

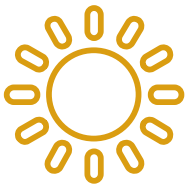
THE PATH FORWARD

The New Foodservice Landscape

Asad Amin, Vice President, Market Strategy & Understanding
30 April, 2020

GAME CHANGERS





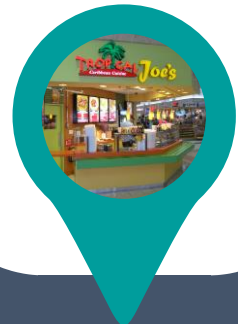
MERCURY
ESPRESSO



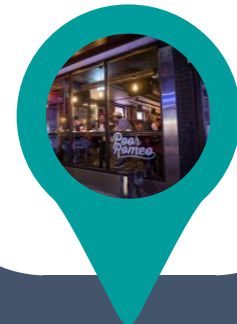
AVLING
BREWERY



ED'S REAL
SCOOP



TROPICAL
JOE'S



POOR
ROMEO





An ongoing daily tracking of what individual consumers ate and drank sourced from foodservice yesterday.

FSM links consumer needs with consumer behaviour to offer subscribers a 360 degree look at the commercial foodservice experience in Canada.

Average **Annual** Counts

- ❖ **36,500** individual completes
- ❖ **46,400** occasions captured
- ❖ **118,600** Menu Items Consumed
- ❖ FAB New Reality Reports
- ❖ Path Forward Behaviour Tracker

MARCH FOODSERVICE DECLINES

Foodservice **Dollars** Mar 2020
-47%

Foodservice **Traffic** Mar 2020
-39%



Source: Ipsos Foodservice Monitor Mar 2020 vs. YoY

CANADIAN FOODSERVICE PROFIT MARGINS

4.3%

QSR

3.8%

FSR

Source: Restaurants Canada Operations Report 2019

A woman in a dark leotard is captured mid-jump, clearing a brick wall. The background features a city skyline with a body of water and a bridge. In the top left corner, there are diagonal stripes in teal, grey, and blue. The word "CONFIDENCE" is written in large white letters across the bottom of the image.

CONFIDENCE

ALL EYES ARE ON CHINA'S RECOVERY



■ April 15, 2020, 5:47 PM EDT ■ Updated on April 16, 2020, 10:12 AM EDT

Wuhan's 11 Million People Are Free to Dine Out. Yet They Aren't

● An entrepreneur struggles in a coronavirus-ravaged city where consumer habits may forever be changed.


Bloomberg News



▲ Xiong Fei at one of his restaurants in Wuhan, China, on April 14. PHOTOGRAPHER GILLES SABRE FOR BLOOMBERG BUSINESSWEEK

THE STRAITS TIMES

Coronavirus: F&B, retail suffering even as Wuhan emerges from lockdown




People eat outdoors in Wuhan on April 16, 2020. PHOTO: AP

BEIJING

Beijing's roads and restaurants grow crowded, as scientists warn second coronavirus wave is 'inevitable'

NATHAN VANDERKLIPPE ASIA CORRESPONDENT
PUBLISHED MARCH 24, 2020

121 COMMENTS SHARE



A visitor takes a photo of blossoms at the Beijing Zoo after it reopened its outdoor exhibit areas to the public for the first time since they were closed amid the coronavirus outbreak, on March 24, 2020. The zoo and parts of the Great Wall of China have reopened to visitors who book in advance, as the capital slowly returns to normal amid a sharp fall in the number of new coronavirus cases.

OPINION

Refusing to name the Nova Scotia mass shooter avoids one problem – but creates another

ROBYN URBACH

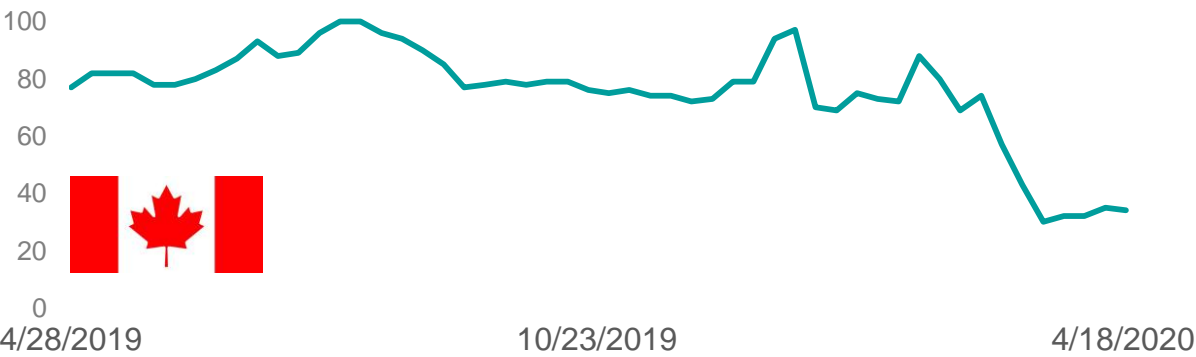
TRENDING

- 1 Alberta pension manager loses \$4-billion on investment bet gone wrong
- 2 Nova Scotia RCMP now investigating if gunman had help as victim death toll rises to 22
- 3 Two cargo planes return empty to Canada from China without medical supplies
- 4 How the pandemic makes it even more scrupulous to delay the start of CPP retirement benefits
- 5

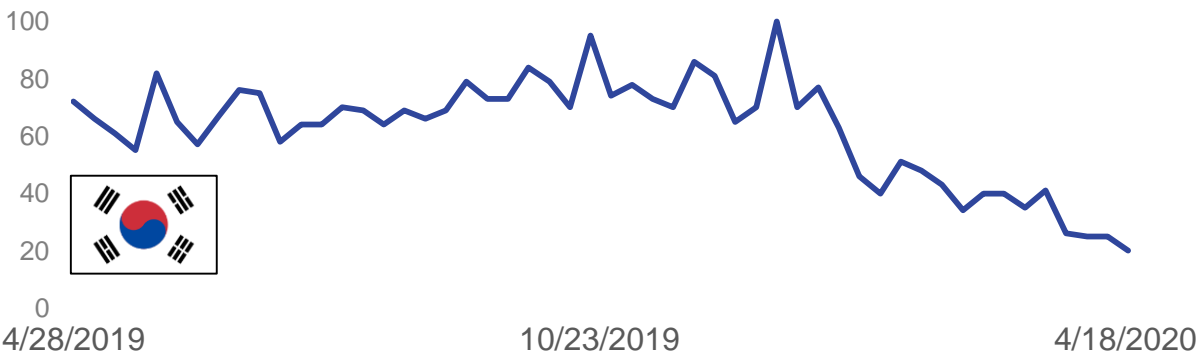


GLOBAL SEARCH TRENDS FOR 'RESTAURANT'

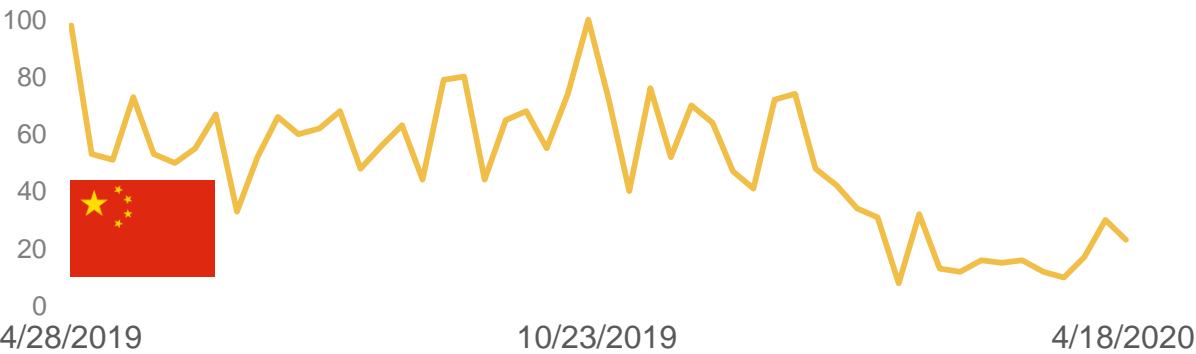
CANADA



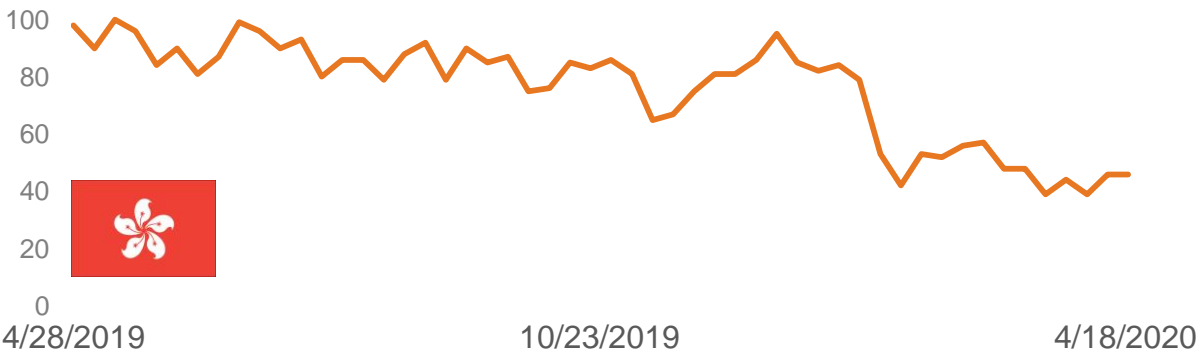
SOUTH KOREA



CHINA



HONG KONG



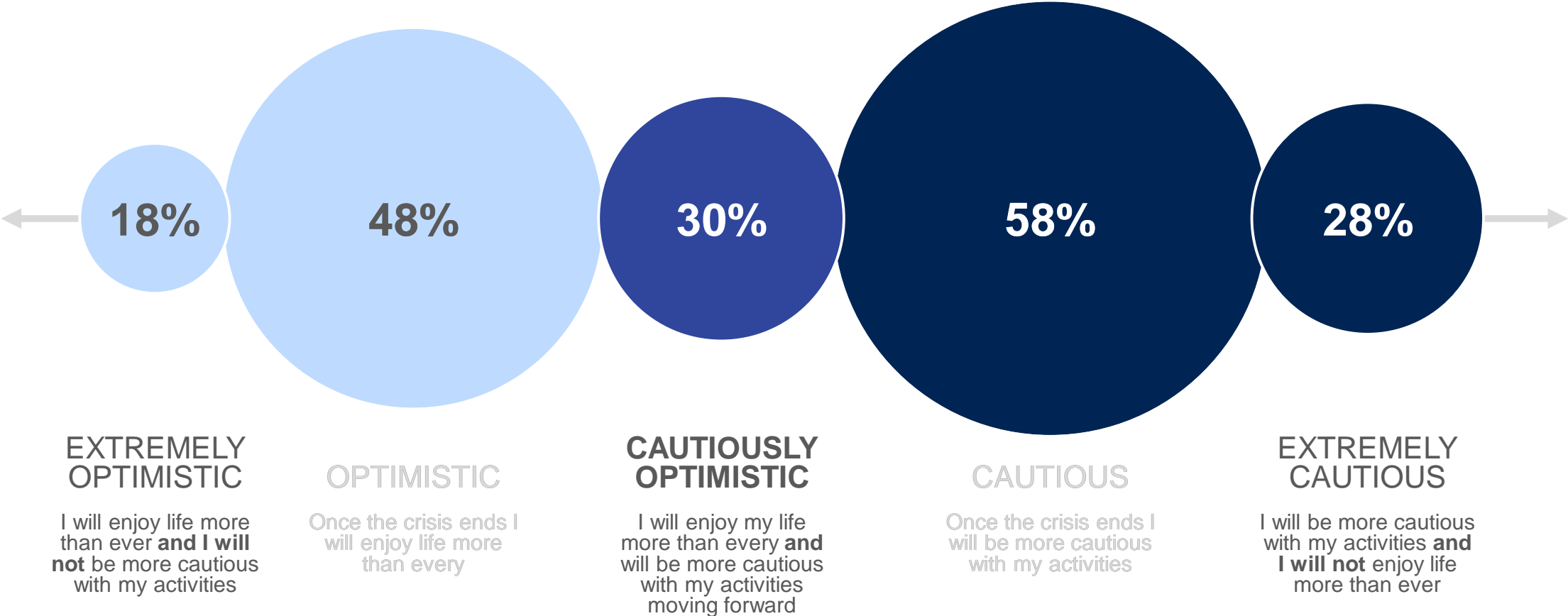
Source: Google Trends

NEW ZEALANDERS RUSH FOR FAST FOOD AND COFFEE



WHILE A CONSIDERABLE SHARE OF CANADIANS REMAIN UNDERSTANDABLY CAUTIOUS ABOUT THE FUTURE, IT'S CERTAINLY NOT ALL DOOM AND GLOOM

CONSUMER OPTIMISM SCALE



Sources: Ipsos Path Forward COVID-19 Behavior Tracker Wave 2 Apr 14-20, 2020, N=1,000
Q. Below are a number of behaviours and attitudes that people could have as a result of the Covid-19 health crisis. For each of the statements below, please indicate whether you agree or disagree. % in Circles Based on Top 2 Box

62%

OFF-PREMISE

▲ +9%

5 Yr Traffic Share Growth

38%

ON-PREMISE

▼ -9%

5 Yr Traffic Share Drop

WHAT IS YOUR OFF-PREMISE STRATEGY?

Source: Ipsos Foodservice Monitor 12ME Feb 2020

TOP **GROWING** ITEMS



Bakery/Dessert

Beverages

Entrees

Sides

Appetizers



TOP **DECLINING** ITEMS

Source: Ipsos Foodservice Monitor Mar 2020

WHAT IS THE PATH FORWARD IN THE CURRENT FOODSERVICE LANDSCAPE?



THE PATH FORWARD

1. SAFETY
2. VALUE
3. SOCIAL
4. PIVOT
5. COMPASSION



SAFETY

62%

**Restaurants
Taking
Precautions**

Source: Ipsos Path Forward COVID-19 Behavior Tracker Wave 2 Apr 14-20, 2020, N=1,000

VALUE

24%
Dealing

Source: Ipsos Foodservice Monitor Mar 2020

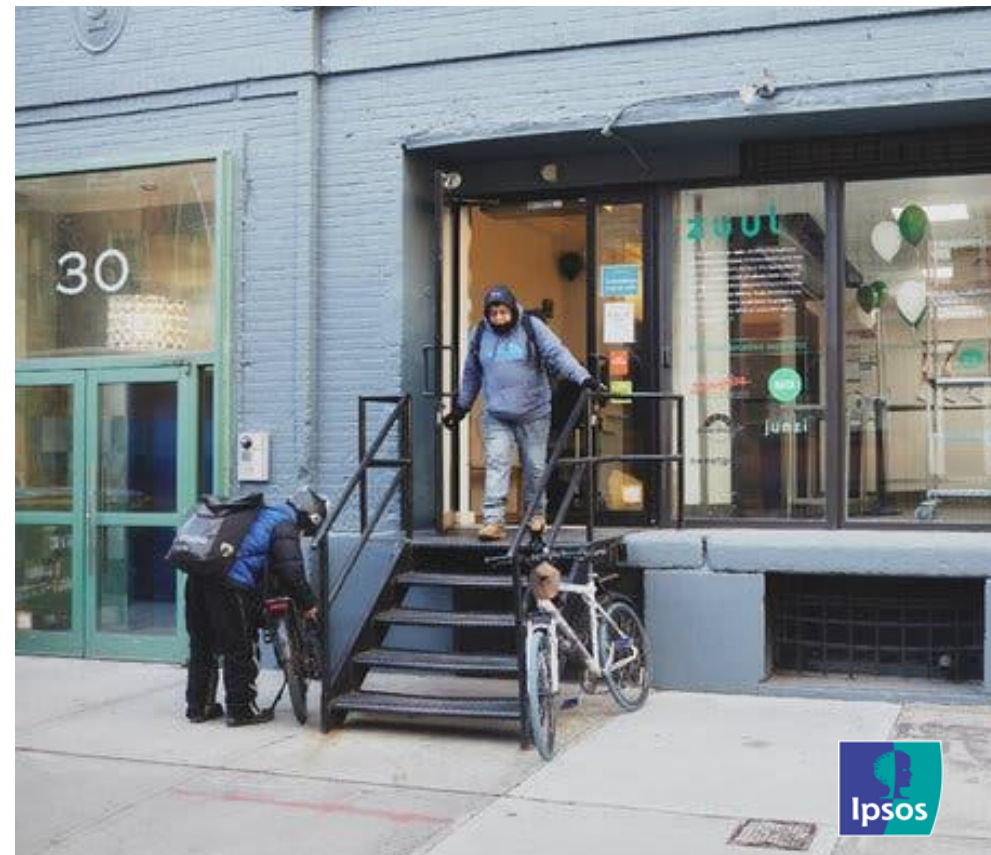
SOCIAL

17%

**Virtual
Happy Hour**

Source: Ipsos Path Forward COVID-19 Behavior Tracker Wave 2 Apr 14-20, 2020, N=1,000

PIVOT



COMPASSION



30 spots. days.

COVID-19 **CRISIS RELIEF** FOR
TORONTO'S RESTAURANT WORKERS

TASTETORONTO



LOGIN / SIGN UP

RECIPES

SUBMIT A RECIPE

Featured



RECIPES

Chef Anthony Rose's Patty Melt

Make chef Anthony Rose's famed patty melt. Comprised of crispy rye bread, melted cheddar cheese, caramelized onions and medium-rare patties, this is the ultimate comfort food. ... If you give this recipe a shot, make sure to post up your creation on Instagram and tag @tastetoron...

