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The future of food: a Canadian perspective

The conflicted consumer

2021 food consumer survey

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About the research

The conclusions in this report are based on research and analysis conducted by Deloitte in Canada from March 2020 to May 2021.

The research included:

- In-depth interviews with executives ranging from food manufacturers to grocery retailers to culinary consultants
- Qualitative research across a range of age groups
- Quantitative, nationally representative online survey of adult Canadians conducted in March 2020 and March 2021, averaging approximately 1000 respondents per wave

More than a year of living with a global pandemic has revealed a series of contradictory tensions among Canadian consumers. We're baking our own bread, yet ordering in more than ever. We're obsessed with fresh fruit and vegetables, but we can't get enough of sugary, salty snacks. We're committed to supporting local businesses, yet we're shopping on Amazon more than ever. Are these duelling consumer personalities simply a response to intense feelings of scarcity? Has the pandemic experience unlocked new needs and preferences that are here to stay? Or did the crisis simply accelerate impulses that have been here all along?



Introduction

One thing's for sure: scarcity has compelled and revealed both new and evergreen tendencies. Our cognitive bandwidth is in short supply. We're beset with worry, fear, and anxiety. And we have little capacity to rein in our impulses, even as we strive to find ways to control our immediate environment.

We feel time is scarce because all the activities that used to take place elsewhere now take place at home, leaving us with no perceived downtime. We're feeling physical scarcity, as lockdowns, stay-at-home orders, and even social-distancing rules keep us housebound and force us to shop more carefully and deliberately than ever as we fret about whether we've laid in enough supplies. And we're far more aware of the structural scarcities in society: the essential workers who put themselves at risk in warehouses, processing plants, and stores, all for low pay; the unequal division of labour in the home, often gender-based; the small businesses that struggle while big box stores thrive; the racial, social, and economic inequalities brought to our collective attention once more by re-energized social justice movements.

These scarcities and the tensions they elicit seem to be inspiring a reckoning of sorts. As consumers, we're thinking more deeply about what and how much we consume, and what these factors say about us. We're distinguishing between what we can do without and what we truly value. We're thinking about fairness at a societal level. We're developing new skills, new connections, and new communities, and we've gained a new sense of confidence in ourselves. As talk of a return to normal grows, most Canadians are realizing that old notions of the status quo aren't particularly desirable or achievable—and they're emboldened to demand a new, better normal.

Understanding these tensions and the forces that drive them, as well as their impacts on Canadians' behaviour, will be vital for companies across the food and grocery retail sector. Today's consumers expect significantly more from the companies and brands they support, not just in terms of products and customer experience, but also with respect to behaving with integrity, compassion, and humanity—and they're prepared to walk away from the businesses that don't step up.

In this report, the first of a series on the future of the food and grocery sector in a post-pandemic world, Deloitte explores the tensions that are driving Canadian consumer behaviours and trends, along with their effect on food and grocery retailers. Subsequent pieces will explore the impact of sustainability on the sector and the role of the store in a rapidly changing industry. Our hope is that these reports spark important conversations that propel Canada's food and grocery sector forward with confidence.

“Consumers have developed new competencies and a new confidence in doing things for themselves; they’ll carry these skills with them as we move past the pandemic.”

Dr. Sarah Reid | Head of Dublin Canada, a Deloitte business

Economic outlook from Chief Economist Craig Alexander

A bright future for food and grocery— and retail in general

The prospects for retail spending, including in the food and grocery sector, are heavily affected by general economic conditions and consumer fundamentals; current indicators are positive and strong. The Canadian economy has proved to be surprisingly resilient during the second and third waves of the pandemic. Though reimposed government restrictions have tempered the pace of recovery, the country has thus far avoided a renewed downturn. As of March 2021, roughly 90% of jobs lost during the 2020 contraction had been recovered; and while the unemployment rate of 7.5% (as of March) is well above pre-pandemic levels, it's dramatically below last year's peak of 13.7%. Personal after-tax income increased last year—a unique experience during a recession—reflecting government income transfers that exceeded the total lost-labour compensation. These factors helped fortify consumer confidence, which in turn helped to keep wallets open. Sentiment was also bolstered by the past year's residential real estate boom, which sent national average home prices skyrocketing. As home prices rise, Canadians tend to feel wealthier, which often translates to more spending.

Total retail sales plunged 32% in the first lockdown, though by June 2020, strong consumer spending during regional reopenings saw this measure return to pre-pandemic levels. However, renewed government restrictions led to a temporary pullback in December 2020 and January 2021.

The real story, though, is how the pandemic has dramatically shaped what consumers are buying. Purchasing of essential products or goods consumed at home, such as food and other grocery items, has been strong throughout the crisis. Canadians eager to improve their health have driven increased sales of more nutritious foods and of athletic gear, while those who don't necessarily share those concerns have become more sedentary, consuming more food, liquor, and cannabis.

As the national vaccination effort is completed, the COVID-19 health crisis will abate and government restrictions will be lifted. This will lead to a renewed acceleration of economic growth, as projected for the second half of this year. There's every reason to believe this fiscal surge will be fuelled by consumer spending. In a nutshell:

- The recession and restrictions have created significant pent-up consumer demand. Canadians will want to reconnect and do the things they haven't been able to do during the pandemic.
- The economic cycle will allow for job creation and unemployment will steadily decline.
- Government stimulus initiatives will still be present and interest rates will remain remarkably low. While some of the emergency programs will be phased out, thus reducing funds transferred to households, governments won't shift to fiscal restraint until 2022 or 2023. At the same time, improving business conditions could support higher wages.
- Possibly most importantly, people have a renewed and increased capacity to spend. In the four years prior to the pandemic, Canadian households saved a total of roughly \$10 billion a year; in 2020, because consumers weren't able to spend on movies, dinners out, vacations, and more, that figure soared to \$214 billion. As retail trends have shown, the country has its wallet open.

Overall, we forecast the Canadian economy will grow by 6.2% in 2021 and 4.0% in 2022. Consumer spending, in nominal terms (i.e., factoring in rising prices), is expected to grow by close to 8% in 2021 and 7.5% in 2022, whereas retail spending will likely outperform regular trends slightly, increasing by more than 10% this year and roughly 7% the year after. Retail categories most depressed by the recession are projected to experience the strongest gains, but spending on food, other grocery items, and further essentials is predicted to remain robust. A healthy economy is expected to be the dominant trend, driving strong sales and good revenue growth over the next couple of years. Consumers may also become less price-sensitive as employment conditions improve and income rises.

The return of the homemade meal

A generation learns to cook

“It was the intersection of many trends that got consumers to bake their own bread.”

Culinary consultant and producer

It began with bread. As the first wave of the COVID-19 pandemic swept the country, consumers found themselves homebound, anxious, and bored. Many turned to baking as a way to fill time and ward off worry, connecting with their fellow locked-down bakers through social media. Soon Canadians everywhere were discovering—or rediscovering—the joys of preparing home-cooked meals from scratch.

Of Canadian consumers surveyed, 66%—and 72% of those aged 35 to 54—say they're cooking more meals at home than in the previous year, and 36% are baking more, too. In fact, 63% overall prepare dinner from scratch four to six times per week, with consumers aged 55 and older, those in Atlantic Canada, and people in Quebec even more likely to do so (70%, 68%, and 67%, respectively). This trend is bringing households together to share mealtimes and even to find new menu ideas: 48% of consumers say they get food suggestions from family, while 47% search online and 38% prod friends for ideas.

The resurgence of home cooking is also changing what Canadians buy at the grocery store. For example, approximately 80% say they're spending more on fresh produce and non-dairy substitutes, while roughly 40% say they're spending less on baked desserts, prepared ingredients, and hot ready-to-eat meals.

Cooks still love to order in

While Canadians may be preparing meals at home more often, time scarcity often drives them in the other direction: ordering in. In fact, 35% of survey respondents say they've ordered takeout more often as a direct result of the pandemic. More than one in three (37%) say they've bought restaurant takeout or fast food in the past month, while 12% say they've ordered through a food-delivery app and 5% made purchases from a meal-kit company over the same period. Use of food-delivery apps is greatest among consumers aged 18 to 34, at 24%, a rate that's more than double that of people aged 35–54 (11%). More than 71% of Canadians expect to continue to order takeout from restaurants at a higher rate than they did before the pandemic.

Snack time!

Juggling working from home, back-to-back video calls, and keeping kids engaged with their online classes has also driven a shift from set mealtimes to daylong grazing. Consumers are taking comfort in their fridges and pantries, and grabbing a quick snack when time allows. Overall, 44% of survey respondents say they've been consuming more snacks since the start of the pandemic, with those in the west and Ontario snacking slightly more than the national average (46% and 48%, respectively). Broken down by age, more than half (51%) of 18-to-34-year-olds report increased snacking, as do 47% of those aged 35 to 54.

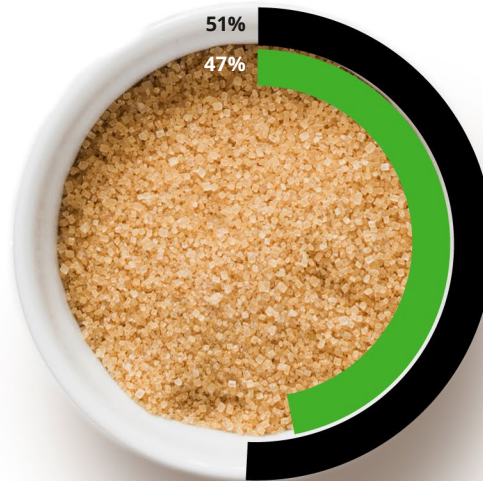
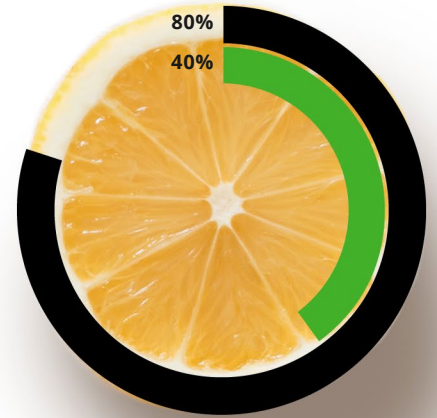
More snacking means, of course, more spending on snacks: overall, 67% of consumers say their snack expenses have increased or increased significantly over the past year, with this figure reaching 68% in Ontario and 73% in Quebec. Meanwhile, 69% of people aged 18–34 and 72% of those aged 35–54 report increased snack spending. Expanded offerings in healthy snacks is likely to attract customers looking to indulge their grazing habits. Modern convenience stores, with their small footprints and close proximities to suburban neighbourhoods, may be uniquely positioned to capitalize on the snacking trend.

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Food as religion

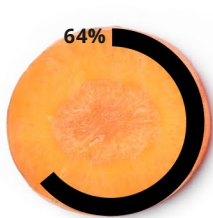
The gateway to health and wellness

Canadians want to eat more healthily, but that's not as easy as it seems—even without a pandemic. Consumers are overwhelmed by a dizzying array of food, nutrition, and sustainability narratives that push them in one direction before pulling them in another.

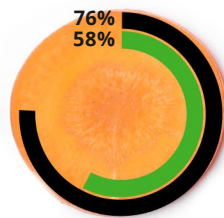
And at a time when what we choose to eat can be seen as an expression of our identities and values, many find their preferred foods are out of reach financially. Moreover, adopting a particular diet can be, for some, almost like embracing a set of religious beliefs: you don't *eat* vegan, you *are* vegan. Diet becomes intertwined with identity, with any menu deviations eliciting shame or guilt.

Nearly two-thirds (64%) of consumers surveyed say that in the past year, they've grown more interested in how their diets affect their overall health and immunity. While this interest is driving Canadians to examine their food choices more carefully, it isn't pushing them to adopt the latest diet fads: 76% say they didn't try a diet trend in the past year and 58% say they're unlikely to do so in the next year. Instead, consumers are making informed food choices in an effort to eat a more balanced, healthy diet overall. Almost half (44%) say they tried to consume less meat over the past year.

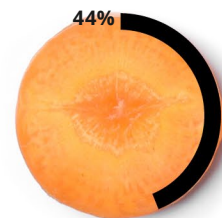
Products that topped the list of household food purchases included those that were locally sourced (43%), had recognizable ingredients (33%), were natural or organic (31%), and offered sugar-reduced versions (35%)—the latter particularly among men, as well as consumers in general aged 55 and older. Overall, women and younger consumers (aged 18–34) are most likely to seek out healthier foods, including natural, organic, vegetarian, and vegan products; plant-based proteins and meat alternatives; and dairy-, lactose-, and gluten-free products. Canadians have been spending more on



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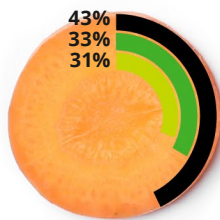
food in all categories over the past year, yet it's easy to discern consumers' push for healthier, more sustainable choices: 85% say they spent more on fresh produce; 79% say their spending on plant-based milks and other non-dairy products rose; and 72% report an increase in purchases of alternative meat products.

Nimble emerging food retailers are responding to consumers' demands for healthier, more sustainable food options in a number of ways, such as by offering minimal or no packaging and by stocking fresh, local, organic, and/or in-season products. But these services and products come at a cost that not all consumers can afford, and not just in terms of money: not everyone has the time or resources to shop at local

farmers' markets, speciality stores, or specialized grocery stores. Some consumers, then, face barriers to their choices of healthy, sustainable foods.

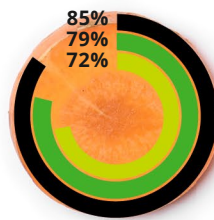
“We’re not out to preach to people or to guilt them. We’re here to inform them that following a plant-based diet is one of the biggest things they can do to contribute to the environment; hopefully we’ll inspire them, too.”

Executive at a plant-based dairy-substitute producer

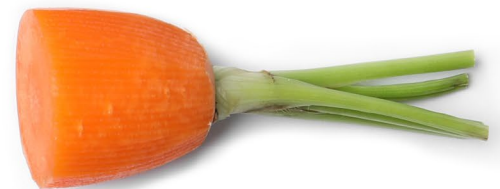


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Consumers strive to make better choices... ...and they expect brands to do the same

Growing consideration of sustainability and social inequities is strengthening consumers' resolve to make better choices on health, environmental, and ethical grounds, and they're looking for brands and companies that share their concerns and values.

Almost three-quarters (71%) of Canadians who responded to our survey say it's important for them to understand where their food comes from, which speaks to both health and ethical concerns. This preference is even more marked in women (75%) and in consumers aged 55 and older (76%). And it's not just food that's of interest: 61% of Canadians are concerned about the amount of packaging used for food ordered online. Packaging excesses are even more on the minds of those aged 18 to 34 (66%) and of Ontario shoppers (64%).

These and other concerns are influencing consumers' purchasing decisions. Overall, 72% of respondents say they prefer to shop at food retailers that have strong sustainability or ethical practices. Atlantic Canada and Ontario consumers have even firmer preferences on this topic (80% and 76%, respectively), as do

women (76%). Additionally, 42% of socially conscious shoppers say they'd buy more locally sourced items going forward, even if these cost a little more—and 33% say they'd purchase more from brands that responded to the pandemic crisis with ethical actions and behaviours.¹

Brands and companies that live up to consumers' rising expectations can anticipate being rewarded with loyalty. Eighty-three percent of Canadians say they're brand-loyal when they shop for food; Quebec consumers, notably, are less inclined to stick consistently with a particular brand (75%). Consumers see name brands as superior to store brands, believing them to be trustworthy and of higher quality (30% each).²

Yet at the same time, Canadians worry whether their trust in brands might be misplaced. The growing availability of

information about the food industry, including its environmental sustainability, is giving consumers the chance to peer behind the curtain of the food value chain. Coupled with an increasing expectation for brands and food retailers to be candid about where their food comes from and how it's made, a lack of transparency can send consumers into the arms of other brands and/or to local farms and markets, where they can speak face-to-face with the people who produce the food. It can also prompt them to provide real-time feedback and hold brands and companies—including business executives—accountable via social-media platforms.

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"I spoil myself when I buy organics; I don't necessarily consider the virtues of these products, but rather consider this a treat to myself."

Customer

Convenience matters more than ever... ...but one-stop shopping remains elusive

The pandemic era has Canadians seeking convenience. When they can shop online, they do. When they can't, they try to visit as few stores as possible.

The COVID-19 crisis has had an obvious impact on shopping habits across the country, forcing a change in how consumers purchase food and other products. The past year saw Canadians try a variety of food-shopping options for the first time, including curbside pickup (25%), grocery delivery (15%), third-party food-delivery services such as Uber Eats (15%), and meal-kit delivery services (10%). Many plan to continue using delivery services (69%)—meal-kit delivery in particular (65%)—in the next 12 months.

The reasons provided for shopping for food online reflect a world of stay-at-home orders, myriad time pressures, and virus worries. More than two-thirds (68%) of survey respondents say it's because of the availability of home delivery; 59% cite the convenience of shopping from home; 47% say it saves them time; 44% value the free or low-cost shipping offered; and 38% specify pandemic-related store closures as their online-shopping rationale. This trend has been supported by retailers themselves, from large grocery chains to neighbourhood stores and even to local farmers, all of whose expansions of or pivots to e-commerce and delivery have greatly increased online-shopping options.

Unfortunately, Canadians seem less than enthralled with the online experience: only 23% overall say they've been satisfied with their online pickup or delivery services. Consumers in Ontario and those aged 18 to 34 are just slightly more satisfied than the national average (28% and 35%, respectively). This may explain why consumers overall buy 89% of their monthly groceries in bricks-and-mortar stores rather than online, though this figure drops to 84% for those aged 18–34, who appear somewhat more amenable to the online experience. Canadians seem to have a slight preference for picking up groceries ordered online (6%) over having them delivered (5%).

The majority of respondents (59%) prefer to complete all their in-person food shopping at one location rather than to visit multiple stores. This increases to 68% for Ontario consumers, 71% for Atlantic Canada shoppers, 74% for women, and 75% for people aged 18 to 34. But one-stop shopping isn't always possible, unfortunately. In such cases, 36% of Canadians say they prefer to get the things they need at multiple stores in the same general vicinity—although 53% prefer to limit their browsing and get in and out as quickly as they can. Only 13% express a preference to visit multiple stores over the course of several trips. Price, assortment, and quality are the three key factors that persuade customers to shop at multiple locations. People may visit a particular chain store to capitalize on weekly specials, for example, but find that a preferred brand or the desired quality of a given item are not available, thus requiring stopovers at additional stores.

Reasons for in-person shopping at specific food stores vary: 47% of consumers cite a retailer's convenient locations; 38% mention loyalty programs; 37% say they can complete their orders at one place; and 32% choose a given store because of the quality of the produce.

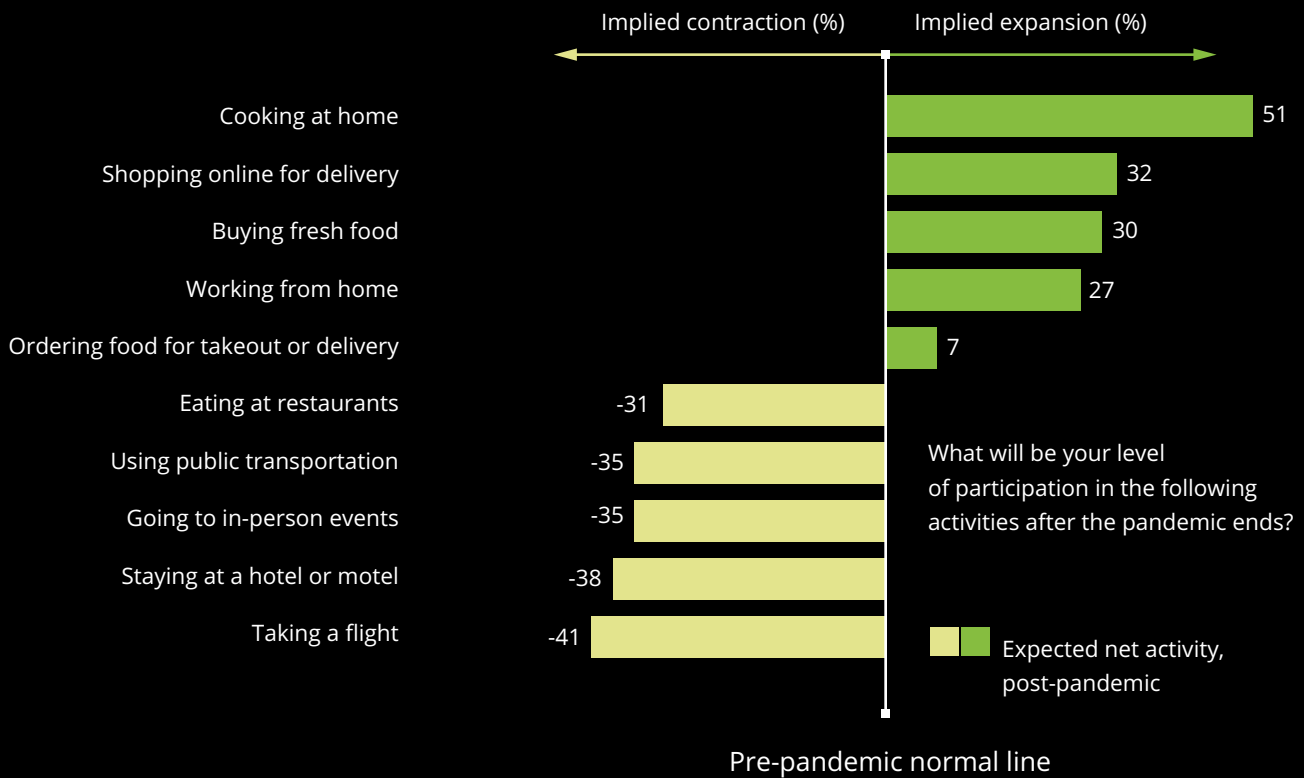
“When COVID-19 cases were surging, I planned weekly online grocery orders because of safety concerns, and as a result became less budget-constrained; food is central to treating myself.”

Customer



Expected net activity change after the health crisis ends in Canada

Percent of respondents indicating more vs. less activity after the pandemic, as compared with pre-pandemic activity



Source: Deloitte Global State of the Consumer Tracker 2020-21

The future of food is more complex than ever

Retailers must adapt to consumers' elevated expectations

Canadians are in a reflective mood as the COVID-19 pandemic stretches into a second year. Enormous social change has also taken place, and Canadians are more aware of the impact of their choices on the world around them. This recognition is increasingly shaping their purchasing decisions and their trust in brands and other institutions.

New channels gain traction

During the pandemic, we've seen food shoppers and brands embrace new ways of doing business, and companies explore new sales models. Social media and their influencers have made it easier for direct-to-consumer farm wholesalers to grow and to expand their reach, evidenced by people being able to stock their freezers and pantries despite grocers' supply-chain challenges in the first months of the crisis. Elsewhere, brands are offering subscriptions, memberships, and so-called super apps to persuade customers to try new products. These sales models also allow consumers to build online communities and become part of brands' ecosystems.

While consumers can't wait for the pandemic to end, they don't want to return to the way things used to be. They crave a different, better future and they want a say in what it looks like. They'll likely continue to pursue short-term gratification over longer-term needs, but they won't want to be told what to like and what to buy.

Companies and brands that understand and respond to this change in expectations and behaviours will be better positioned to thrive in the post-pandemic world. Those that will be successful over the long term will have learned how to relinquish control to the consumer and will have understood that customer-centricity isn't simply about seeing through the clients' eyes, but rather about anticipating, meeting, and even driving their needs. Satisfying those needs that customers aren't yet aware of can be transformative, spurring improvements to and successful deviations from the status quo.



The pandemic has become both a catalyst and a disruptor for retail businesses worldwide, including those in the food and grocery sector. Its impact likely will be lasting and wide-ranging, with several key trends expected to reshape consumer behaviour in the years to come:

- **Rise of the epicurean.** Pent-up demand for the dining-out experience will be a short-term risk to grocery, meal-kit, and delivery chains as restrictions ease and customers initially return to restaurants. However, dining out is unlikely to return to pre-pandemic levels in the long term: consumers will continue to add new recipes to their rotations, looking to grocery stores for meal inspirations and expecting more from in-store associates than speedy checkouts.
- **Shopping basket bifurcation.** Consumers will respond to rising grocery spending by saving in some areas and splurging in others: they'll rely on value-based chains for essentials and turn to premium suppliers for indulgences. Retailers could potentially use loyalty programs to keep consumers within their ecosystems, or strategically plan product assortments that provide higher- and lower-priced options to offer consumers a choice.
- **Grocers go green and double down on diversity, equity, and inclusion.** Safety was prioritized over sustainability at the beginning of the pandemic as single-use plastics were used to ensure hygiene, but it has since returned to its rightful place at the forefront of people's minds. Canadians will increasingly be looking for brands and companies

that demonstrate strong, authentic commitments to sustainability, and environmental, social, and corporate governance overall. Food and grocery brands will need to limit single-use plastics, shift from recyclables to reusables, allow patrons to reuse their own containers, and minimize food waste and spoilage through flexible portioning. Meanwhile, as consumers have developed a renewed sense of social purpose, they'll expect the brands and companies they support to reflect their personal communities and values, with a strong focus on diversity, equity, and inclusion.

- **Healthy diet, healthy mind.** The wellness trend has gone mainstream as consumers capitalize on the wealth of available health information and embrace technologies that help them track their progress in real time. This has given rise to new customer priorities, including safe and transparent formulations of product ingredients, tailored health monitoring, and the recognition of targeted, functional health benefits of specific foods. Companies will shift from data collection to predictive analytics and invest further in digital apps that provide nutritional guidance, ingredient lists, and curated recipe suggestions.
- **Virtually identical experiences.** The practical need for pandemic-era food shopping is expected to give way to the customer experience as a whole. While consumers will still limit trips to the physical store, they'll look to be romanced by retailers' offerings and the overall shopping adventure.

Online customers, too, will demand more, and businesses will strive to deliver. Companies that move beyond two-dimensional scrolling to a three-dimensional virtual experience will elicit in shoppers that familiar feeling of being inside a bricks-and-mortar location, all from the comfort of their homes. Patrons will continue to embrace contactless payment options and other emerging technologies. And retailers, too, can continue to benefit from the latest technological advances, providing clients with a curated assortment of items so they can quickly find what they want, thus facilitating one-stop shopping. Combining purchases from multiple stores within the same enclosed mall or power centre into a single curbside pickup or home delivery can also enhance the consumer experience.

Post-pandemic, vaccinated Canadians may flock to public events, restaurants, and social gatherings, ushering in a new Roaring '20s-like era. It's likely that some will continue to work from home, but many will work from both home and the office, in a new hybrid model that delivers the best of both worlds and allows people to decide what makes sense for them on any given day. We expect that Canadian consumers will retain their renewed, intensified focus on human connection and community at both the local and global level. Canadians will continue to care about their families, friends, neighbours, and communities—as well as people around the world, the environment, and global health.

Conclusion

Long after the fear of COVID-19 subsides, food retailers will need to continue demonstrating authenticity, empathy, transparency, and genuine commitment—to their communities, the wider world, and especially their employees. Store associates are no longer invisible to the public’s consciousness: they’re essential workers, with vital roles in supporting society during this incredibly trying time. Companies have an opportunity to capitalize on this enhanced status and transform these employees into trusted food-and-wellness advisors, providing them with the learning and development needed to offer the product insights that consumers increasingly crave. These and other steps are expected to improve brand perception, generate significant goodwill, and confer enormous competitive advantage. We’ll explore these ideas further in a future report on the role of the store in a post-pandemic environment.



Endnotes

1. Deloitte, "Deloitte state of the consumer tracker," March 31, 2021, <https://www2.deloitte.com/us/en/insights/industry/retail-distribution/consumer-behavior-trends-state-of-the-consumer-tracker.html>.
2. Ibid.



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