



CANADA VANTAGE 2021 TRENDS REPORT OVERVIEW

Seismic Shifts in Foodservice

6th 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

While the COVID-19 pandemic has ravaged many industries and individuals, few can argue the visible impact it has had on the Foodservice industry. At the onset of the crisis most did not know how long it would last. For an industry that is reliant on traffic volume to help stave off low profit margins, those connected to Foodservice had hoped that it would be short-lived. Alas, almost a year since the first cases were recorded in Canada we are still under lockdown in parts of the country at the time of this writing.

Having said this, we know how resilient, entrepreneurial, and adaptive the Foodservice industry is and many have clearly stepped up to the challenge to survive. The reality is some channels and operators have fared better than others, while many have altogether folded altogether.

Canadians interaction with what they eat and drink continues to change and evolve, particularly as we retreat into our homes with governmental regulations, restrictions and public health guidance continuing to limit our daily movement.

In this highly homebound environment, marketplace attitudes are shifting. This is also clearly impacting the dynamics within the Foodservice industry. We are already seeing a very different landscape to what existed a year ago.

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
- elevated emphasis on pleasure, exploration and experience

Fast forward to the end of 2020 and, while many macro trends remain in play, the impact of the global health pandemic and resultant quarantine environments has certainly accelerated the importance of certain factors while diminishing the importance of others.

In the Canada Vantage 2021 report, we will provide an overview of how current trends resulting from the pandemic are influencing Canadians' Foodservice choices and habits, relative to the pre-pandemic period, to assist in creating a perspective on which shifts will stick moving forward through evaluation of the following:

The Trends

The New Reality

- The New Foodservice Landscape resulting from:
 - Channel shifts towards off premise
 - Impact on Delivery vs. Drive Thru vs. Takeout

CANADA VANTAGE 2021 REPORT OVERVIEW

- QSR vs. FSR vs. Retail
- Chains vs. Independents
- Dayparts Shifts
- Demographic callouts (Generations, Regions, Urban/Rural, Income)
- Evolution of Needs
- Preferred Menu Items, including a spotlight on the Chicken Sandwich wars
- Scenario Planning as we Look Towards 2021 and the Road to Recovery

Consumer Sentiment Towards Dining Out

- General Consumer Outlook and Confidence Levels
- Gauging an Understanding of Consumer Dining Behaviors Post Pandemic
 - Concerns Related to Safety and Cleanliness
 - Supporting Local
 - Avoiding Crowded Places
- Barriers to Dining In once Social Distancing Rules are Lifted
- Impact on Foodservice Spending Habits Post Pandemic

A Look In Home

- Working from Home Impact
- Transforming the Foodservice Industry to Meet New In-Home Experience Requirements
 - Focus on Meals and Sharing
 - Key Needs and other Relevant Occasion Dynamics

Digital Adoption

- Role of Contactless Ordering
- Explosion of Delivery and Mobile Apps in Correlation with Dining In
- Post Pandemic Outlook for Delivery
- Third Party Aggregators vs. Restaurant Operators

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

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IPSOS SYNDICATED

The Food and Beverage Group Syndicated Studies



January 2020

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Ipsos Foodservice Monitor ('FSM')

FSM is an ongoing daily tracking of what individual consumers ate and drank sourced from all foodservice segments yesterday. FSM links consumer needs with consumer behaviour to offer subscribers a 360 degree look at the commercial foodservice experience in Canada. We capture detail related to industry size and channels, visit details, party dynamics, menu choice and demographics, among other metrics. With an annual online sample of **36,500** Foodservice visitors FSM can review item level consumption from ages 4 and up.

success criteria

BUSINESS
UNDERSTANDING &
SOPHISTICATION

SPEED OF
SERVICE

QUALITY OF
SERVICE
DELIVERY

ONE IPSOS
PHILOSOPHY

The FSM Difference

1 Competitive pricing



We offer flexible pricing schedule with single year or multi-year access options on year to meet a variety of budgetary needs.

2 Frequent, fast, flexible



Monthly reporting 15 business days from close with **weekly view**.

3 Detailed market view



Custom menus across 260+ operators, wider view of **retail channels** (eg. Dollar Store, Fresh Markets, Online, etc.) via **FIVE**

4 Consultative servicing



We focus on **telling stories** and finding solutions to **business issues**.

5 Sample transparency



Base reported using **respondents** (not occasions or items). **Clear weighting** method.

6 Access to **FIVE Daily Consumption Diary** to fill information gaps



Leverage Ipsos for FIVE syndicated daily all-venue (at home, carried from home and away from home) of all food and beverage usage and attitudes diary tracking among 20,000 individuals annually in field since 2013; detail also captures attitudes, preparation dynamics, health statuses, conscious consumption dynamics and other general beliefs

FSM Capture Variables

● industry

Industry Dollars, Eaters, Occasions, Items

Operator Type (QSR, FSR, C-Store, Gas, Grocery, Cinema, Cafeteria etc.)

Average Party Size

Average Party Cheque

Average Eater Cheque

Average items

● visit details

Operator Considered/ Chosen

Channel Ordered/Consumed

Daypart, Hour part, Weekpart

Payment

Combo

Weather

Satisfaction with Visit

Reasons for Visit

Sources of Information

Actions Taken During Visit (e.g. Instagram)

Revisit Intent

● party

Number of Party Members

What each Member Ordered

Profile of Party Member (e.g. Child)

● menu

Menu of Specific Operator

Generic Menu for Roll-Ups / Industry View

Product on LTO or Not

Beverage Brand Detail (Alcoholic and Non-Alcoholic)

● respondent

Age, Gender, Province, City

Marital Status

HH Income

Education

Employment

Ethnicity, Recency

Household Composition

Sexuality

Ingredients Increasing / Excluding in Diet

General Dining Habits

COVID-19 Attitudes

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How can we help?



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About Ipsos

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

"Game Changers" – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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Game Changers

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.

**BE
SURE.
MOVE
FASTER.**



ALCOHOL CONSUMPTION TRACKER



Tracking alcohol consumption during the course of a full month, across all categories, brands, and types of occasions.

WHAT IS ACT?

ACT is a syndicated research program in Canada (ACT Canada) and the US (ACT US) subscribed to by market leaders in the Beer, Wine, Spirits, Cider, Cooler and Pre-mixed Cocktail categories.

It provides occasion-based insight at both a macro and micro level typically not cost-feasible with a proprietary study. Relevant for Beverage Alcohol makers, distributors and retailers alike, subscribers gain expanded insight into consumption behaviour.

OCCASION DIARY.

All month. Every month.



S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

HOW DO PEOPLE CONSUME ALCOHOL?



- When
- Where You Were
- Role of Food
- Who You Were With
- What You Were Doing

UNDERSTAND DRINKING BEHAVIOUR BY:

- Category (beer, wine, spirits, RTD, ciders, coolers)
- Brand (1,000+ brands tracked)
- Occasion profiles
- Segments (demographic, behavioural, attitudinal)

VIEW INSIGHT THROUGH DIFFERENT LENSES:

- Consumer based (incidence)
- Volume based (number of occasions or servings)
- By month, day, or specific type occasion)

OVERLAY CROSS-CATEGORY BEHAVIOUR:

- Loyalty to categories and brands
- Cross category interaction
- White space opportunities for category and brand development

For more information, contact:

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FIVE 
SYNDICATED

January 2020

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A close-up photograph of a woman with long brown hair, smiling broadly as she eats. She is holding a white plastic fork in her right hand, poised to take a bite from a white bowl filled with a fresh salad. The salad contains green lettuce, cherry tomatoes, and purple grapes. The background is a soft, out-of-focus light blue and white, suggesting an indoor setting with natural light.

Daily tracking of individual consumers' eating and drinking habits, attitudes and item choices both at home and away from home to address business issues like:

- Trends
- Targeting
- Positioning
- Daypart Evaluations
- Drivers of Growth or Decline
- Annual Planning Initiatives
- Retailer Presentation Enhancements

The Evolution of FIVE

Industry
Leader for
Consumption
Behavior in
Canada

● **2013**

- Successful launch
- 3 founding clients
- 2 ad hoc clients

● **2015**

- Category Deep Dives
- Trended Data
- 7 subscribing clients
- 9 ad hoc clients

● **2019**

- Strategic Partnering
- Food and Beverage Expertise
- 10 subscribing clients
- 20 ad hoc clients

Ipsos FIVE: How we do it

FIVE is an online diary consumption tracking study fielded daily. Launched January **2013**, this syndicated study captures eating and drinking behaviour for the average Canadian's day across all categories/brands, dayparts and venues.

Sample

Annual base sample of 20,000 Canadians ages 2yrs+

Surveys sent out daily – English and French

Data is weighted and released quarterly (5000 completes per quarter)

**IN FIELD 7 DAYS A WEEK.
365 DAYS A YEAR.**

How is it Captured?

Information capture is focused on yesterday's behaviour targeting:

- Morning (Breakfast and all Morning Snacks)
- Afternoon (Lunch and all Afternoon Snacks)
- Dinner
- Evening Snack and Light Meals

- Captures situational dynamics, attitudes, motivations, item preparation details, health statuses and general beliefs
- Captures where items consumed were sourced and some purchase behaviour dynamics



Ipsos FIVE: What we capture

who

Standard Demographics (Age, Gender, Region, Household Income)

Acculturation & Ethnicity

Generations (Gen Z, Millennials, etc.)

HHL D Structure (Kids, Size, Life Stage)

what

Food & Beverages Consumed (day before)

Brand/SKU

Product Usage as Ingredient & Additive

Dish Composition analysis

Packaging Detail (in select categories)

Dish Position (Main Dish, Side Dish, Dessert, etc.)

where

Where Consumed (In Home vs. OOH Locales including Restaurants)

Where Consumed In Home

Situational Dynamics (Activity, # Eating, Who With)

Where Purchased

Non-traditional Channels

Who Did Shopping

Decision Maker

Planned vs. Impulse

In-store Influencers

when

Occasion

Clock Time of Day

Weekday vs. Weekend

Special Occasion / Holidays

Seasonality

How Prepared

Time Spent

Appliance Usage

Product Format (ie. refrigerated, frozen, meal kits, etc.)

why

Functional Motivations

Emotive Attitudes

General Opinions

Health Statuses

Dietary Restrictions

Meal Skipping

Label Claims

Physical Activity

Information Influencers

Information Sources

Lifestyle Choices

COVID-19 Impacts

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How can we help?



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CANNABIS CONSUMPTION TRACKER



Tracking cannabis consumption during the course of a full month, across all categories, brands, and types of occasions.

WHAT IS CCT?

CCT is a new syndicated diary research program available to market leaders in the Cannabis, Alcohol, and Health industries.

It provides occasion-based insight at both a macro and micro level typically not cost-feasible with a proprietary study. Relevant for producers, distributors and retailers alike, subscribers gain expanded insight into the consumption behaviour of Canadians.

OCCASION DIARY.

All month. Every month.



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HOW DO PEOPLE CONSUME CANNABIS?



- When
- Location
- Food
- With Whom
- Activity

UNDERSTAND CONSUMPTION THROUGH AN ENTIRE MONTH:

- Formats (edible, smoked, etc.)
- Brands (all brands tracked)
- Types of consumption occasions
- Segments of consumers (demographic, behavioural, attitudinal)

VIEW INSIGHT THROUGH DIFFERENT LENSES:

- Consumer based (incidence)
- Volume based (number of occasions)
- By month, day, or specific type occasion

OVERLAY CROSS-CATEGORY BEHAVIOUR:

- Loyalty to strains, formats and brands
- Cross category interaction with Alcohol
- White space opportunities for category and brand development
- for category and brand development

For more information, contact:

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