

REACT Survey – August 2022



SURVEY METHODOLOGY

Findings in this report are from a monthly survey conducted by Angus Reid on behalf of Restaurants Canada with a nationally representative sample of 1,500 Canadians who are members of the online Angus Reid Forum. For comparison purposes only, a sample of this size would result in a margin of error of +/- 2.6 percentage points, 19 times out of 20.

REACT Survey

– Restaurant Expectations And Consumer Trends –

HIGHLIGHTS

Rising Cost of Living Results in Fewer Canadians Dining Out in August

- The pent-up demand and enthusiasm to purchase a meal or snack from a restaurant we have seen since restaurants reopened appears to have peaked in July, as visit frequency fell across all dayparts in August. Typically August is another strong month for restaurant operators, but high inflation, rising interest rates and growing fears of a possible recession resulted in fewer visits to restaurants. While all dayparts were impacted, the share of Canadians ordering dinner from a restaurant at least once a week fell from 35% in July to 30% in August. This is the lowest share since Restaurants Canada began the REACT survey.

September Could See A Further Pullback in Restaurant Visits

- Three in 10 Canadians said they expect to order from a table- or quick-service restaurant less often in September compared to August. Despite a strong labour market, a recent survey by Angus Reid found that 77% of Canadians believe we are currently in a recession, or headed towards a recession.

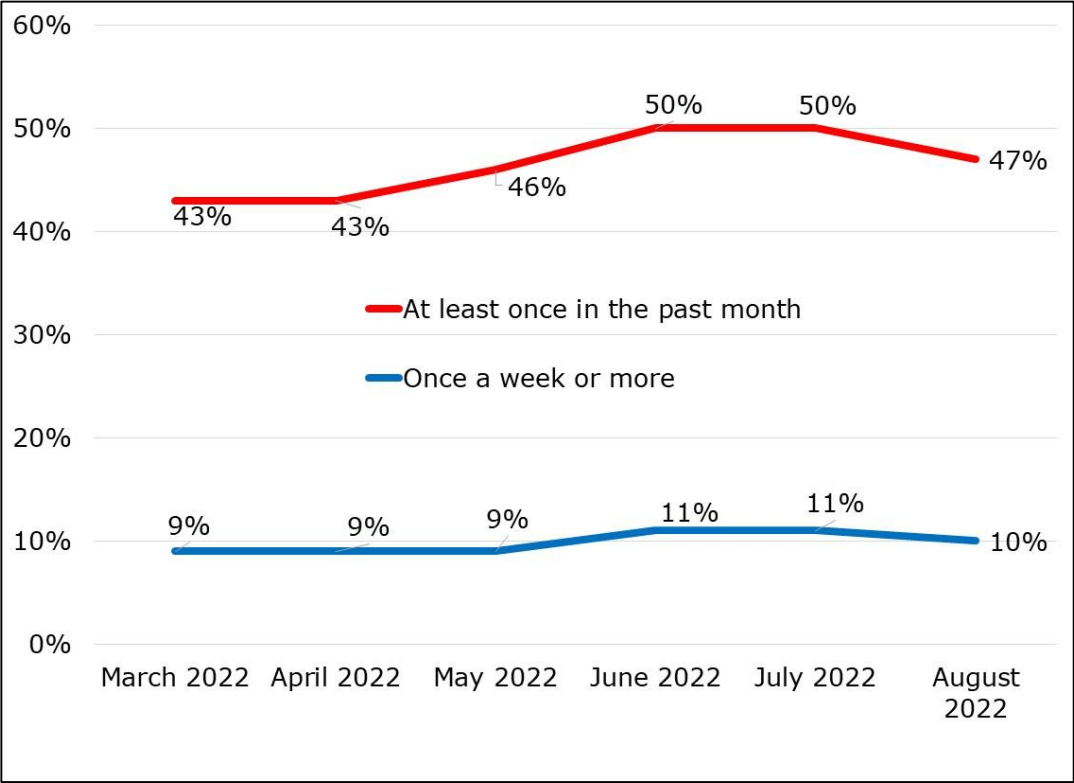
Restaurant Purchases Climb Higher (Again) in Calgary

- For the second consecutive month, Calgary led the country in dinner traffic growth. Overall, half of respondents in Calgary purchased dinner from a restaurant *once a week or more* in August.



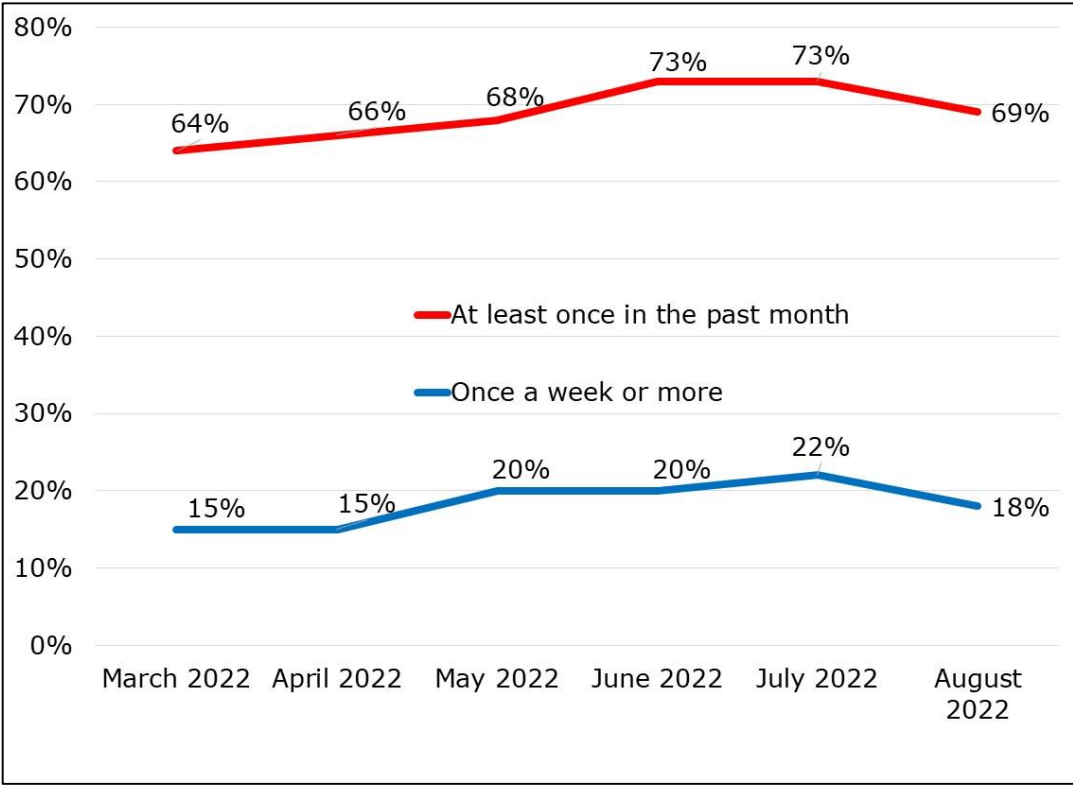
Share of Canadians who dined at, or ordered takeout or delivery, from a restaurant for the following dayparts.

Breakfast



- The share of Canadians that purchased breakfast from a restaurant *at least once* in the month of August slipped to 47%. This is largely due to a decline in visits by 35 to 54 year olds.

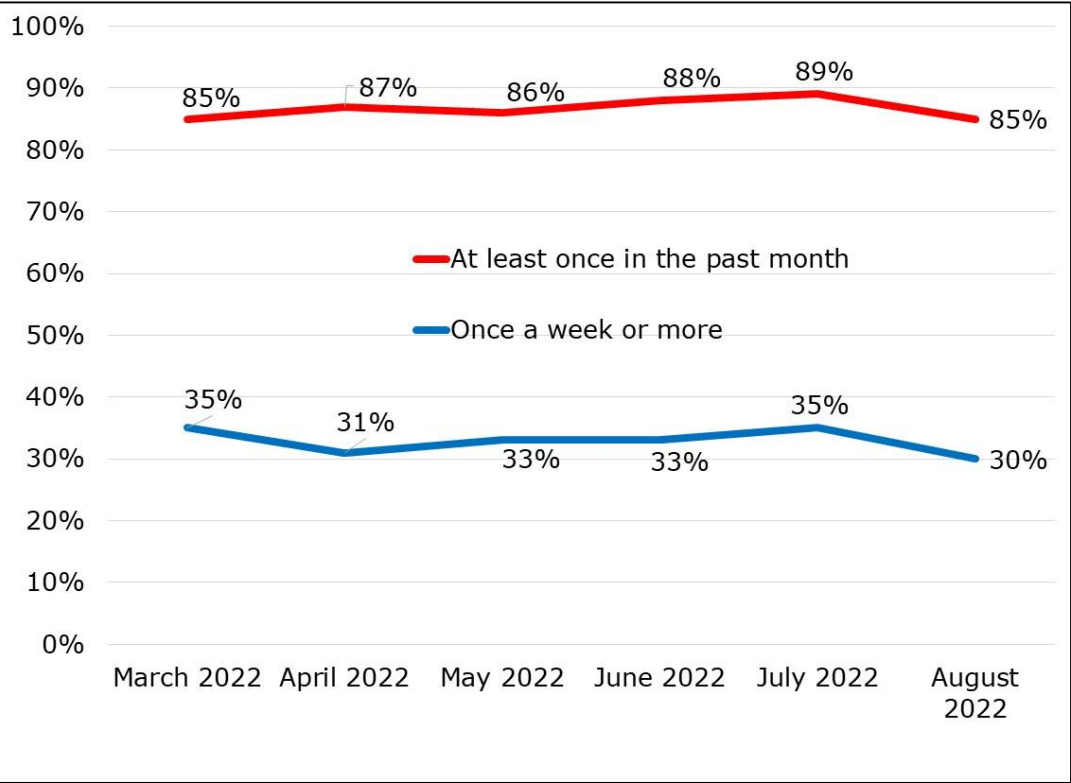
Lunch



- The share of Canadians that purchased lunch from a restaurant *once a week or more* fell to 18% in August compared to 22% in July, due to fewer visits by 18 to 34 year olds and 35 to 54 year olds.

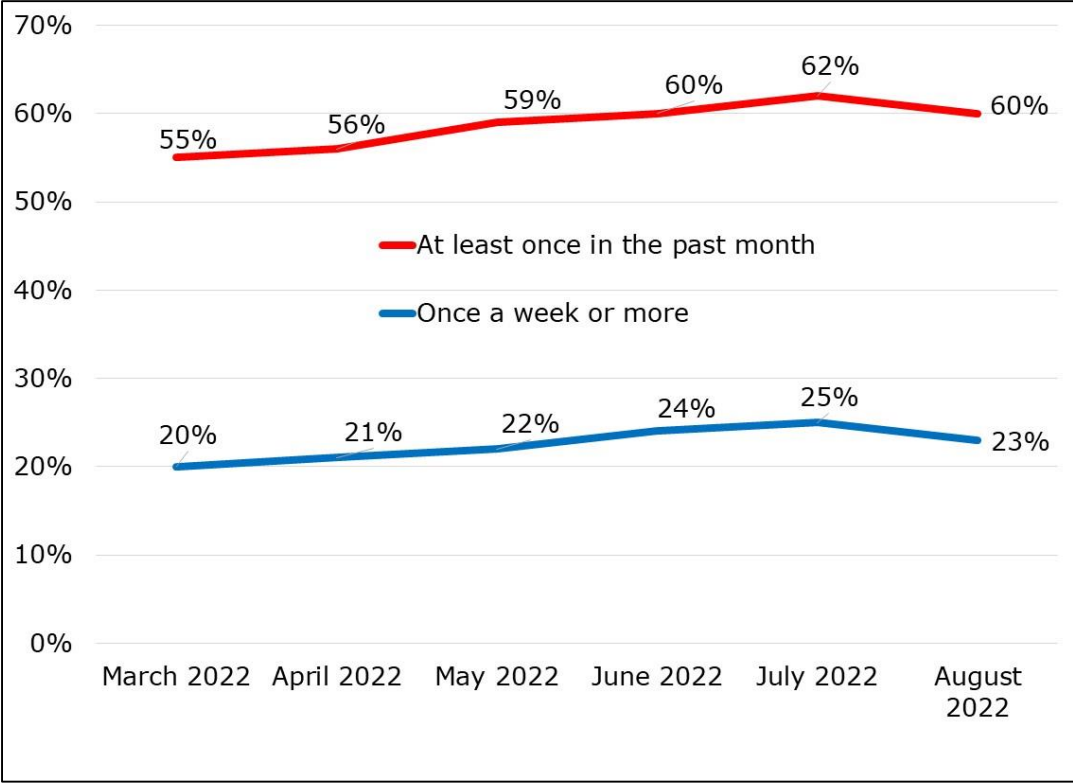
Share of Canadians who dined at, or ordered takeout or delivery, from a restaurant for the following dayparts.

Dinner



- The share of Canadians who purchased dinner from a restaurant *once a week or more* fell five-points to 30%. This is the lowest level since Restaurants Canada began collecting this data in March.

Coffee or Snack Break



- After five consecutive months of higher traffic, the share of Canadians who purchased a coffee or snack from a restaurant *at least once* in the past 30 days slipped to 60% in August.

Share of Canadians who dined at, or ordered takeout or delivery, from a restaurant *once a week or more* in August.

| | TOTAL | Vancouver | Edmonton | Calgary | GTA | Ottawa | Montreal |
|------------------------|-------|-----------|----------|---------|-----|--------|----------|
| Breakfast | 10% | 11% | 17% | 11% | 16% | 11% | 8% |
| change over last month | -1% | -5% | 3% | 1% | 2% | 0% | -1% |
| Lunch | 18% | 25% | 25% | 22% | 26% | 11% | 15% |
| | -4% | -1% | 11% | -15% | -4% | -9% | -3% |
| Dinner | 30% | 41% | 34% | 50% | 40% | 26% | 26% |
| | -5% | -5% | 1% | 8% | -8% | -14% | -7% |
| Coffee or snack break | 23% | 26% | 29% | 27% | 34% | 18% | 14% |
| | -2% | -11% | 3% | -7% | 5% | -7% | 1% |

- Half of respondents in Calgary purchased dinner from a restaurant *once a week or more* in August. This is up 8 percentage points from July. While Calgary has the highest share of respondents purchasing dinner from a restaurant *once a week or more* in August, Ottawa and Montreal have the lowest at 26%.
- The share of respondents that purchased a coffee or snack from a restaurant *once a week or more* in August fell sharply in Vancouver, Calgary and Ottawa.

Share of Canadians who expect to dine at, or order takeout or delivery, from the following foodservice establishments more often, less often or about the same compared to the previous month.

Quick-service Restaurant

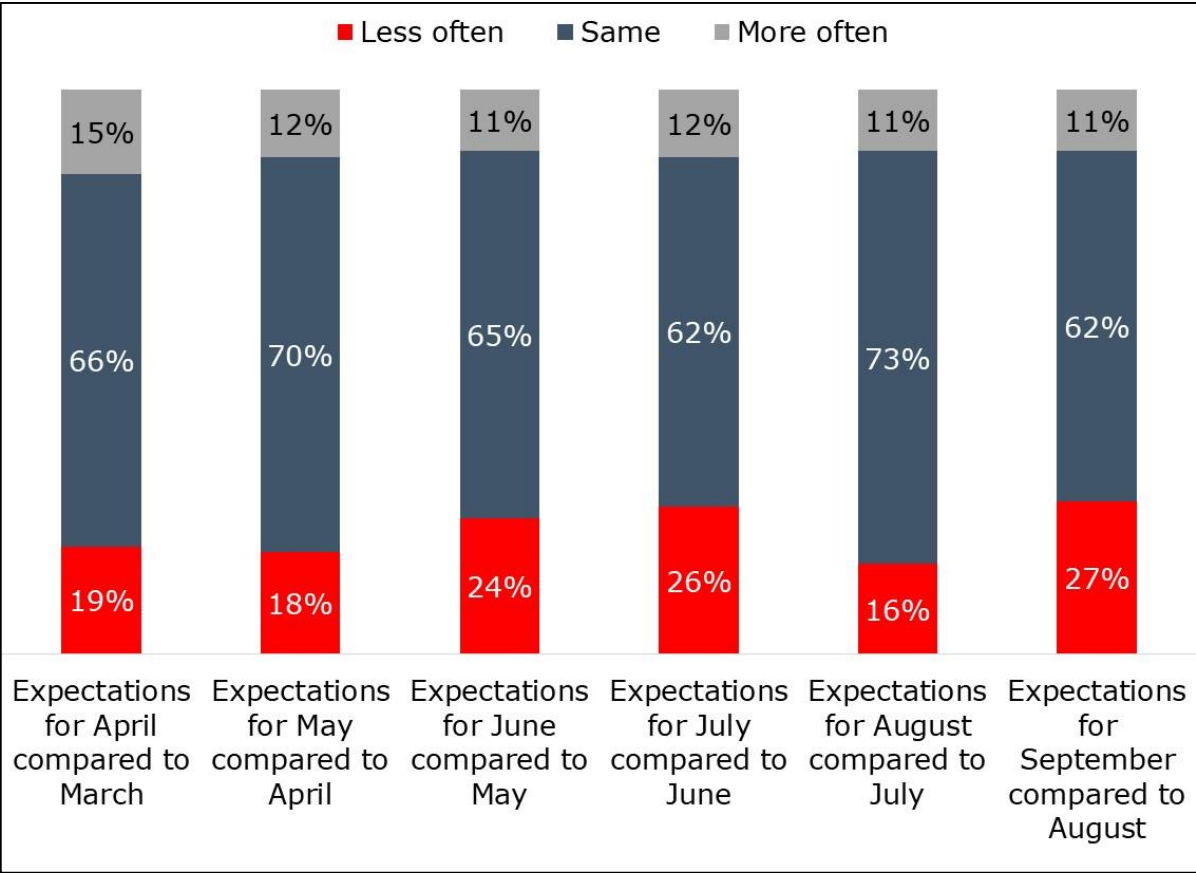
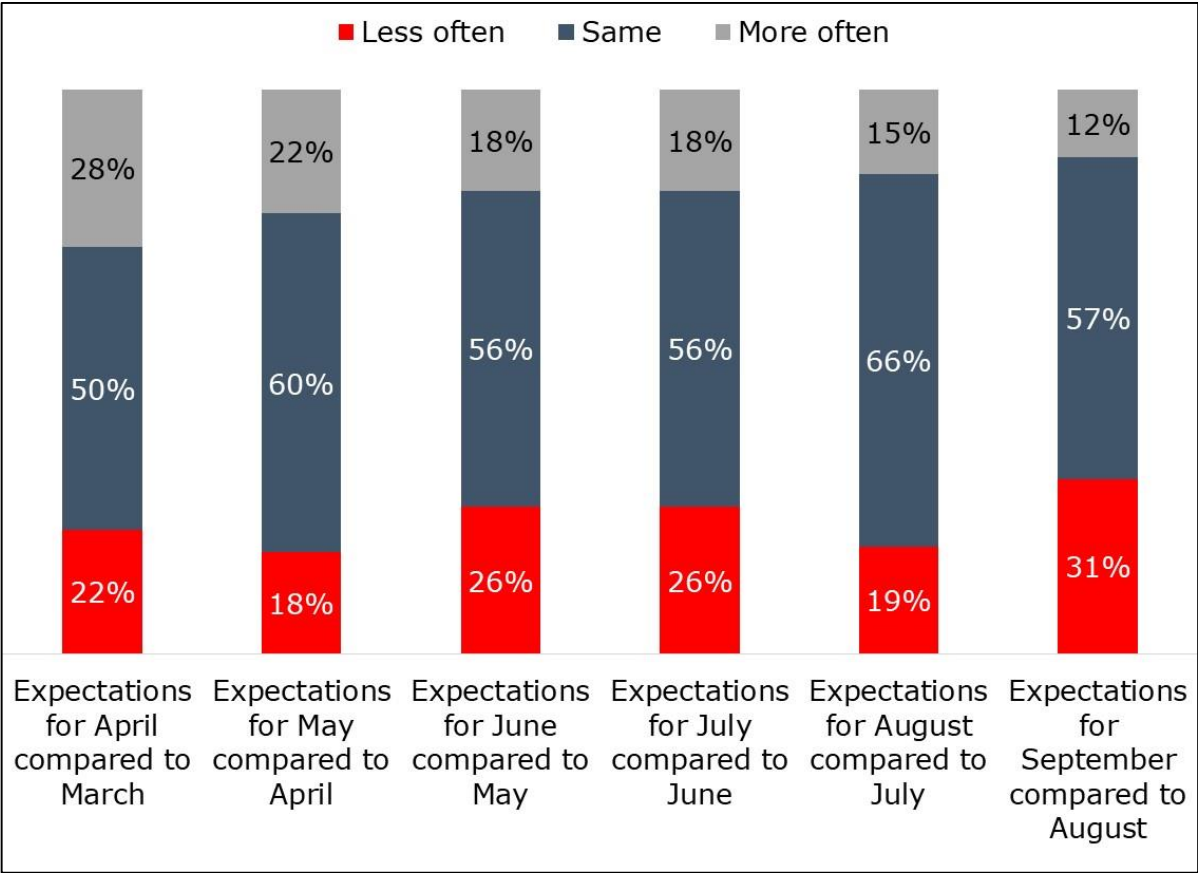


Table-service Restaurant



- High inflation and rising interest rates have caught up to Canadians' intentions to dine out as approximately 30% of Canadians expect they will dine out *less often* in September compared to August.

TABLES

In August 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

BREAKFAST

| | Total | 18-34 | 35-54 | 55+ |
|--|------------|------------|------------|------------|
| Never <i>change over last month</i> | 53% 3% | 44% -1% | 54% 7% | 59% 3% |
| Once | 19% 0% | 22% 4% | 19% -1% | 18% -1% |
| 2-3 times | 18% -2% | 22% -1% | 18% -4% | 15% -2% |
| 4-5 times | 5% -1% | 6% -1% | 5% -1% | 5% 0% |
| 6 times or more | 4% -1% | 5% -2% | 5% 0% | 3% 0% |

- The share of 35 to 54 year olds that ordered breakfast from a restaurant *at least once a month* fell from 53% in July to 46% in August.

LUNCH

| | Total | 18-34 | 35-54 | 55+ |
|-----------------|------------|------------|------------|------------|
| Never | 31% 4% | 22% -1% | 30% 8% | 38% 3% |
| Once | 22% 2% | 22% 5% | 22% 1% | 21% -1% |
| 2-3 times | 30% -1% | 33% 1% | 30% -2% | 26% -2% |
| 4-5 times | 12% -1% | 14% -2% | 12% -2% | 10% 1% |
| 6 times or more | 6% -3% | 8% -4% | 6% -5% | 5% -1% |

- 18% of 35 to 54 year olds purchased lunch from a restaurant *once a week or more* in August, down from 25% in July.
- 18 to 34 year olds reduced how often they purchased lunch from a restaurant in August, with a greater share opting to order lunch once to three times a month, instead of four times a month or more.

In August 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

DINNER

| | Total | 18-34 | 35-54 | 55+ |
|-------------------------------|-------|-------|-------|-----|
| Never | 15% | 11% | 11% | 21% |
| <i>change over last month</i> | 4% | 4% | 4% | 4% |
| Once | 19% | 14% | 20% | 20% |
| | 3% | 1% | 3% | 1% |
| 2-3 times | 36% | 35% | 37% | 36% |
| | -2% | 1% | -1% | -4% |
| 4-5 times | 20% | 25% | 22% | 16% |
| | -5% | -6% | -5% | -2% |
| 6 times or more | 10% | 15% | 10% | 7% |
| | 0% | 0% | -1% | 1% |

- The share of Canadians that purchased dinner from a restaurant *at least once a month* declined by six points in August for both 18 to 34 year olds and 35 to 54 year olds.

COFFEE OR SNACK BREAK

| | Total | 18-34 | 35-54 | 55+ |
|-----------------|-------|-------|-------|-----|
| Never | 40% | 30% | 38% | 50% |
| | 2% | -1% | 3% | 4% |
| Once | 13% | 14% | 12% | 13% |
| | 2% | 3% | 2% | 0% |
| 2-3 times | 24% | 29% | 24% | 21% |
| | -2% | 0% | -2% | -2% |
| 4-5 times | 12% | 15% | 14% | 8% |
| | 0% | -1% | 1% | -1% |
| 6 times or more | 10% | 13% | 12% | 7% |
| | -3% | 0% | -4% | -2% |

- Snacking traffic fell in August for both 35 to 54 year olds and those 55 and older.

In August 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

BREAKFAST

| | British Columbia | Alberta | Sask/MB | Ontario | Quebec | Atlantic |
|--|------------------|------------|------------|-----------|------------|------------|
| Never <i>change over last month</i> | 59% 16% | 49% -6% | 48% 2% | 53% 1% | 53% 7% | 52% 0% |
| Once | 17% -4% | 18% 5% | 20% -1% | 19% 0% | 21% 0% | 18% 0% |
| 2-3 times | 15% -6% | 22% 1% | 21% -5% | 18% 0% | 17% -5% | 18% -3% |
| 4-5 times | 4% -3% | 6% -1% | 5% 0% | 5% -1% | 4% -2% | 7% 2% |
| 6 times or more | 5% -3% | 5% 1% | 5% 3% | 4% -1% | 4% -1% | 5% 1% |

- The share of respondents in British Columbia that purchased breakfast from a restaurant *at least once a month* tumbled from 57% in July to 41% in August.
- It was a similar situation in Quebec where the share that purchased breakfast from a restaurant *at least once a month* fell from 54% in July to 47% in August.

In August 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

LUNCH

| | British Columbia | Alberta | Sask/MB | Ontario | Quebec | Atlantic |
|--|------------------|------------|------------|-----------|------------|------------|
| Never <i>change over last month</i> | 27% 2% | 23% 1% | 28% 2% | 30% 1% | 36% 7% | 38% 16% |
| Once | 24% 8% | 24% 3% | 21% 5% | 20% 0% | 22% 0% | 23% -5% |
| 2-3 times | 29% -5% | 33% 0% | 37% 4% | 31% 3% | 25% -6% | 26% -8% |
| 4-5 times | 12% -3% | 13% -1% | 12% -7% | 13% 0% | 11% 1% | 4% -3% |
| 6 times or more | 7% -3% | 7% -3% | 3% -3% | 5% -5% | 6% -2% | 9% 0% |

- The share of Atlantic Canadians that purchased lunch from a restaurant *at least once a month* fell from 78% in July to 62% in August.
- Western Canada and Ontario saw a decline in the share of respondents that purchased lunch from a restaurant *once a week or more* in August.

In August 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

DINNER

| | British Columbia | Alberta | Sask/MB | Ontario | Quebec | Atlantic |
|--|------------------|-------------|------------|------------|------------|------------|
| Never <i>change over last month</i> | 13% 1% | 11% 6% | 10% 4% | 12% 3% | 20% 4% | 24% 11% |
| Once | 19% 8% | 22% 5% | 16% -7% | 17% 3% | 20% 0% | 20% -3% |
| 2-3 times | 35% -3% | 29% -14% | 44% 6% | 38% 0% | 38% 3% | 29% -8% |
| 4-5 times | 21% -6% | 25% 2% | 22% -2% | 21% -7% | 17% -5% | 17% -1% |
| 6 times or more | 12% 0% | 12% 0% | 7% -2% | 12% 1% | 6% -1% | 11% 2% |

- Dinner frequency fell across all regions with a greater share of respondents saying they did not purchase dinner from a restaurant in August.

In August 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

COFFEE OR SNACK BREAK

| | British Columbia | Alberta | Sask/MB | Ontario | Quebec | Atlantic |
|--|------------------|------------|------------|------------|------------|------------|
| Never <i>change over last month</i> | 37% 3% | 34% 3% | 39% 7% | 36% 2% | 52% -2% | 41% 8% |
| Once | 16% 3% | 13% 6% | 11% -5% | 12% 1% | 14% 4% | 9% -7% |
| 2-3 times | 25% 3% | 26% -7% | 24% 1% | 26% -3% | 21% 1% | 22% -2% |
| 4-5 times | 11% -4% | 16% 4% | 11% -4% | 15% 3% | 6% -5% | 14% -3% |
| 6 times or more | 11% -5% | 10% -7% | 14% 0% | 11% -3% | 7% 2% | 14% 4% |

- With the exception of Ontario and Atlantic Canada, there was a decline in the share of respondents that purchased a snack from a restaurant *once a week or more* in August.

Will you be dining at or ordering takeout or delivery from the following foodservice establishments more often, less often or about the same **in September compared to August?**

QUICK-SERVICE RESTAURANT

| | Total | 18-34 | 35-54 | 55+ |
|-------------------------------|-------------|------------|------------|-------------|
| A lot more often | 2% | 4% | 2% | 1% |
| <i>change over last month</i> | <i>0%</i> | <i>2%</i> | <i>0%</i> | <i>0%</i> |
| A little more often | 8% | 10% | 7% | 8% |
| | <i>-1%</i> | <i>-1%</i> | <i>-2%</i> | <i>0%</i> |
| About the same amount | 62% | 59% | 64% | 63% |
| | <i>-11%</i> | <i>-9%</i> | <i>-9%</i> | <i>-13%</i> |
| A little less often | 18% | 20% | 17% | 17% |
| | <i>8%</i> | <i>8%</i> | <i>6%</i> | <i>9%</i> |
| A lot less often | 9% | 7% | 10% | 10% |
| | <i>3%</i> | <i>0%</i> | <i>5%</i> | <i>3%</i> |

TABLE-SERVICE RESTAURANT

| | Total | 18-34 | 35-54 | 55+ |
|-----------------------|------------|------------|------------|-------------|
| A lot more often | 3% | 3% | 2% | 2% |
| | <i>1%</i> | <i>1%</i> | <i>-1%</i> | <i>0%</i> |
| A little more often | 9% | 12% | 8% | 9% |
| | <i>-4%</i> | <i>-3%</i> | <i>-4%</i> | <i>-3%</i> |
| About the same amount | 57% | 54% | 57% | 58% |
| | <i>-9%</i> | <i>-7%</i> | <i>-8%</i> | <i>-13%</i> |
| A little less often | 19% | 21% | 18% | 18% |
| | <i>7%</i> | <i>7%</i> | <i>6%</i> | <i>9%</i> |
| A lot less often | 12% | 9% | 14% | 12% |
| | <i>5%</i> | <i>2%</i> | <i>6%</i> | <i>6%</i> |

- Across all age groups, a greater share of respondents said they will order from a quick- or table-service restaurant *less often* in September compared to August.

Will you be dining at or ordering takeout or delivery from the following foodservice establishments more often, less often or about the same **in August compared to July?**

QUICK-SERVICE RESTAURANT

| | British Columbia | Alberta | Sask/MB | Ontario | Quebec | Atlantic |
|-------------------------------|------------------|---------|---------|---------|--------|----------|
| A lot more often | 2% | 1% | 3% | 2% | 3% | 1% |
| <i>change over last month</i> | 2% | -1% | 0% | 0% | 1% | 1% |
| A little more often | 9% | 8% | 4% | 9% | 9% | 7% |
| | -2% | -3% | -6% | 1% | 0% | -2% |
| About the same amount | 64% | 63% | 69% | 62% | 57% | 69% |
| | -8% | -10% | -7% | -12% | -11% | -7% |
| A little less often | 15% | 16% | 17% | 19% | 20% | 14% |
| | 7% | 4% | 9% | 9% | 10% | 4% |
| A lot less often | 9% | 11% | 6% | 9% | 11% | 9% |
| | 0% | 9% | 3% | 4% | 1% | 4% |

- The share of Albertans that said they would dine out *a lot less often* in September jumped to 11% compared to 2% in August.
- 31% of respondents in Quebec expect to dine out *less often* in September compared to August – the highest share in the country.

Will you be dining at or ordering takeout or delivery from the following foodservice establishments more often, less often or about the same **in August compared to July?**

TABLE-SERVICE RESTAURANT

| | British Columbia | Alberta | Sask/MB | Ontario | Quebec | Atlantic |
|-------------------------------|------------------|---------|---------|---------|--------|----------|
| A lot more often | 4% | 1% | 1% | 2% | 3% | 2% |
| <i>change over last month</i> | 4% | -1% | -1% | -1% | 1% | 0% |
| A little more often | 9% | 7% | 6% | 12% | 8% | 7% |
| | -3% | -8% | -7% | 0% | -5% | -8% |
| About the same amount | 61% | 59% | 62% | 56% | 53% | 59% |
| | -8% | -8% | -5% | -12% | -7% | -10% |
| A little less often | 13% | 20% | 21% | 19% | 21% | 18% |
| | 5% | 8% | 6% | 7% | 8% | 6% |
| A lot less often | 12% | 14% | 9% | 11% | 15% | 13% |
| | 1% | 10% | 6% | 5% | 4% | 11% |

- While 6 in 10 Canadian expect to *maintain* their purchase frequency at table-service restaurants in September, the share that expect to make *fewer* purchases rose across all regions.

FOR FURTHER INFORMATION



**Restaurants
Canada**

The voice of foodservice | La voix des services alimentaires

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