



Restaurants
Canada
Research



RESEARCH

Restaurant Outlook Survey

Q2 2019





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Executive Summary

- 40% of foodservice operators in Canada reported lower same-store sales in Q2, virtually unchanged from Q1. Inclement weather, increased competition and a sputtering economy were the primary causes.
- The share of respondents reporting higher same-store sales climbed to 27% in Q2 from 24% in Q1. Despite rising sales, higher operating costs are eroding margins for many operators.
- With new restaurant unit openings outpacing population growth, there is increasing competition to bring in guests and find labour.
- Nearly half (48%) of respondents are optimistic about the next 12 months due to an expected improvement in traffic. In contrast, 24% are pessimistic due to a slowing economy, labour shortages, and increased competition from other restaurants.
- Menu prices are forecast to grow by an average of 3.0% over the next 12 months, down slightly from 3.3% in Q1.
- Labour shortages are negatively impacting more than half of foodservice businesses. Changing demographics – an aging population, lower birth rates in recent decades, and fewer young people joining the workforce – are a significant part of the problem.
- The top three staffing challenges facing restaurants are: a lack of qualified applicants; new hires that don't have appropriate skills; and, a high rate of staff turnover.
- In the back of house, the top three positions that have the highest turnover are line cooks, prep cooks, and dishwashers.
- For front of house positions, food and beverage servers and managers have the highest turnover.
- Foodservice operators had the most success finding candidates by using word-of-mouth from other coworkers, as well as digital sites such as Indeed and Facebook.
- Nearly seven in 10 respondents have taken on a co-op student or an intern. Almost 75% of those that did ended up hiring them after their placement.

Competition from new operations helped suppress sales in Q2 - do we have too much of a good thing?

It was a challenging first half of 2019 for foodservice operators. In what was virtually a statistical repeat of Q1, the share of businesses reporting lower same-store sales versus a year ago rose slightly to 40%. Inclement weather – frigid temperatures, lots of snow, and a delayed spring – was part of the reason. A slowing economy and volatile consumer confidence also contributed to the rough start to the year.

Beyond these macro factors, there were many industry-related issues also suppressing sales at the operator level. Many respondents reported a decline in traffic, a result of rising expenses, which forced restaurants to raise menu prices, which, in turn, led to lower same-store sales.

Another challenge, cited by about one-third of operators, is growing competition from new and existing restaurants. While competition can spur innovation, and it results in more options for guests, it can also hamper sales for some businesses. Increasing restaurant competition is borne out by unit data from Statistics Canada's Business Register. In 2018, the number of table-service restaurants in Canada increased to 44,204, a 2.8% increase over 2017. It's not surprising that 38% of table-service respondents said that increased competition is hurting their business.

The growth rate of the table-service restaurant category is twice that of Canada's overall population.

Meanwhile, the number of quick-service restaurants rose by 1.8% in 2018, to a record high of 38,758 units. The increase in units is not only increasing the competition for guests, but also the competition for labour.

Few bright spots emerged in Q2 with an increasing share reporting lower same-store sales

Share of Operators Reporting Higher and Lower Same-Store Sales



The tough start to the year impacted all foodservice segments. The share of quick-service restaurant respondents reporting higher same-store sales slipped to 32% in Q2, down from 37% in Q1. An increased share of QSR operators reported flat same-stores — 29% in Q2 versus 18% in Q1. According to data from Statistics Canada, real sales at quick-service restaurants were relatively flat (+0.3%) in the first five months of 2018. Adjusted for unit expansion, real spending at the operator level is down on a year-over-year basis.

The performance for table-service restaurants was virtually identical in Q2 as Q1, with 24% of respondents posting higher same-store sales, against 43% that saw lower sales. Although real

sales at table-service restaurants increased by 2.3% in the first five months, after factoring out unit growth, real spending at the operator level was nearly flat.

Operators in the “all other foodservice” category – including foodservice options at hotels and other accommodations, institutions, and clubs and drinking establishments – didn’t fare much better than quick-service restaurants or table-service restaurants. Overall, 27% of these businesses recorded higher same-store sales, while 34% experienced lower sales than they did in Q2 2018.

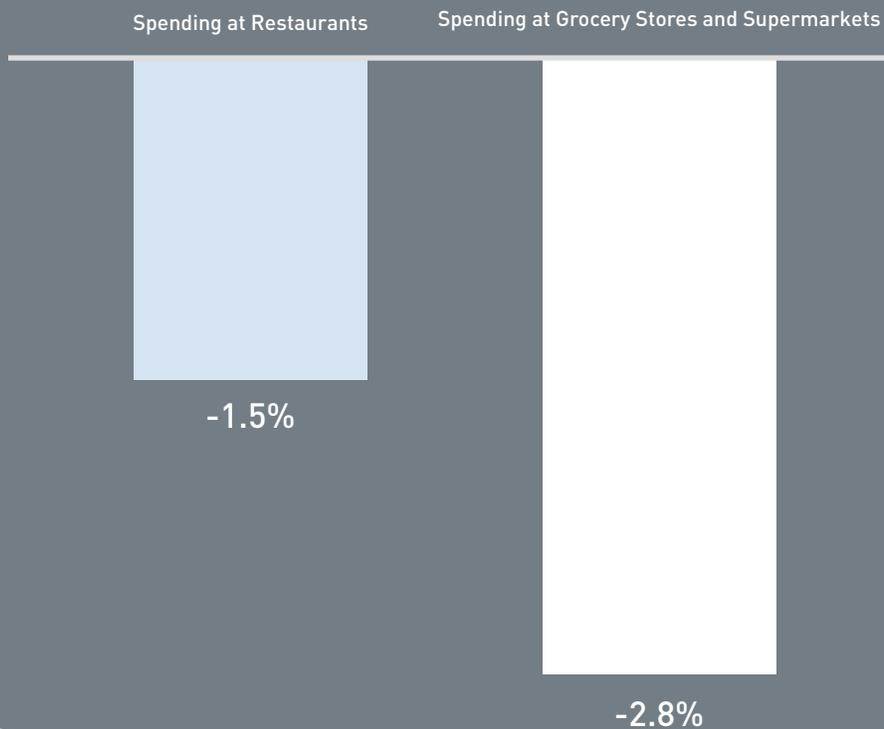
Adjusted for seasonality and inflation, real sales at restaurants fell by 1.5% between December 2018 and May 2019. Interestingly, guests are not transitioning over to grocery stores and supermarkets, as real spending declined by 2.8% in this category during the same period.

It wasn't entirely doom and gloom in Q2, however. The share of operators reporting higher same-store sales in Q2 increased slightly to 27%, compared to 24% last quarter. For these businesses, increased demand and renovations were chiefly responsible for the boost in sales. Even for those that are experiencing growth, though, rising expenses continue to erode margins.

Real Sales Growth Between December 2018 and May 2019*

*Data are adjusted for seasonality

Source: Statistics Canada

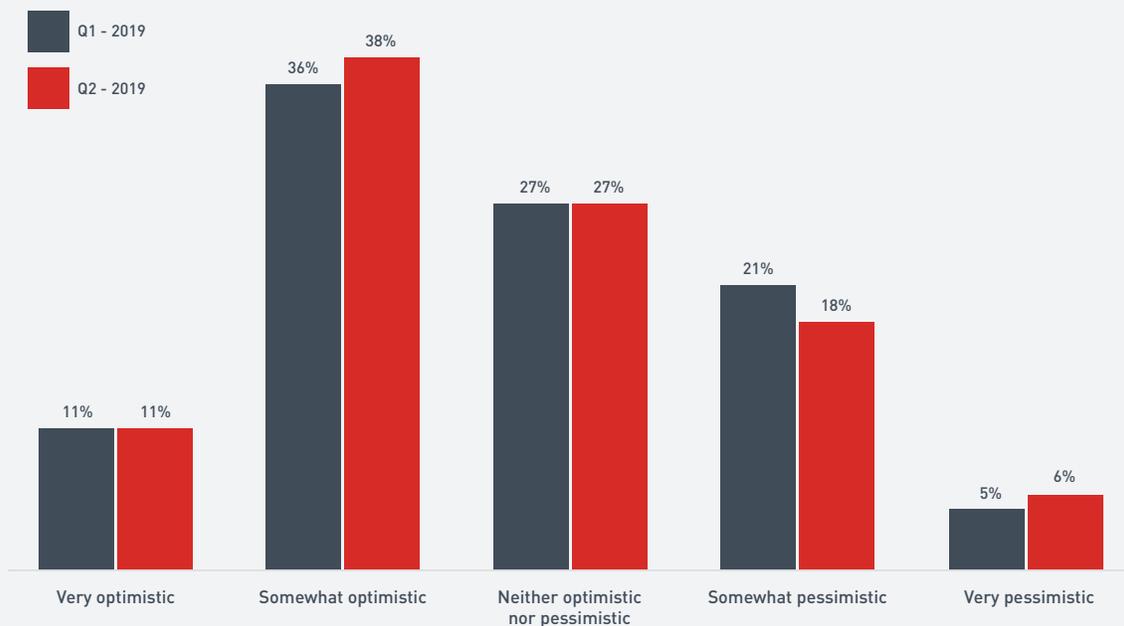


Hopes remain high for the rest of 2019 and into 2020

Despite a difficult start to the year, expectations remain buoyant about the year to come. Nearly half (49%) of operators are either “very” or “somewhat” optimistic about the next 12 months, little changed from Q1 (47%). In contrast, 24% of operators are feeling “very” or “somewhat” pessimistic.

While these figures are on par with historical data, foodservice owners raised several concerns, ranging from higher operating costs to eroding profit margins, more competition, labour shortages and a slowing economy.

How optimistic are you about your foodservice operation over the next 12 months compared to the previous 12 months?



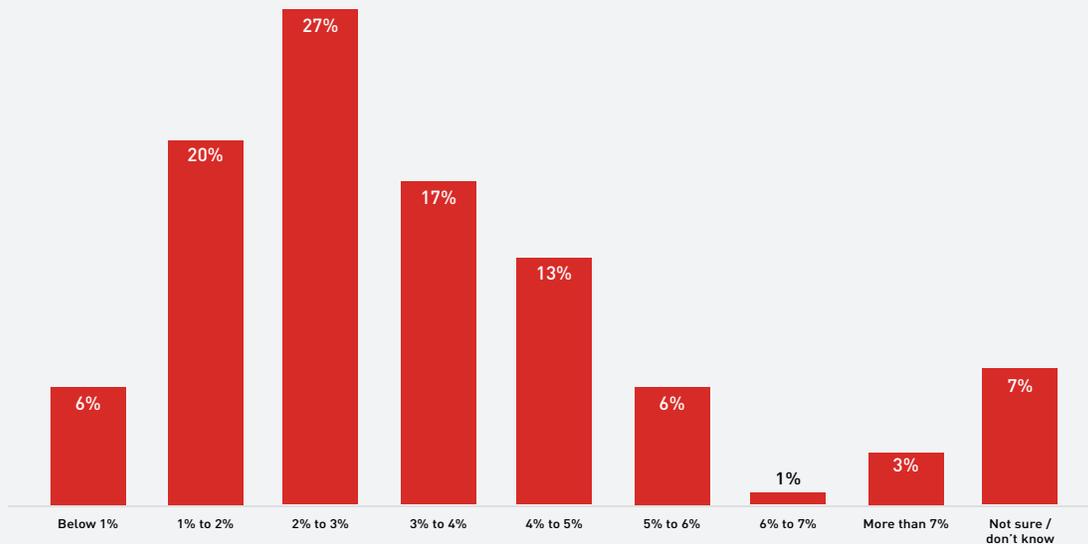
Breaking the outlook down by segment, 47% of quick- and table-service restaurant respondents felt optimistic about the future. The “all other foodservice” category, however, was the most optimistic with numerous operators reporting increased traffic. In total, 56% of respondents from this sector are either somewhat or very optimistic. In particular, the

accommodation sector experienced an increase in bookings, in keeping with a reported boost in international tourism to Canada, thanks in part to a favourable exchange rate. This sector should remain hot as new measures to bolster tourism unveiled by the federal government come into effect.

While Canada’s economy experienced a soft patch in Q4 2018 and Q1 2019 thanks largely to a slumping energy sector and a sagging housing market, economic activity is expected to accelerate in the second half of 2019 and into 2020. A rebound in business investment and exports will support employment gains and income growth. Average weekly earnings in Canada have been trending upward the past couple of months, which means more money for discretionary purchases like restaurant meals.

Looking ahead on inflation, menu prices are forecast to increase by an average of 3.0% over the next 12 months. This rate is down slightly from 3.3% in Q1. The average quick-service restaurant is expected to increase its menu prices by 2.9%, and table-service restaurant prices should rise by 3.1%. The “all other foodservice” category is expected to raise menu prices by an average of 2.8%.

Over the next 12 months, do you expect your menu price increase on a year-over-year basis to be:



According to Statistics Canada, menu prices increased by an average of 2.8% in the first half of 2019 over the same period in 2018. Most of the increase was due to higher menu prices at quick-service restaurants (+3.9%) pulling up the average, compared to table-service restaurants where the rise was a more modest 2.3%.

Labour concerns and operating costs top list of operator challenges - again

In the Q4 2018 Restaurant Outlook Survey, we queried respondents about the challenges they face and what's taking a toll on their businesses. Many expected labour costs would be their number one challenge for 2019. Sure enough, that prediction came true, with nearly nine in 10 respondents saying high labour costs are harming their business.

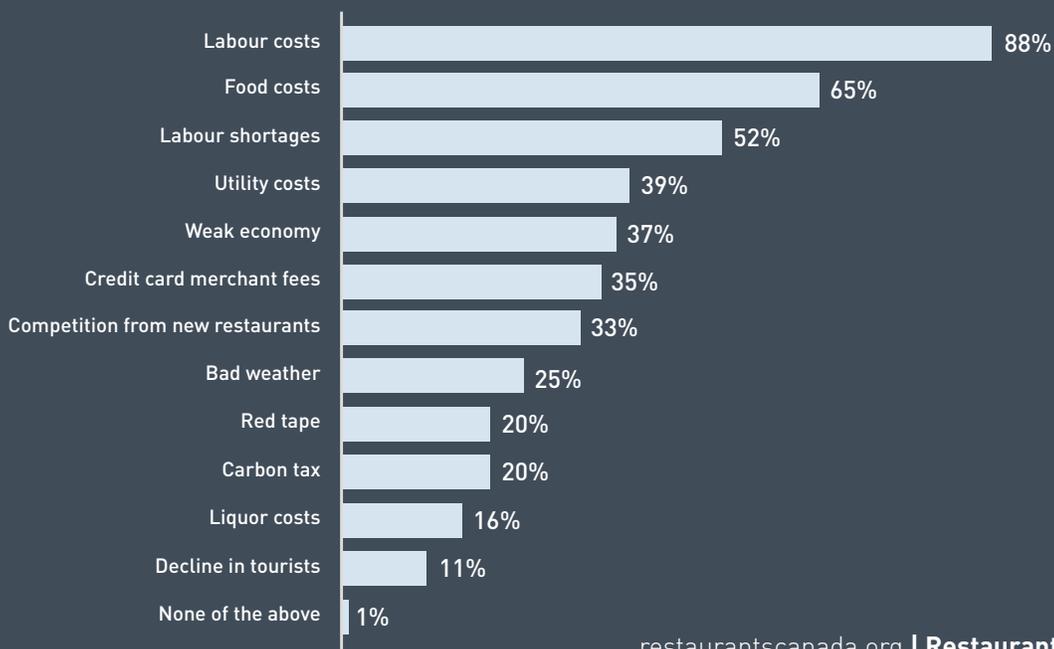
Another top obstacle for 2019 uncovered in the Q4 2018 Survey was the retention and recruitment of workers. In Q2 2019, labour shortages had a negative impact on more than half of foodservice operators. Unfortunately, history tells us this is a problem that will only get worse during the busy summer months.

There were a few other areas where significant differences showed on a year-over-year basis. As stated earlier,

established restaurants are seeing greater competition from newly opened operations. In addition, bad weather had a negative impact on 25% of respondents in Q2 2019, up from just 9% in Q2 2018. That's no surprise when we look at some of the weather stories from the spring: the daytime high on the Saturday of the May long weekend in Toronto was just 13°C, leaving patios virtually empty, and severe snowstorms in April kept would-be patrons home-bound in many western and Atlantic provinces.

Another area of difference was the growing concern over a weakening economy (37% in Q2 2019 compared to 23% in Q2 2018). While many forecasters expect economic activity to pick up, there are worries that high household debt and global trade wars will erode consumer spending.

What factors, if any, are currently having a negative impact on your foodservice business?



Feeling the Labour Pains: From coast to coast to coast, foodservice operators are having a hard time finding help

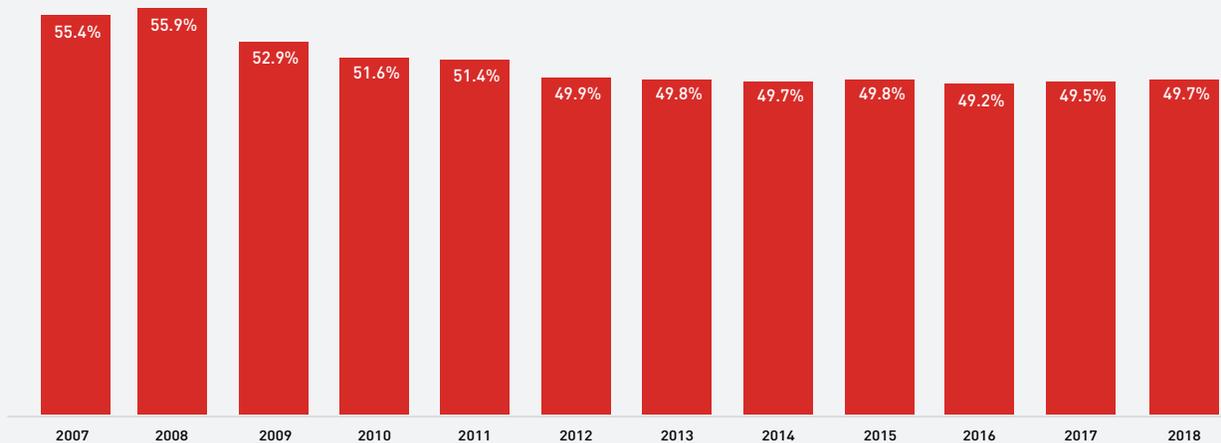
One message that came back loud and clear from this edition of the Restaurant Outlook Survey is the struggle to find labour. As shown earlier, labour shortages are a challenge for more than half of foodservice operators. From job candidates not showing up for interviews, to applicants lacking the skills needed to work in a restaurant, the challenge of filling positions continues for the foodservice industry.

The latest data from Statistics Canada shows that in Q1 2019, the number of job vacancies in the foodservice industry grew by nearly 8% compared to a year ago. This is a trend that began in 2017 and is getting worse each year.

How critical are things? In Quebec, the number of job vacancies jumped by 30.4% to 9,505. Ontario has the highest number of job vacancies at 15,285 – a 16.2% increase over Q1 2018. Meanwhile, the number of job vacancies in New Brunswick soared by 49.2% to 880. It’s important to point out that not all provinces saw an increase. Nevertheless, with the busy summer months approaching, these vacancy figures will surely climb.

The participation rates for 15- to 19-year-olds in the workforce, once a reliable source of entry-level, QSR, and summer labour, has dropped by more than six percentage points between 2008 and 2018. Intriguingly, 2008 coincides with the leading edge of Generation Z turning 13.

Workforce Participation Rate for Teens



Source: Labour Force Survey, Statistics Canada

If the teen participation rate today were the same as it was in 2008, it would add 122,000 workers to Canada's total labour market.

Why is it that more teens and young people are eschewing work, not just in foodservice, but also in retail stores and summer camps? A recent article published by the National Association of Convenience Stores noted that fewer teens are seeking summer jobs in the United States in their field, as well. Anecdotally, this is also happening in Canada.

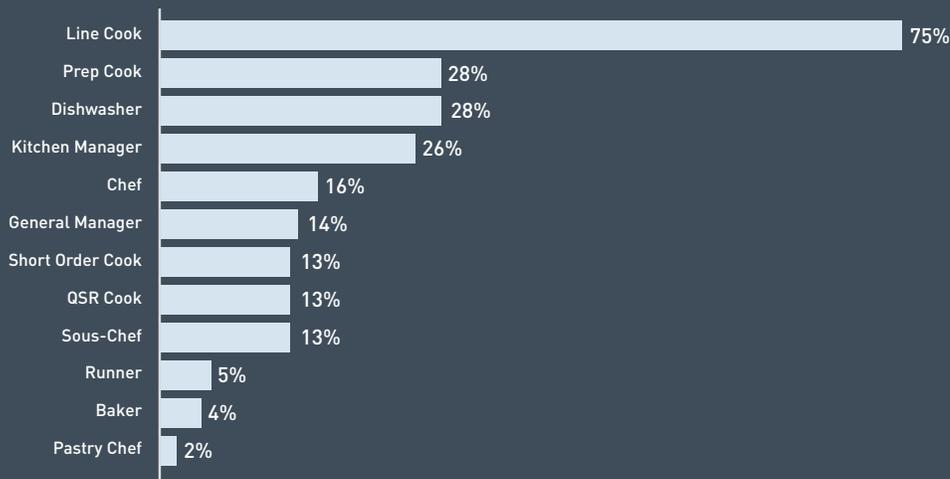
With access to post-secondary education and scholarships becoming more competitive than ever, there is now increased emphasis among teens on studying during the summer months, volunteering for community service, and pursuing athletics to improve their chances of getting into the university or college of their choice.

Ironically, the teen unemployment rate in Canada averaged 14.2% in the first half of 2019, the lowest rate since 1990. How to explain this? With so many youth opting not to enter the labour market, those that do are having an easier time finding work. Meanwhile, the number of restaurants is climbing, creating more competition for a dwindling supply of youth labour.

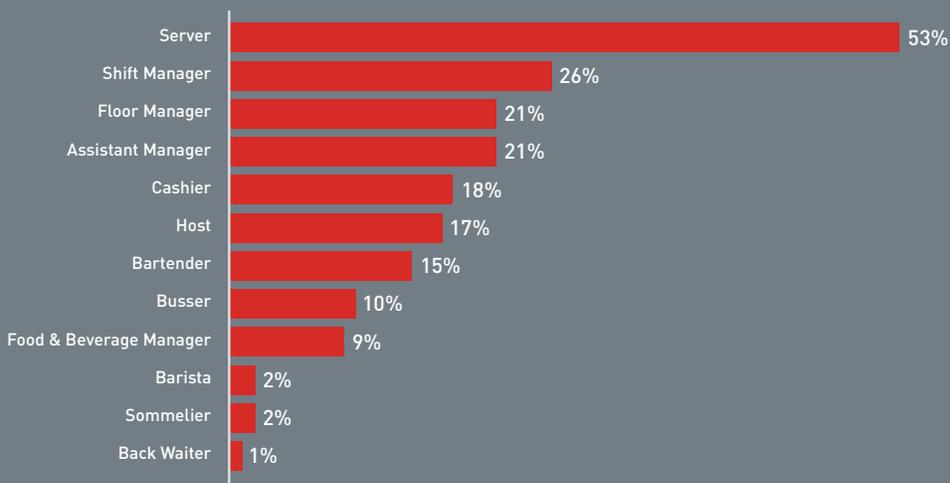
How labour challenges are impacting foodservice operators

Declining birth rates, an aging population, and two generations of young people, millennials and Gen Zers, who don't behave like their predecessors in the workforce are creating a perfect storm for restaurant owners. By its nature, foodservice is very labour intensive, and finding any staff, let alone staff with applicable skills and experience, has become more challenging than ever. In a recent survey by Restaurants Canada, 73% of restaurant operators said they simply couldn't find qualified applicants.

Back of House: Which of the following positions present(s) the greatest difficulty with staff turnover?



Front of House: Which of the following positions present(s) the greatest difficulty with staff turnover?



As part of the Q2 2019 survey, Restaurants Canada asked which sources restaurant owners use to find candidates to work at their businesses.

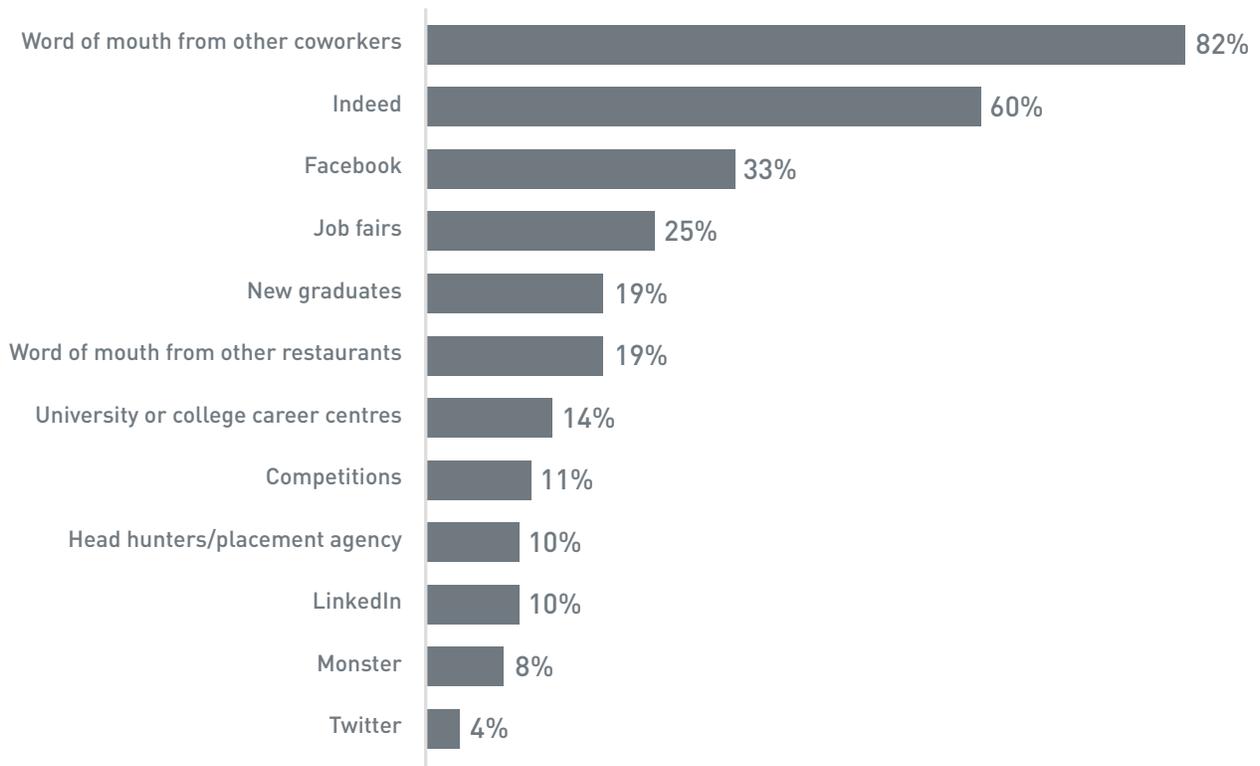
The vast majority (82%) rely on word-of-mouth from other coworkers. This is understandable; if your foodservice business has a positive work culture, your employees are more likely to recommend to their friends that they work at your particular establishment.

Several digital platforms were listed, chiefly Indeed (60%) and Facebook (33%). LinkedIn and Monster also received mentions, scoring 10% each. Although it wasn't an option we listed, some operators said that Kijiji was a

reliable source to find workers. Others noted that they had the most frequent success choosing from candidates that dropped off resumes in person, a surprising revelation in this era of online applications.

It was interesting to note that only 19% of respondents said "new graduates" were a source of successful candidates. For many years, foodservice was a common stepping stone into the workforce. In fact, a survey by Restaurants Canada found that the restaurant industry was the number one source for first time jobs. Times have changed, and foodservice operators will have to get creative to find, train, and keep good staff.

Which of the following sources have you used to find successful candidates to work at your establishment?



A note on difficulties hiring labour reported in the Q2 2019 Survey: the jobs that seem to be most in need of filling and that generally have the highest turnover include line cook, prep cook, dishwasher, and host/hostess. Because these are typically lower-paying, non-tippable and demanding positions, they are often seen as not requiring a college or university education.

Nevertheless, many colleges offer one-semester or one-year courses for these roles. There are also associations – such as Tourism HR Canada through their *emerit* program, and Hospitality Workers Training Centre in Toronto – that offer online and hands-on training, particularly for these essential jobs. Additionally, they have listings of people available for hire. Many operators may not be aware that these resources exist.

The biggest constraints for operators, particularly small-scale ones, are the time, money and energy it takes to go through the process of informing the public of a job opening, interviewing candidates, and training new hires. Plus, there's increasing pressure on operators to change their management philosophy and environment to accommodate this new world of millennial and Generation Z workers. While the latter proposition will be met with resistance by some, a change to the traditional ways of thinking may be what's required to make this situation a win-win for everyone.

Many operators are looking to co-op placements to solve their staffing issues

Have you considered taking on a co-op student or an intern to fill your labour gaps? Nearly seven in 10 survey respondents have done so, and eight in 10 said they were interested. The rate was highest at table-service restaurants where 76% of respondents took on a co-op student or intern, compared to 52% of quick-service restaurants.

The University of Windsor's Taskforce compiled the following benefits of a co-op placement on Experiential Education in 2017. Keep in mind these are based on management positions requiring a university education and not entry-level jobs.

Student Benefits

- Better job prospects – those who completed a co-op were 9% more likely to find full-time employment
- Improves academic and workplace performance and leads to higher wages
- Increases motivation and engagement, encouraging self-directed learning
- Facilitates the exploration of the relationship between academic theory and practice, increasing clarity around academic and career goals
- Increases understanding and perceptions around workplace cultures
- Enhances professional networks
- Helps students better understand work realities and expectations
- Provides opportunity to gain career-related experiences, clarifying employment and career goals
- Builds leadership, technical, and professional skills
- Increases confidence, maturity, and self-management
- Improves problem-solving, critical thinking, research, communication, and teamwork skills
- Develops skills to transition to the workforce
- In cases of paid placements, provides earnings to assist with financial obligations
- Builds citizenship skills

Employers and Community Benefits

- Increases the diversity, energy, and enthusiasm within the workplace
- Engages post-secondary institutions in responding to identified community need
- Fosters additional collaboration with the academic institution
- Increases the profile of the community's opportunities and challenges
- Helps organizations find solutions to specific business or industry needs
- Attracts and hires motivated and enthusiastic new employees

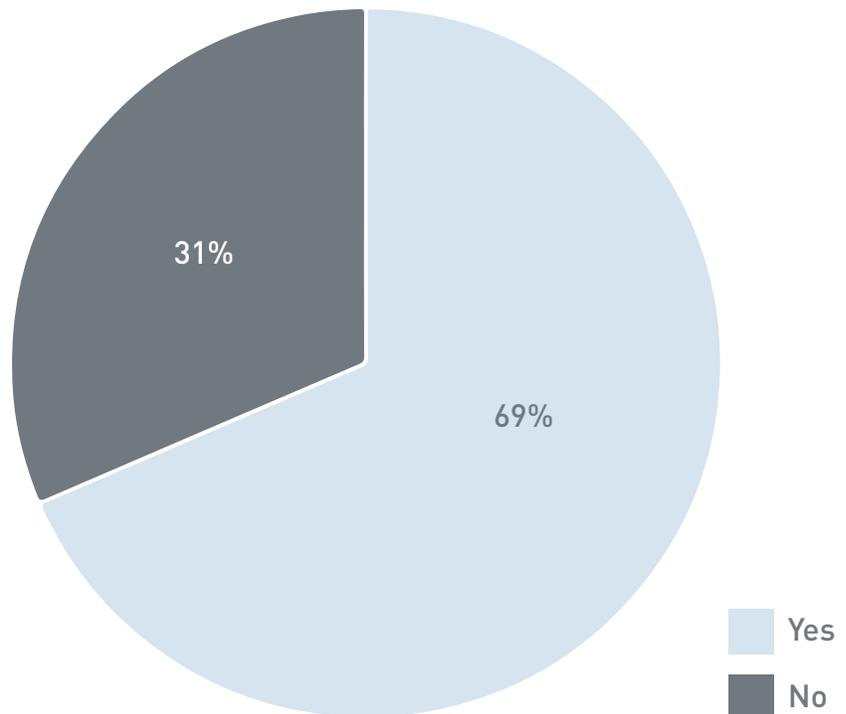
There are many benefits to taking on a co-op student. For starters, you'll be gaining a motivated employee who is interested and even passionate about the industry. Putting that person with your like-minded existing staff should bring out the best in him or her. It also streamlines the often frustrating hiring process for both sides. Once on-board, the operator has the chance to train that individual to their specifications, and build loyalty through a unique mentorship-type relationship you don't often get with a typical new-hire.

The major disadvantage of bringing on a co-op student is that it will take time for the individual to get up to speed in the restaurant since they

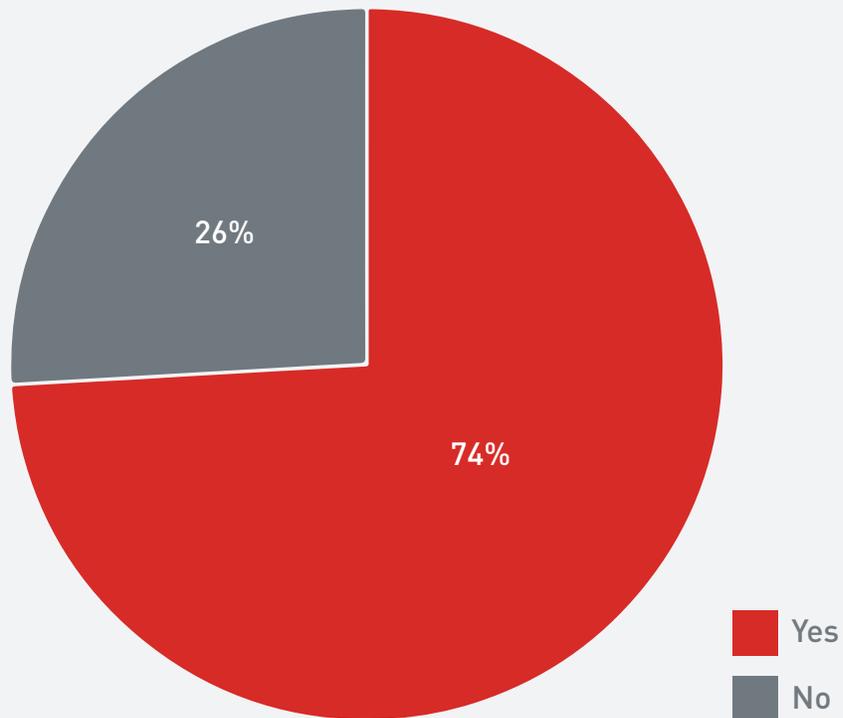
will likely lack many relevant skills. This could impact your labour budget and scheduling as other employees are diverted from their regular tasks to help train and guide the new person.

The typical pitfall for those taking on interns or co-op students is not training them properly and only providing them with menial work that no one else in the organization wants to do. To be effective, the placement has to be of merit, and the intern needs to be made aware of how their tasks (trivial or non-trivial) help them move forward into a position or even a career. Remember, the goal isn't free labour for your business, it's to groom a future, and hopefully long-term, member of your team.

Have you ever taken on a co-op student or an intern or provided an opportunity for a stage (cooking)?



If Yes, did you hire them after placement?



What's the likelihood of the investment of time in a student paying off? Of those respondents that did accept a student, 74% said they hired their co-op student or intern after their placement was completed.

For the 30% that have not taken on a co-op student or an intern, there were many reasons why that were indicated, including:

- Never had the opportunity
- Not sure how to participate
- No one is available
- Never thought about it
- A lack of financial incentive, owing to an investment in training and a perceived lack of ROI

Thinking outside the box may lead you to unexpected labour solutions

There is no one-size-fits-all solution to the labour crisis in the Canadian foodservice industry. Here are a few suggestions for how you might try to improve your situation:

- Given declining labour force participation by youth, it may be time to consider other age cohorts, such as retirees or seniors. This is a demographic that has a strong work ethic, is reliable and punctual, and has a willingness to learn. They can also bring their past work experience, which may, in turn, help your business. People 65 years of age or older are the fastest-growing labour demographic in foodservice. In 2018, there were 28,200 foodservice workers aged 65 years or older, nearly a six-fold increase over 2000.
- Turning from the old to the new, technology has come a long way; is there a way new tech or updated technology systems can be added to your restaurant to enhance your operation? Not only would technology help during a labour crunch, but it could also help increase worker productivity, which would allow you to pay your employees more, a key to retention.
- What about modernizing your payroll structure? Apps exist that allow employees the option of getting paid daily, weekly, or on-demand. This flexibility could appeal to younger people who are less tied to rigid schedules of monthly bill payments.
- To attract and retain workers, some operators have chosen to convert their part-time workers into full-time positions with benefits. This gives employees consistent schedules, and they are more likely to be engaged in their work by not having to work two to three jobs to make ends meet. It also makes scheduling a lot easier.
- There needs to be an emphasis on showing teens the skills they will learn at work and how those skills will benefit them in their educational studies, or other fields if they decide to pursue a career outside the foodservice industry.
- One of the biggest challenges is that many teens today don't want entry-level jobs. It is important to highlight the opportunity for advancement. With any luck, they will want to continue to work in foodservice.
- Helping to pay for employees' certifications, outside training, or their full tuition is not unheard of, with the obvious caveat that the employee, intern or co-op student would be required to work for that organization for a certain period after graduation. There is usually also a minimum grade point that must be maintained, and assessments for payments are generally based on a semester or yearly term and off-school times are spent working for the organization.



Our thoughts on this era of transition

Canada's labour market is rapidly changing from one that was dominated by Baby Boomers to one of millennials and Gen Zers. The leaders in the foodservice industry must adapt to this unfamiliar workforce culture and meet these future employees halfway, learning how they can work with these new generations.

Millennials and Gen Zs are looking for financial security, but they are also looking for meaningful work – to them, the mission matters. They need constant connectivity and feedback, hands-on learning and a sense of belonging. It may be time to start thinking like them, revisit the 'all work and no play' scenario and be open to changing the long, hard rules of the old work routine.

However, despite our automatic thought of hiring someone young to fill these positions, restaurant operators more than ever need to think outside of the box. Open up to the possibilities of an 'any age willing' workforce and new immigrants.

Passion and willingness should be the key components to look for when searching for workers, not academics, experience, or age. Skills are teachable – passion is something you either have, or you do not. Operators need to make their business environment conducive to the new labour force: young, old, or new Canadian.

There needs to be a new approach on how operators can achieve reduced operating costs without cutting labour expenditures, and still be able to enjoy a better profit margin. Hospitality – foodservice – tourism – these fields are nothing without their employees, so this shouldn't be the first place we look for cuts and savings.

Appendix

What factors, if any, are currently having a negative impact on your foodservice business?
(please select all that apply)

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Labour costs	88%	86%	93%	83%
Food costs	65%	58%	69%	62%
Labour shortages	52%	50%	54%	46%
Utility costs (water, electricity, gas and heating)	39%	41%	41%	30%
Weak economy	37%	39%	41%	28%
Credit card merchant fees	35%	29%	38%	32%
Competition from new restaurants	33%	25%	38%	27%
Bad weather	25%	27%	23%	26%
Red tape (unnecessary government policies and regulations)	20%	14%	25%	12%
Carbon tax	20%	21%	21%	15%
Liquor costs	16%	4%	21%	15%
Decline in tourists	11%	11%	11%	14%
None of the above	1%	1%	0%	1%

In the second quarter of 2019, was your total sales volume (on a same-store basis) higher, lower, or about the same as it was in the second quarter of 2018?

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Higher	27%	32%	24%	27%
About the same	33%	29%	33%	39%
Lower	40%	39%	43%	34%

How optimistic are you about your foodservice operation over the next 12 months compared to the previous 12 months?

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Very optimistic	11%	13%	10%	10%
Somewhat optimistic	38%	34%	36%	46%
Neither optimistic nor pessimistic	27%	29%	30%	19%
Somewhat pessimistic	18%	24%	18%	16%
Very pessimistic	6%	0%	7%	7%

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Over the next 12 months, do you expect your menu price increase on a year-over-year basis to be:

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Below 1%	6%	5%	5%	9%
1% to 2%	20%	21%	19%	22%
2% to 3%	27%	29%	26%	27%
3% to 4%	17%	8%	21%	13%
4% to 5%	13%	21%	12%	10%
5% to 6%	6%	3%	8%	3%
6% to 7%	1%	0%	1%	1%
More than 7%	3%	3%	3%	3%
Not sure / don't know	7%	11%	5%	10%

Which of the following are your top hiring / staffing challenges? (please select all that apply)

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Finding qualified applicants	73%	67%	74%	75%
New hires not having appropriate skills	45%	44%	47%	39%
High rate of staff turnover	42%	38%	44%	39%
Not being able to offer appropriate compensation/benefits	32%	26%	37%	23%
None of the above	4%	7%	3%	4%

Which of the following positions present(s) the greatest difficulty with staff turnover? (please select all that apply)

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Line Cook	75%	51%	84%	69%
Prep Cook	28%	21%	28%	36%
Dishwasher	28%	10%	35%	22%
Kitchen Manager	26%	21%	29%	19%
Chef	16%	8%	17%	17%
General Manager	14%	17%	14%	8%
Short Order Cook	13%	13%	13%	15%
QSR Cook	13%	33%	8%	10%
Sous-Chef	13%	2%	14%	21%
Runner	5%	10%	3%	6%
Baker	4%	2%	4%	7%
Pastry Chef	2%	0%	1%	7%

Which of the following positions present(s) the greatest difficulty with staff turnover?
(please select all that apply)

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Server	53%	39%	56%	58%
Shift Manager	26%	43%	23%	14%
Floor Manager	21%	17%	24%	17%
Assistant Manager	21%	21%	22%	19%
Cashier	18%	54%	7%	12%
Host	17%	6%	22%	14%
Bartender	15%	1%	18%	17%
Busser	10%	4%	13%	12%
Food & Beverage Manager	9%	4%	11%	5%
Barista	2%	4%	1%	3%
Sommelier	2%	2%	2%	0%
Back Waiter	1%	0%	0%	3%

Which of the following sources have you used to find successful candidates to work at your establishment? (please select all that apply)

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Word of mouth from coworkers	82%	81%	86%	68%
Indeed	60%	49%	64%	59%
Facebook	33%	21%	38%	32%
Job fairs	25%	26%	26%	19%
New graduates	19%	18%	20%	20%
Word of mouth from other restaurants	19%	16%	20%	19%
University or college career centres	14%	15%	14%	15%
Competitions	11%	12%	11%	15%
Headhunters/placement agency	10%	11%	10%	10%
LinkedIn	10%	8%	9%	17%
Monster	8%	12%	8%	3%
Twitter	4%	1%	4%	3%

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Have you ever taken on a co-op student or an intern or provided an opportunity for a stage (cooking)?

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Yes	69%	52%	76%	61%
No	31%	48%	24%	39%

If you replied “Yes”, did you hire them after their placement?

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Yes	74%	81%	71%	81%
No	26%	19%	29%	19%

Would you be interested in taking on a co-op student or an intern, or providing an opportunity for a stage (cooking)?

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Yes	82%	71%	88%	70%
No	18%	29%	12%	30%

How many units do you own and/or operate?

	Total Foodservice	Quick-service Restaurants	Table-service Restaurants*	All Other Foodservice**
Number of responses	467	102	271	94
Number of units	9,424	3,819	3,231	2,374

* Includes table-service restaurant and combination table-service restaurant and bar

** Includes accommodation, drinking places, institutions (e.g. health care, education) and managed service providers.

About the Restaurant Outlook Survey

The results for the second quarter are compiled from responses to an email to foodservice operators inviting them to take an online survey. The survey was conducted in July 2019.

In total, 467 completed surveys were submitted, representing 9,424 establishments.

Restaurants Canada encourages foodservice operators to participate in the Restaurant Outlook Survey to ensure results continue to be representative of our industry. Contact Chris Elliott at celliott@restaurantscanada.org to participate in the survey.

About Restaurants Canada

Restaurants Canada (previously CRFA) is a growing community of 30,000 foodservice businesses, including restaurants, bars, caterers, institutions and suppliers. We connect our members from coast to coast, through services, research and advocacy for a strong and vibrant restaurant community. Canada's restaurant industry is an \$89 billion industry, directly employs 1.2 million Canadians, is the number one source of first jobs, and serves 22 million customers every day.



The voice of foodservice | La voix des services alimentaires

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