RCINTEL

RESEARCH

# Restaurant Outlook Survey

## Q4 2019

# Executive Summary

- For the fourth consecutive quarter, the share of respondents with lower same-store sales outnumbered those with higher same-store sales. This was due to a decline in traffic, most notably at full-service restaurants.
- Nearly half of respondents said their financial performance in terms of net income in 2019 was worse than in 2018. The percentage of respondents that said their financial performance was better fell from 38% in 2018 to 26% in 2019.
- The most significant contributing factors to worsening financial performance in 2019 were rising labour costs and fewer customers. For those respondents whose financial performance improved, tighter cost control and enhanced guest experience were most frequently cited as reasons.
- Despite challenges, a greater number of respondents (41%) are optimistic about 2020 than are pessimistic (33%). The biggest sources of concern for 2020 are the economy and high labour costs.
- The top priorities for restaurants are to reduce operating costs and improve the guest experience to meet economic challenges. Operators will also focus on improving staff training and increased marketing.
- Menu prices are forecast to increase by an average of 3.1% in 2020.
- A majority of restaurant operators have made an online purchase of foodservice equipment, commodities, consumables, and services.

RCINTEL

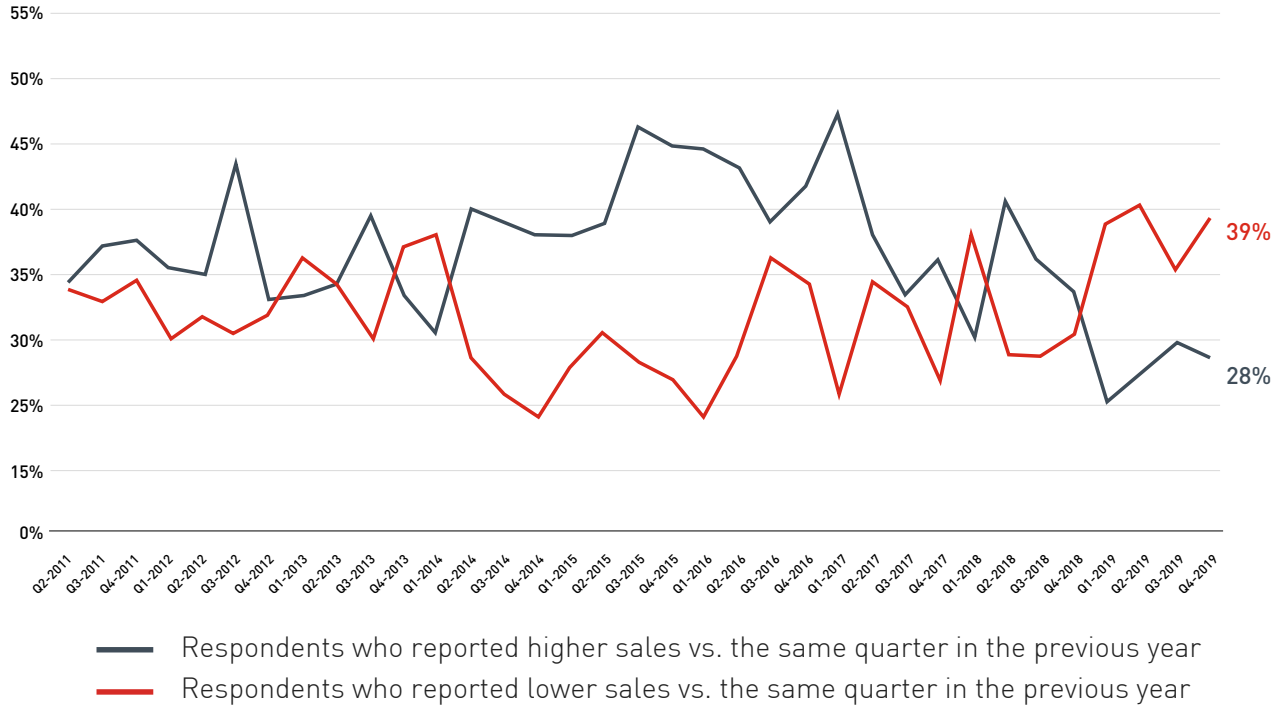
# On paper, Canada's foodservice should have enjoyed a year of strong sales gains in 2019. It didn't happen.

Overall, it was a tough year for Canada's foodservice industry despite some encouraging macroeconomic indicators. Disposable income growth accelerated to 4.0% in 2019, up slightly from 3.8% last year, helping to put more money in consumers' pockets. Additionally, Canada's job market added 390,760 net new jobs in 2019, the strongest annual increase since 1979, and pushed the unemployment rate down to 5.6% in December 2019.

And yet, foodservice sales struggled. For the fourth consecutive quarter, the percentage of respondents with lower same-store sales outnumbered those with higher sales. The share of respondents who reported lower sales in Q4 compared to a year ago rose to 39%, the second-highest level since Restaurants Canada began the Restaurant Outlook Survey in 2011. Meanwhile, the share of respondents who reported higher sales compared to the same quarter in 2018 slipped slightly to 28% in Q4, down from 29% in Q3.

**A mix of eroding consumer confidence and rising household debt led to lower same-store sales for many operators. However, once again, performance varied significantly by segment.**

## Share of Operators Reporting Higher and Lower Same-Store Sales




In Q4, quick-service restaurants was the only segment in which the share of respondents posting higher same-store sales (35%) slightly outnumbered those reporting lower sales (32%). Nevertheless, the share of operators with higher same-store sales fell sharply from 48% in Q3.

Table-service restaurants, in contrast, saw a repeat showing in Q4 as in Q3. While 27% of respondents had higher same-store sales, this was more than offset by the 41% that had lower same-store sales. It was a similar story for 'all other foodservice' – which includes foodservice options at hotels and other accommodations, institutions, and clubs and drinking establishments – where 38% saw lower same-store sales in Q4.

What happened? Despite the sturdy economic underpinnings of strong wage growth and healthy job creation, increasing economic anxiety and mounting household debt took a toll on consumer confidence throughout 2019. By December 2019, Canada's consumer confidence index plummeted to a 36-month low as households worried about their financial security. This drop makes sense given total household debt (including mortgages, credit cards, lines of credit and loans) reached an alarming $2.29 trillion in Q3 2019.

Recent menu price increases may also be discouraging consumers. In the past two years, menu prices have increased by 9.2% at quick-service restaurants and 6.2% at table-service restaurants. In contrast, prices for food sold from grocery stores rose by 4.5%.

The slowdown in consumer spending is not unique to the restaurant industry. Overall retail sales growth is projected to slow to a tepid 1.9% in 2019, the weakest increase since 2009. According to data from Statistics Canada, there was a sharp moderation in spending across a broad range of categories, with electronics and appliance stores posting the largest decline (-10%).

On an aggregate basis, projections for commercial foodservice sales are for an increase of just 3.6% in 2019 following five consecutive years of nominal growth of 5% or more. Nevertheless, that doesn't mean consumers are going en masse to retail stores. Supermarket and grocery store sales grew by just 2.5% in the first ten months of 2019, a pace that is relatively unchanged from 2018. Retail liquor store sales moderated to 2.4% growth in 2019 from 3.7% in 2018. Although consumers have to eat, they are watching their food dollar very closely. They are looking for value, but also savings.

In late September 2019, BDO Canada released a survey that found 53% of Canadians are living paycheque to paycheque, and 27% do not have enough money to cover their needs. Three in ten have delayed paying off their credit card balances because they can't afford it. Looking ahead at retirement, the same study also found that roughly three in ten Canadians (including boomers and seniors) have no retirement savings. With households under significant financial pressure, consumers will seek value when they dine out.

As discussed in a later section on top priorities for 2020, foodservice operators need to look for savings as well. Given households' propensity to look to spend less wherever and whenever they can, restaurateurs need to keep a close eye on menu prices.

# Rising costs everywhere remain the top challenge for restaurants

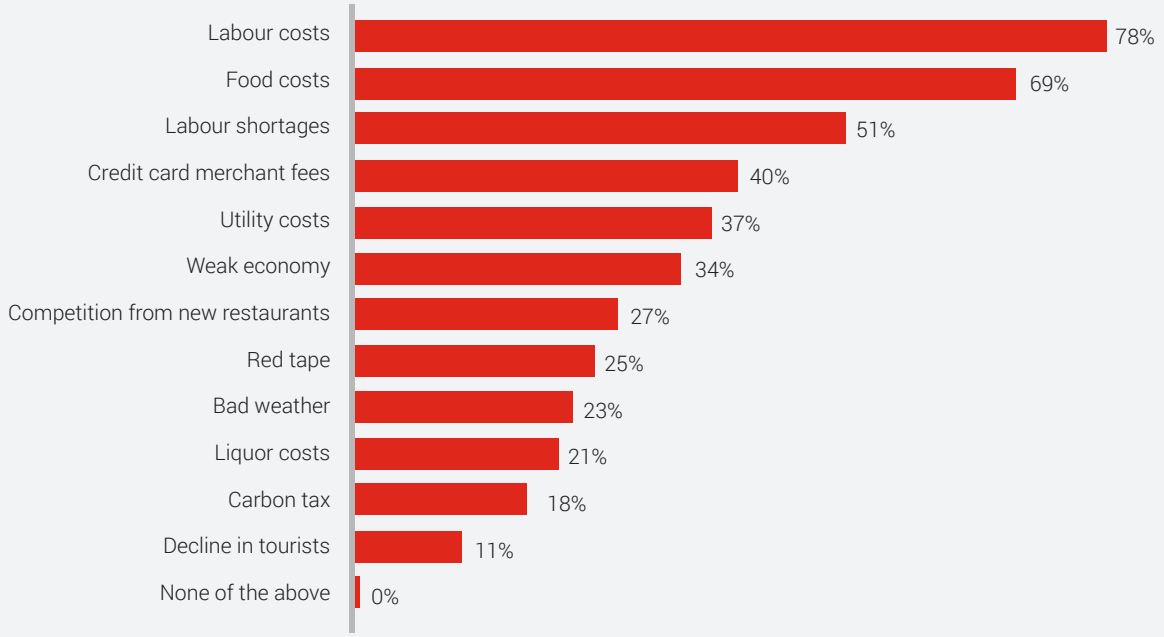
The key issues negatively impacting foodservice operators remain labour costs, food costs, and labour shortages. Although labour shortages rank among the top three, the overall share of operators reporting job vacancies slipped from 59% in Q3 to 51% in Q4 as fewer restaurants were looking for workers during the winter months. Still, labour shortages remain a significant challenge for 60% of quick-service restaurant operators, with many necessarily allocating more time and money to recruiting, training, and retaining workers.

Add to those costs: high credit card merchant fees, utilities, rent, and third-party delivery commissions. It's easy to see why many restaurants are struggling financially, as discussed in the next section.

Not only are costs rising, but revenues are also eroding, due in part to increased competition. Four in 10 quick-service restaurant respondents said growing competition from new restaurants is harming their business. This isn't much of a surprise since the number of quick-service restaurants increased by 1.6% in the first half of 2019 over the same period in 2018.

What is a surprise is that only 27% of table-service restaurants reported feeling the impact of new competition. Yet the number of table-service restaurants jumped by a noteworthy 2.1% in the first half of 2019. By comparison, the population of Canada increased by 1.4%, showing unit growth is outpacing population growth. With more restaurants chasing fewer dollars, it's no wonder same-store sales have struggled.

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



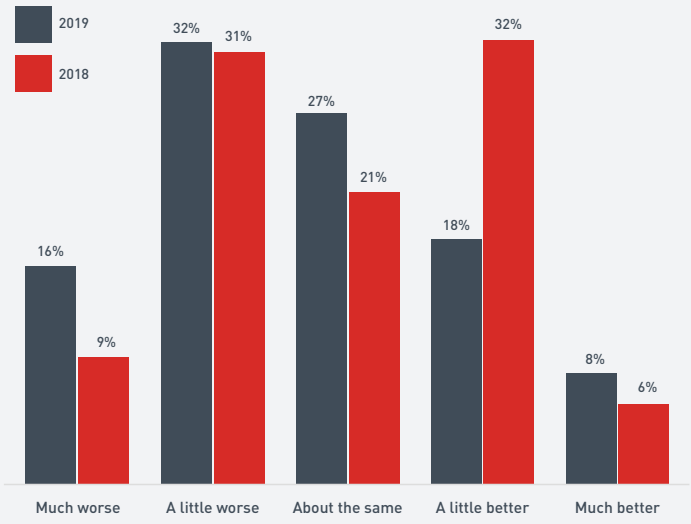
# Higher labour costs and lower customer counts took a toll on operators' financial performance in 2019

With lower same-store sales throughout 2019, it was not a good year financially for most operators. Indeed, 48% of respondents reported their financial performance in terms of net income was worse than in 2018. Worryingly, 16% of respondents said that it was "much worse". This disappointing result comes on the heels of a difficult 2018 when 40% of operators at the time said that their financial performance worsened compared to 2017.

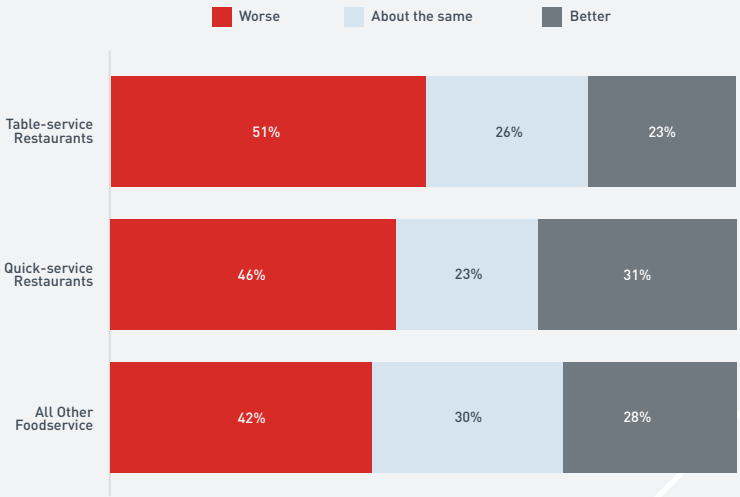
By comparison, 26% said their financial performance was better in 2019, and 27% reported it was about the same. This is a sharp decline from the 38% of operators that said their financial performance improved in 2018 versus the previous year.

For many operators, the past two years have been a struggle. In 2018, the impact of the minimum wage increases and new labour laws in Ontario and Alberta led to a significant jump in labour costs, which in turn led to higher menu prices and fewer customers. What were the major snags in 2019?

**In 2019, was your financial performance in terms of net income, better, worse, or about the same as in 2018?**




**In 2019, was your financial performance in terms of net income, better, worse, or about the same as in 2018?**
(By segment)



# Many of the issues that led to a worsening financial performance in 2018, were back again in 2019

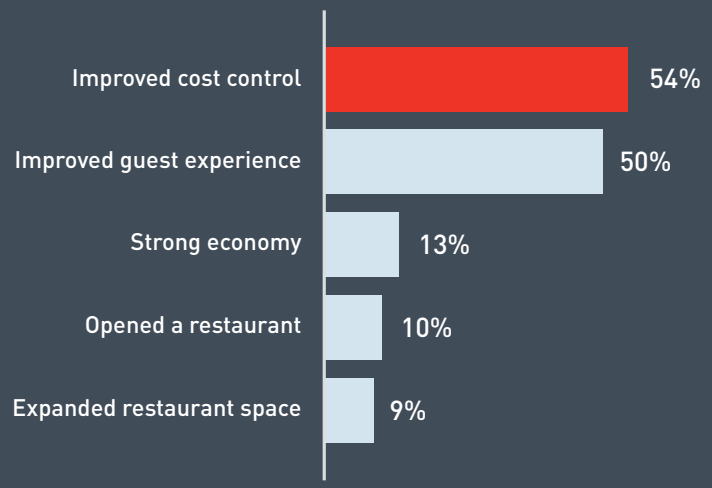
Rising labour costs – 77%; statistically unchanged from 2018 – remains the number one challenge for restaurant owners. This is not due solely to the ripple effect of rising minimum wages, but also to rising costs from labour shortages.

Where we see a notable departure, is the share of respondents reporting fewer customers jumped to 69%, up dramatically from 50% in 2018. Clearly, the combination of rising menu prices (relative to grocery stores) and high household debt is putting a severe dent in traffic to restaurants. The share of respondents that cited 'weak economic activity' as having a detrimental impact on their business jumped to 45% in 2019 compared to 36% in 2018. Operators in Alberta were especially hard hit.

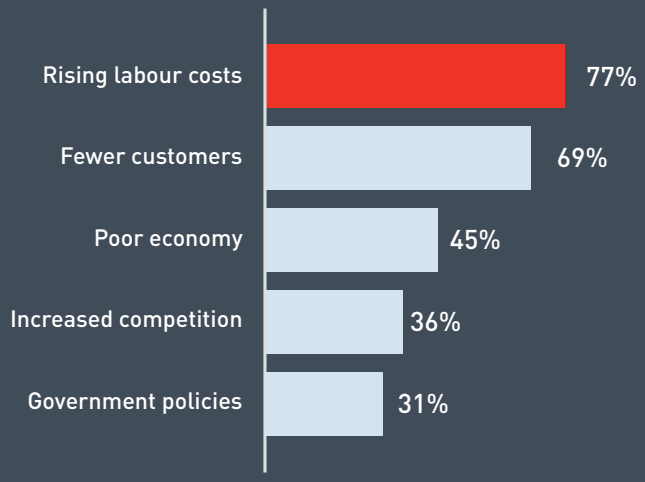
Drilling into the comments, there were also issues with rising utility costs, high commission fees for third-party aggregators, and labour shortages.

For those restaurants that said 2019 was a better year financially than 2018, the majority benefited from improved cost control (54%), such as moving to a shorter work week and reducing hours of operation. Other respondents lowered staffing levels to mitigate rising wage levels, while many benefited from improved guest experience (50%). Some respondents said tourism helped grow their sales, while others found new sources of revenue from the catering side of the business.

**Which factors led to an improved financial performance in 2019?**




**Which factors led to a worsening financial performance in 2019?**



RCINTEL

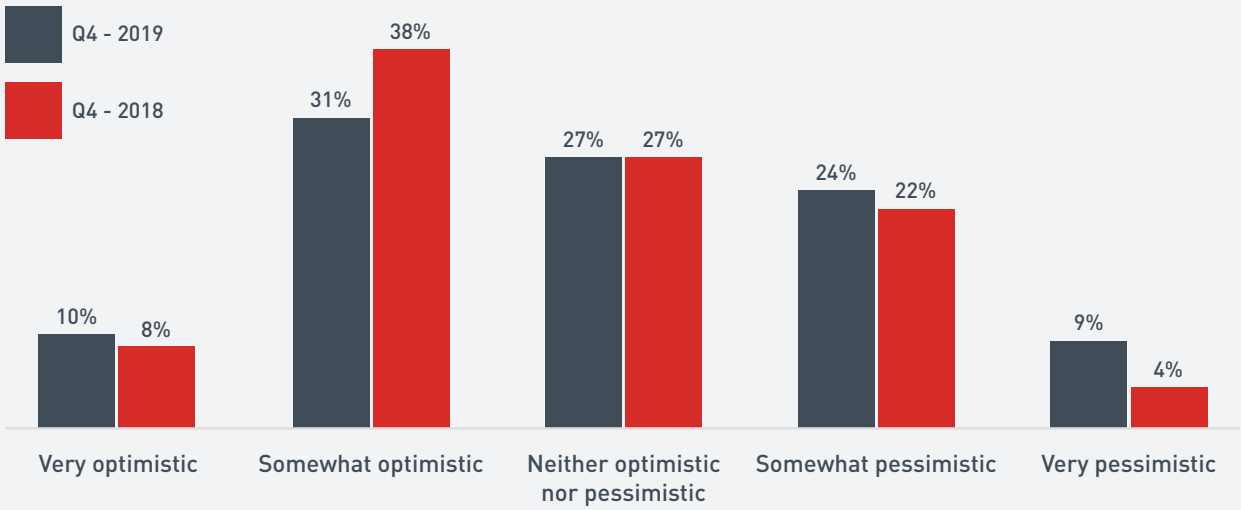
# Looking ahead to 2020

Even given the challenges of the past two years, restaurant operators remain surprisingly upbeat; those feeling optimistic about 2020 outnumbered those feeling pessimistic. Still, optimism took a tumble in recent quarters, slipping from 49% in Q2 2019 to 46% in Q3 and landing at 41% in Q4.

Those that are optimistic cited a variety of reasons, including more than six in 10 saying success will come from their improved business practices and the quality of their guest experience in 2020. Indeed, several respondents mentioned the loyalty of their customer base and improved quality of their food would see them through any challenges. Others have made recent renovations to help attract guests, while some are expanding their digital footprint by opening ghost restaurants. To boost revenues, many operators are focusing on expanded marketing, and new catering opportunities.

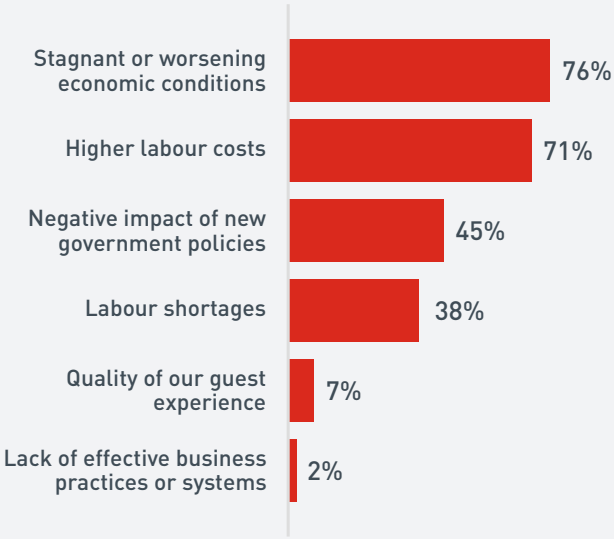
On the flip side of the coin, the number of respondents feeling pessimistic has increased from 24% to 33%, the highest level reported since Q3 2017 (37%). The biggest reasons? More than seven in 10 respondents are worried about worsening economic conditions and higher labour costs. The deepest concern is in Alberta, where a staggering 94% are worried about the economy.

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




## Which of the following factors make you feel optimistic about the next 12 months?


## Which of the following factors make you feel pessimistic about the next 12 months?



RCINTEL

# Canadian Restaurant Operators: In Their Own Words

"I have reduced my staffing costs and am reducing the size of the restaurant starting in 2020, which allowed me to lower my lease costs."

"I'm hoping we can maintain where we are at. I don't expect growth."

"We've seen a continued erosion of profit due to delivery fees, food cost escalation, labour costs. Yet we are not able to increase prices to effectively combat this."

Although many operators are concerned about a possible recession in 2020, it's not all doom and gloom. The Conference Board of Canada predicts Canada's economy will grow by 1.8% in 2020, and a further 1.9% in 2021. During this time, there is no expectation for the economy to see any contraction in activity, which is a positive sign.

Canada's job market remains resilient, despite a significant setback in the employment data in November 2019. Following several years of solid gains, net employment is forecast to slow to a more sustainable pace in 2020, with the creation of 162,000 jobs. The unemployment rate is forecast to fall to an average of 5.5% in 2020, the lowest level seen in more than 44 years.

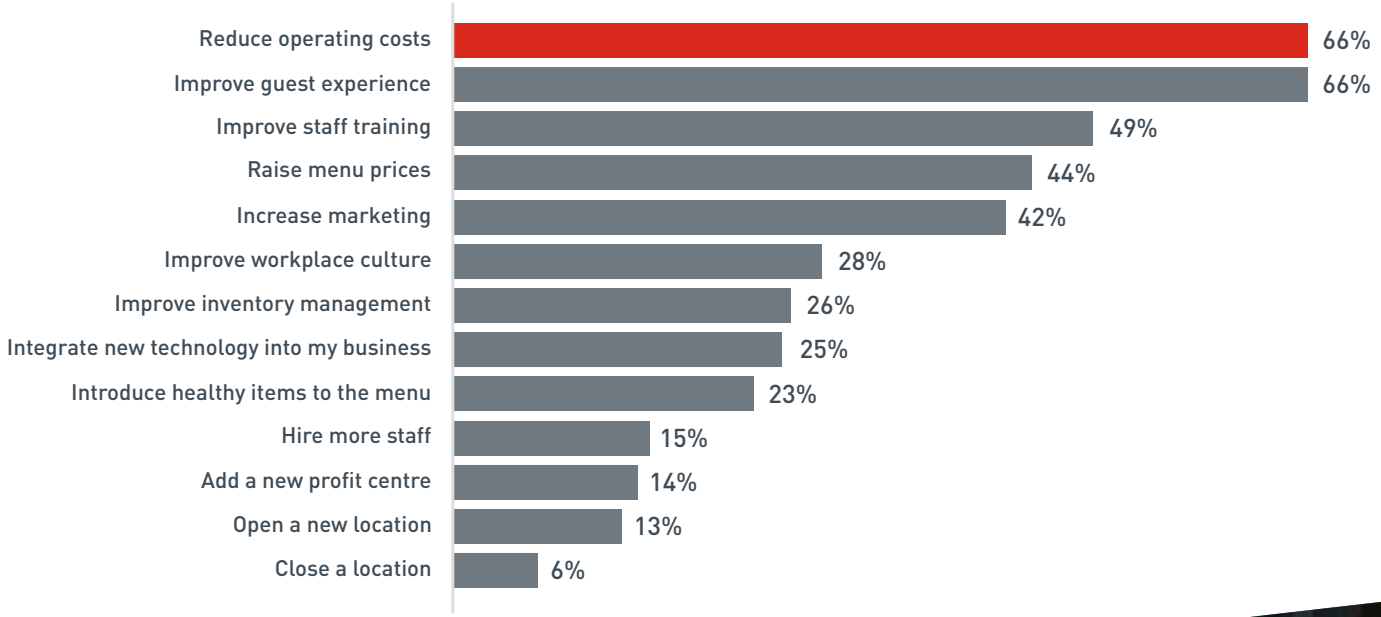
Just for some perspective, 44 years ago it was 1976 - no one knew what Star Wars was, and two guys named Steve built and sold their first computer, the Apple I.

# The outlook for foodservice sales in 2020 and beyond

**According to Restaurants Canada's latest Restaurant Industry Forecast, expectations are for commercial foodservice sales to grow by 4.0% to $77.5 billion in 2020.**

Economic uncertainty, lower consumer confidence, and high household debt led to a notable slowdown in overall consumer spending, which will continue to impact both foodservice and retail sales. On a positive note, Canada's foodservice industry will benefit from an extra day of sales in February due to the leap year. Over the long term, foodservice sales will advance by an average of 3.8% over the next four years, a noticeable deceleration from the 5.3% average of the previous four years.

### Which of the following will be your top priorities for your business over the next 12 months?




RCINTEL

# Two-thirds say their focus is on reducing operating costs and improving the guest experience in 2020

To reduce operating costs, restaurant operators have often looked to shake up their menu by choosing lower-cost food items or reduce shifts and hours of work. Others have tried changing food suppliers or paring down the number of employees. In some cases, operators have adjusted their business hours or reduced the number of items on their menu to lower inventory costs. In a business with razor-thin profit margins, every dollar counts.

Just as important, improving the guest experience is about providing guests with a superior and memorable visit. This kind of enhancement could take the form of a loyalty program or a user-friendly app. It also helps to have inviting décor to make guests feel welcome, or maybe an image update to appeal to a new demographic.

Half of operators will focus on staff training to help weather the storm. A well-trained team is critical to success, as friendly and attentive customer service is a core component of customer satisfaction. It also helps with maintaining the quality and consistency of your food. It only takes one bad experience to turn off a guest - and one smartphone to spread that experience on social media.

Increasing marketing (42%) to boost awareness in a very crowded restaurant environment, is another top priority for many operators.

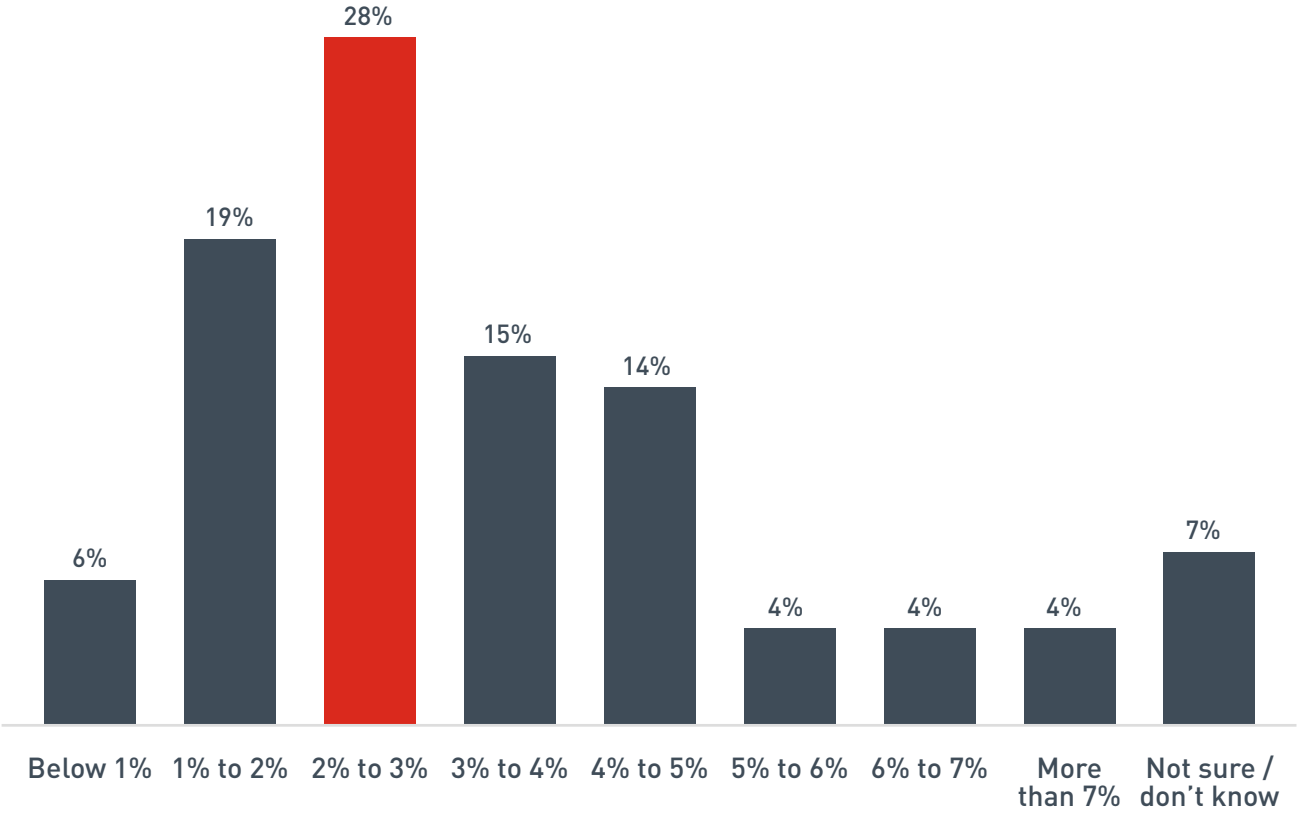
One of the most interesting changes we've uncovered is that 23% of respondents now plan to introduce healthy items to the menu, up from 15% in the Q4 2018 Restaurant Outlook Survey. Taking a look back at the Q3 2019 Restaurant Outlook Survey, the most popular food trends requested at restaurants include gluten-free foods, vegetarian options, and vegan options.

# Quick-service and table-service trade places on menu inflation versus last year

Raising menu prices is another leading priority for many operators in 2020. During the next 12 months, the anticipation is for menu prices to increase by an average of 3.1% over last year. Table-service restaurants said they will raise their menu prices an average of 3.2% over the next 12 months compared to an expected 2.8% increase for quick-service restaurants.

Looking back at 2019, menu prices increased by 3.7% at quick-service restaurants compared to a 2.3% increase at table-service restaurants.

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

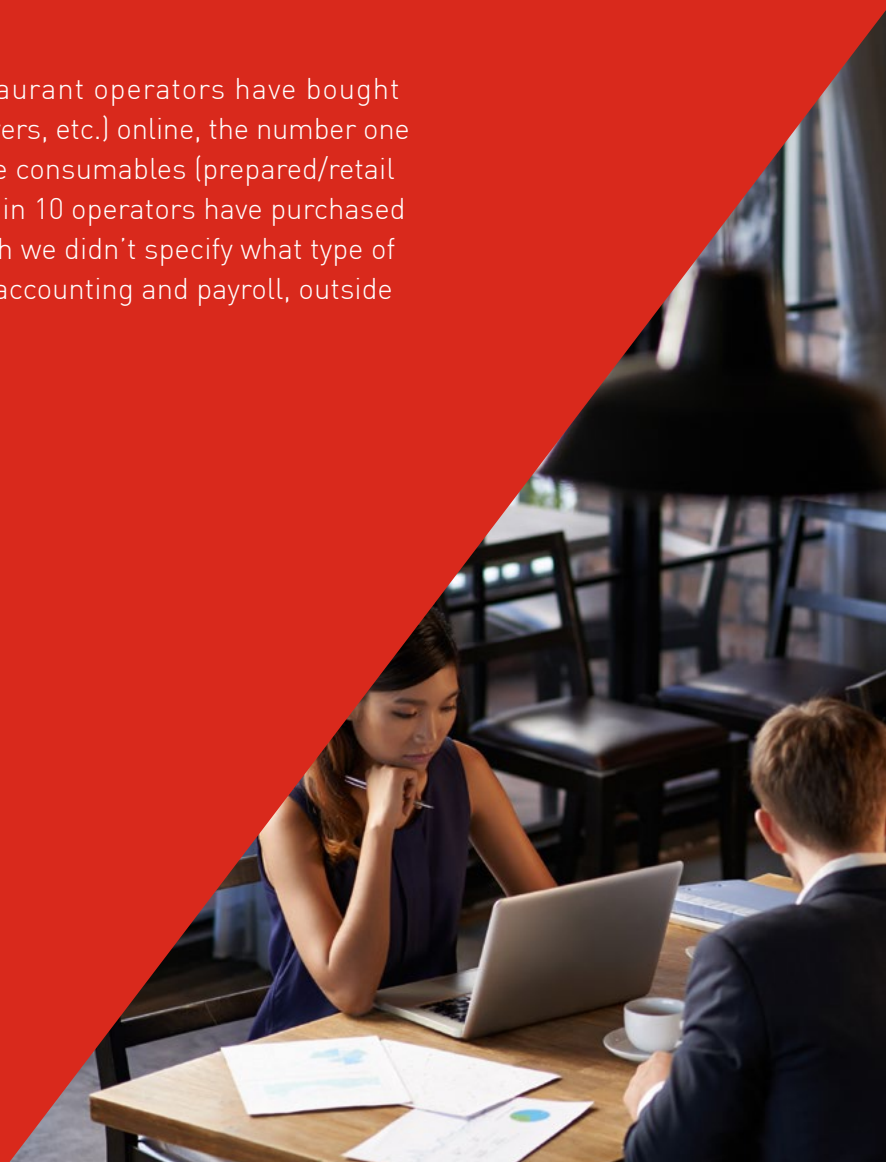


RCINTEL

# Special Insight Section:
## Making Business Purchases Online

Have you ever considered making a purchase online for equipment, commodities, or a service for your restaurant? Given the meteoric rise of online shopping for consumers, we asked restaurant operators if they have ever made any online purchases. It turns out, a surprisingly high number of restaurants have ordered online.

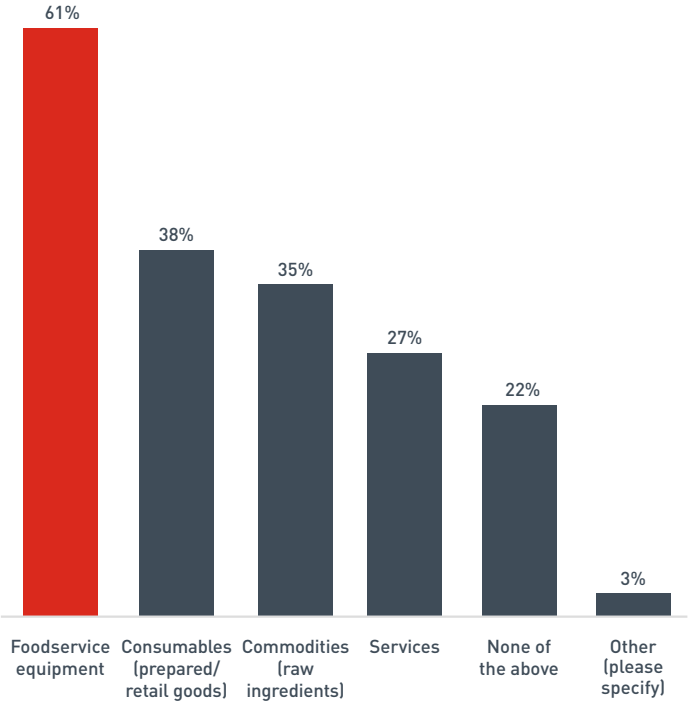
Nearly two-thirds of table-service restaurant operators have bought foodservice equipment (stoves, fridges, fryers, etc.) online, the number one purchase category. Closely following were consumables (prepared/retail goods) and raw ingredients. Nearly three in 10 operators have purchased a service through an online outlet. Though we didn't specify what type of services in the survey, this could include accounting and payroll, outside cleaning help, and more.



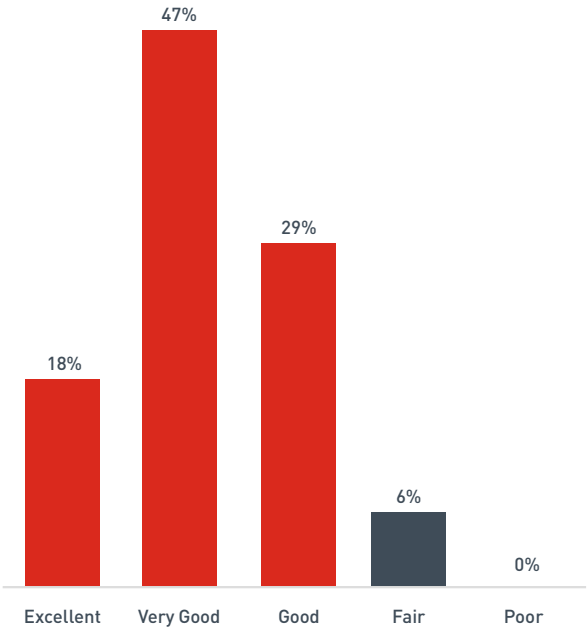
It's also interesting to note that the vast majority of those that made an online purchase rated their experience as 'excellent' or 'very good'. No one rated their experience as poor.

For those that did not make an online purchase, they cited a preference for face-to-face relationships and the personal touch. They felt they could depend on their existing relationships, and if problems arise, they know who to contact. Some had wondered how they would rectify the situation if expensive equipment delivered from an online purchase arrived damaged or with some other issue.

## Have you ever made an online purchase of the following for your restaurant?




## In general, how would you rate your past experience ordering any of these items online?



# Our Thoughts On What Lies Ahead For The Foodservice Industry

The mood in the foodservice industry has certainly dampened for a lot of operators over the course of 2019. Increased operating expenses (labour, food, utilities, rent, third-party commissions) remain a significant obstacle for many. Raising menu prices may have been a solution in the past, but recent increases appear to have discouraged guests from dining out as frequently. With little room to absorb these cost hikes, the majority of restaurant operators said they would make reducing operating costs a top priority for 2020.

We are also living in an era of an aging population and tight labour markets, which will make labour shortages a top challenge for restaurant operators in the years to come. It's also unlikely that operators will get a reprieve from rising expenses.

One area that operators can improve significantly is productivity, typically measured as output per worker. Over the past 15 years, productivity in the foodservice industry increased just 2.2%, compared to a 15.7% increase for all other industries. In fact, foodservice ranks as the fourth lowest in labour productivity out of 234 industries. This is not a sustainable situation.

As pointed out by the Bank of Canada, "gains in productivity allow businesses to pay higher real (inflation-adjusted) wages and still keep costs down and stay profitable and competitive. So, rising productivity is vital to sustained improvements in real incomes and living standards over time."

In a nutshell, increasing productivity will be essential for operators to prosper over the next decade.

Investing in productivity presents new opportunities for the foodservice industry, and may lead to largely unexplored frontiers. It will mean a greater investment in new and emerging technology beyond anything we've seen before. Maybe ghost kitchens will become the new norm by 2030. Will some unknown trend or technology (such as 3D printing) spur innovation? Perhaps. Remember, all the things we accept as the standards today were yesterday's experiments and crazy ideas.

Ultimately, this exploration is what will make the 2020s an exciting decade for the foodservice industry. There will be some risks involved, but the rewards and the benefits will go to those companies and owners with the courage to think beyond business as usual and find ways to diversify and thrive.

# 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 | 78% | 71% | 83% | 70% |
| Food costs | 69% | 63% | 73% | 62% |
| Labour shortages | 51% | 60% | 49% | 52% |
| Credit card merchant fees | 40% | 14% | 46% | 38% |
| Utility costs (water, electricity, gas and heating) | 37% | 26% | 39% | 39% |
| Weak economy | 34% | 29% | 40% | 25% |
| Competition from new restaurants | 27% | 40% | 27% | 22% |
| Red tape (unnecessary government policies and regulations) | 25% | 20% | 27% | 23% |
| Bad weather | 23% | 20% | 27% | 14% |
| Liquor costs | 21% | 0% | 27% | 19% |
| Carbon tax | 18% | 14% | 19% | 17% |
| Decline in tourists | 11% | 9% | 14% | 7% |
| None of the above | 0% | 0% | 0% | 1% |

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

| | Total Foodservice | Quick-service Restaurants | Table-service Restaurants* | All Other Foodservice** |
|---|---|---|---|---|
| Higher | 28% | 35% | 27% | 26% |
| About the same | 33% | 32% | 31% | 36% |
| Lower | 39% | 32% | 41% | 38% |

## In 2019, was your financial performance in terms of net income, better, worse or about the same as in 2018?

| | Total Foodservice | Quick-service Restaurants | Table-service Restaurants* | All Other Foodservice** |
|---|---|---|---|---|
| Much better | 8% | 9% | 7% | 10% |
| A little better | 18% | 23% | 17% | 17% |
| About the same | 27% | 23% | 26% | 30% |
| A little worse | 32% | 34% | 30% | 35% |
| Much worse | 16% | 11% | 20% | 7% |

## Which factors led to an improved financial performance in 2019?

| | Total Foodservice | Quick-service Restaurants | Table-service Restaurants* | All Other Foodservice** |
|---|---|---|---|---|
| Improved cost control | 54% | 36% | 57% | 60% |
| Improved guest experience | 50% | 36% | 51% | 55% |
| Strong economy | 13% | 0% | 14% | 20% |
| Opened a restaurant | 10% | 18% | 11% | 5% |
| Expanded restaurant space | 9% | 0% | 8% | 15% |

## Which factors led to a worsening financial performance in 2019?

| | Total Foodservice | Quick-service Restaurants | Table-service Restaurants* | All Other Foodservice** |
|---|---|---|---|---|
| Rising labour costs | 77% | 69% | 78% | 76% |
| Fewer customers | 69% | 69% | 70% | 66% |
| Poor economy | 45% | 44% | 46% | 45% |
| Increased competition | 36% | 56% | 36% | 24% |
| Government policies | 31% | 13% | 35% | 31% |

## 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 | 10% | 9% | 8% | 14% |
| Somewhat optimistic | 31% | 31% | 28% | 38% |
| Neither optimistic nor pessimistic | 27% | 20% | 27% | 29% |
| Somewhat pessimistic | 24% | 31% | 27% | 12% |
| Very pessimistic | 9% | 9% | 9% | 8% |

## Which of the following factors make you feel optimistic about the next 12 months?

| | Total Foodservice | Quick-service Restaurants | Table-service Restaurants* | All Other Foodservice** |
|---|---|---|---|---|
| Improved business practices or systems | 63% | 79% | 66% | 50% |
| Quality of our guest experience | 62% | 57% | 59% | 69% |
| High quality staff | 33% | 21% | 38% | 28% |
| Improving economic conditions | 17% | 7% | 17% | 22% |
| Staff labour costs | 10% | 0% | 10% | 13% |
| Positive impact of new government policies | 4% | 0% | 3% | 6% |

## Which of the following factors make you feel pessimistic about the next 12 months?

| | Total Foodservice | Quick-service Restaurants | Table-service Restaurants* | All Other Foodservice** |
|---|---|---|---|---|
| Stagnant or worsening economic conditions | 76% | 64% | 80% | 69% |
| Higher labour costs | 71% | 79% | 69% | 69% |
| Negative impact of new government policies | 45% | 36% | 47% | 46% |
| Labour shortages | 38% | 57% | 31% | 54% |
| Quality of our guest experience | 7% | 14% | 7% | 0% |
| Lack of effective business practices or systems | 2% | 0% | 3% | 0% |

## 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% | 9% | 6% | 5% |
| 1% to 2% | 19% | 20% | 19% | 21% |
| 2% to 3% | 28% | 23% | 30% | 24% |
| 3% to 4% | 15% | 20% | 12% | 19% |
| 4% to 5% | 14% | 11% | 14% | 13% |
| 5% to 6% | 4% | 3% | 6% | 2% |
| 6% to 7% | 4% | 3% | 5% | 2% |
| More than 7% | 4% | 0% | 4% | 5% |
| Not sure / don't know | 7% | 11% | 5% | 10% |

## Which of the following will be your top priorities for your business over the next 12 months? (please select all that apply)

| | Total Foodservice | Quick-service Restaurants | Table-service Restaurants* | All Other Foodservice** |
|---|---|---|---|---|
| Reduce operating costs | 66% | 63% | 69% | 58% |
| Improve guest experience | 66% | 71% | 65% | 65% |
| Improve staff training | 49% | 43% | 46% | 60% |
| Raise menu prices | 44% | 29% | 51% | 37% |
| Increase marketing | 42% | 43% | 43% | 42% |
| Improve workplace culture | 28% | 17% | 30% | 29% |
| Improve inventory management | 26% | 9% | 27% | 34% |
| Integrate new technology into my business | 25% | 26% | 25% | 24% |
| Introduce healthy items to the menu | 23% | 14% | 22% | 31% |
| Hire more staff | 15% | 11% | 15% | 16% |
| Add a new profit centre | 14% | 20% | 15% | 8% |
| Open a new location | 13% | 23% | 13% | 6% |
| Close a location | 6% | 11% | 7% | 0% |

## Have you, or someone at your company, ever made an online purchase of the following for your restaurant? (please select all that apply)

| | Total Foodservice | Quick-service Restaurants | Table-service Restaurants* | All Other Foodservice** |
|---|---|---|---|---|
| Foodservice equipment (stoves, fridges, fryers, smallwares, etc.) | 61% | 44% | 65% | 58% |
| Consumables (prepared/retail goods) | 38% | 32% | 39% | 38% |
| Commodities (raw ingredients) | 35% | 26% | 35% | 38% |
| Services | 27% | 32% | 27% | 25% |
| None of the above | 22% | 32% | 19% | 23% |
| Other (please specify) | 3% | 0% | 2% | 5% |

## In general, how would you rate your past experience ordering any of these items online? (please select one)

| | Total Foodservice | Quick-service Restaurants | Table-service Restaurants* | All Other Foodservice** |
|---|---|---|---|---|
| Excellent | 18% | 17% | 18% | 18% |
| Very good | 47% | 30% | 50% | 49% |
| Good | 29% | 48% | 26% | 29% |
| Fair | 6% | 4% | 7% | 4% |
| Poor | 0% | 0% | 0% | 0% |

## How many units do you own and/or operate?

| | Total Foodservice | Quick-service Restaurants | Table-service Restaurants* | All Other Foodservice** |
|---|---|---|---|---|
| Number of responses | 266 | 35 | 162 | 69 |
| Number of units | 6,805 | 5,278 | 1,326 | 201 |

* 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 fourth quarter are compiled from responses to an email to foodservice operators inviting them to take an online survey. The survey was conducted in January 2020. In total, 266 completed surveys were submitted, representing 6,805 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 $93 billion industry, directly employs 1.2 million Canadians, is the number one source of first jobs, and serves 22 million customers every day.

Restaurants Canada

The voice of foodservice | La voix des services alimentaires

# For further information

## Restaurants Canada

1155 Queen Street West,
Toronto, Ontario M6J 1J4

**Tel:** 1-800-387-5649
**Fax:** (416) 923-1450

**E-mail:** info@restaurantscanada.org
**Website:** restaurantscanada.org

Thank you to our corporate sponsors

Platinum

Gold

Silver

RCINTEL