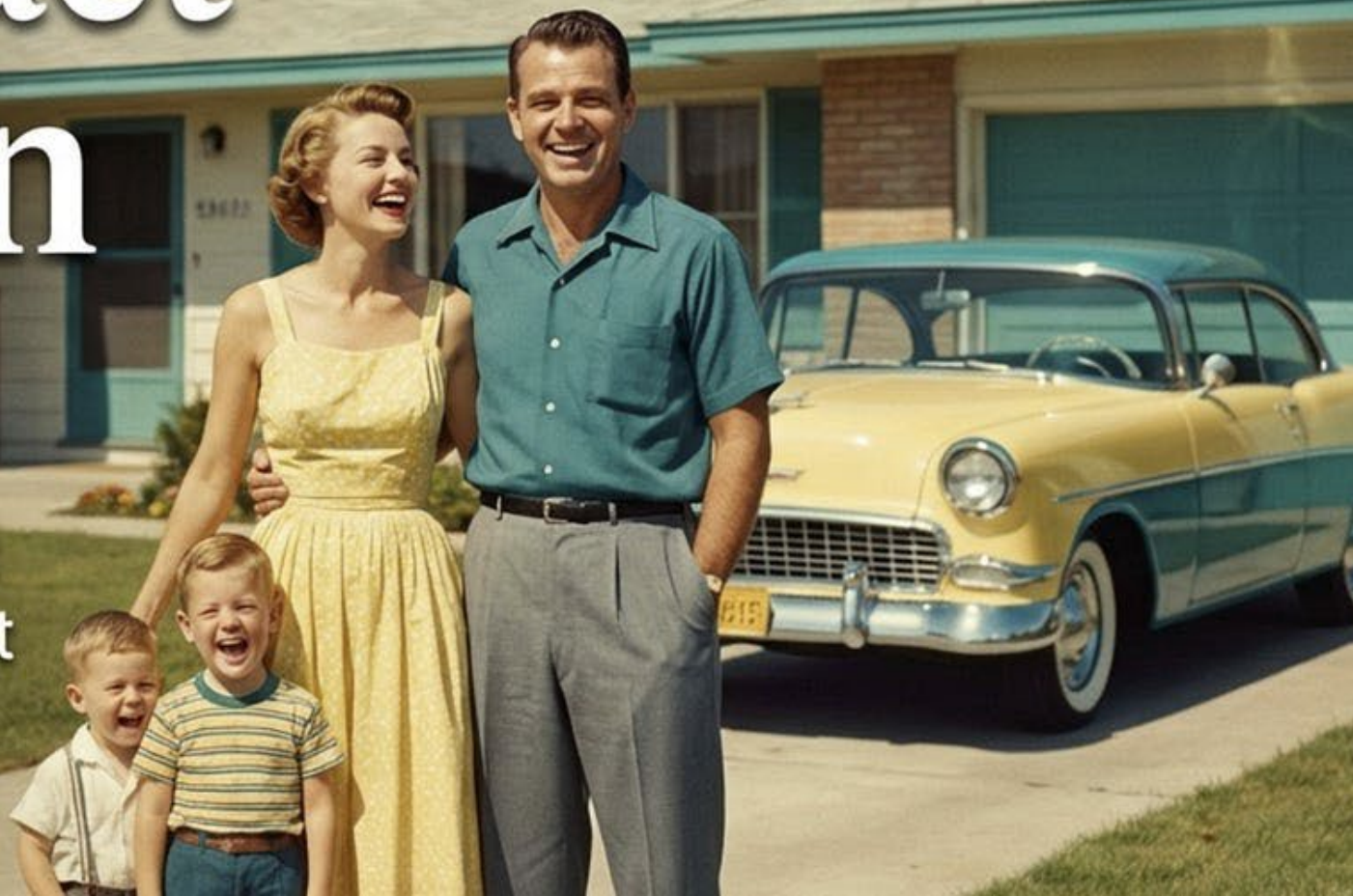
By 2030, households with a GLP-1 user will represent **35%** of all Canadian F&B units sold.



1950 Represents the Contract We Mourn

62% Embrace the 1950s.

This is not about the aesthetic. It is about the 'Deal': The belief that hard work guarantees a home, a family, and a secure retirement.



REASSURANCE

~~Optimism~~ ~~Aspiration~~ ~~Rise and Grind~~

Consumers don't want to be told to be their best selves.
They want the feeling that things are going to be okay.
They want the path to be legible.

Political Variables

Carney Capital

Consumer Variables

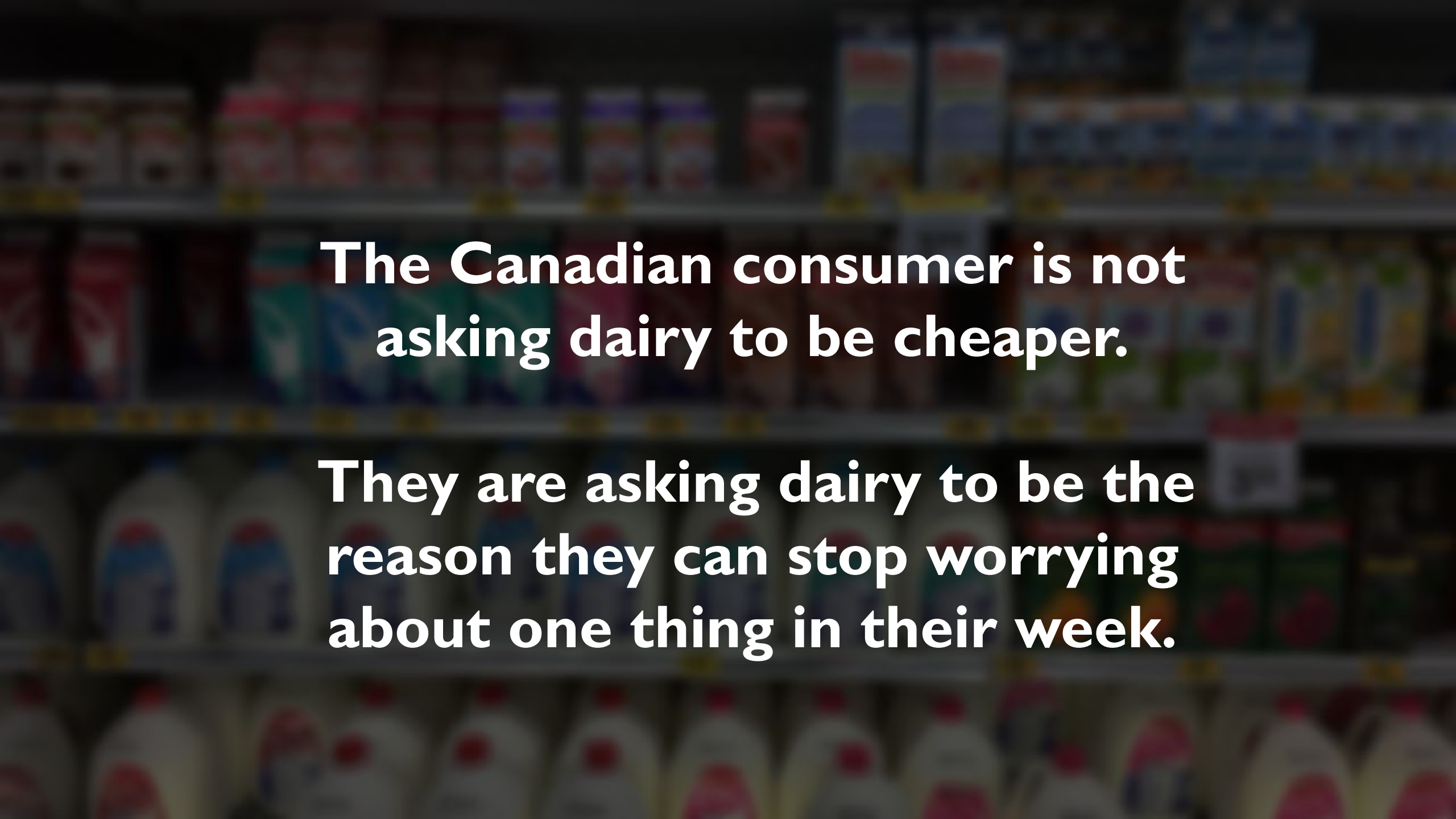
Buy Canadian + GLP-1

Global Variables

CUSMA Public

Worker Variable

AI risk and backlash
potential



The Canadian consumer is not asking dairy to be cheaper.

They are asking dairy to be the reason they can stop worrying about one thing in their week.

The Precarity Mindset

Canadians have shifted from asking "*Do I have enough?*" to asking "*Will I still be okay tomorrow?*" This is the story of that shift — and what it means for everyone who leads.

65% of Canadians are focused on basic needs or safety. **6 in 10** wish they had been born in 1950. This is the Precarity Mindset.

Based on the research of Dr. David Coletto & Dr. Eddie Sheppard, Abacus Data

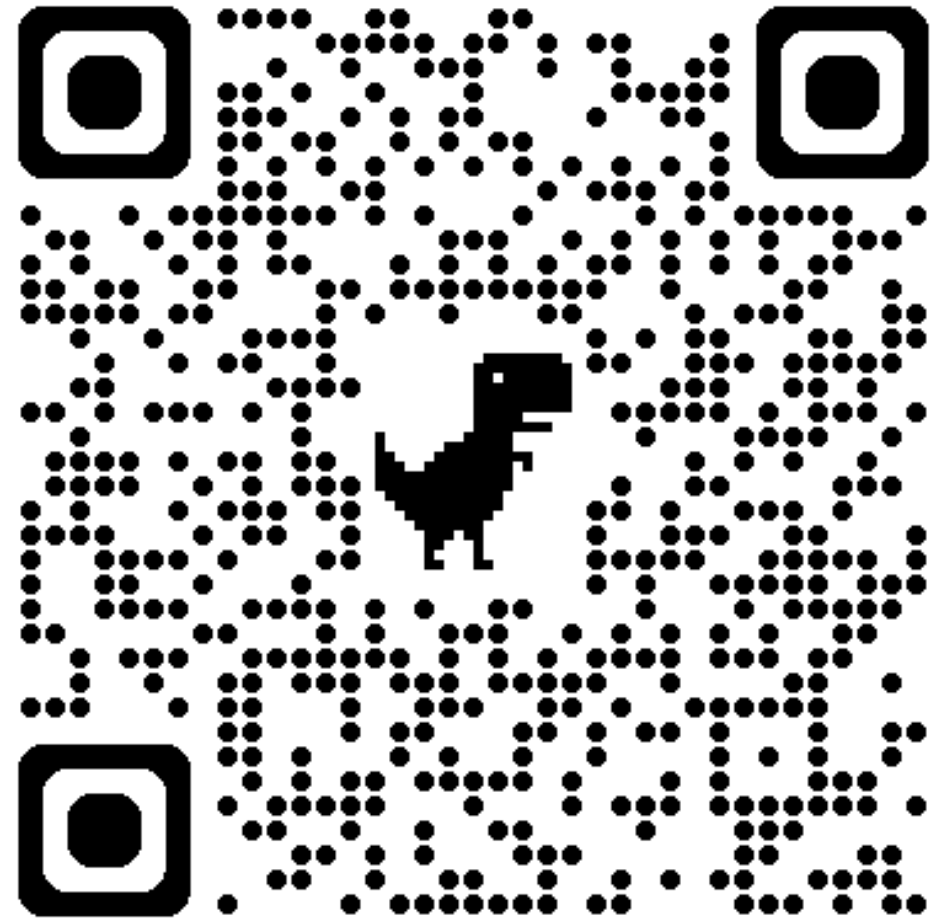
Download
these slides:

Thank You

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