



CANADA VANTAGE 2022 TRENDS REPORT OVERVIEW

The New Dining Frontier

7th Edition of Canada Vantage Report

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GAME CHANGERS



Foodservice Sales, Traffic and Behavioural Trends Study – An Annual Macro Overview of Dining Out in Canada

After two years into the pandemic, it's fair to say that we unanimously have had enough. Even though the crisis is likely far from over there is an eagerness to get back to some semblance of 'normalcy', however elusive and evolving that definition may be.

A year ago, we identified the added focus on the homebound environment and shifting marketplace attitudes as the Great Reset for the Foodservice industry. Today, we find ourselves in the midst of a channel evolution when we look back to what existed before all of this began.

As we start taking steps down the path forward with no dining restrictions, vaccine passports or mask mandates, many Foodservice operators are hopeful that they will see a return of pre-pandemic levels of traffic. They have reason and every right to hope.

Despite unprecedented challenge and change over the past 2 years, the Canadian Foodservice industry has demonstrated unbridled resilience, innovative excellence and clever creativity making growth strides on many fronts.

At Ipsos, we've been studying the topic of consumption trends, both at home and away from home, for almost a decade through our daily syndicated food and beverage tracking diaries fielded to over 400,000 Canadians.

Over this period, we documented many changes in eating patterns, highlighting a confluence of shifting preferences and lifestyle dynamics. Some of these shifts included:

- growth and impact of independents
- the evolution of delivery and its adoption across cohorts
- the digitization of ordering
- the multicultural palate
- the blurring of channels and impact of grocerants
- the prioritization of wellness trends

Fast forward to the end of 2022 and, while many macro trends remain in play, the impact of the global health pandemic and resulting lockdowns, inflationary pressures and confidence levels have all continued to impact Diners' beliefs, needs and priorities.

BUSINESS APPLICATIONS

In the Canada Vantage 2022 report, we will provide an overview of how big picture trends continue to evoke change amid the varying pandemic phases relative to the pre-pandemic phase. 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 (needs, triggers and tensions) behind the Foodservice buy

REPORT SECTIONS/OUTPUT DETAIL

CANADIAN COVID EXPERIENCE REDEFINES FOODSERVICE

- The New Foodservice Landscape resulting from:
 - Channel shifts towards off premise
 - Impact on Delivery vs. Drive Thru vs. Takeout
 - QSR vs. FSR vs. Retail
 - Chains vs. Independents
 - Dayparts Shifts

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- Demographic callouts (Generations, Regions, Urban/Rural, Income)
- Evolution of Needs
- Preferred Menu Items

WILD CARD FACTORS...COVID, CONFIDENCE AND COST

- Scenario Planning as we Look Towards 2022 and a potential surge in diners
 - Future outlook and dining confidence
 - Identifying and sizing COVID concerns
 - Impact of Inflationary Pressures
 - Foodservice occasions vs. Retail
 - Average Eater Check Changes
 - Diners dealing (e.g., LTOs, couponing, etc.)
 - Including a view on the US market recovery
 - Sizing Pent-Up Demand vs. COVID Concerns vs. Inflation Pressures to help shape the path forward

DIGITIZED DINING

- Sizing and trending the role of digital in driving:
 - Restaurant Trial
 - Dining frequency and size of average eater check (by channel and device)
- The role of digital loyalty programs
- Triggers and barriers to on-line ordering and use of digital

GUESS WHO'S COMING TO DINNER (AS WELL AS BREAKFAST AND LUNCH)

- Changes in diners and habits by pandemic phase (pre-pandemic vs. initial period vs. current)
 - Differences by daypart broken out by:
 - Those working from home and those in the office
 - Where are they ordering from
 - By what method
 - Reasons for dining

FROM COMFORTING CRAVINGS TO CONSCIOUS CONSUMPTION REALITY

- Have diners reverted to healthy eating after bingeing at the start of the pandemic
- Health attributes diners are trying to include and reduce
- Differences by cohort
- Pandemic impact in plant-based menu items

MAIN REPORT SOURCES

Ipsos Foodservice Monitor (FSM) – FSM is an ongoing daily market measurement tool detailing what individual consumers purchased from *foodservice* channels (Quick-Service Restaurants, Full-Serve Restaurants and Home-Meal-Replacement Retail channels) yesterday including market sizing, operator share and performance, average eater cheque and top items ordered. FSM links consumer needs with behaviour to offer a 360 degree look at the commercial foodservice experience in Canada.

Ipsos FIVE – FIVE is a daily on-line 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 that launched in 2013 and provides an unparalleled view of consumption among over 20,000 individuals annually aged 2+ years

Deliverables Include: Resource Power Point Report in PDF format accompanied by a virtual one-hour presentation report. Additional hours for follow-ups and further queries available upon request.

List Price: \$25K

Report Availability:

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