

# The Canadian Foodservice Consumer - Canada - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- Restaurant visits and access modes used.
- Comparing visit occasions before and during the pandemic.
- The tactics, if any, that consumers will use to offset rising prices.
- Usage of restaurant tools like website, apps, coupons and loyalty programs.
- The parts of the restaurant experience that consumers want to see be improved.
- How digital tech is used and whether or not consumers want more.
- The importance of teens to the industry and their top motivators.

Restaurant sales in 2021 were more than \$11 billion lower than in 2019 – a 15% drop in revenues for the industry (per Statistics Canada). But these revenue losses are not a result of declining relevance or consumers exiting the industry; 92% of Canadians visited a restaurant in the three months leading up to mid-March 2022. Few other industries in the entire market have that level of reach.

Of course, those revenue declines were a direct result of the COVID-19 pandemic. Closures throughout 2020 and 2021 were massive barriers for restaurants – and even the relaxed restrictions (eg capacity limits instead of dining room closures) created challenges. Furthermore, the indirect effects from other struggling industries – like travel and live entertainment – exacerbated the difficulties for restaurants. Today, the pandemic is still a factor, but in a more nuanced way; rather than restrictions on operations, it is now consumer attitudes and behaviours that are influencing their willingness to dine out. Moreover, rapid inflation rates have compounded the issue for restaurants. Many businesses are financially challenged after years of restrictions and now their margins are shrinking, forcing them to increase prices – at a time when consumers are increasingly price-sensitive due to market-wide inflation.



“It’s been over two years of incredible challenges for the foodservice industry. There is positive momentum and broad usage, but lasting behaviour changes will delay its return to pre-pandemic levels. Looking ahead, consumers’ increased comfort with digital tech opens the door for restaurants to differentiate and improve profitability with streamlined operations.”

– **Scott Stewart, Associate Director, Lifestyles & Retail**

### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The more existential threat, though, is the possibility of long-term behaviour changes. The pandemic and inflation are immediate threats, but should eventually subside. But the fact that consumers have become so much less likely to use restaurants for special meals – such as date nights, birthdays or meeting up with friends before a movie – means that some of those occasions may be lost forever. If consumers developed new habits around those occasions during the pandemic – such as hosting dinner parties at home or skipping movie theatres and opting for digital streaming releases – it will be very difficult to win them back and re-establish pre-pandemic traffic levels. Businesses that can weather the short-term storm of COVID concerns and inflation should focus on how to bring customers back for those occasions before their new habits become further entrenched.

There is plenty of reason for optimism, though. The ubiquity of restaurant usage means that the industry remains highly relevant; it can focus on driving frequency rather than adoption. And the digital technology advancements in recent years are not only creating opportunities to improve the dining experience, but also develop more cost-efficient operations. From the simple (eg mobile app loyalty programs) to the complex (eg fully automated restaurants), there is a constant stream of innovations that businesses can use to stay relevant, differentiate and maintain profitability.

### What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### OVERVIEW

- What you need to know
- Key issues covered in this Report
- Definition

### EXECUTIVE SUMMARY

- Top takeaways
- Market overview  
Figure 1: Category outlook, 2022-27
- Opportunities
- Foodservice’s relevance is broad and stable
- There are countless ways to differentiate
- The pandemic has been a turning point for digital tech in restaurants
- Challenges
- Certain occasions are at risk of being lost long term
- Consumers are prepared to respond to inflation

### THE MARKET – BY THE NUMBERS

- A bounce-back year was not enough, and 2022 will be similar

Figure 2: Foodservice sales, 2017-21

### MARKET FACTORS

- COVID concerns have gone down, but are still lingering  
Figure 3: Concern about risk of exposure to COVID-19, 2020-22
- Restaurants are experiencing food price inflation  
Figure 4: Consumer price index (food), 2020-22
- Minimum wage increases create another challenge
- Related industries are also struggling  
Figure 5: Tourism demand in Canada, Q4 2018-Q4 2021  
Figure 6: Cineplex theatre attendance, 2017-21
- A return to normal for pro sports is a welcomed boost  
Figure 7: Couchgating, 2021

### COMPETITIVE STRATEGIES

- Without COVID restrictions, companies are navigating strategically
- Loyalty programs are becoming the norm  
Figure 8: McDonald’s Twitter post, 2021  
Figure 9: Starbucks Twitter post, 2021

### What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Restaurants will use price increases to offset inflation**

Figure 10: Subway Canada Instagram post, 2022

## THE CANADIAN FOODSERVICE CONSUMER – FAST FACTS RESTAURANT USAGE

- **Most Canadians are using restaurants**

Figure 11: Restaurants used in the past three months, 2022

- **Young, employed Canadians are the most common restaurant patrons**

Figure 12: Used any restaurant in the past three months, by age, parental status and employment status, 2022

Figure 13: McDonald's Canada Instagram post, 2021

- **Quebec remains underdeveloped**

Figure 14: Restaurants used in the past three months, overall vs Quebec, 2022

- **Consumers are shifting back to on-premise visits**

Figure 15: Ways of getting meals from restaurants in the past three months, 2021 vs 2022

Figure 16: Ways of getting meals from restaurants in the past three months, by worry about exposure to COVID-19, 2022

## RESTAURANT OCCASIONS BEFORE AND DURING THE PANDEMIC

- **Functional restaurant visits have been relatively stable**

Figure 17: Functional restaurant occasions before and during the pandemic, 2022

Figure 18: Discretionary restaurant occasions before and during the pandemic, 2022

Figure 19: The Keg Instagram post, 2021

- **Remote workers may stop functional visits from fully rebounding**

Figure 20: At-work restaurant occasions before and during the pandemic, by current working situation, 2022

Figure 21: Going to/from work restaurant occasions before and during the pandemic, by current working situation, 2022

- **COVID-19 is a factor for discretionary restaurant occasions, but not the only one**

Figure 22: Restaurant occasions before and during the pandemic among those who are worried about COVID-19, 2022

Figure 23: Restaurant occasions before and during the pandemic among those who are not worried about COVID-19, 2022

- **Older consumers have had the largest decline**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 24: Discretionary restaurant occasions during the pandemic, by age, 2022

### HOW CONSUMERS WILL HANDLE PRICE INCREASES

- Canadians are worried about inflation**  
Figure 25: Top concerns, 2022  
Figure 26: Actions in response to rising prices at restaurants, 2022
- Leveraging savings tools to offset costs**
- Chinese Canadians will be the most active with digital coupons**  
Figure 27: Coupons and loyalty programs in response to rising prices at restaurants, by race, 2022
- Coupons and loyalty programs will increase in frequency more than reach**
- Many will look for lower prices – especially in fast food**
- Those with healthy finances are the least likely to seek out lower prices**  
Figure 28: Switching to lower prices in response to rising prices at restaurants, by financial situation, 2022
- Adapting ordering behaviour to mitigate cost increases**
- Value meals and meat-free options to offset inflation**  
Figure 29: Ordering less food in response to rising prices at restaurants, by age, 2022
- One in five consumers do not plan to make any changes**  
Figure 30: Would not change response to rising prices at restaurants, by employment status, student status and financial situation, 2022

### USING RESTAURANT TOOLS

- Young consumers are driving the shift from sites to apps**  
Figure 31: Digital restaurant resources used in the past three months, by age, 2022  
Figure 32: Digital restaurant resources used in the past three months, by daily social media usage, 2022
- Leveraging digital incentives to drive mobile app usage**  
Figure 33: Digital restaurant resources used in the past three months, by loyalty and coupon usage, 2022  
Figure 34: Tim Hortons Twitter post, 2020
- French Quebec consumers are the least likely to use digital tools**  
Figure 35: Digital restaurant resources used in the past three months, overall vs Quebec, by language, 2022

### What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Chinese Canadians use mobile apps more than others**  
Figure 36: Digital restaurant resources used in the past three months, by race, 2022
- Self-serve kiosks remain niche and may soon prove redundant**  
Figure 37: Ways of ordering at restaurants in the past three months, by age, 2022
- Using restaurant tools to save money**  
Figure 38: Savings used at restaurants in the past three months, by household income, 2022
- Putting loyalty programs into perspective**
- Physical coupons still have relevance today**  
Figure 39: Coupons used at restaurants in the past three months, by age, 2022  
Figure 40: Fido Twitter post, 2022

#### PRIORITIES FOR RESTAURANTS

- Improving loyalty programs is a delicate balance**  
Figure 41: Initiatives restaurants should invest more resources into, 2022
- Active loyalty users are the most interested in seeing programs improve**  
Figure 42: Restaurants should invest resources into loyalty programs, by current loyalty program behaviours, 2022
- The menu is a constant focal point for diners**  
Figure 43: Menu initiatives restaurants should invest more resources into, men vs women, 2022
- Making a healthier, more sustainable menu**  
Figure 44: Menu initiatives restaurants should invest more resources into, overall vs those who believe restaurants should invest resources into sustainability, 2022  
Figure 45: Quesada Burritos Instagram post, 2022
- COVID precautions have become an aspect of restaurant service**  
Figure 46: Customer service initiatives restaurants should invest more resources into, by concern about risk of exposure to COVID-19, 2022
- Restaurants that cater to older women should be particularly focused on COVID-19 safety**  
Figure 47: Restaurants should invest resources into COVID-19 safety, by age and gender, 2022
- In-house delivery services are an opportunity to increase profitability**

#### What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

#### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

#### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 48: Restaurants should invest resources into in-house delivery service, overall vs delivery users, 2022

- **Modernizing the restaurant experience**
- **Younger consumers are the most interested in these advancements**

Figure 49: Modernization initiatives restaurants should invest more resources into, by age, 2022

Figure 50: Modernization initiatives restaurants should invest more resources into – 18–34s, men vs women, 2022

Figure 51: Tim Hortons Twitter post, 2020

- **Investment in design/décor should be reconsidered amid the pandemic**

### THE ROLE OF DIGITAL TECH IN RESTAURANTS

- **Consumers are conflicted about more technology**  
Figure 52: Attitudes towards innovations in restaurants (% agree), 2022
- **Young consumers are interested in innovations, but still appreciate the good old days**  
Figure 53: Attitudes towards innovations in restaurants (% agree), by age, 2022
- **Half of consumers are open to more restaurant automation**  
Figure 54: Attitudes towards automation in restaurants (% agree), by age, 2022
- **Consumers who have minimal contact with restaurants are the most open to automation**  
Figure 55: Attitudes towards automation in restaurants (% agree), by past three-month access modes, 2022
- **Automation at full-service restaurants must be more nuanced**  
Figure 56: 'I'd like to be able to digitally pre-order at full-service/sit-down restaurants' (% agree), by age, 2022
- **Mobile apps' importance to foodservice**  
Figure 57: Attitudes towards restaurant mobile apps (% agree), by age, 2022

### TEENS AT FAST FOOD

- **Most teenagers use the foodservice industry**
- **Taste, convenience and price are key decision factors**  
Figure 58: Teens: fast food restaurant decision factors, 2021
- **Low importance of mobile ordering is illustrative of its value to older consumers**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Consumer survey data
- Consumer qualitative research
- Mintel Trend Drivers
- Abbreviations and terms
- Abbreviations
- Terms

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100





## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.