CITY OF TORONTO RESTAURANT PROGRAM CONSULTATION - FINAL REPORT

November 2022

TORONTO

Ipsos

Contents

OBJECTIVES & METHODOLOGY

Objectives

The City of Toronto's restaurant programs aim to promote Toronto's restaurants, showcasing the City's diverse cuisine, driving patrons to participate in fine dining establishments, and generating revenue for the local restaurant industry during slow times of the year. The Winterlicious (WL) and Summerlicious (SL) culinary programs were initiated in 2003 and are the two most prominent restaurant programs that are administered by the City of Toronto. Over time, however, questions have arisen regarding the reach of the City's restaurant support programs and participation barriers for restaurants outside the city core.

Therefore, Ipsos undertook research aimed at gauging awareness and opinion of restaurant support programs produced by the City of Toronto (CoT) among various stakeholders, including operators and the general public, to assist in the evaluation of existing support programs and the potential development of new ones.

Specifically, research was conducted with four aims:

1. To shed light on public and industry sector perceptions and sentiment of the CoT restaurant support programs (WL/SL);
2. To offer insights on whether it is still a worthwhile effort for the CoT to continue to produce restaurant support programs (WL/SL); and
3. To gather opinions regarding potential modifications to existing restaurant support programs or possible alternate programs that could be developed in the future.
4. Investigate opinions and preferences for workforce development initiatives, including support programs to address recruitment and training challenges.

Quantitative Methodology

Ipsos conducted three (3) online surveys among the general public and restaurant owners and operators. The following surveys were conducted:

Quantitative Surveys	Total Sample	City of Toronto	Other GTA	Prefer not to answer
Representative Public Online Survey	N=1,500	N=1,200	N=300	NA
Open-Link Online Restaurant Owners and Operator Survey*	N=129	N=110	N=3	N=15
Open-Link Online Public Survey	N=1,493	N=1,222	N=112	N=159
Total	**N=3,122**	**N=2,532**	**N=415**	**N=174**

Online Representative Survey:

Ipsos conducted a representative survey of adult City of Toronto and other GTA residents utilizing the Ipsos iSay Panel. The online representative survey was conducted between July 1st and 21st, 2022. The survey data has been weighted by age, gender, education and region to ensure the sample composition reflects the Canadian population. Quota sampling was also implemented according to age, gender, region, and education level.

Open-Link Operator and Public Surveys:

Ipsos hosted open-link surveys among the general public and operators. The survey was offered in multiple languages, including English, Mandarin (n=19), Cantonese (n=13), Spanish (n=1), and Tamil. A link to each survey was hosted on the City of Toronto's website. Survey promotion was conducted by the City. Fieldwork was conducted between June 22 and August 2, 2022.

INTERPRETATION OF FINDINGS

Note that the sample size for the Open-Link Restaurant Owner and Operator Survey is small at n=129 responses, therefore the results from this survey should be treated with caution.

Qualitative Methodology

Ipsos conducted three (3) online focus groups, six (6) in-depth interviews, and one (1) dyad with various personnel in the restaurant industry sector. Each session was 1.5 hours long and occurred between March 2022 and August 2022. Participants for the groups, interviews, and dyad were categorized according to the following group profiles:

- Group 1: Full-service restaurants (FSRs) that *had* previously participated in City of Toronto restaurant support programs;
- Group 2: Full-service restaurants (FSRs) that *had not* previously participated in City of Toronto restaurant support programs;
- Group 3: Executives/Head Chefs (non-owners);
- Group 4: Quick-service restaurants (QSRs); and
- Group 5: Industry organization representatives.

The below table provides a synopsis of the participants according to each group profile.

Group Profiles		**Focus Group**	**Interview**	**Dyad**	**Total**
Group 1	FSRs that participated in past programs	1	2	1	**4**
Group 2	FSR that did not participate in past programs	1	2		**3**
Group 3	Executives/Head Chefs		1		**1**
Group 4	QSRs		1		**1**
Group 5	Industry organization representatives	1			**1**
	Session Totals	**3**	**6**	**1**	**10**

INTERPRETATION OF FINDINGS

The following findings are qualitative in nature. The work is exploratory and intended to gather participants' perspectives and opinions. As a result of the number of participants and the method by which the sample was drawn, the results should be regarded as directional and may not be projected to the larger population without further quantitative research.

EXECUTIVE SUMMARY

Executive Summary | Qualitative Research Among Operators

1 **Restaurants faced multiple challenges during COVID-19 that are still ongoing and affecting the industry.** Several participants shared stories of closures, and issues with retaining staff, hiring staff, attracting new customers, and returning customers. The City of Toronto programs were viewed to help attenuate some of these issues.

2 **Perceptions of the future outlook for the industry were mixed.** Feelings ranged from optimistic, hopeful, and confident to unsure, concerned, and pessimistic. This was due to the various challenges highlighted above.

3 **The CoT restaurant programs were viewed positively overall.** All participants were familiar with these programs and thought of them as worthwhile. Positive features of the programs were advertising, making restaurants money, attracting customers, reaching new customers, and making Toronto a culinary destination.

4 **Barriers to joining the City of Toronto restaurant programs involved issues with restaurants fitting with the WL/SL program's aims, support with the programs (before and during the program months) and feeling like the programs are not tailored towards their restaurant.** Participants from QSRs and smaller-sized restaurants generally felt the programs did not fit with their business aims and offerings, and bigger FSRs felt that they needed additional support to participate such as due to being busy and having multiple locations to join the programs (e.g., with establishing menu pricing).

5 **Suggestions for enhancing the programs surrounded the key themes of digitizing, diversifying, collaborating, advertising, and adapting.** Such recommendations involved, for example, digitizing program information, expanding program menu options so more restaurants can participate and thus diversify the program options, and working with tourism businesses and services across the City of Toronto.

6 **Workforce development needs encompassed assisting workers with transportation support, marketing and advertising restaurants, and looking at ways to enhance affordability in the City of Toronto.** Participants' sensitivity to the challenges and needs workers and businesses face following the pandemic are some reasons for these recommendations.

Executive Summary | Representative Public Survey

1 **Familiarity of Summerlicious and Winterlicious programs are high among residents.** A majority of those who are familiar with the City's restaurant programs are participating in them. Familiarity for both Summerlicious (68%) or Winterlicious (67%) is equally high. Residents are most likely to be aware of these programs from word of mouth (38%), social media (36%), or the City of Toronto's website (30%).

2 **Among those who attended a participating restaurant, an overwhelming majority are satisfied with their experience.** About six in ten of those residents who are aware of Summerlicious (59%) or Winterlicious (55%) visited a participating restaurant. Nine in ten (91%) of those who participated were satisfied with their experience, **a very high level of satisfaction** with their experience.

3 **Appeal of prix fixe menu on the program website, perceptions of having fun with family/friends, and good value for money are top motivators for visiting a participating restaurant.** Not having an interest in the program, being expensive, or too crowded are cited as reasons for not participating or visiting a participating restaurant during either event.

4 **Participating in the Summerlicious and Winterlicious programs exposes customers to new restaurants and results in return visits throughout the year.** More than eight in ten (86%) participants visited a restaurant for the first time during the promotional event and half (50%) of these participants returned to the restaurant again after the event closed.

5 **Three quarters of Toronto residents believe that Summerlicious and Winterlicious is a worthwhile effort on the part of the City**. Only 16% of residents say that these programs are not worthwhile.

6 **About half of those who previously participated in Summerlicious or Winterlicious believe that the programs are in need of a revitalization, including 16% who *strongly agree* and 38% who *somewhat agree* with this.** When asked to offer their own suggestions for improvements, about one in five past participants mention better pricing (20%), including a greater variety of restaurants (20%), and increased menu options (or not limiting to a prix fix menu) as aspects of the program that could be changed.

7 **Other potential program changes including extending program period to 4 weeks and including takeout and/or delivery options.** Previous program participants are the most likely to agree with extending the program period to 4 weeks and to not change anything about the events.

Executive Summary | Restaurant Owner Survey

1 **Restaurants are most likely to participate in Summerlicious or Winterlicious because the programs can increase sales during slower months and because they see increasing traffic and new customers.** Being more involved in the local community or benefiting from marketing or advertising are less motivating factors for participating.

2 **The primary barrier for not participating in these program is not offering three-course meals as required by the program.** Among non-participating restaurants, a plurality (31%) indicate they do not participate because their restaurant does not offer three-course meals. Around one in four mentioned they are not willing to offer discounted prices for menus (23%) or the price point category is not right for their restaurant (23%).

3 **Seven in ten (69%) participating restaurants indicate that the Summerlicious and Winterlicious programs have been effective at increasing business for their restaurant.** A minority (25%) of previous participants say that these programs have not helped their business.

4 **Only about half of all restaurants that participated in the survey feel that the program format is relevant for their business.** Those who previously participated in both programs are significantly more likely to indicate that the format is relevant (79%), compared to those restaurants that did not participate (23%). Even half of previous participants agree that the current format of the program is not compatible with their menu offerings, this increases to 74% of restaurants who have not participated in the past.

5 **The overwhelming majority (89%) of restaurants feel that participating in restaurant support programs should be free of charge.** Further, eight in ten (82%) of restaurants agree that participation fees should be waved or eliminated completely.

6 **There is strong interest in a restaurant support program that highlights restaurants in a particular neighbourhood.** Nine in ten (88%) restaurants agree with this type of a program. Furthermore, seven in ten restaurants agree that program celebrating different types of cuisine from different countries or a program that would run concurrently with other events in the city (such as the CNE or Pride) would be of interest to their establishment.

Executive Summary | Restaurant Owner Survey

7 **Providing grants to improve business operations, assisting the hiring of workers, and driving foot traffic to restaurants through programs like Summerlicious and Winterlicious ranked as the best ways the City can help restaurants.** Ranking a close third overall is having the City support the hiring of workers for the food service industry.

8 **The Small Business Tax Incentive Program, CafeTO, and the Property Tax Deferral Program seen as the most valuable support programs offered by the City.** At least six in ten restaurants say that the Small Business Tax Incentive Program (66%) and Café TO (59%) are very valuable programs.

9 **Staffing challenges are very significant for restaurant business today.** Eight in ten indicate that they are currently short staffed, while three quarters (75%) say that they are unable to operate at full capacity because of staffing issues.

10 **Cooks and Chefs seen has the hardest positions to hire**. Seven in ten (71%) restaurants say that they have the most difficulty hiring cooks and chiefs, followed by servers (49%) and dishwashers (40%).

QUALITATIVE FINDINGS

- Focus Groups and In-Depth Interviews

LIFE IN THE RESTAURANT BUSINESS – EMERGING FROM THE PANDEMIC

CHALLENGES DURING COVID

Restaurants faced many challenges during the COVID-19 pandemic, especially during the first year. Although, most felt more prepared for the second year of COVID-19 as they developed and adjusted their business models (e.g., moving business offerings online in some capacity) and adapted their servicing.

The overall challenges restaurants faced during COVID-19 were:

- Shortage of staff and hiring challenges; Health and safety concerns; Forced closures; Increasing service costs; Feelings of the unknown; Adopting and adapting to new business models; Attracting and retaining new customers; and Negative public perceptions of restaurants stemming from the pandemic fears around health and safety.

Participants indicated that these challenges seem to be improving more recently, as they are seeing a rise in customers returning, especially over this past year. This is primarily because restaurants are open again, and there has been an ease in COVID-19 restrictions/mandates. Participants feel the community and their loyal customers want to continue supporting their businesses and have been returning. Restaurants are happy to have made it through the COVID-19 pandemic and are glad to continue in this industry now that it faces fewer challenges. However, restaurants whose customer base involves more higher-end, affluent people stress that this group of customers are not returning to restaurants like they were before the pandemic. Participants note that this is believed to result from these customers expressing more caution due to COVID-19.

> *I'd say the biggest challenges were kind of* ***the unknown****. It seemed like every week things were changing. It seemed like the more we would find out, the less we would actually know. And so, there was this bit of uncertainty of what we were doing; we had to change our business model completely, we had to go to a delivery-based platform for our restaurants, no indoor dining, we had to do a lot of takeaway, a lot of cook-at-home stuff for our restaurants.*

> *People want to support us, you know, I mean I hear it every day how customers are so happy that we're still there. They want to support us.* ***The problem is the fear****, right, of coming into that environment now that there's no masks and no checking of vaccines.*

> ***The top end of the market hasn't returned****. The folks that can hide in Forest Hill, or Rosedale, or any of these top-end neighbourhoods, the richer Torontonians, have chosen to get curated meals delivered to their homes, and aren't dining out in the numbers that they used to, or that the younger crowd does. And so, I'm not sure if that's ever going to return again, I have to be honest with you.*

CHALLENGES DURING COVID

Staffing challenges during COVID-19 was identified as restaurants' primary source of strain. Participants reported that not all restaurants had enough staff to operate their business, so some had to cut down on operating days or bring in family members to help. Specific staff roles that were the most difficult to fulfill were:

- Kitchen staff
- Frontline workers
- Butchers
- Mongers and cheese mongers
- Dishwashers
- Cleaners

These roles were explained as the most challenging to fill because they primarily work behind closed doors and do not typically receive gratuity and tips from customers.

> *I mean it's the most challenging because of the way gratuities work, you know, so a back-of-house person has to work like a dog and may make very similar money regardless of whether two guests come in or 200 guests come in. But that's a sliding scale for the front-of-house people because they're getting gratuities. So, that's always been a challenging part of it. There's ways to get creative around that, but I still think* ***the back-of-house gets the short end of the stick****.*

> *Well, in our case,* ***we bring in family members****. So, you know, we're all pitching in, I'm washing dishes often at night, just because those are the positions that we just can't find*

Participants noted that they were trying to fill the staff vacancies through multiple approaches, oftentimes to no avail, including:

1. Increasing health and safety standards, such as supplying hand sanitizers around the restaurant, continuing and enforcing mask mandates, and generally creating a safe environment for workers.
2. Staff offerings like free food from the restaurant, referral bonuses for bringing in new hires, and offering more break time.
3. Advertising their job postings through various online mediums, including Indeed, Monster, Facebook, college websites, SwiftHires, and others.

*"**We have tried everything**. I have tried Indeed, paying for posts, you know, Facebook, the colleges. I think I've exhausted every possible channel that we can think of."*

EMERGING FROM THE PANDEMIC & FUTURE OUTLOOK FOR THE INDUSTRY

Participants' views on emerging from the pandemic and the future outlook for the industry are mixed.

Some expressed a lack of confidence about the outlook for the restaurant industry:

- These participants believed there would be a recession because of the high inflation rates, which was stressed to be a significant concern for restaurants.
- Others relayed that as most people continue to work from home, restaurants around specific workplace locations that remain remote (like universities and office buildings) have not recovered and will take longer to recover than restaurants in other areas.
- Emerging from the pandemic, it was explained that some of the ripple effects of the COVID-19 pandemic are adjusting to technological demands and developments during the pandemic, adjustments in consumer behaviour, and even ongoing confusion surrounding public health measures like masks and vaccines.

> *You have 77% vacancy in the office buildings, which means there's less people, way less, to go out for a drink, to go out for a coffee, to go out for a lunch. Those food court restaurants have been closed for two years, period.*

> *In the restaurants where we're still waiting for kind of those weekday diners, the people who lunch, you know, business lunch type people, still waiting to see students. Being here in Yorkville, we've got the University of Toronto very close to us, that we haven't really been able to see.*

> *I think people's behaviours have changed. I mean people that would never have cooked before, now everybody's a home chef, right. And we've got so much competition now, right, you've got all these chef boxes that arrive at your house. You know, people have kind of, for two years, they've basically entertained at home.*

EMERGING FROM THE PANDEMIC & FUTURE OUTLOOK FOR THE INDUSTRY
(cont.)

Others expressed hope and sureness for the future of the industry:

- Participants emphasized that the warmer weather has encouraged people to go out, and, in turn, visit more restaurants and drive-up business and sales.
- Restaurants with multiple locations discussed plans to attract more customers, such as hosting summer ticket events, which they hope will help them generate money. This is an approach multiple restaurants in the industry are using to try to bounce back from some of the challenges faced during COVID-19 and that are ongoing.
- Those who were confident about the future for the industry also believed that customers are tired of the COVID-19 restrictions and are ready to move past them.

I think I mean there is something about that, that when summer is kind of on the horizon that just like, you know, things seem easier and brighter, and whatnot.

I'm hoping, because for all the person who is staying at home, they are bored with their home food too, they love to try the food in the restaurant, they're missing to dine in, they're missing their loved ones to sit and chit chat, and enjoy the food.

I would say I am optimistic. There are some things that we're like testing the waters with these days. For example, we host our own events in the restaurants in the marketplace itself, so like a ticketed event. And one of the indicators for us that has been really positive is we did one that was small, 60 people, and it was like a dine around at all the restaurants. Then we did another last Friday, it was 300 people. And then we're doing another one on May 13th, 900 people, which were all things that were just impossible until now. But the uptake on each of those has been really, really great.

PERCEPTIONS OF CoT RESTAURANT PROGRAMS

THE CoT RESTAURANT PROGRAMS

- All participants mentioned that they are familiar with the CoT Winterlicious/Summerlicious (WL/SL) and DineTOgether restaurant programs.
- Restaurants felt that the WL/SL programs are more organized than DineTOgether, and the CoT has put more effort into marketing and advertising for WL/SL than DineTOgether.
- Feelings of the WL/SL programs were **overall positive**, and all **saw value in these programs**. Participants view it **worthwhile** to continue them. Sometimes participants saw the value only for other restaurants and not for their own. This was primarily due to perceptions that their restaurant was not a good fit for the program because of the participation criteria. For example, some discussed that the WL/SL menu options require three-course meals, which is **perceived to not work with their restaurant's existing menu**. Others saw the value for both their restaurants and others.

I think those are great initiatives. I think they're totally on track … No criticism whatsoever in terms of these programs.

These are all amazing initiatives. You can see they've really got their eye on supporting the industry, and there's absolutely no criticism there whatsoever. I can only commend them, in terms of all the initiatives and everything they're doing to support the industry.

THE PERCEIVED VALUE OF THE CoT OFFERING RESTAURANT PROGRAMS

The WL/SL programs are viewed positively by restauranteurs as it benefits both the industry and the customers. The perceived value of the CoT offering these restaurant programs is for the following reasons:

Puts Toronto on the map as a foodie destination and showcase the diverse cuisines available around the City	*"It just enables them to have that access and feel more comfortable, which I think is kind of cool because then people get to really see what this city is all about. And increasingly, like I hear from people who travel and go to restaurants and things, and they're always saying, 'The Toronto dining scene is like the most outstanding scene in North America'.'"*
Exposes customers to new restaurants they have not tried before	*"They're periods to go out and dine, and try new restaurants, and try restaurants at a decreased price point, a more accessible price point."*
Expands restaurants customer base by encouraging new customers to go into and try these restaurants	*"Encouraged folks to come out, to keep the food in the fridge fresh by turning it over, keeping employees employed, teaching them new skills, whatever that is. Keeping the machine moving."*
Acts as an advertising method for restaurants and Chefs	*"When people search for the restaurant, they can see it in the City of Toronto [program], and the people will have more confidence, 'Oh, this restaurant is listed by the City of Toronto', and they'll see then how this works, and this is always good. Like getting a review in the newspaper… Good advertisement."*
Provides an option for restaurants to make money during weaker or slower months	*"Summerlicious has always been timed quite well to reflect when the city quiets down."* *"It's driving business during these slower business times."*
Allows customers to try higher-end restaurants	*"When, you know, the higher-priced restaurants, when they participate, I think it opens themselves up to a new clientele. And I think that is important. I think it's important for the restaurant, but also for the consumers, because these are really great places."*

EXPERIENCES OF USING THE CoT PROGRAMS

Reasons for restaurants participating in the CoT programs:

1: Attract foot traffic into the restaurant

- Restaurants join primarily as they are eager to attract more customers and expand their returning customer base. Some even mention they have a stronger desire to join now as a means to recover from the COVID-19 pandemic.

"I think the primary, well… really, we do hope that it brings traffic, and that's like the business side of things."

2: Partake in community events

- Some restaurants joined as they feel it is important to be a team player and a part of the community events, like the programs hosted by the CoT.

"Because I think it's really important for our company to partake in citywide programs… being open to them and trying them, and at least being a team player, especially after the last two years, I'd rather us do more and figure out what works and doesn't work, and then pull back, than sort of not participate, like I'm very much a joiner by nature."

3: The opportunity to showcase

- Some participants opted to get involved in the CoT programs to feature their restaurants, restaurant experience, Chef's capabilities, and new menu items. The CoT programs thus offered restaurants a way to highlight their features.

"There's a lot of really talented chefs in the city. And sometimes, spending 100-dollars for two on dinner isn't realistic, but if you can get in and out for 22, 25-dollars a head, that to me makes more sense and can actually drum up business."

4: Marketing/ advertising strategy

- Restaurants used the CoT programs to reach a wider audience and broadcast and promote their restaurant. Using the WL/SL programs as a marketing/advertising strategy was also a part of their efforts to increase their returning customer base.

"We are doing this to promote our business, so that those people that come to experience us during the program will come back and become regular customers, brand ambassadors."

BARRIERS TO USING THE CoT PROGRAMS:
FSRs THAT PREVIOUSLY PARTICIPATED

Some FSRs, especially those that are higher-end, noted that the **price points of the menu options** and **lack of a higher price category** are a barrier to using the CoT programs. Participants discussed that this would be important now while recovering from the COVID-19 pandemic and to offset the high cost of groceries stemming from economic inflation. They emphasize these barriers stop them from offering their popular, higher, costing menu options, which they suggest inhibit drawing people into the restaurant while still making a profit.

Another barrier identified by a few participants relates to the time FSRs spend on menus and pricing, without guidance and support, especially those bigger and with multiple locations. This was compounded as a barrier due to already facing staffing and other challenges and strains related to COVID-19.

"Maybe if you're a really small restaurant, it's not that much time. But if you're a bigger restaurant or you have multiple locations…each participating separately, each potentially with lunch and dinner, completely different menus. It's like a day's work like to kind of go through it and make sure it's right. So, maybe that's something that could be set up, like a hotline or a service where somebody could help, if you submit the menus and somebody can help with that."

BARRIERS TO USING THE CoT PROGRAMS: QSRs

Two primary barriers emerged to participating in the CoT restaurant programs for QSRs:

1. **Lack of menu offerings to fulfil requirements of participation.**

Not all QSRs have the ability to serve a three-course meal because of their existing menu offerings. For example, some are specialized in coffee and small sandwiches only, meaning that they are not able to join in WL/SL. Therefore, the lack of combo meal options was noted as a barrier for QSRs participating in these programs.

"A combo would work. You know, a main, an appetizer and a drink, or a drink and a dish."

2. **Particularly in regard to desert-menu offerings.**

It was stressed that the QSR only specializes in appetizers and main dishes, without offering dessert, which impacted their ability to participate in the CoT restaurant programs. It was suggested that if WL/SL allowed a 2-course prix fixe menu option, it would make more sense to QSRs and improve QSR access to these programs.

"We don't offer dessert at our restaurant so a 3-course meal would not work for us, we could offer a drink instead."

BARRIERS TO USING THE CoT PROGRAMS:
FSRs THAT DID NOT PREVIOUSLY PARTICIPATE

Reasons restaurants did not previously participate in the CoT restaurant programs surrounded a perceived lack of need to join. These restaurants explained that they were doing well financially and felt they were attracting enough customers. Because of these reasons, they did not feel a strong need to join the programs.

However, there were also barriers related to the CoT programs that impacted restaurants' participation. Some note that the programs seem to be geared towards restaurants in certain core areas, like downtown Toronto, and so those in other locations, like North York, felt that the event was not popular enough in their area and they would thus not benefit from it.

BARRIERS TO USING THE CoT PROGRAMS I In Their Own Words…

City of Toronto, as they can go for higher class of restaurant, they can also go for the small size of restaurant, then they can give the reviews. They can also introduce some program that okay…if city does the subsidy, then we can give the customer some percentage break and all those things. But with our own costs, it is difficult. We cannot, because the produce is so expensive. Oil price is very expensive, so that is, ***the small-scale restaurants cannot afford*** *that probably. But if there is a subsidy system… - QSR.*

The restaurants have to be full service*, because it's predicated on a three-course meal. That excludes a lot of people right off the bat. One of the things that I think is never talked about, is the fact that the participating restaurants have to pay a fee to become part of Winterlicious Summerlicious. The fee is $1200 or something like that. But for a lot of people that I know in* ***small business, when somebody says, "This is great, but it's going to cost you $1200," They wave bye-bye****, and that's the end of the discussion - QSR*

Summerlicious though for the area…that I'm currently in, actually if anything is possibly drawing customers away from it. It's not inclusive in the price point. From what I've heard from the restauranteurs, they've looked at it, maybe wanted to participate. Our area still has price points that are not $30, $40, but you can still get an amazing meal closer to the $20 price point range, for example, for a main. ***A lot of them find the price point, they're not able to participate*** *– Industry organization representative.*

Not enough prep time*, especially with staffing challenges as well. We needed a lot longer lead time to communicate that for them to plan a menu, figure out how the heck they would staff it and participate. – FSR that has not previously participated.*

I can see where a higher-end restaurant, they're filling their seats on a slower night on the week, yes, they're discounting their menu, but it's a prix fixe menu. They can adapt…their prep, their purchasing, to accommodate that. It's a ***different value proposition*** *for the restaurant and the consumer at that end of the spectrum. At my end of the spectrum, the numbers don't work the same way. And then of course, even smaller, more casual restaurant that maybe has limited seating, like 30, 40 seats, the math really doesn't work well on that. – FSR that previously participated.*

SUGGESTIONS FOR ENHANCING THE CoT PROGRAMS FROM THE QUALITATIVE FINDINGS

Most restaurants felt that the CoT restaurant programs were beneficial, helpful, and suitable. Still, there were some suggestions offered to enhance these programs:

1	**Increase the promotion of these programs outside of the downtown City core to other areas in Toronto.** This was evident in discussions with the few FSRs that had not previously participated, emphasizing that there appeared to be a particular focus on downtown Toronto restaurants and promotions. Promoting and supporting restaurants outside of core Toronto areas, like North York, was suggested to likely assist in increasing restaurant participation in the programs, expanding the restaurants using the programs, and attracting clients from other regions and backgrounds.
2	**Diversify.** There were several references to a number of potential ways the CoT programs could be improved under the overarching theme of diversifying. Diversification recommendations included expanding menu and combo options, adjusting the participation criteria more generally to account for QSRs and other restaurant types, outreach to other restaurants beyond higher-end businesses, and outreach to restaurants of a range of backgrounds to diversify the restaurants involved in the programs (e.g., ethnic varieties). This suggestion was further emphasized with the explanation that more diversity in the restaurants using the programs likely means more diversity and breadth of customers who will be attracted to the programs, the City of Toronto, and the restaurants.
3	**Increase digital access to participating restaurants.** Many participants saw value in developing the digital options available to customers, offering the creation of a free mobile application for customers like that of Uber Eats that would feature all the participating restaurants with their menus and other relevant details (e.g., location). This was suggested to increase accessibility to the restaurants.
4	**Adjust the closing date of the WL program so that it does not end around Valentine's Day.** With Valentines Day being a significant holiday specifically for the restaurant industry, participants felt that the WL dates could be moved to end earlier than right around February 14. They note that ending a day before, on Valentine's Day, or even a few days close to this day, does not give them enough time to shift gears from the WL program to prepare their restaurant for Valentine's Day customers. As a result, some restaurants extend the duration of their promotions from during the program to past the event dates. Participants emphasize they need more time to transition to break the switch, suggesting that ending a week or more before Valentine's Day would be helpful.

SUGGESTIONS FOR ENHANCING THE CoT PROGRAMS FROM THE QUALITATIVE FINDINGS (cont.)

5 **Create more of a fun and experiential aspect around the event to attract more customers.** Some suggestions to do so included creating more of a local factor about it (e.g., promoting local chefs, local wines, and local dishes), including fun events in the programs to draw more people in, rejuvenate the programs with newer activities, raising the level of excitement towards these events with fun competitions, and a WL/SL passport with stamps for every restaurant customers visit which enters customers into a draw to win a prize.

6 **Collaborate with other tourism aspects in the CoT.** It was suggested that engaging other businesses and services related to tourism would help attract more customers from outside the City. For example, it was mentioned that working in partnership with the hotel industry to offer cheap hotel stays would help bring in more people from out of town.

7 **Digitize posters and booklets.** Participants felt that this could save money that could be better spent elsewhere. It was suggested that this money could go towards the City, creating more awareness around the programs and other general advertising and marketing efforts. Some also said that the City should look for ways to enhance its digital platform as they felt that people would rarely visit the CoT website because they rarely visited it.

8 **Increase social media promotions and target Toronto spokespeople and influencers to get involved in advertising the events.** Some participants felt that Toronto has influencers and other notable persons that could act as spokespeople that would be able to increase the promotion of the programs, such as by attracting the online, younger crowd. One suggestion was to create an ambassador program for these events. Another was digital campaigns, which were also offered as a suggestion to lower advertising and marketing costs and meet contemporary customer behaviours as many customers use digital options for accessing food and other City information.

SUGGESTIONS FOR ENHANCING THE CoT PROGRAMS | In Their Own Words…

Digitize:

*Maybe if the city can **create app** where all the restaurants are listed, and people can order through the app. Like we order McDonalds in a mobile app. We order coffee in a mobile app. So those things can be introduced by the city, so then people will be more, digital thinking would be much better than in-person thinking. We are thinking so many times to make it a ghost kitchen, but not easy. – QSR*

Diversify:

*I've heard complaints in my area, where it really doesn't fit a lot of the ethnic restaurants, and why is that? Well, because they serve by the dish. They don't typically have a three-course meal. You buy this, this, and this, and it's brought to the table. That is one of the issues, is how could it be adjusted to better accommodate different ethnic groups? But not withstanding that, I think there's always going to be different needs, different issues, different perceptions, but I don't think we should be dumping on the Licious Program because it doesn't meet all those different needs and perceptions. I think what we have to do is either **expand that program** somehow to meet more needs, or come up with some other things. – Industry organization representative.*

Adapt:

*Overall, enthusiasm to see the programs, but would like to see some **adaptations**, especially now, given everything going on, to make them a **little smoother**, **easier to participate in**, **more inclusive** in general – FSR that previously participated.*

*Maybe the City could consider even with something like that, like **creating an ambassador program** of some sort, that there are like de facto spokespeople for these programs that help push it.*

WORKFORCE DEVELOPMENT NEEDS

SUPPORTS FROM THE CoT

The CoT could help employers seeking staff by offering transportation support to workers.

- Participants felt that public transportation support, such as an allowance for transportation, would help reduce staffing issues and mitigate ongoing hiring challenges as it would attenuate the concern over commuting for workers.
- It was emphasized that most workers must commute to work, and, with increasing remote work options following the pandemic, this was said to deter them from seeking work in some restaurants.

"Maybe some sort of public transit subsidy, competitively-priced subsidized public transit initiative…For the impacted, for the most impacted kind of service positions, maybe if there was a way to give them a transportation pass that is good during work hours or something."

"Public transportation rebate or something like that. Maybe that would be helpful."

TORONTO Ipsos

SUPPORTS FROM THE CoT (cont.)

Some participants suggested that the CoT could also develop a campaign that would support attracting workers into the restaurant industry.

- Participants connected to other marketing campaigns targeted to specific groups, such as the construction and trades industry, that they had noticed, suggesting that the CoT could support a marketing campaign tailored towards the restaurant industry in Toronto to attract workers and support restaurants facing staffing issues. This was connected to placing Toronto on the map as a "foodie destination," as some participants indicate that doing so will increase the attraction of working in the restaurant industry in the City.

> *I mean it's like they targeted some trades in the past to bring people in to fill jobs, so maybe the City could lobby on our behalf to bring people that have culinary experience.*
>
> *Is there a way for the City to put emphasis and start to build into their brand the culinary side of Toronto, the diversity of what we have on offer here? And what came into my mind is I think about Prince Edward County and when it started out, it was absolutely nothing. And they started with this culinary trail, and they started like going, 'Here's this ice cream shop', and 'Here's this place to buy honey', and 'Here's this place that has wine'. And then this thing has exploded because they came into it from a marketing point of view, saying, 'This is a food-related area', and now it's a hospitality-related area, and it's very expensive and it's just like grown. So, you know, I think of a guy like Suresh Doss, who's on the CBC on Thursday mornings and he talks about all these sort of restaurants in the city, but not the fine dining end of things…He talks about the holes in the walls that are all over the place that, 'You have to go here for these dumplings', and 'You have to go here for this empanada', and 'You have to try this Portuguese chicken'. So, is that something that could be part of the identity of Toronto and carved out* ***because if you start creating excitement about this being a food destination city, the kids are going to want to go back to those culinary schools and those hospitality schools because the excitement of what's on offer*** *is better than, 'I'm going to go in a kitchen and work an 18-hour day and not get paid very well'. Like what's the thing that's going to motivate them, you know? I think saying we have these courses isn't going to do it as much as like here's the vision of what's on offer.*

SUPPORTS FROM THE CoT (cont.)

A handful of participants explained that examining affordability issues impacting the restaurant industry in Toronto would help the City be informed and potentially improve some of the strains restaurants face following the COVID-19 pandemic.

- Some participants connected some of their ongoing challenges in their industry, such as staffing shortages, customers coming into restaurants, and attracting new customers, to affordability issues in the City. They saw it as a more significant issue than a specific problem facing the restaurant industry sector. Participants ultimately remarked that a diverse and thriving workforce could likely occur with adequate support and resources for workers (e.g., transportation support).

What happened during the pandemic, and probably will continue to be a problem, is you have people, if they can't, if things like housing is an issue, you know, like there's all these socioeconomic factors that then feed into companies being able to hire. And so, what you see is a lot of like, the ones that are sitting comfortably are big tech because they can pay a base salary of 100,000 dollars to people, and then it just sort of fuels the system. So, I think probably ***the City could take a look at affordability factors that ensure a diverse workforce can live and work in Toronto before people get priced out****. Because we can only afford to pay so much.*

In general, and everything is related. Everything is related. It will be harder [to fill those vacancies]. Because if we keep people, we won't be able to pay them twenty dollars an hour. But if they don't make the minimum wage, they cannot survive properly.

I believe that employees need to get more payment per hour. Otherwise, they won't be able to, because city also needs to reduce the rent of the, residential rent. One bedroom apartment is $1500, $1600, $1800. Working in a quick restaurant part-time, people are getting hard time to pay their rent. So it is related.

TRAINING NEEDS

Participants of all groups conclude that each training option mentioned is important to their workplace. There was a hierarchy in terms of importance and need, with 'Soft Skills' being at the top, and health and safety training at the bottom:

1

Most participants voted for the 'Soft Skills' training as the most needed, primarily due to the necessity in the restaurant industry to work well with others, communicate, be flexible, engage in teamwork, and have time management.

The whole thing about bringing somebody into our industry, most operators will tell you, this is hire for attitude, train for skill. How do you hire for attitude? What does that mean? What does that look like? …Soft skills training would touch on that

2

Next voted for was the 'Hard Skills' training. It was felt that this training is essential because it is a part of every component of their work, and training on their work roles and responsibilities is vital to ensure the success of their restaurants.

"The hard skills. Yeah….it's directly related to exactly what we need."

3

Digital basics training was viewed as necessary by some participants. It was felt that this training was especially vital following the pandemic moving more work online and the push to advance technology.

"This is a digital world now, we are getting into more, we are coming out of the in-person thing to the virtual thing."

4

Last in terms of essential and helpful training emerged as the health and safety training, such as WHMIS and COVID-19 specific training. Participants often viewed this as "the basic stuff," with hard and soft skills requiring greater training and attention than health and safety. So, health and safety training is regarded as a simple component of the job and less about a training need.

"This training is so important for each and everyone. If we can show our employee trained in this area, we're going to give us more satisfaction, and more peaceful feeling to our customer."

SERVICES/PROGRAMS

In terms of the types of service/program options, the following was discussed:

- There was some preference for service/program options. Those noted below are thus ordered in the most voted for in terms of importance, need, and utility:
    1. Consolidated industry job board is helpful as a one-stop place for listing all industry-specific jobs that would assist with hiring.
    2. Access to free training is vital for ensuring the workers are skilled.
    3. Access to a pool of trained candidates and co-op programs is essential to keep the industry booming.
- Participants felt all the above service/program options were important as they prepare workers for the workforce and help find suitable candidates.
- Some felt that having service/program options specifically for the hospitality industry would help get the right workers in the right roles.

I think all of them are important…I mean they all point to the issue of finding candidates and getting them ready to enter our Canadian workforce or just the workforce in general. So, the free training obviously would be incredible if we could partner with one of the institutions. And everything else would really help get, you know, reach these potential candidates, right. Because right now, basically we're relying on mass market employment sites, like Indeed and Workopolis, et cetera, et cetera. Really, those are so wide that it's hard. It would be great to have something specifically for the hospitality industry that's affordable, that's not going to require us to really invest a lot of funds, and that would get to the right candidates.

REPRESENTATIVE PUBLIC SURVEY FINDINGS

- Representative (Ipsos Online Panel) Survey

TORONTO

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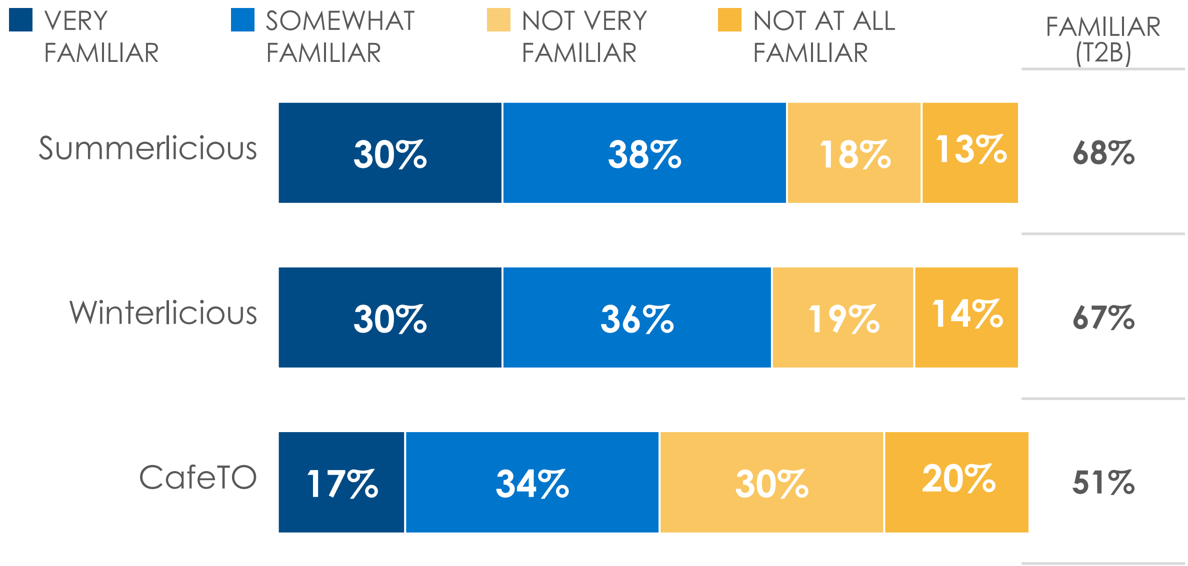
FAMILIARITY WITH & PARTICIPATION IN CoT RESTAURANT SUPPORT PROGRAMS

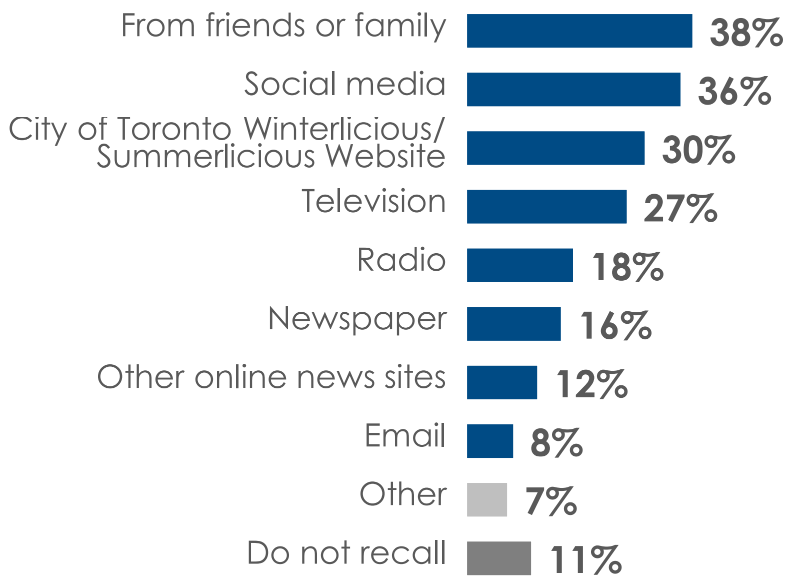
Familiarity with CoT Restaurant Support Programs

- Familiarity with the programs is high as two-thirds of Toronto residents say they are familiar with the Summerlicious (68%) and/or Winterlicious (67%) programs. Those who are familiar with the Summerlicious and Winterlicious programs most commonly cite friends/family (38%) and social media (36%) as the source(s) of their knowledge.
- Scarborough residents are among the least likely to indicate familiarity with Winterlicious (54% vs. 70% of all other Toronto residents). Residents under 55 are among the most likely to claim to have learned about the restaurant programs through social media (41% vs. 27% aged 55+).
- Familiarity outside the City of Toronto is much lower, however still strong, as fewer than half of GTA residents excluding Toronto indicate familiarity with Summerlicious (44%) and Winterlicious (44%).

Familiarity with Restaurant Programs



Source of Knowledge



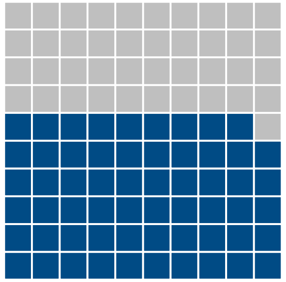
Base: All respondents (n=1200)
Q7. How familiar are you with each of the following restaurant programs or events that are produced and run by the City of Toronto?

Base: Those who is familiar with Summerlicious and/or Winterlicious (n=1060)
Q8. How did you learn about Summerlicious or Winterlicious restaurant promotional programs?

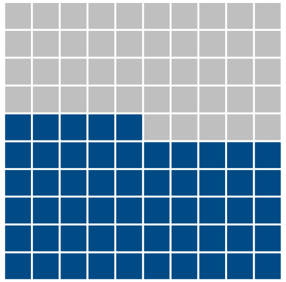
Satisfaction with the Summerlicious & Winterlicious Experience

- Majorities of Toronto residents who are familiar with the Summerlicious (59%) and Winterlicious (55%) programs report having visited a participating restaurant during the promotional period. What's more, the vast majority of those who participated in both Summerlicious (91%) and Winterlicious (91%) indicate satisfaction with their experience.
- Low income households (under $50k) are less likely to participate in the Winterlicious (35% vs. 59% $50k+) and Summerlicious (35% vs. 63%) programs.
- Those living outside of Toronto in the surrounding regions are less likely to have participated in Summerlicious (40% vs. 59% Toronto residents) and Winterlicious (37% vs. 55%). However, GTA residents who have participated in Summerlicious are even more likely (at 97%) than Toronto residents (91%) to indicate satisfaction with the Summerlicious experience.

Participation in Restaurant Programs



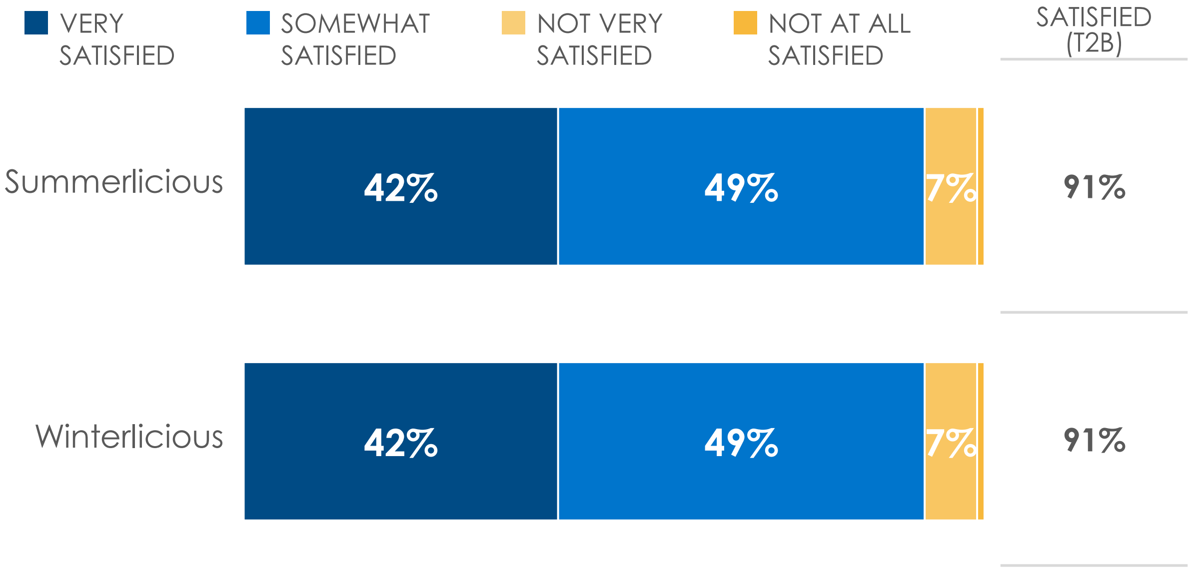
59% visited a restaurant participating in Summerlicious during the promotional period



55% visited a restaurant participating in Winterlicious during the promotional period

Base: Those who is familiar with Summerlicious (n= 1047)and/or Winterlicious (n=1041)
Q9. Have you ever dined at or visited a restaurant participating in any of the following City of Toronto restaurant events during the promotional period?

Satisfaction with Restaurant Programs

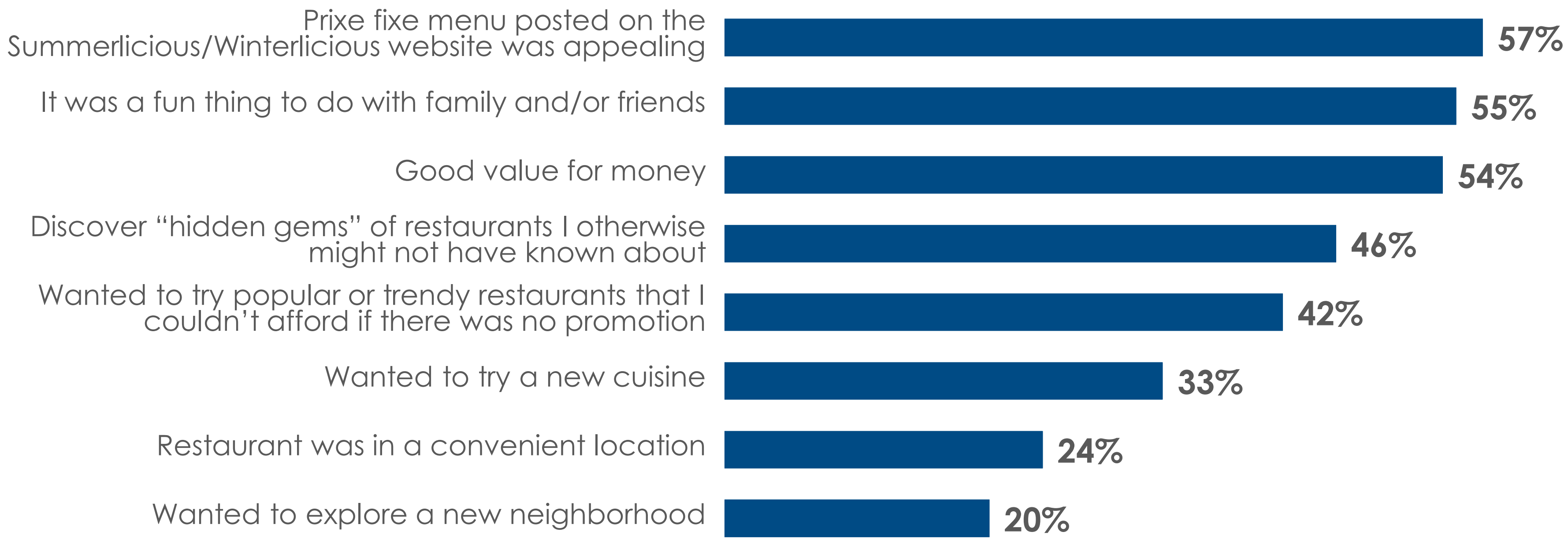


<3% Scores are not labelled

Base: Those who ever dined at or visited a restaurant participating in any of the following City of Toronto restaurant events during the promotional period; Summerlicious (n=623); Winterlicious (n=577)
Q10. Overall, how satisfied are you with your experience participating in each of the following restaurant events?

Reasons for Participation

- Among those who participated in Summerlicious and/or Winterlicious event, majorities cite value for money (54%), the prixe fixe menu (57%), and simply having a fun time with family and/or friends (55%) as reasons that compelled them to participate in the Winterlicious and/or Summerlicious programs.
- Residents aged 30+ are more likely (at 61%) compared to those aged 18-29 (35%) to say that the prixe fixe menu posted on the Summerlicious/Winterlicious website was what motivated them most to participate in a restaurant program.

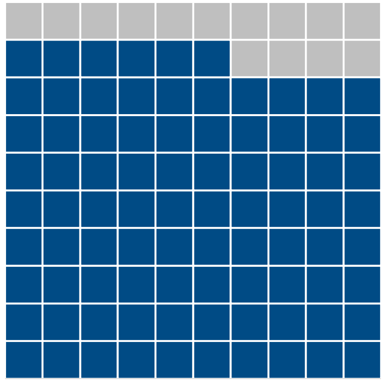


Base: Those who visited a restaurant participating Winterlicious and/or Summerlicious event during the promotional period (n=682)
Q11. Which of the following best describes what motivated you most to participate in the Winterlicious and/or Summerlicious event? Select all that apply.

First-Time & Returning Restaurant Visits

- The vast majority (86%) of those who participated in Summerlicious and/or Winterlicious say they visited a restaurant for the first time during the event. Additionally, half (50%) of those who participated in Summerlicious and/or Winterlicious say they returned to the same restaurant again after the event.
- Toronto residents are more likely compared to those living outside of Toronto in the GTA to have returned to the restaurant, following the Summerlicious or Winterlicious event.

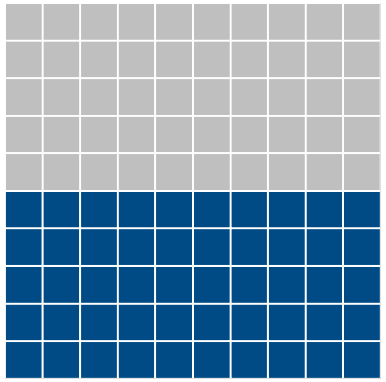
First-Time Restaurant Visit



86% visited any restaurant for the first time during a Summerlicious or Winterlicious event

Base: Those who visited a restaurant participating Winterlicious and/or Summerlicious event during the promotional period (n=682)
Q12. Did you visit any restaurant for the first time during a Summerlicious or Winterlicious event?

Returning Restaurant Visit

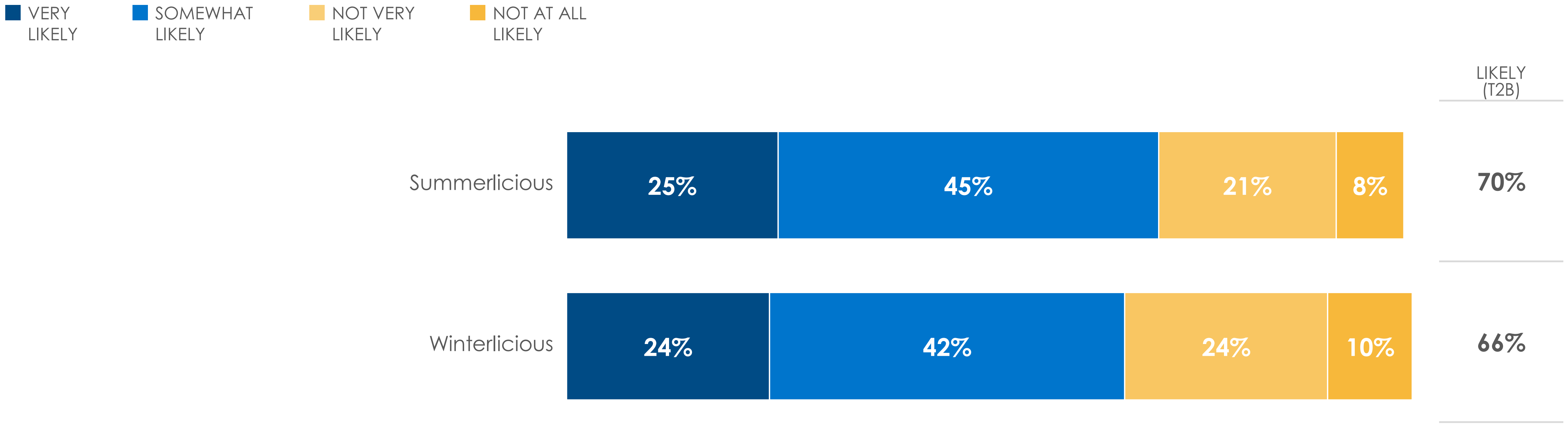


50% returned to this restaurant again since the Summerlicious or Winterlicious event

Base: Those who visited a restaurant participating Winterlicious and/or Summerlicious event during the promotional period (n=682)
Q13. Have you returned to this restaurant again since the Summerlicious or Winterlicious event?

Likelihood of Future Participation

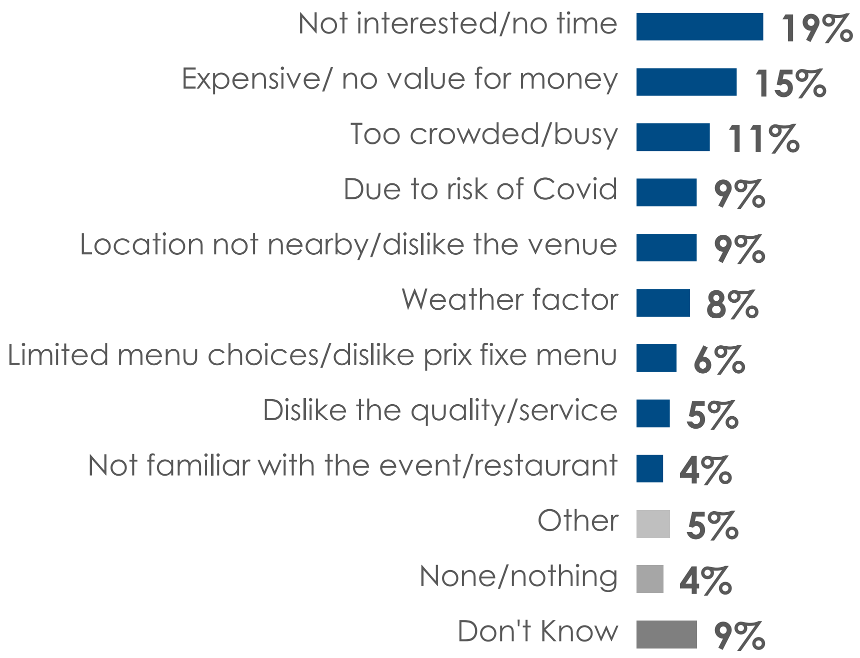
- Most Toronto residents say they are likely to visit a restaurant in the City of Toronto during the Summerlicious (70%) and Winterlicious (66%) events.
- The under 65 cohort is more inclined to indicate they would be likely (very/somewhat likely) to visit a restaurant during both the Summerlicious (73% vs. 57% aged 65+) and Winterlicious (69% vs. 52%) events. Low income households (under $50k) are less inclined to say they would be likely to participate in future Winterlicious events (58% vs. 70% of residents who earn $50k+).



Base: All respondents (n=1200)
Q14. How likely would you be to visit a restaurant in the City of Toronto for the Summerlicious or Winterlicious events?

Reasons for Not Participating

- When asked why they are not likely to participate in Summerlicious and/or Winterlicious in the future, a variety of responses are provided by Toronto residents who indicate that they are unlikely to do this, with concerns related to price (15%), crowds (11%), and a lack of interest (19%) topping the list.
- Those living in the GTA outside of Toronto are more likely to cite distance as a reason for not participating in future Summerlicious and/or Winterlicious (44% vs. 9% Toronto).



I don't want to get COVID. Sacrificing the health of myself and my family simply isn't worth going to a restaurant.

Many of the participants are in parts of the city that are not close to my home

Compared to the prices at all-you-can-eat restaurants, I think the prices at Summerlicious or Winterlicious may still be expensive for me.

We seldom eat out. Prefer to cook and eat at home.

The food is not that good when there's a prix fix menu....

Menu not to my liking and somewhat costly

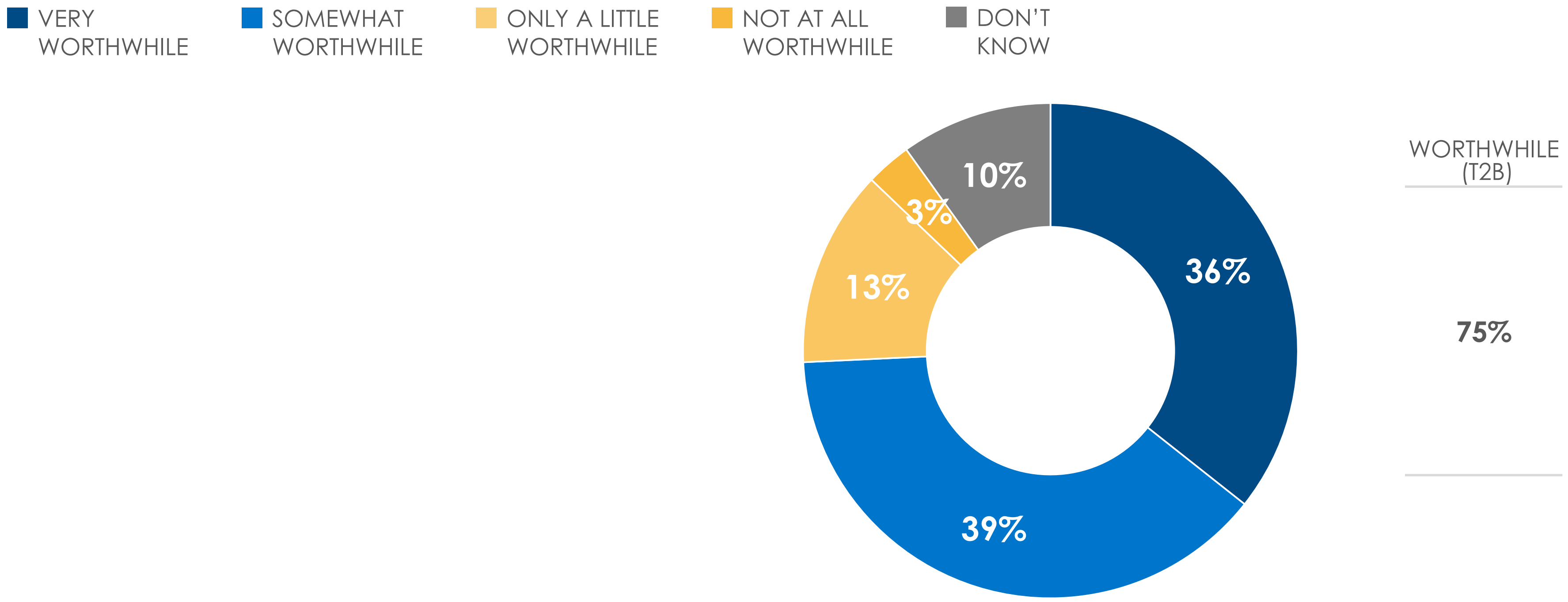
<3% Data are not labelled

Base: Those who not very or not at all likely to Summerlicious and/or Winterlicious (n=434)
Q15. Why would you not be likely to visit a restaurant in the City of Toronto for the Summerlicious or Winterlicious events in the future? Please do not include any personal information in your response.

PUBLIC OPINION ABOUT CoT RESTAURANT PROGRAMS

Worthwhile Effort of CoT Restaurant Programs

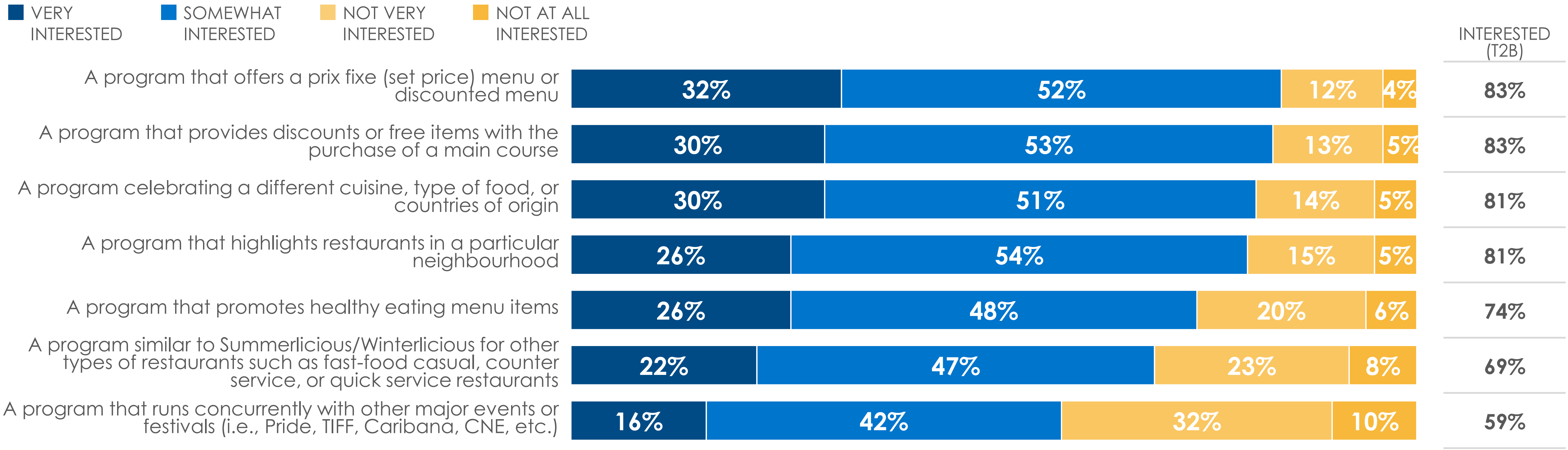
- Three-quarters (75%) of Toronto residents say that a restaurant promotional program produced and marketed by the City of Toronto, such as Summerlicious/Winterlicious, is a worthwhile effort on the part of the City. Only 16% of residents say that these programs are not worthwhile.



Base: All respondents (n=1200)
Q21. Is a restaurant promotional program or event (such as Winterlicious/Summerlicious), produced and marketed by the City of Toronto to highlight Toronto's culinary industry, a worthwhile effort on the part of the City?

Interest in Different Types of Restaurant Programs Among Consumers

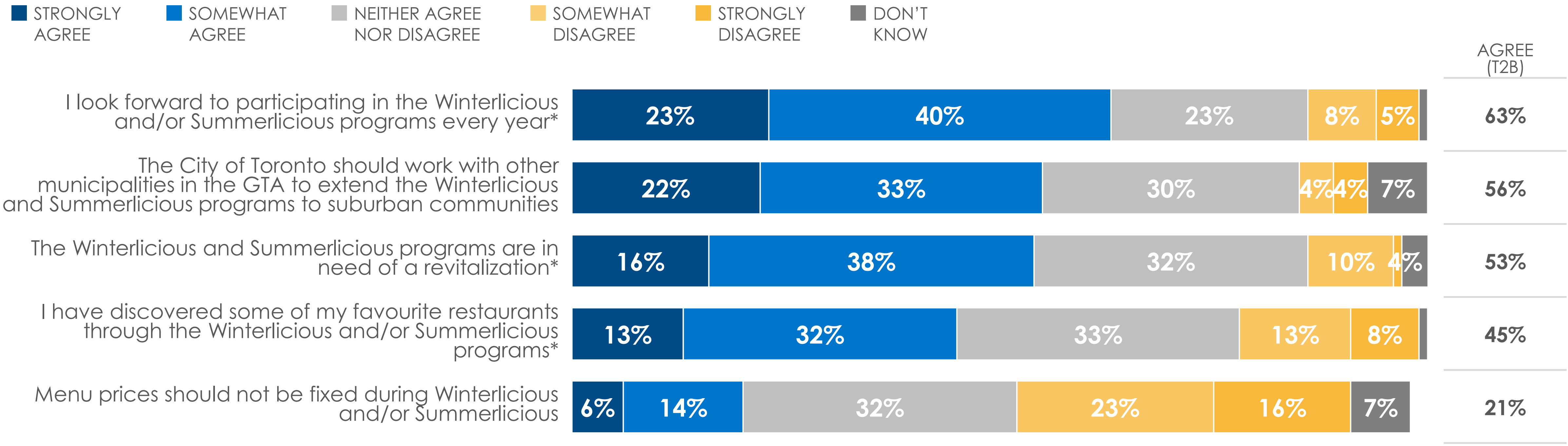
- There is considerable interest in all types of restaurant programs that might be offered by the City of Toronto. Most notably, interest is strongest when prixe fixe or discounted menus (83%) and discounted or free items with the purchase of a main course (83%) are offered. The vast majority are also interested in seeing programs that celebrate different cuisines (81%) or highlight particular neighbourhoods of the City (81%).
- Seniors (65+) are less likely to express interest in programs similar to Summerlicious/Winterlicious (55% vs. 73% under 65) or a program that runs concurrently with other major events (36% vs. 64%). High income households ($100k+) are among the most likely to express interest in a program that celebrates a different cuisine, type of food, or country of origin (87% vs. 79% under $100k).
- Toronto residents are more likely compared to those living outside of Toronto in the GTA to express interest in most types of restaurant programs.



Base: All respondents (n=1200)
Q16. How interested would you be in visiting a restaurant that offered the following types promotional programs that could be offered by the City of Toronto?

Views of Toronto's Restaurant Programs Among Participants

- Nearly two-thirds (63%) of Toronto residents who have participated in the Winterlicious/Summerlicious programs say they look forward to these events, every year, a figure which highlights the overall success of the licious programs. A majority of Toronto residents think the City of Toronto should work with other municipalities in the GTA to extend the restaurant programs to suburban communities (56%). Two in five (40%) disagree with the idea that menu prices should not be fixed, a figure which suggests the current formula for the licious programs might be working fine.
- Those that identify as having a disability are more likely to agree with the idea that menu prices should not be fixed (31% vs. 20% do not identify as having a disability). The under 65 demographic tends to be more likely to agree with most statements, as they relate to restaurant events in Toronto.



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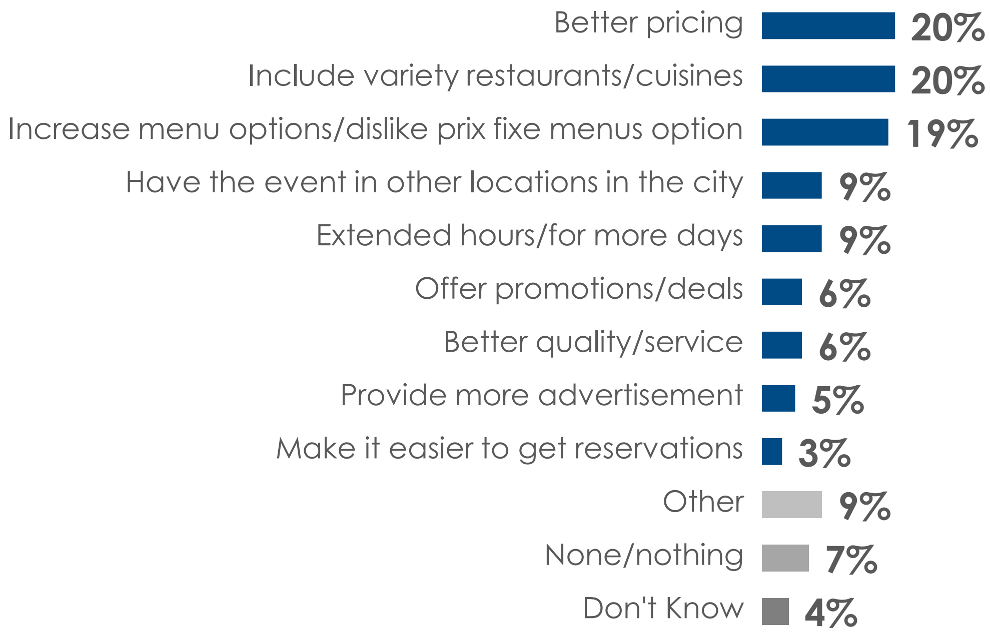
Base: All respondents (n=1200)
*Base: Participated in Winterlicious and/or Summerlicious in the past (n=682)
Q17. Please rate the extent to which you agree or disagree with each of the following statements, as they relate to restaurant events in Toronto.

Suggestions for Enhancing CoT Programs

- When those who participated in Summerlicious and/or Winterlicious were asked what, if anything, they would change about the programs. At two in ten, the highest proportion mention having better pricing (20%), including variety of restaurants/cuisines (20%), and increasing menu options (19%).



2 weeks is not a very long time to try many things. Maybe do 2 weeks downtown, 2 weeks north Toronto, 2 weeks East Toronto, 2 weeks West Toronto. So there is a chance to try different places and more

Pricing should be a "bargain." Or offer free glass of wine or a free dessert.

Extend to inner suburbs like, Scarborough, Etobicoke, North York, etc. Markham, Pickering, Vaughan, etc. can do there own thing.

The winter/summerlicious was a fantastic program in its infancy years in discovering new and nicer restaurants that were unknown or inaccessible. Recent years the prices have increased and the quality has declined. It use to be a time of excitement, it's become a time of avoiding any restaurants participating as it was going to be mediocre food with terrible service.

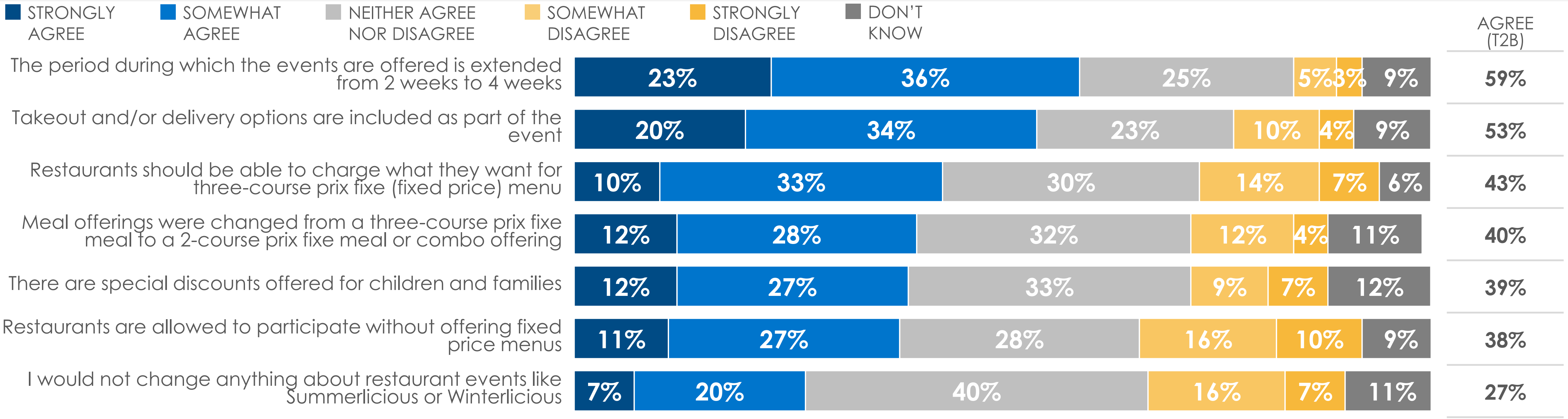
Broader selection of 'normal' restaurants that aren't attractive to only trendy crowd.

<3% Data are not labelled

Base: Those who participated in Summerlicious or Winterlicious (n=369)
Q18. If you could change the Winterlicious and Summerlicious programs, what, if anything, would you do differently? Please be as specific as possible. Please do not include any personal information in your response.

Attitudes & Opinions Towards Restaurant Program Reform

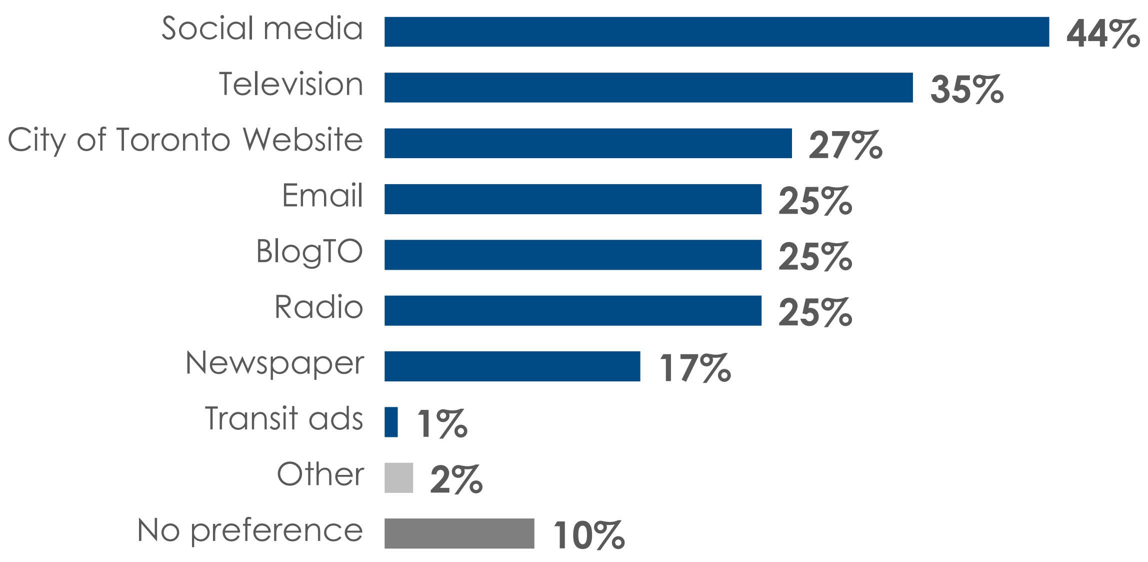
- One in four (27%) agree wit the idea that nothing in connection with the Summerlicious and Winterlicious program needs to change, a figure which suggests that some reforms might be in order, though as many as half (51%) admit they neither agree nor disagree with this idea (40%) or aren't sure if they do (11%). Three-fifths (59%) want to extend the promotional period of the restaurant programs from 2 weeks to 4 weeks. A majority (53%) would also like to see takeout and/or delivery options included as part of the event. Less than two in five (38%) think restaurants should be allowed to participate without offering fixed price menus.
- Younger residents tend to be more likely to agree with most statements, as they relate to reforming Toronto's restaurant programs.
- Previous participants are most likely to agree that the program period should be extended and the least likely to agree that changes need to be made to the programs.



Base: All respondents (n=1200)
Q19. Please rate the extent to which you agree or disagree with each of the following statements, as they relate to restaurant events in Toronto.

Preferred Communication Channels

- Social media tops the list (44%) as the preferred media channel through which Torontonians would like to hear about programs and events that promote Toronto restaurants.
- The under 55 demographic is more likely to cite BlogTO (30% vs. 14% aged 55+) and social media (53% vs. 27%) but is less likely to mention television (27% vs. 51%), newspaper (9% vs. 32%), and radio (19% vs. 36%) as preferred channels. Those living outside of the downtown core are more likely to cite radio (28% vs. 19% Downtown Toronto) and are less likely to prefer BlogTO (21% vs. 33%). Those that do not identify as having a disability are more likely to cite social media as a preferred information channel (46% vs. 35% identify as having a disability).
- Those living in the GTA outside of Toronto are less likely to cite BlogTO (20% vs. 27% Toronto) or the City of Toronto's website (14% vs. 25%) as preferred communication channels.



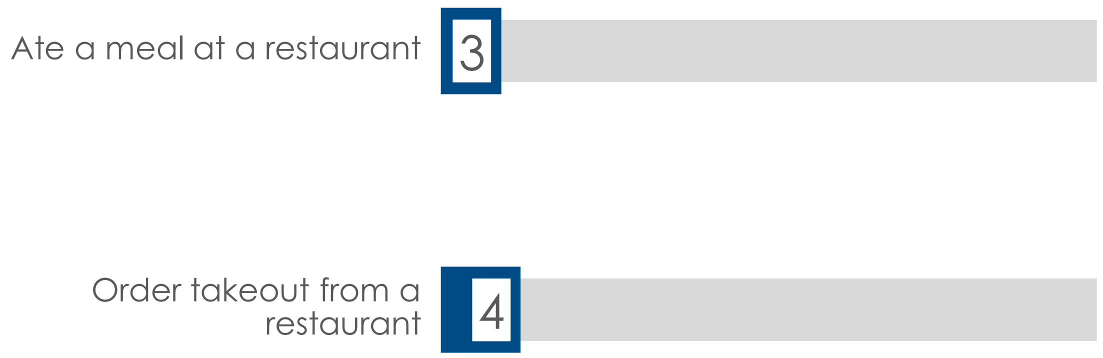
Base: All respondents (n=1200)
Q20. How would you prefer to hear about programs and events that promote Toronto restaurants, such as Winterlicious and Summerlicious? Select up to three responses.

CONSUMER DINING HABITS & BEHAVIOURS

Consumer Dining Habits

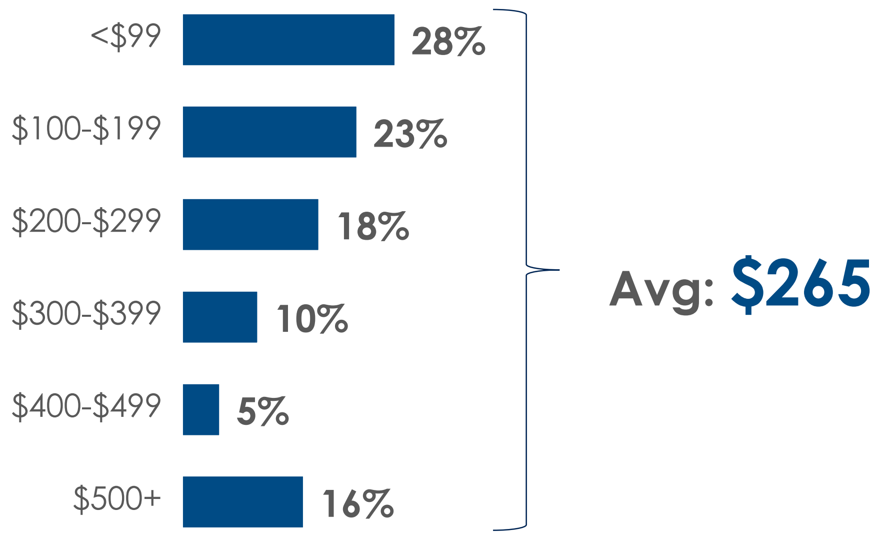
- On average, Toronto residents report eating a meal at a restaurant three times and ordering takeout from a restaurant four times in the past month. Among those who ate at or ordered from restaurants in the past month, over one-in-four (28%) say they spent less than $99, while around one-in-six (16%) spent more than $500. Toronto residents who ate at or ordered from restaurants spent $265 doing this, on average, over the past month.
- Residents aged 18-54 report ordering takeout from a restaurant more frequently than those aged 55+ on average (≥ four times vs. ≤ three times). Additionally, those aged 25-54 on average report spending more money on restaurant dining in the past month than those aged 55+. Low income households (under $50k) and those that identify as having a disability have attended restaurants to eat a meal with less frequency, on average, in the past month.

Frequency of Restaurant Dining



Base: All respondents (n=1200)
Q1. In the past month, how many times would you say you did each of the following…

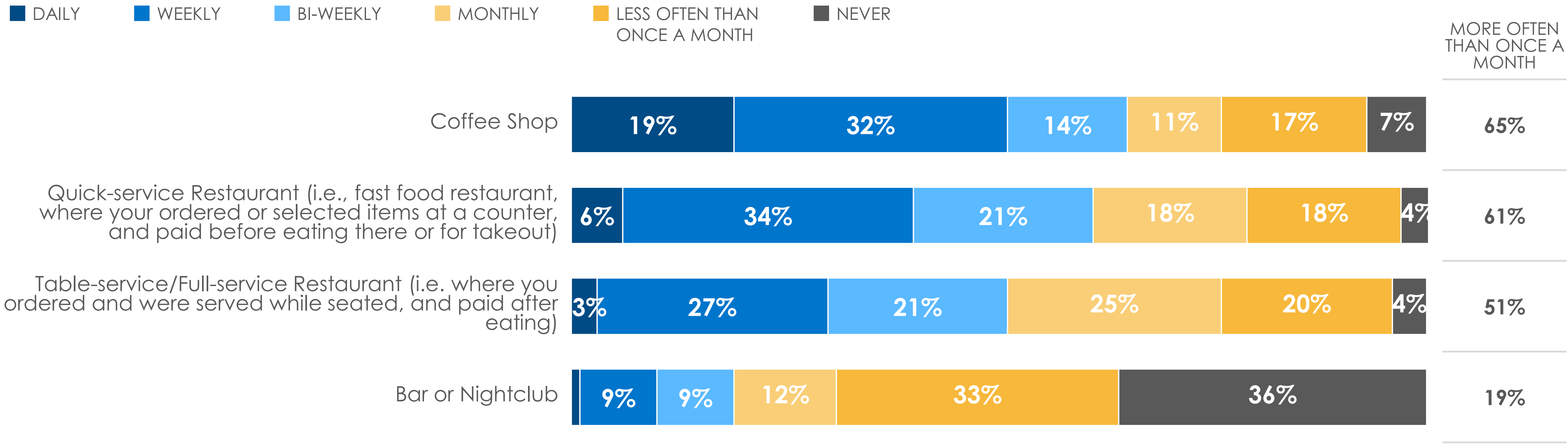
Monthly Spending on Restaurants



Base: Those who ate at a restaurant or ordered takeout/delivery from restaurants in the past month (n=1118)
Q2. In the past month, how much did your household spend, on average, eating at a restaurant or ordering takeout/delivery from restaurants?

Pre-Pandemic Dining Habits

- Thinking back to before the COVID-19 pandemic, around two-thirds (65%) of Toronto residents say they visited coffee shops more often than once a month, followed by quick-service restaurants (61%), table-service/full-service restaurants (51%), and bars/nightclubs (19%).
- Toronto residents aged 18-29 are more likely to say they visited quick-service restaurants (13% vs. 4% aged 30+) and table-service restaurants (6% vs. 2%) on a *daily* basis. High income households ($100k+) (25% vs. 16% under $100k) and the 25-54 cohort are among the most likely to report visiting coffee shops on a daily basis (24% vs. 13% of those aged 18-24 and 55+).

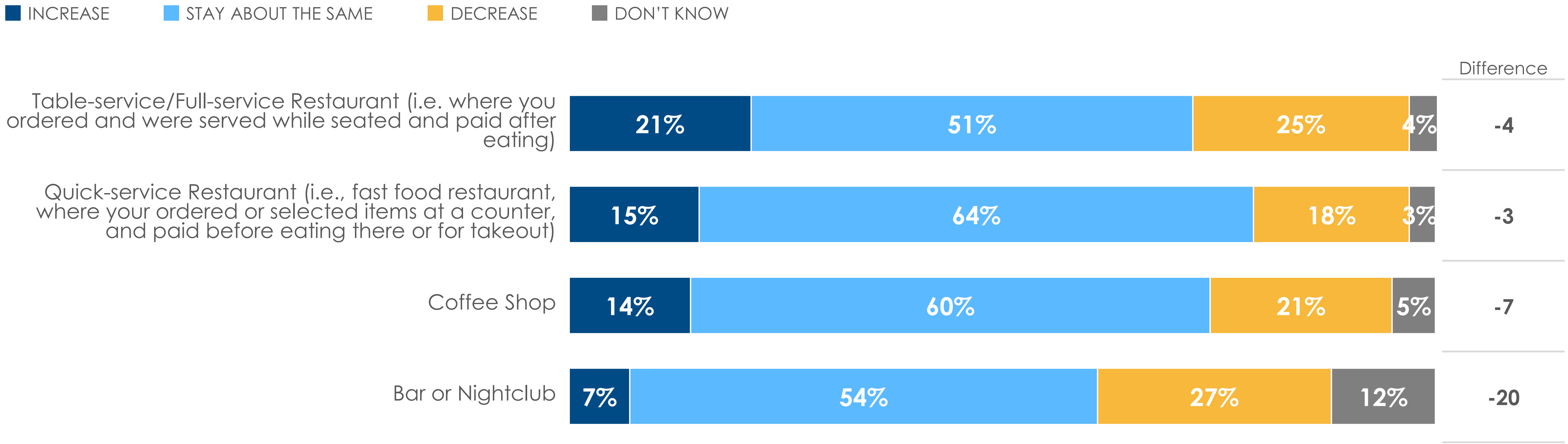


<3% Scores are not labelled

Base: All respondents (n=1200)
Q3. Thinking back to before the COVID-19 pandemic (prior to March 2020), how often did you typically visit each of the following for an in-person experience?

Expected Dining Habits (Post-Pandemic Restrictions)

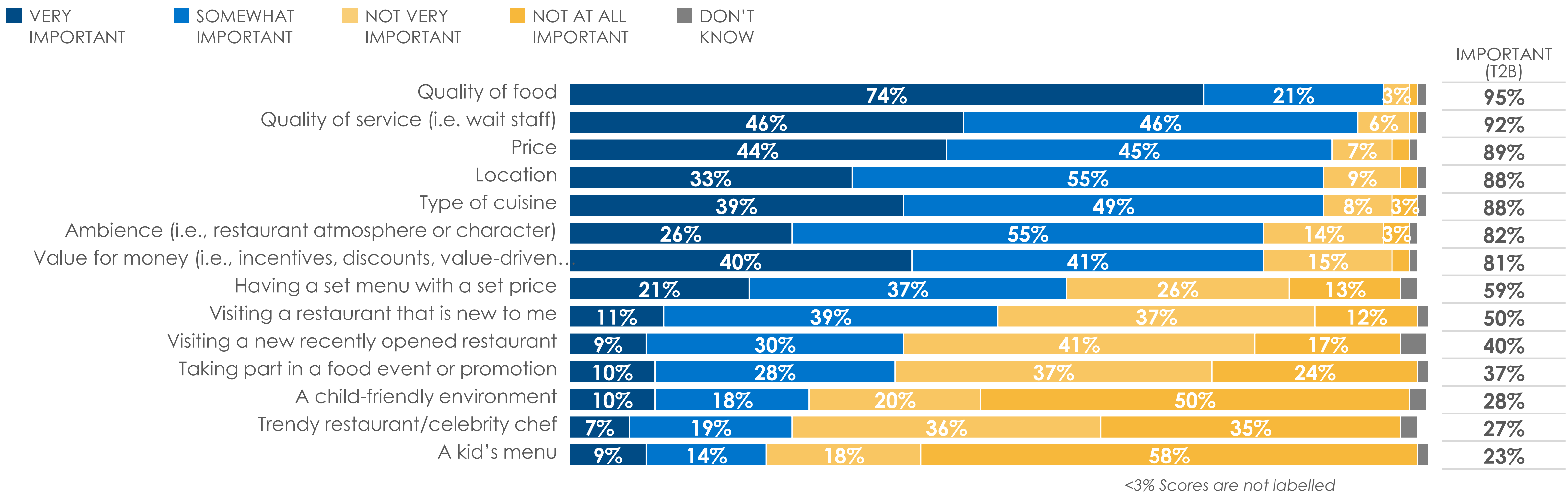
- When asked to consider the removal of COVID-19 mandates and restrictions, a majority of Toronto residents say they expect their frequency of in-person restaurant visits to stay about the same as it was, prior to the pandemic. Among those who do not expect their dining habits to return to pre-pandemic levels, a higher proportion expect in-person visits to decrease rather than increase, across all types of restaurants.
- The under 30 demographic is twice as likely (at 26%) compared to those aged 30+ (13%) to expect to increase their in-person visits to quick-service restaurants. Those aged 18-54 are more likely to say they will visit bars or nightclubs with greater frequency (8% vs. 3% aged 55+). Those aged 25-54 are among the most likely to anticipate increasing their in-person visits to coffee shops (17% vs. 10% aged 18-24 and 55+).



Base: All respondents (n=1200)
Q4. With the removal of Covid-19 mandates and restrictions, do you expect your tendency to visit each of the following for an in-person experience over the next year to increase, decrease, or stay about the same as it was, prior to the pandemic?

Importance of Factors when Going to a Restaurant

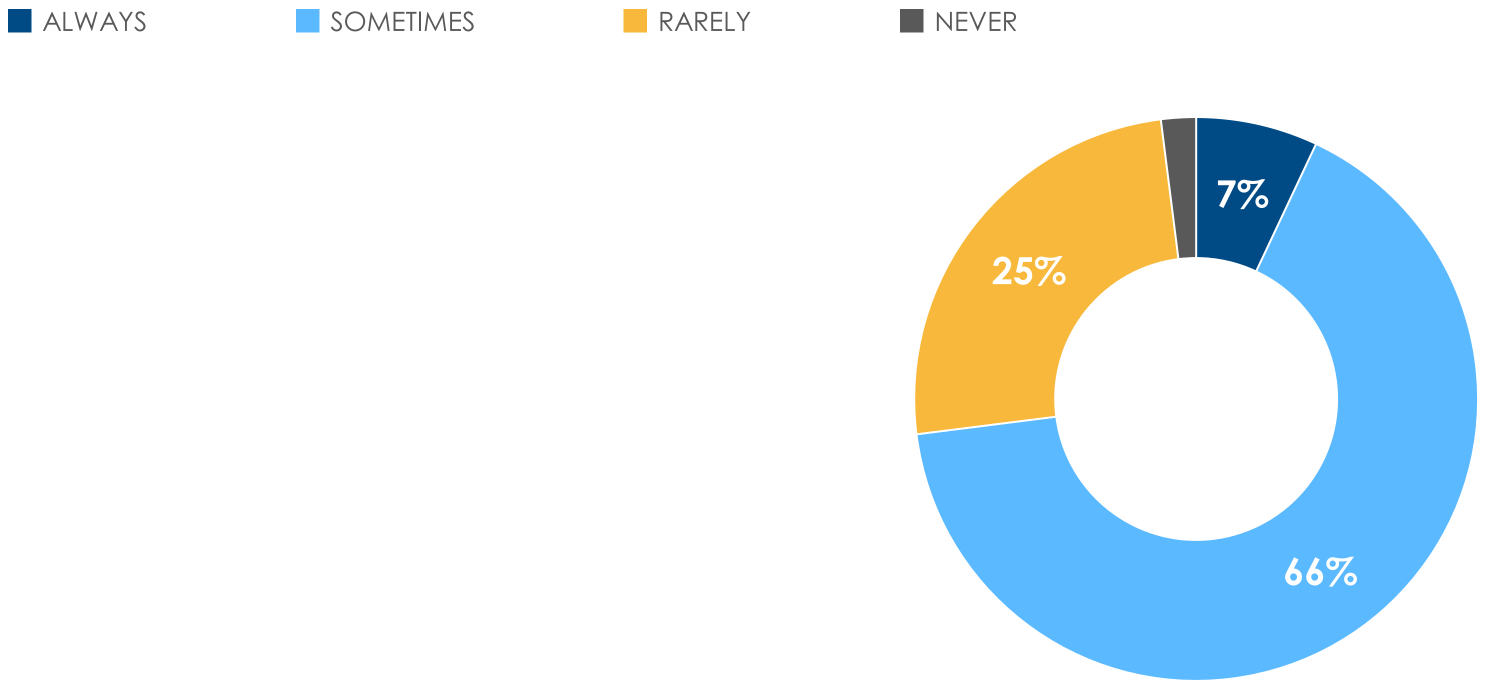
- Quality of food (95%) and service (92%) are deemed the most important considerations by those who ate at or ordered from restaurants in the past month. Location (88%), price (89%), cuisine type (88%), ambience (82%), and value for money (81%) are also perceived as being important by the vast majority within this group. Taking part in a food event or promotion (37%), attending a trendy restaurant (27%), and having a kid's menu (23%) or child-friendly environment (28%) are thought to be of less importance. Three in five (59%) think having a set menu with a set price is important.



Base: Those who ate at a restaurant or ordered takeout/delivery from restaurants in the past month and did it before the COVID-19 pandemic (n=1193)
Q5. When considering going out to a restaurant, how important are each of the following to you?

Choosing New vs. Familiar Dining Experience

- Most (73%) Toronto residents admit they will choose a new dining experience over something familiar at least sometimes, though just seven percent (7%) say they will always do this. As many as one in four (25%) indicate that they *rarely* will choose a new dining experience.
- High income households ($100k) (79% vs. 70% under $100k), those that do not identify as having a disability (74% vs. 64% identify as having a disability), and the 18-54 demographic (80% vs. 61% aged 55+) are among the most likely to report choosing a new dining experience over something familiar at least sometimes.



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Base: All respondents (n=1193)
Q6. How often do you choose a new dining experience as opposed to frequenting restaurants you are familiar with?

RESTAURANT OPERATOR SURVEY FINDINGS

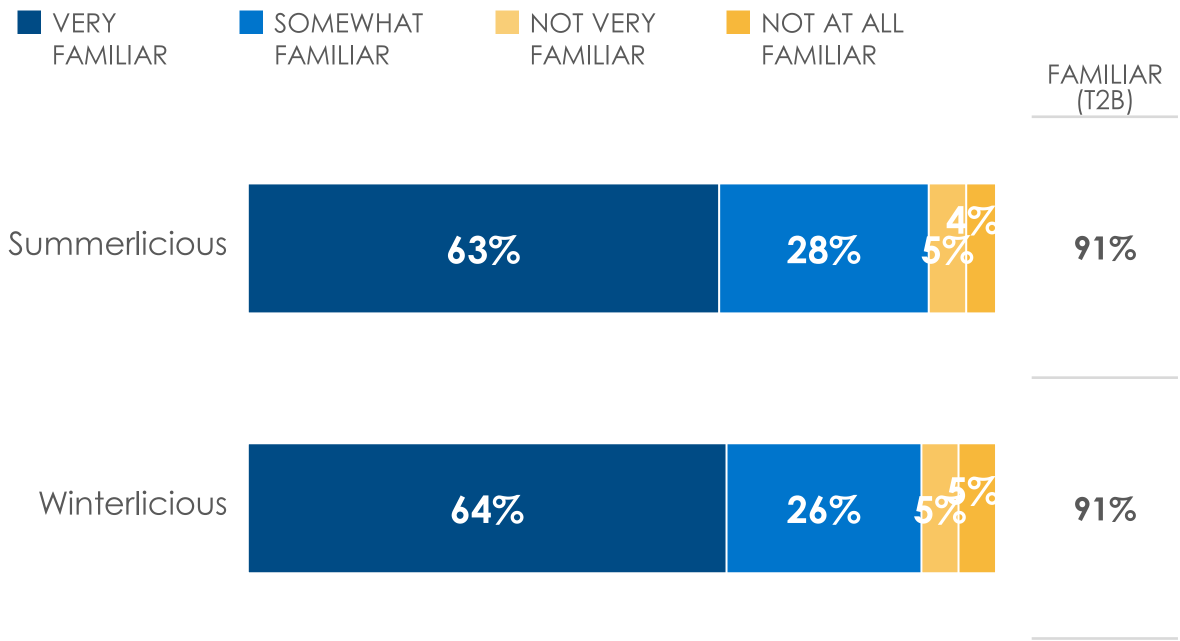
- Public Online Survey (Promoted by CoT)

FAMILIARITY WITH & PARTICIPATION IN CoT RESTAURANT SUPPORT PROGRAMS

Engagement with Summerlicious & Winterlicious Among Operators

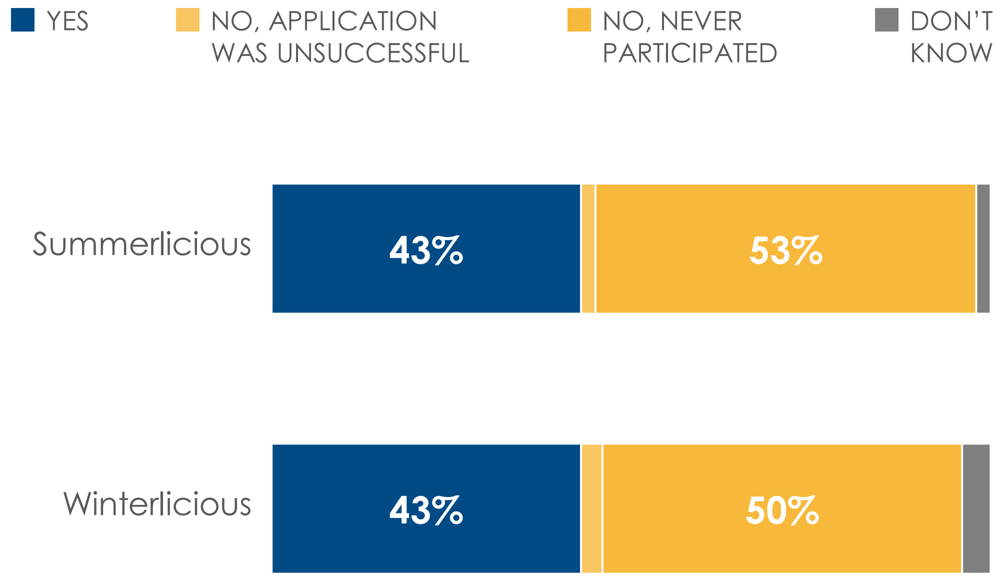
- The vast majority (91%) of Toronto restaurants surveyed are familiar with Summerlicious and/or Winterlicious. More than two-fifths (43%) of respondents have participated in Summerlicious and/or Winterlicious .

Familiarity with Restaurant Programs



Base: All respondents (n=129)
Q8. How familiar are you with each of the following restaurant programs or events that are produced and run by the City of Toronto?

Participation in Restaurant Programs

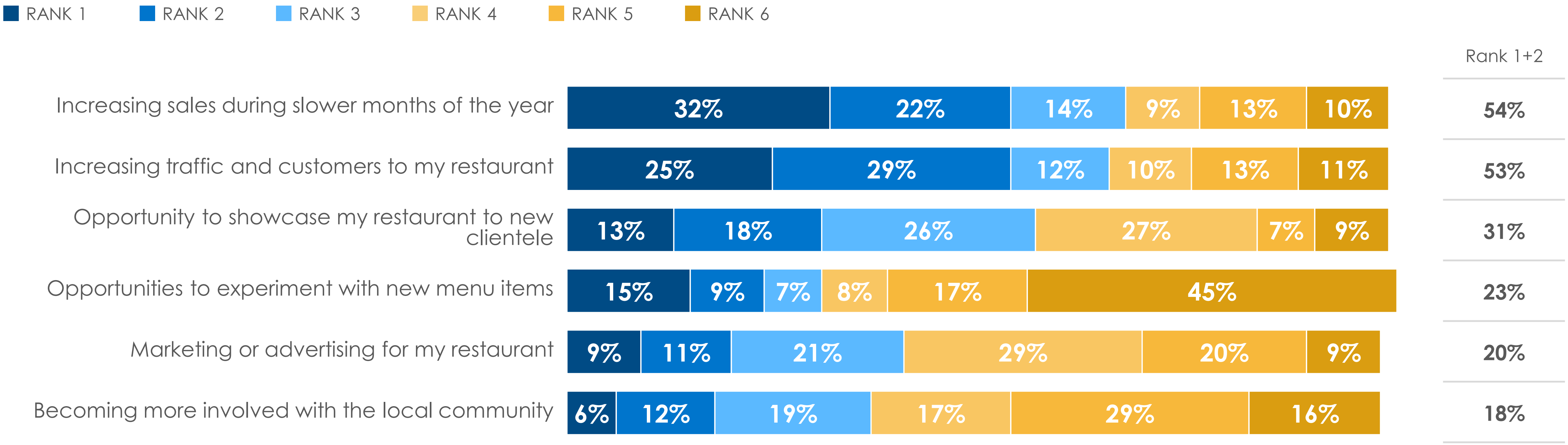


<3% Scores are not labelled

Base: All respondents (n=129)
Q9. Has your restaurant ever participated in any of the following restaurant programs offered by the City of Toronto?

Motivations for Participation in Promotional Programs

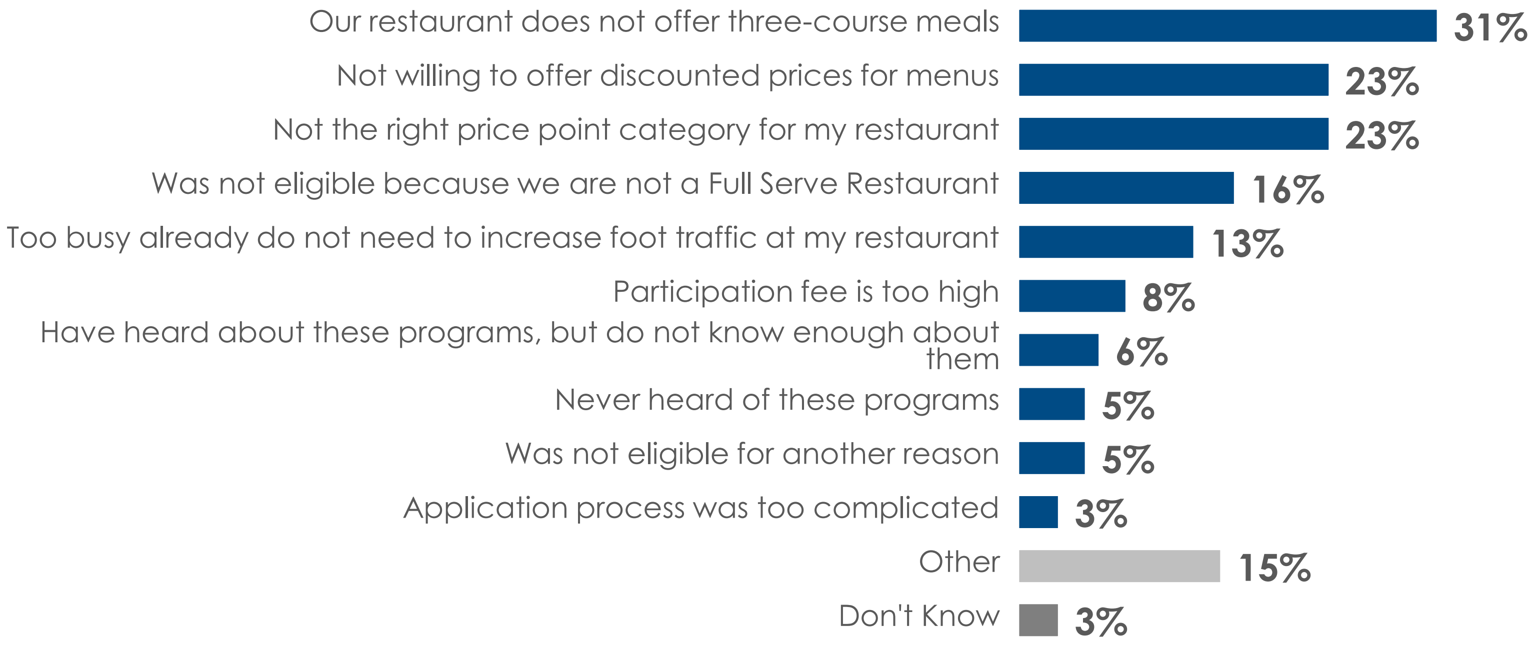
- Majorities of Toronto restaurants surveyed rank increasing sales during slower months (54%) and restaurant traffic (53%) as highly important motivations (rank 1-2) for participating in restaurant promotional programs offered by the City of Toronto.



Base: All respondents (n=129)
Q13. Please rank the following, in terms of their importance to your restaurant, where 1 is most important and 5 is least important, as motivations for participating in restaurant promotional programs offered by the City of Toronto.

Reasons for Operators Not Participating

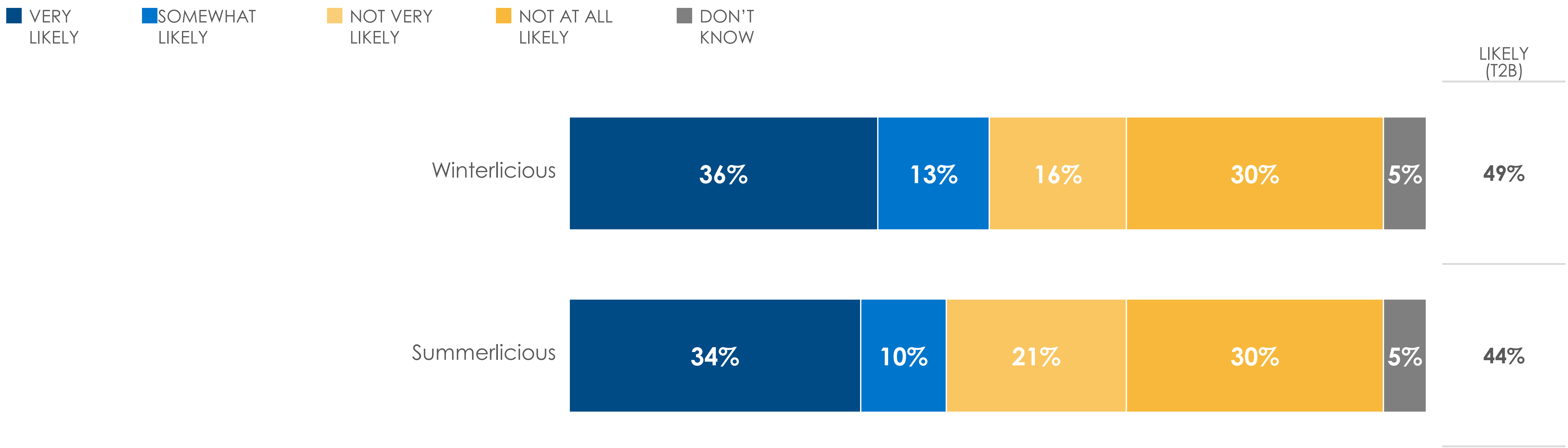
- When those who have never participated in Summerlicious and/or Winterlicious programs were asked why they have not done this, a plurality (31%) indicate that it is because their restaurant does not offer three-course meals. Around one in four declined to participate because they are not willing to offer discounted prices for menus (23%) or the price point category is not right for their restaurant (23%).



Base: Those who did not participate in programs (n=62)
Q10. You indicated that you have never participated in the Winterlicious or Summerlicious programs. Why has your restaurant never participated in Winterlicious or Summerlicious in the past? Please select all that apply.

Likelihood of Future Participation Among Operators

- Just half (49%) of Toronto restaurants surveyed say they would be likely to participate in future Winterlicious programs and even fewer (44%) indicate that they are likely to participate in future Summerlicious programs.
- Those that have participated in both Summerlicious and Winterlicious in the past are about four times more likely, compared to those who have not participated in either program, to say they would be likely to participate in Summerlicious (participated in both: 79% vs. participated in neither: 18%) and Winterlicious (81% vs. 22%) in the future.

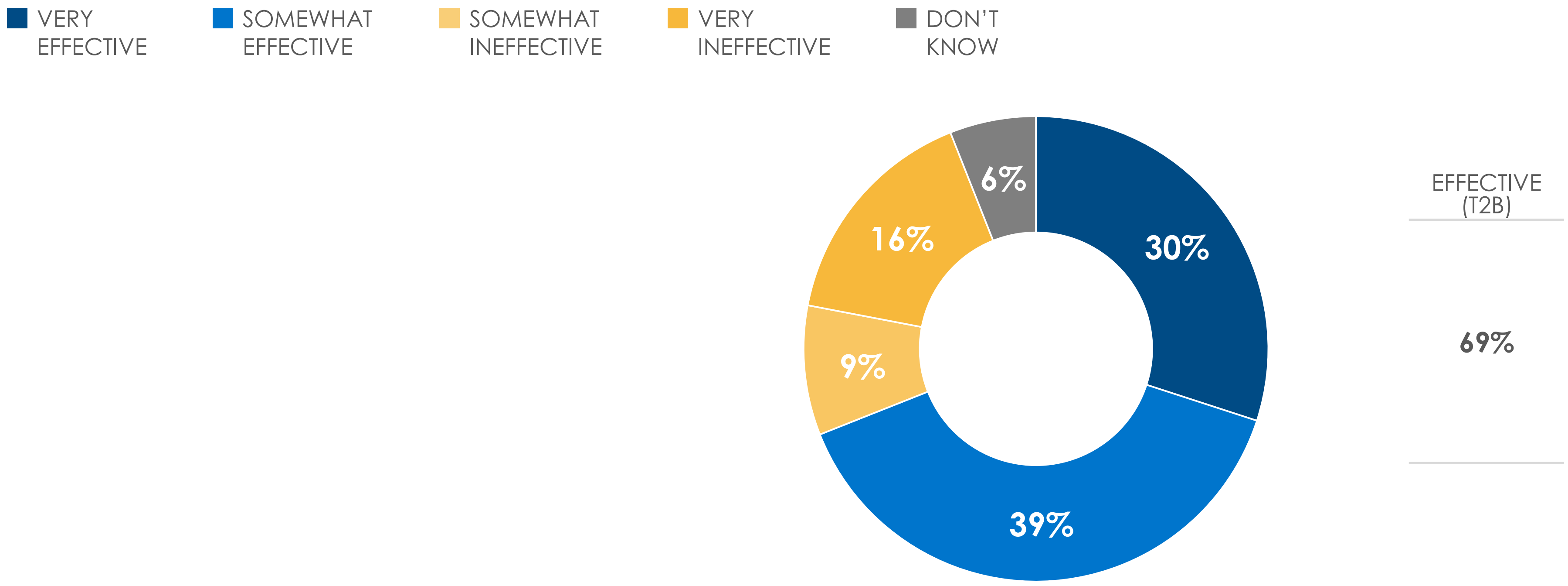


Base: All respondents (n=129)
Q11. How likely or unlikely is your restaurant or food service establishment to participate in each of the following restaurant programs, in the future?

OPERATOR OPINIONS ABOUT CoT RESTAURANT SUPPORT PROGRAMS

Effectiveness of CoT Restaurant Programs to Operators

- Most (69%) restaurants that have participated in the Summerlicious and/or Winterlicious programs say they feel the programs have been effective at helping them increase business for their restaurant.

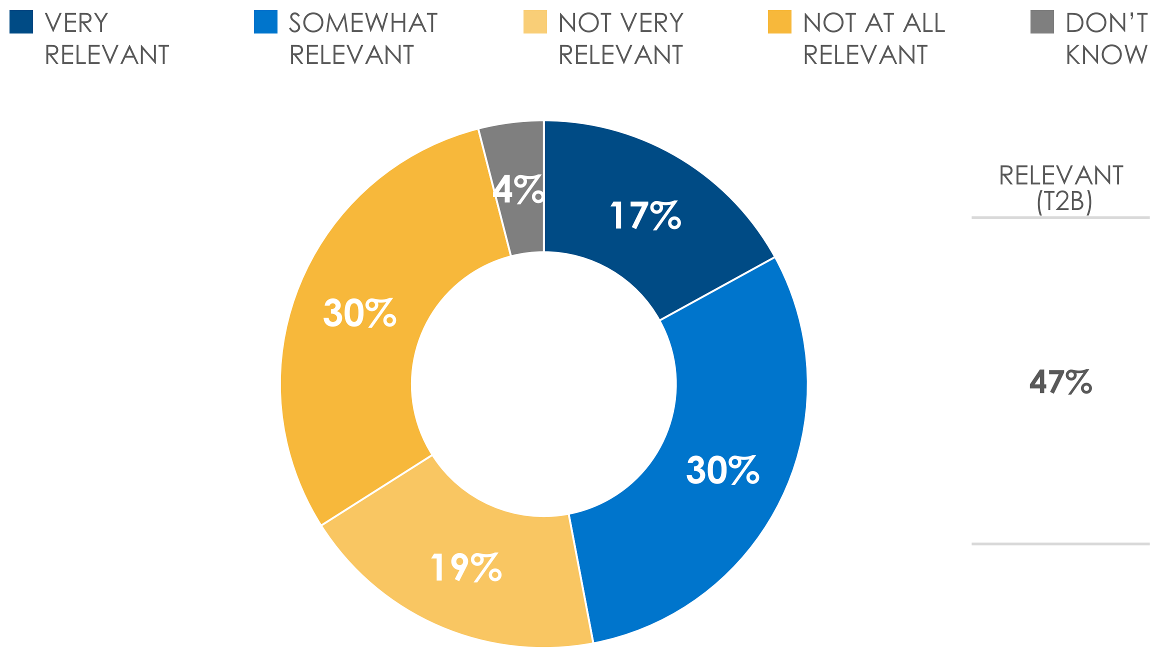


Base: Those who participated in Summerlicious or Winterlicious (n=64)
Q14. How effective do you feel that participating in Summerlicious or Winterlicious programs has been at increasing business for your restaurant?

Program Relevance & Worthiness

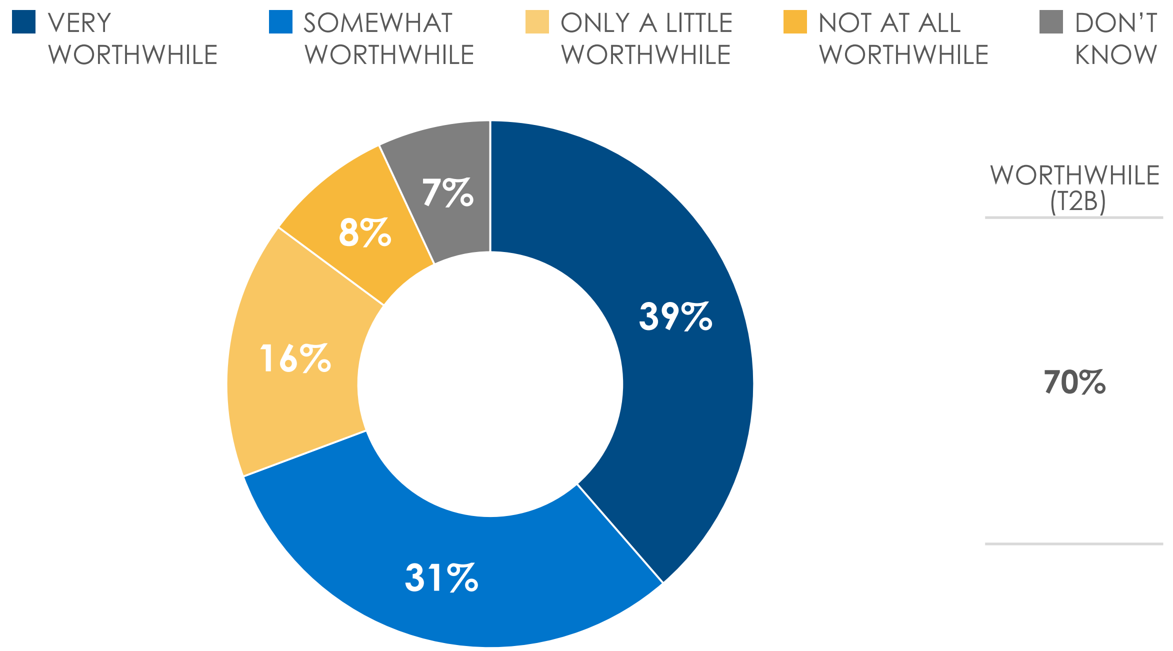
- About half (47%) of Toronto restaurants that participated in the survey view the current program format as being relevant to their restaurant.
- Those who previously participated in both programs are significantly more likely to indicate that the format is relevant (79%), compared to those restaurants that did not participate (23%). Despite this, however, most (70%) feel restaurant promotional programs or events, such as Winterlicious or Summerlicious, are worthwhile efforts on the part of the City.

Relevance of Restaurant Program Format



Base: All respondents (n=129)
Q18. Thinking about Winterlicious/Summerlicious, which typically features a value-driven three-course prix fixe menu at a number of price point categories, how relevant do you feel this program format is to your restaurant, specifically?

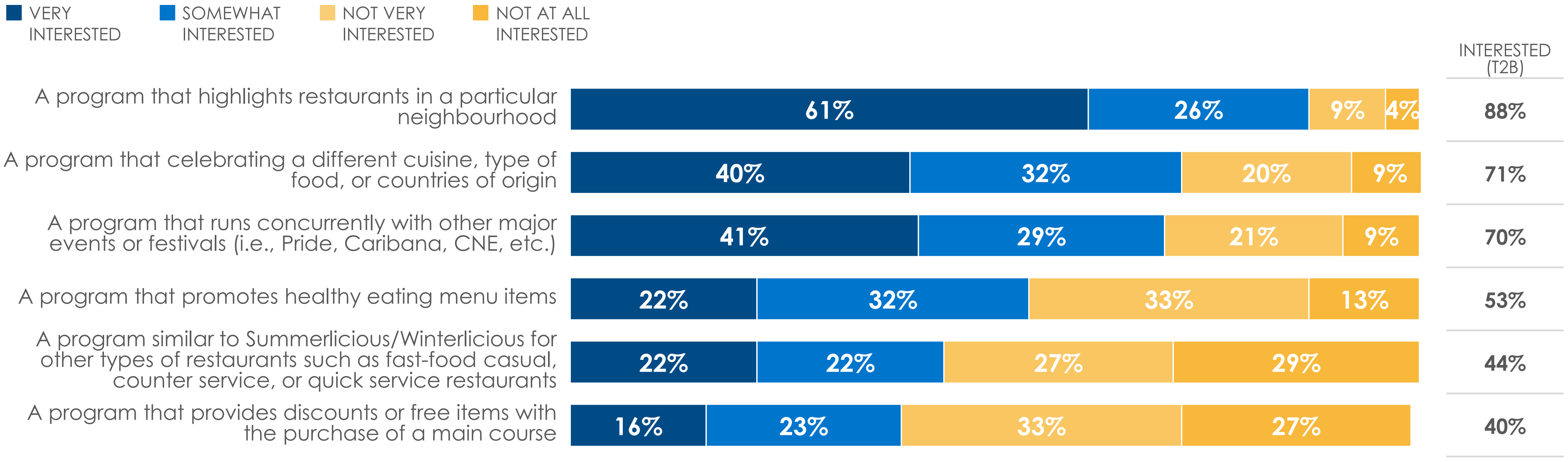
Worthiness of Toronto's Restaurant Programs



Base: All respondents (n=129)
Q19. Is a restaurant promotional program or event (such as Winterlicious/Summerlicious), produced and marketed by the City of Toronto to highlight Toronto's culinary industry, a worthwhile effort on the part of the City?

Interest in Different Types of Restaurant Programs Among Operators

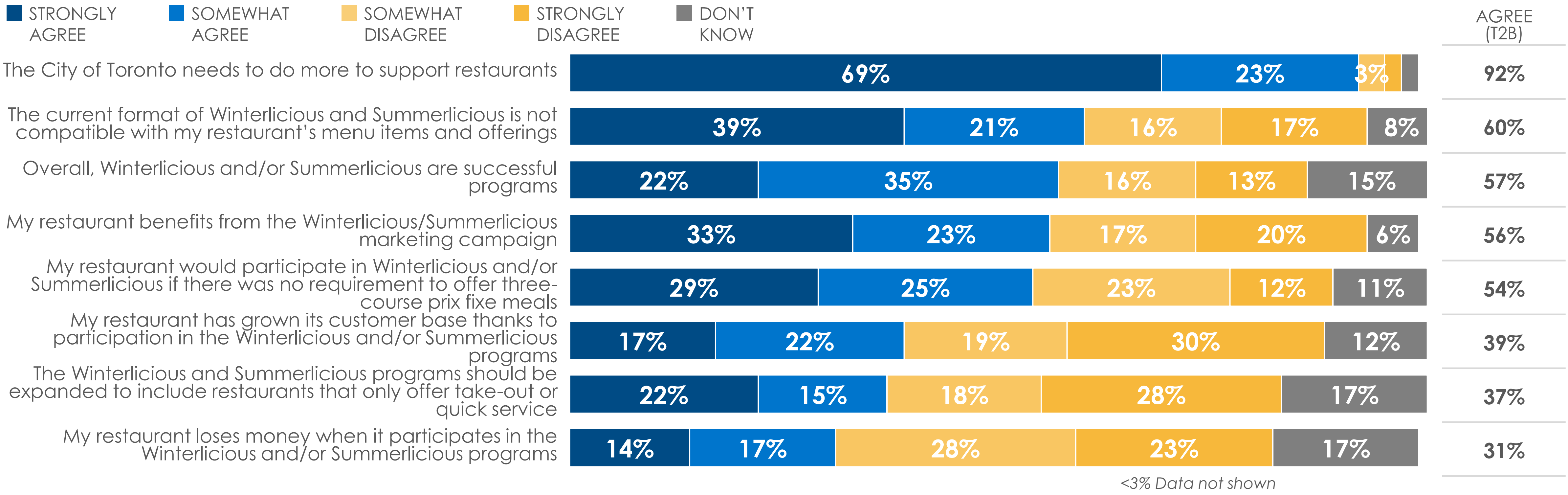
- There is strong interest in having a restaurant program that highlights restaurants in a particular neighbourhood (88%), a program that celebrates different cuisines, types of food, or countries of origin (71%), and a program that runs concurrently with other major events or festivals (70%). A majority (53%) would also like to see a program that promotes healthy eating menu items.



Base: All respondents (n=129)
Q20. How interested would your restaurant be in participating in the following types promotional programs that could be offered by the City of Toronto?

Attitudes & Opinions Towards Summerlicious & Winterlicious Among Operators

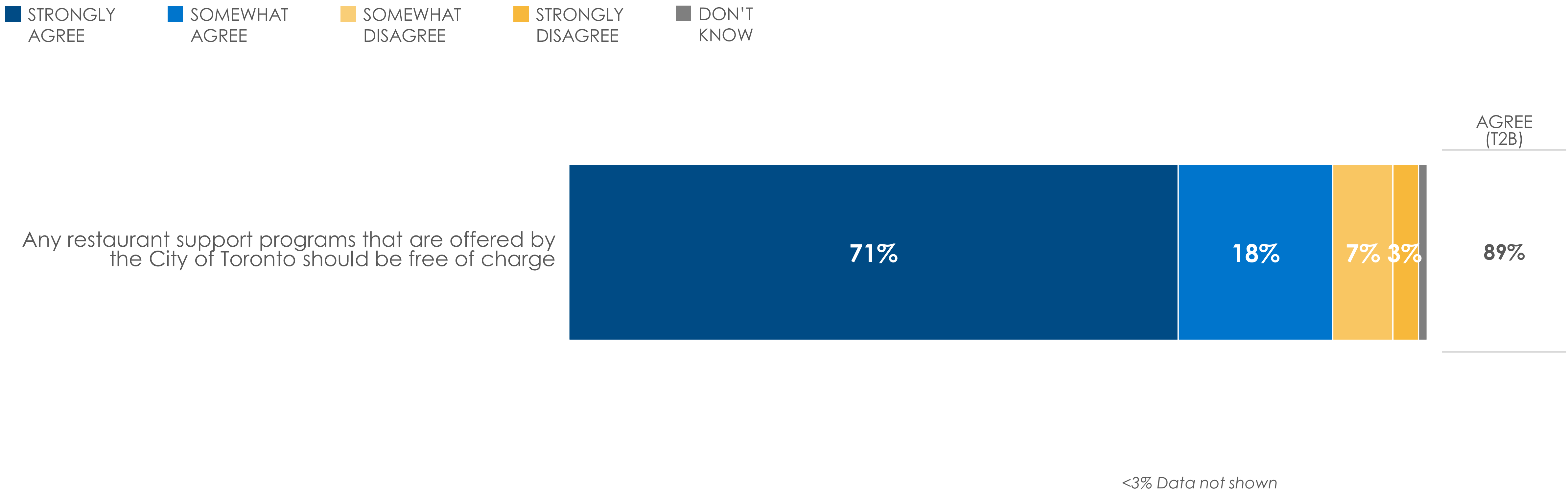
- A majority of those in the food and restaurant sector agree that Winterlicious and/or Summerlicious are successful programs (57%) and that their restaurant benefits from the Winterlicious/Summerlicious marketing campaign (56%). Despite this, the vast majority (92%) think the City of Toronto needs to do more to support restaurants. Additionally, six-in-ten (60%) feel that the current format of Winterlicious and Summerlicious is not compatible with their restaurants' menu items (this reaches 74% among those who have not previously participated) and offerings and a majority (54%) of those that have not participated in the programs say they would have participated if there was no requirement to offer three-course prix fixe meals.



Base: All respondents (n=129)
Q17. Please rate the extent to which you agree or disagree with each statement as it relates to the Winterlicious and/or Summerlicious programs, specifically.

Charging a Fee for Support Programs

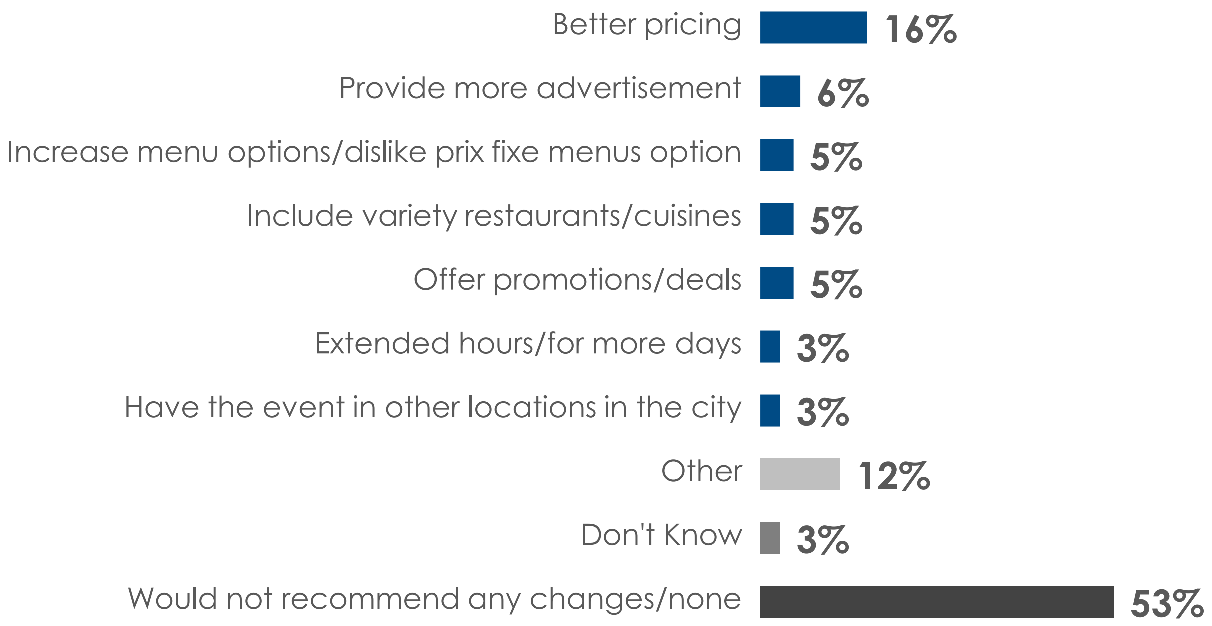
- The vast majority (89%) of Toronto restaurants surveyed think any restaurant support programs that are offered by the City of Toronto should be free of charge.



Base: All respondents (n=129)
Q24. Please rate the extent to which you agree or disagree with each of the following statements.

Recommendations for Program Reform Among Operators

- Over half (56%) of restaurants that participated in the Summerlicious and/or Winterlicious programs would not recommend any changes (53%) or aren't sure what they would do differently (3%), when asked to describe what changes, if any, they would make to the programs if given the opportunity. Those that do offer a response most commonly say they would like to see better pricing (16%) followed at a distance by having more advertisement (6%), increasing menu options (5%), including a variety of cuisines (5%), and offering other promotions/deals (5%).



It needs a total overhaul, a re-energizing . Not sure how yet but it has lost it sizzle just due to time. It is time for change

Program has lost its appeal and has become too costly for the ROI. Too many people make fake reservations, and it does not bring a lot of extra revenue.

Offering more than three price points for lunch and dinner. This has already been implemented in the upcoming Summerlicious offering.

For restaurants with smaller menu, we should be able to just provide less options, instead of 3, maybe we can do just 2 or less options.

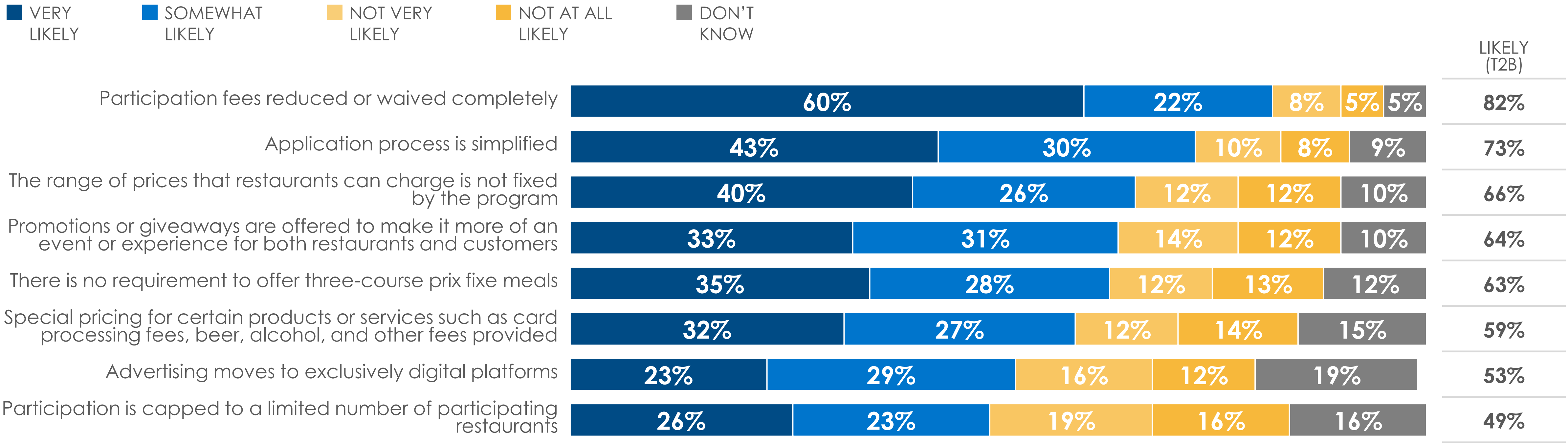
Run the promotion in blocks of 10 days by area instead of promoting all spaces over 1 set of 10 days.

<3% Data not shown

Base: Those whose restaurant ever participated in any of the following restaurant programs offered by the City of Toronto (n=64)
Q15. What, if anything, would you change about the Summerlicious or Winterlicious programs?

Impact of Programming Changes on Participation Among Operators

- Four in five (82%) Toronto restaurants surveyed say they would be likely to participate in future restaurant programs that are offered by the City if participation fees are reduced or waived completely, including as many as three in five (60%) who say they would be very likely to participate if this change was made. Most (73%) contend they would be likely to participate if the application process was simplified and around two-thirds say they would be likely to participate if the range of prices that can be charged is not fixed (66%), if there was no requirement to offer three-course prix fixe meals (63%), or if promotions/giveaways are offered to make it more of an event or experience for both restaurants and customers (64%).

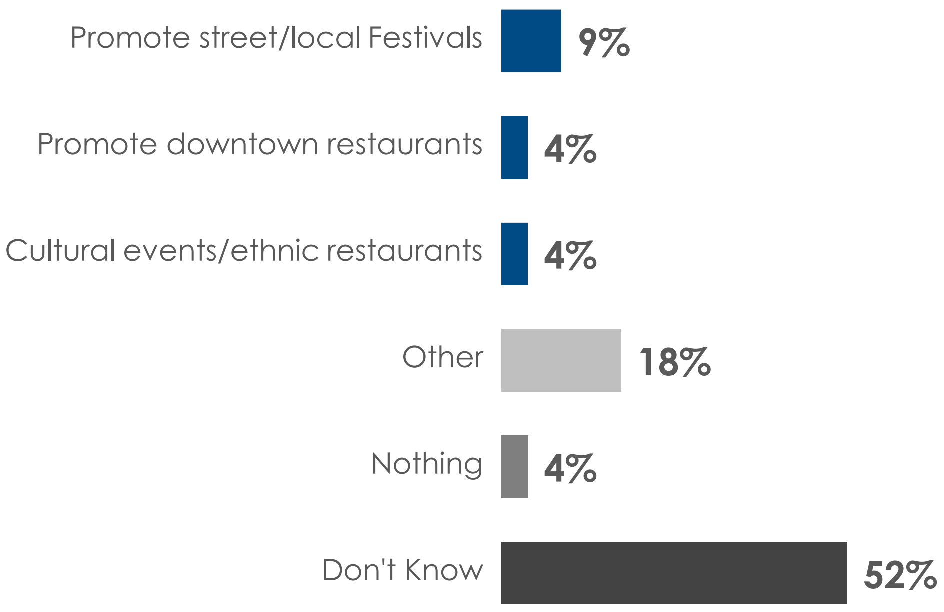


	VERY LIKELY	SOMEWHAT LIKELY	NOT VERY LIKELY	NOT AT ALL LIKELY	DON'T KNOW	LIKELY (T2B)
Participation fees reduced or waived completely	60%	22%	8%	5%	5%	82%
Application process is simplified	43%	30%	10%	8%	9%	73%
The range of prices that restaurants can charge is not fixed by the program	40%	26%	12%	12%	10%	66%
Promotions or giveaways are offered to make it more of an event or experience for both restaurants and customers	33%	31%	14%	12%	10%	64%
There is no requirement to offer three-course prix fixe meals	35%	28%	12%	13%	12%	63%
Special pricing for certain products or services such as card processing fees, beer, alcohol, and other fees provided	32%	27%	12%	14%	15%	59%
Advertising moves to exclusively digital platforms	23%	29%	16%	12%	19%	53%
Participation is capped to a limited number of participating restaurants	26%	23%	19%	16%	16%	49%

Base: All respondents (n=129)
Q16. If the following changes to the program or program format were made, how likely would you be to participate in future restaurant programs that are offered by the City of Toronto?

Suggestions for Different Types of Restaurant Programs

- When asked what type of restaurant promotional program or event they would like to see the City of Toronto produce in the future, a majority decline to offer feedback. Those that do offer a variety of responses, with the highest proportion suggesting the promotion of local festivals (9%), downtown restaurants (4%) and cultural events (45).



Winterlicious was great. However, requiring that restaurants discount their menu items by 20% is very difficult on us. Future events should not require discounted items--especially considering how COVID-19 has negatively affected our industry.

A street festival similar to Dundas west fest but downtown around King St. or Queen St.

Commercials, Advertisements via FB/IG, etc. Free parking to guests that come for it would be great as well.

Just like in Britain, half priced pints on a specific day each week, with the City reimbursing the operators for the discount…

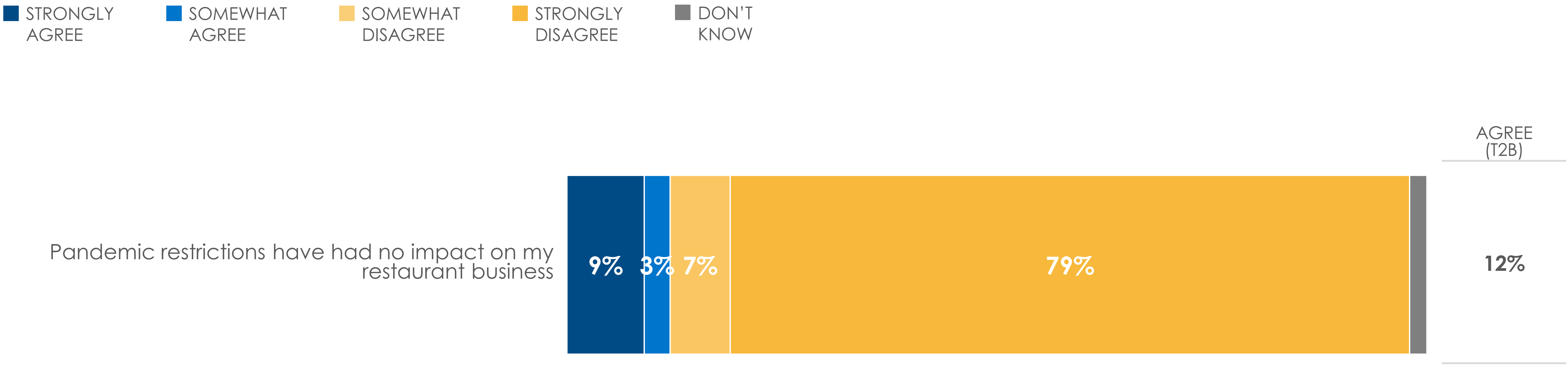
<3% Data not shown

Base: All respondents (n=129)
Q12. What, if any, type of restaurant promotional program or event would you like to see the City of Toronto produce in the future? Please do not include any personal information in your response.

SUPPORT STRATEGIES

Impact of the COVID-19 Pandemic on Operators

- Only about one in ten (12%) operators say that pandemic restrictions have had no impact on their business. In fact, the vast majority (79%) strongly disagree with this.



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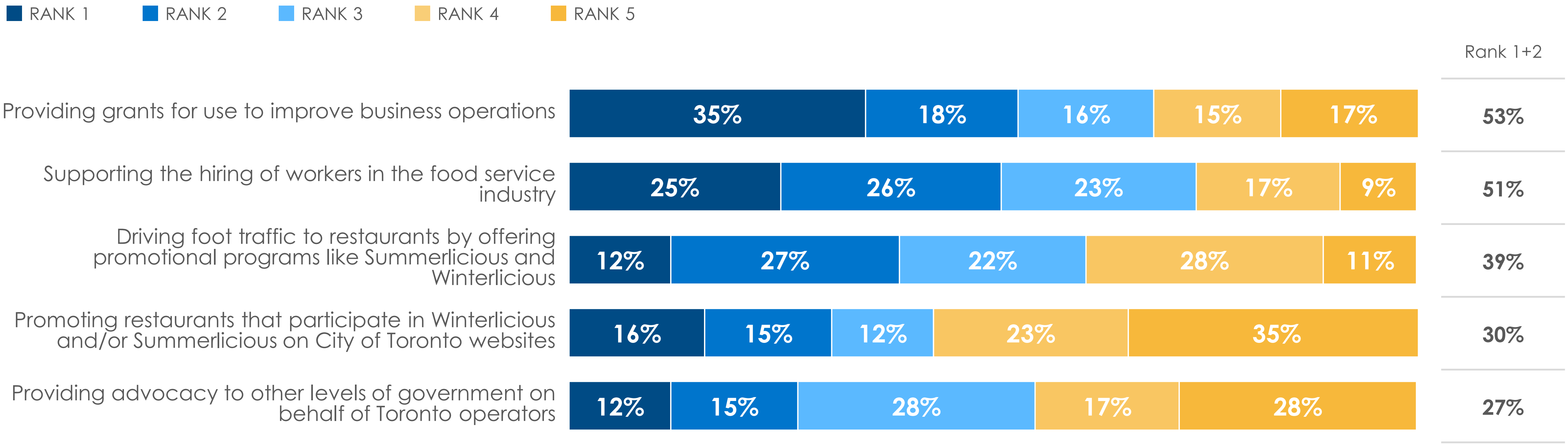
Base: All respondents (n=129)
Q24. Please rate the extent to which you agree or disagree with each of the following statements.

Importance of Various Restaurant Support Strategies

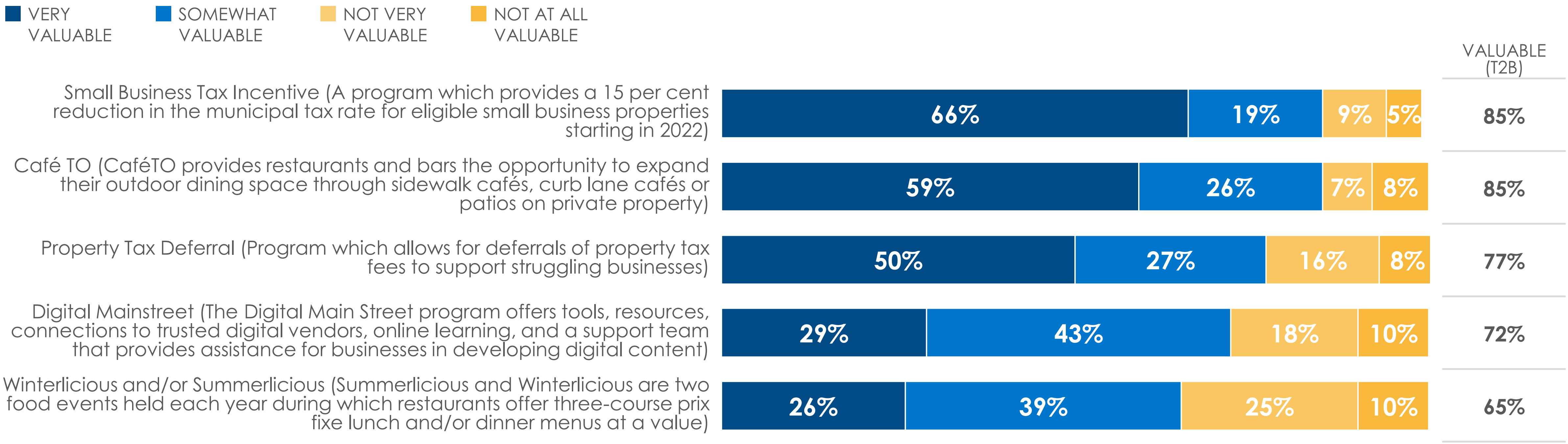
- Grants (53% rank 1-3), supporting the hiring of workers in the food service industry (50%), and driving foot traffic through restaurant support programs like Summerlicious / Winterlicious (39%), are viewed as being among the most important restaurant supports that can be offered by the City of Toronto. Promoting restaurants that participate in the Winterlicious and/or Summerlicious programs (30%) and providing advocacy to other levels of government of behalf of Toronto operators (27%) are thought to be of less importance.



Base: All respondents (n=129)
Q22. Please rank the following restaurant supports that can be offered by the City of Toronto, from 1 to 5, where 1 is most important and 5 is least important, in terms of their importance to your restaurant business.

Value of Support Programs Offered by CoT

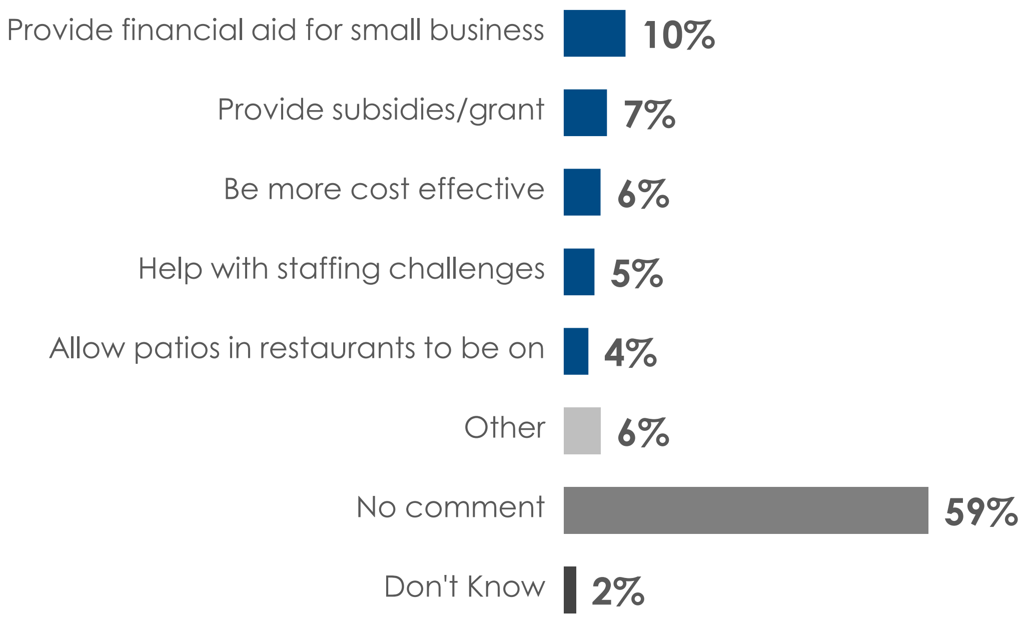
- Across the board, majorities perceive all of Toronto’s restaurant programs as being at least somewhat valuable to their restaurant business. The Café TO and small business tax incentive program specifically are perceived as being among the most valuable, as the vast majority view both programs as being valuable, including two-thirds (66%) that rate the small business tax incentive program as being *very valuable* to their restaurant business.



Base: All respondents (n=129)
Q21. How valuable do you feel each of the following City of Toronto restaurant programs are to the restaurant industry in Toronto?

How can CoT Best Support Restaurant and Food Service Establishments

- Three in five (60%) Toronto restaurants surveyed decline to offer feedback (59%) or admit they aren't sure (2%) how the City can best support restaurant and food service establishments. Those that do offer feedback most commonly mention receiving financial aid from the City (10%).



Drive more people to the downtown core and help with staffing challenges that restaurants are currently experiencing. Thank you.

You are asking a lot of the same old wrong questions - HOW can you help us, then listen to us, would be better. You should know that any "Marketing' the city does for us is a waste of time and money. Just give us the money. This is going to be a town of AnW's and international mega chains soon, say goodbye to neighbourhoods and residents. Small businesses go, the city turns into a toilet. Lead by example, get city staff to support small businesses, offer contracts and concessiosn to small producers instead of mega corps = eg Budweiser gets contracts vs local breweries. Save a dollar, lose a city. Leadership, wish we had some

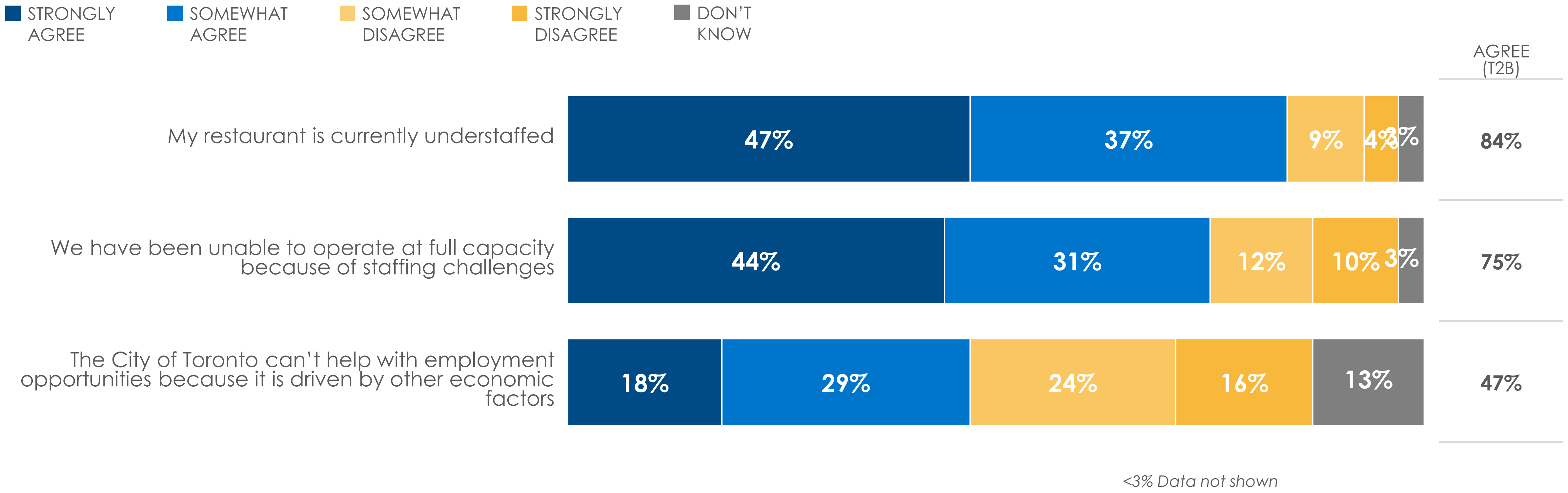
Combining two words (summer-licious), making puns, and slapping TEE-OH onto a name is so lame. Restaurants need money. They need less rules. Get out of the way of patios etc. and just let restaurants operate! Make it easier to get a license. Help people get their liquor licenses! It's insane how hard it is to open a business or add a patio to private property.

Base: All respondents (n=129)
Q26. What, if any, final comments would you like to share with the City of Toronto about how to best support restaurant and food service establishments?

EMPLOYMENT TRAINING & RECRUITMENT CHALLENGES

Attitudes & Opinions Towards Staffing

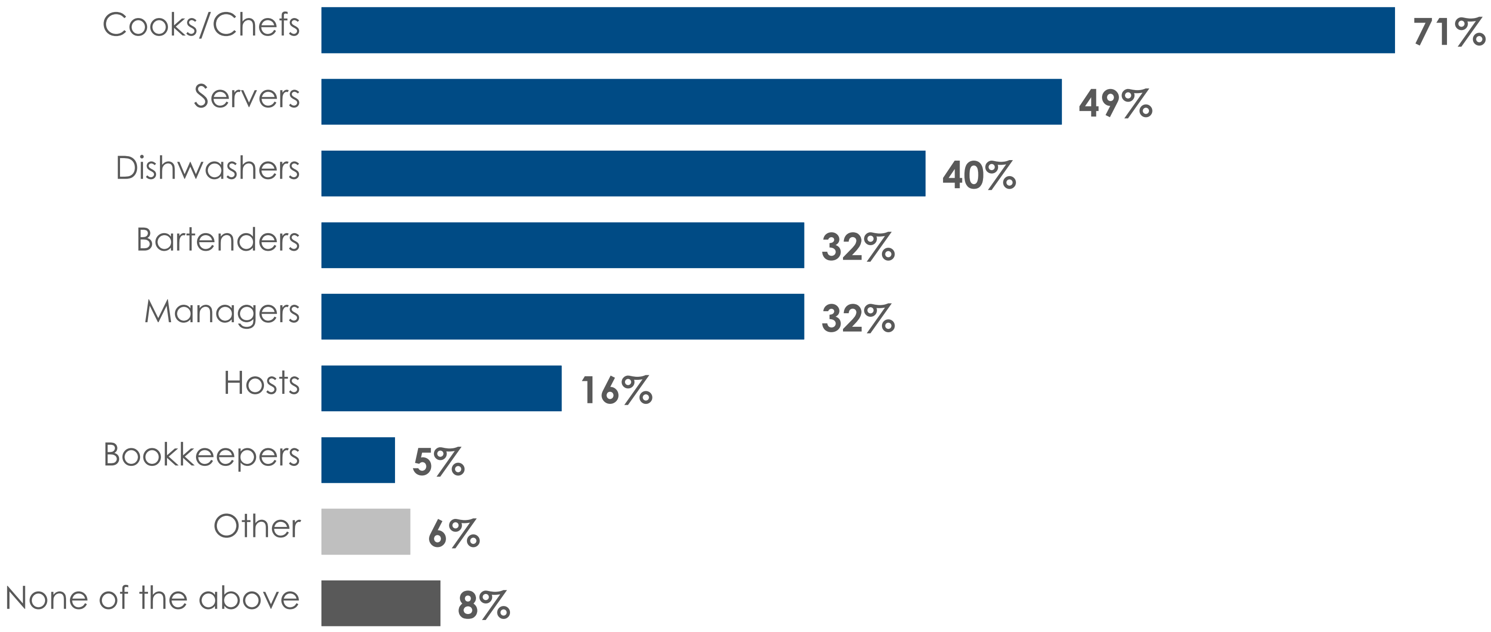
- The vast majority (84%) of Toronto restaurants surveyed indicate that they are currently understaffed, while three-quarters say that they have been unable to operate at full capacity because of staffing challenges. Half of operators agree that the City can't help with these staffing challenges because it is being driven by other factors.



Base: All respondents (n=129)
Q24. Please rate the extent to which you agree or disagree with each of the following statements.

Recruitment Challenges by Type of Position

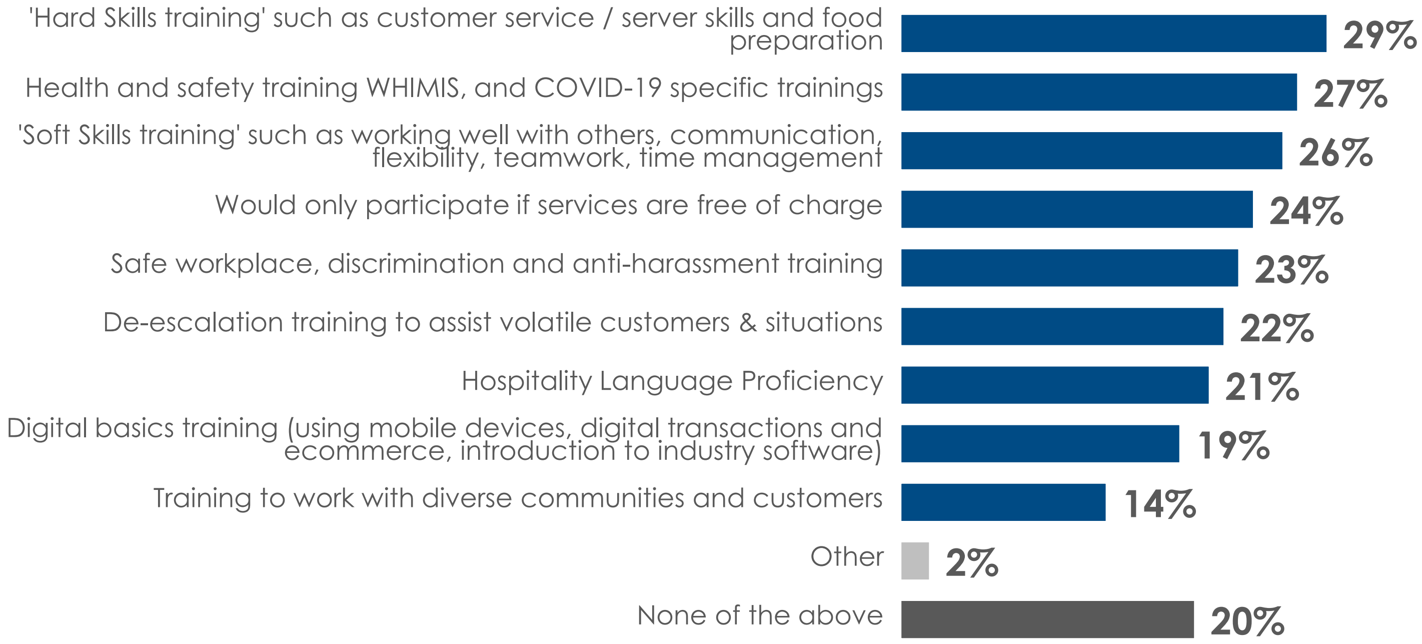
- Cooks/chefs are by far the most difficult positions to recruit, as most (71%) Toronto restaurants surveyed admit they have difficulty recruiting for this position. Around half (49%) are having difficulty recruiting servers while slightly fewer are having difficulty recruiting dishwashers (40%), managers (32%), and bartenders (32%).



Base: All respondents (n=129)
Q23. What, if any, positions are you having the most difficulty recruiting and/or retaining? Please select all that apply.

Interest in Training Programs

- There is no clear preference, in terms of preferred training programs. At around three-in-ten (29%), the highest proportion of Toronto restaurants surveyed say that they would access 'Hard Skills training' for their business, if offered by the City or a partner for a small fee, followed by health and safety training (27%) and 'Soft Skills training' (26%).



Base: All respondents (n=129)
Q25. If offered by the City or a partner for a small fee, which of the following, if any, types of training would you access for your business? Please select all that apply.

OPEN-LINK PUBLIC SURVEY FINDINGS

- Public Online Survey (Promoted by CoT)

TORONTO

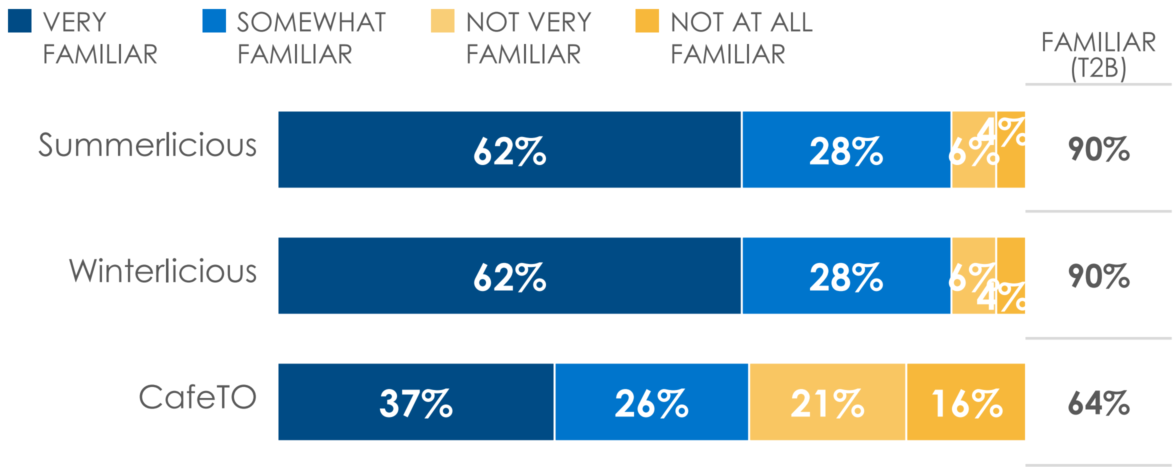
Ipsos

FAMILIARITY WITH & PARTICIPATION IN CoT RESTAURANT SUPPORT PROGRAMS

Familiarity with CoT Restaurant Support Programs

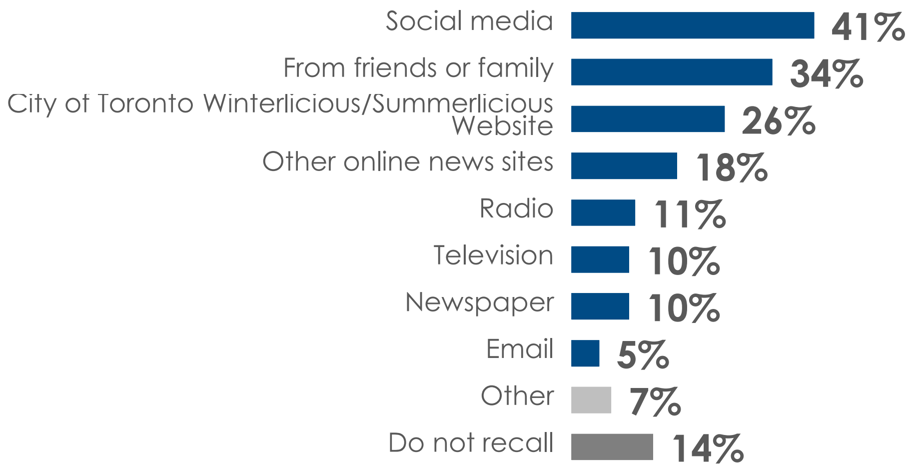
- The vast majority of open-link survey respondents report familiarity with the Summerlicious (90%) and/or Winterlicious (90%) programs. Those who are familiar with the Summerlicious and Winterlicious programs most commonly cite social media (41%) and friends/family (34%) as the source(s) of their knowledge.
- High income households ($100k+) are more likely to indicate familiarity with Summerlicious (94% vs. 86% household income under $100k) and Winterlicious (93% vs. 87%) programs. Residents of the Downtown/East York core are more likely to say they are familiar with CafeTO (74% vs. 62% of all other Toronto residents). Older residents (55+) who are familiar with Summerlicious and/or Winterlicious are more likely to cite traditional media (TV, radio, newspapers) as program knowledge sources.
- Those living in the GTA outside of Toronto are less likely to report familiarity with the Summerlicious (83% vs. 92% Toronto) and Winterlicious (83% vs. 92%) programs.

Familiarity with Restaurant Programs



Base: All respondents (n=1493)
Q36. How familiar are you with each of the following restaurant programs or events that are produced and run by the City of Toronto?

Source of Knowledge

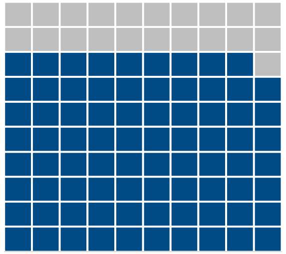


Base: Those who is familiar with Summerlicious and/or Winterlicious (n=1435)
Q37. How did you learn about Summerlicious or Winterlicious restaurant promotional programs?

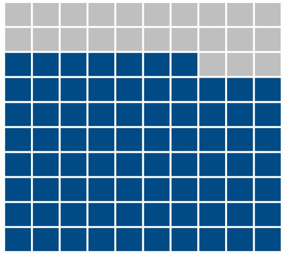
Satisfaction with the Summerlicious & Winterlicious Experience

- Most of those who are familiar with the Summerlicious (79%) and Winterlicious (77%) programs report having visited a participating restaurant during the promotional period. What's more, the vast majority of those who participated in both Summerlicious (89%) and Winterlicious (90%) indicate satisfaction with the experience.
- High income households ($100k+) are more likely to have participated in Summerlicious (84% vs. 71% under $100k) and Winterlicious (83% vs. 70%), as are those who do not identify as having a disability (Summerlicious: 80% vs. 72% identify as having a disability; Winterlicious: 79% vs. 69%).
- Those living in the GTA outside of Toronto are among the most likely to report satisfaction with both the Summerlicious (98% vs. 88% Toronto) and Winterlicious (99% vs. 89%) programs.

Participation in Restaurant Programs



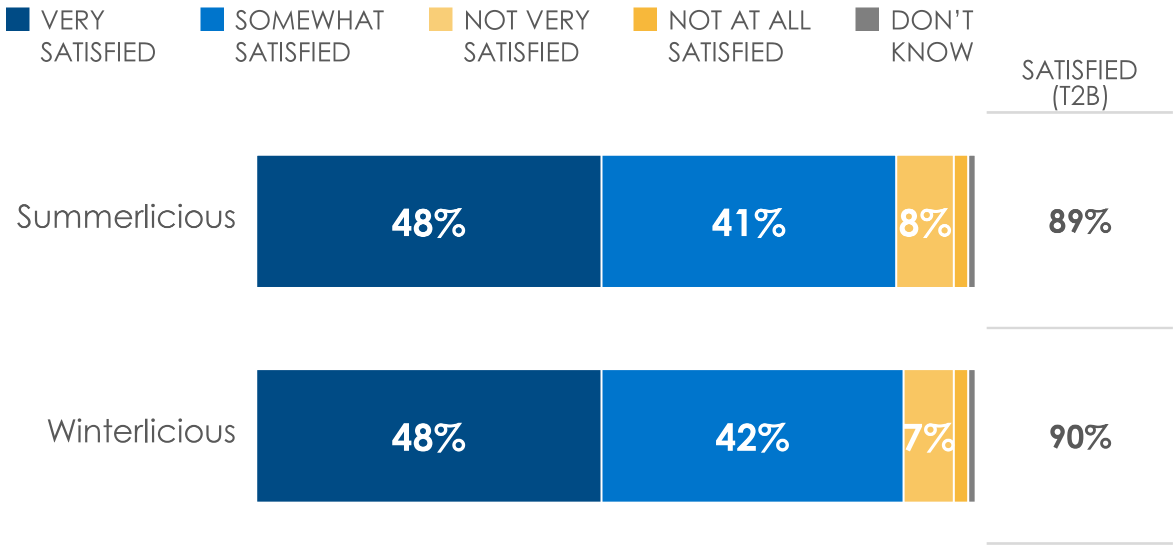
79% visited a restaurant participating Summerlicious during the promotional period



77% visited a restaurant participating Winterlicious during the promotional period

Base: Those who is familiar with Summerlicious and/or Winterlicious (n=1430)
Q38. Have you ever dined at or visited a restaurant participating in any of the following City of Toronto restaurant events during the promotional period?

Satisfaction with Restaurant Programs

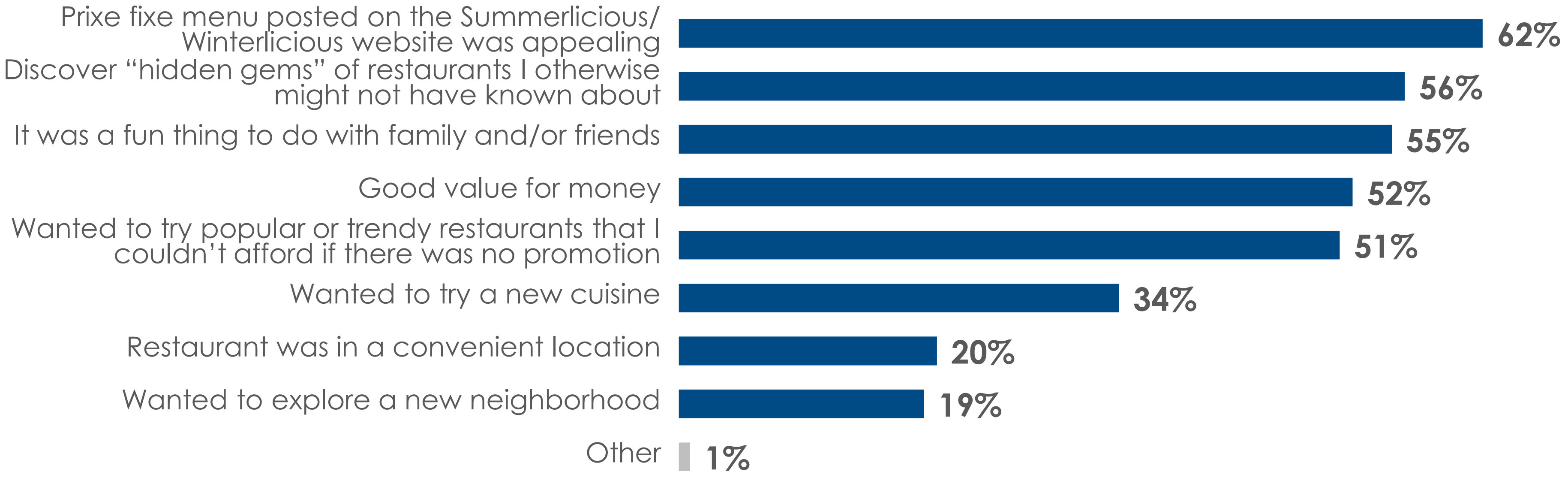


<3% Scores are not labelled

Base: Those who ever dined at or visited a restaurant participating in any of the following City of Toronto restaurant events during the promotional period (Summerlicious n=1127; Winterlicious n=1103)
Q39. Overall, how satisfied are you with your experience participating in each of the following restaurant events?

Reasons for Participation

- Among those who participated in Summerlicious and/or Winterlicious, majorities cite the prixe fixe menu (62%), value for money (52%), discovering "hidden gems" of restaurants they otherwise might not have known about (56%), simply having a fun time with family and/or friends (55%), and trying out popular restaurants they couldn't afford without a promotion (51%) as reasons that compelled them to participate in the Winterlicious and/or Summerlicious programs.
- Those living in the GTA but outside Toronto are more likely to cite discovering "hidden gems" of restaurants (66% vs. 54% Toronto) or wanting to try a new cuisine (48% vs. 33% Toronto) as reasons for participation. Within Toronto, North York residents are among the most likely to mention the prixe fixe menu as enticing them to participate (75% vs. 60% of all other Toronto residents).

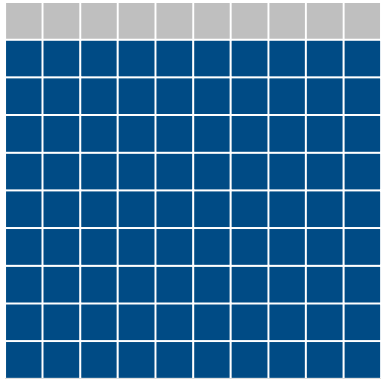


Base: Those who visited a restaurant participating Winterlicious and/or Summerlicious event during the promotional period (n=1191)
Q40. Which of the following best describes what motivated you most to participate in the Winterlicious and/or Summerlicious event? Select all that apply.

First-Time & Returning Restaurant Visits

- The vast majority (90%) of those who participated in Summerlicious and/or Winterlicious say they visited a restaurant for the first time during the event. Additionally, more than half (53%) of those who participated in Summerlicious and/or Winterlicious say they returned to the same restaurant again after the event.
- The under 55 cohort (95% vs. 87% 55+), those that have a household income above $50k (92% vs. 80% under $50k), and do not identify as having a disability (91% vs. 85% identify as having a disability) are among the most likely to say they visited a restaurant for the first time during Summerlicious and/or Winterlicious events.

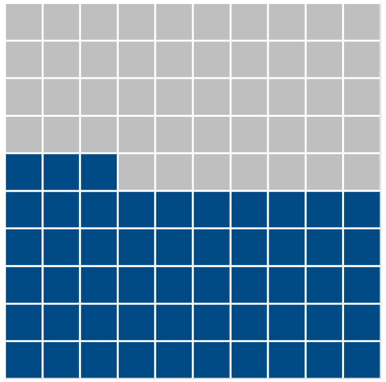
First-Time Restaurant Visit



90% visit any restaurant for the first time during a Summerlicious or Winterlicious event

Base: Those who visited a restaurant participating Winterlicious and/or Summerlicious event during the promotional period (n=1191)
Q41. Did you visit any restaurant for the first time during a Summerlicious or Winterlicious event?

Returning Restaurant Visit

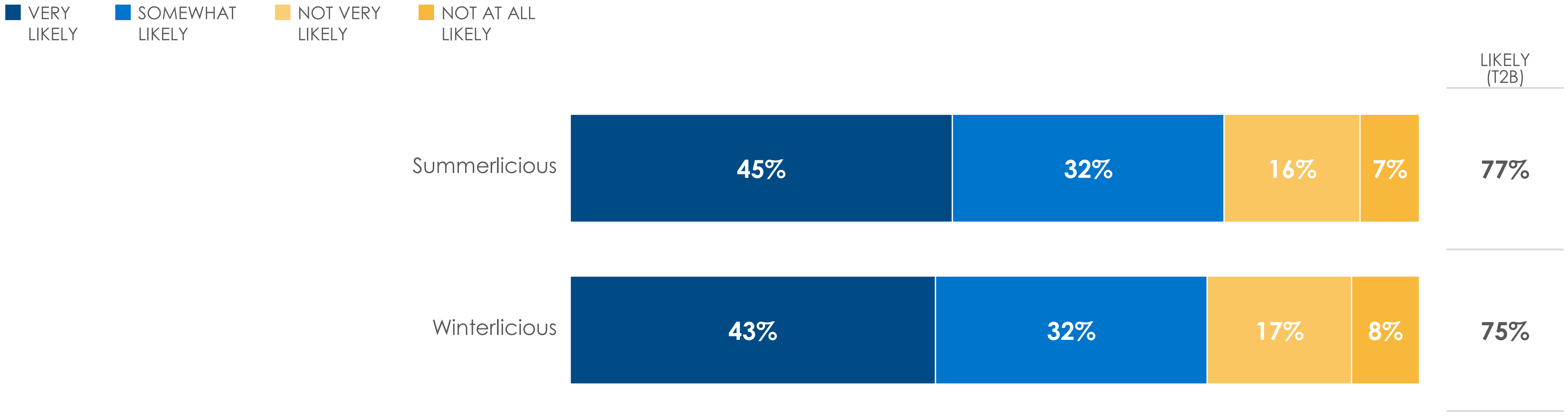


53% returned to this restaurant again since the Summerlicious or Winterlicious event

Base: Those who visited a restaurant participating Winterlicious and/or Summerlicious event during the promotional period (n=1191)
Q42. Have you returned to this restaurant again since the Summerlicious or Winterlicious event?

Likelihood of Future Participation

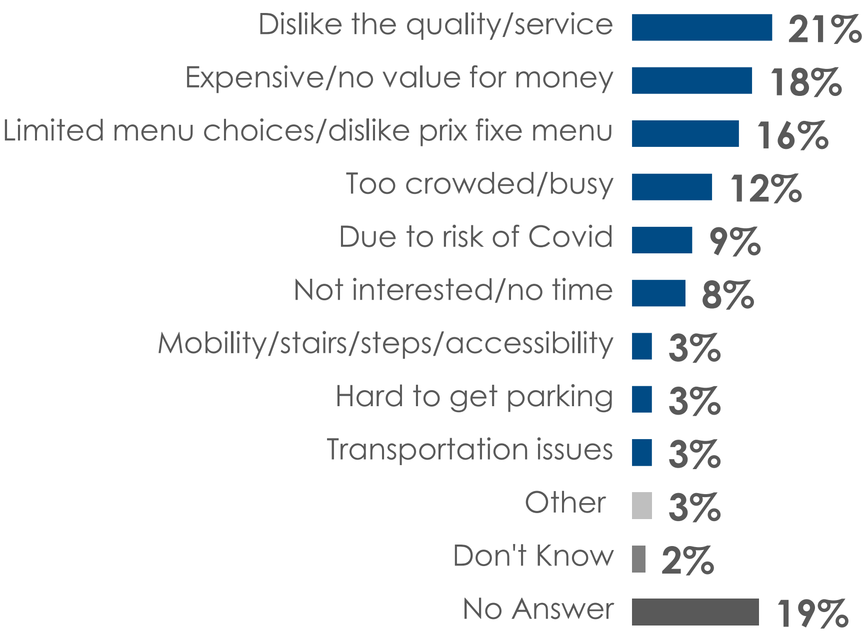
- Most say they are likely to visit a restaurant in the City of Toronto during the Summerlicious (77%) and Winterlicious (75%) events.
- The oldest cohort (75+) are among the least likely to claim that they would be likely to participate in future Summerlicious (61% vs. 78% under 55) and/or Winterlicious (76% vs. 58%) events. Those that do not identify as having a disability are more likely to indicate that they would be likely to participate in future Summerlicious (80% vs. 63% identify as having a disability) and/or Winterlicious (78% vs. 61%) events. Those that have household income of at least $50k (77% vs. 66% under 50K) are more inclined to say they would be likely to participate in future Winterlicious events.
- Those living outside of Toronto in GTA are more likely than those living in Toronto to say they would be likely to participate in future Summerlicious (93% vs. 75% all other regions) and/or Winterlicious events (89% vs. 74%).



Base: All respondents (n=1493)
Q43. How likely would you be to visit a restaurant in the City of Toronto for the Summerlicious or Winterlicious events?

Reasons for Not Participating

- When asked why they are not likely to participate in Summerlicious and/or Winterlicious in the future, a variety of responses are provided by those who indicate that they are unlikely to do this, with concerns related to price (18%), quality/service (21%), and menu choices (16%) topping the list.
- Those that do not identify as having a disability are among the most likely to cite limited menu choices (20% vs. 5% of those that identify as having a disability) as a reason for not participating in future events but are less likely to mention mobility (14% vs. 1%) .



It's not worth the price. It used to be an opportunity to try somewhere that wasn't normally accessible because the $15 lunch prices were lower than their regular menu. Now you have diners charging 65$/pp for dinner and for me that's just not do-able. In ten years, the prices have doubled but my wages have not kept up with inflation. I'm more likely now to lean toward fast food when going out compared to ten years ago when I was able to afford go to a sit-down restaurant once or twice a week.

The couple of times I have joined friends at a restaurant serving Summerlicious, the food and service has been less than great. As if the restaurant is doing you a favour by offering a deal and am not delighted with that response as a guest. I would rather pay full-pop for a terrific meal and a special time out.

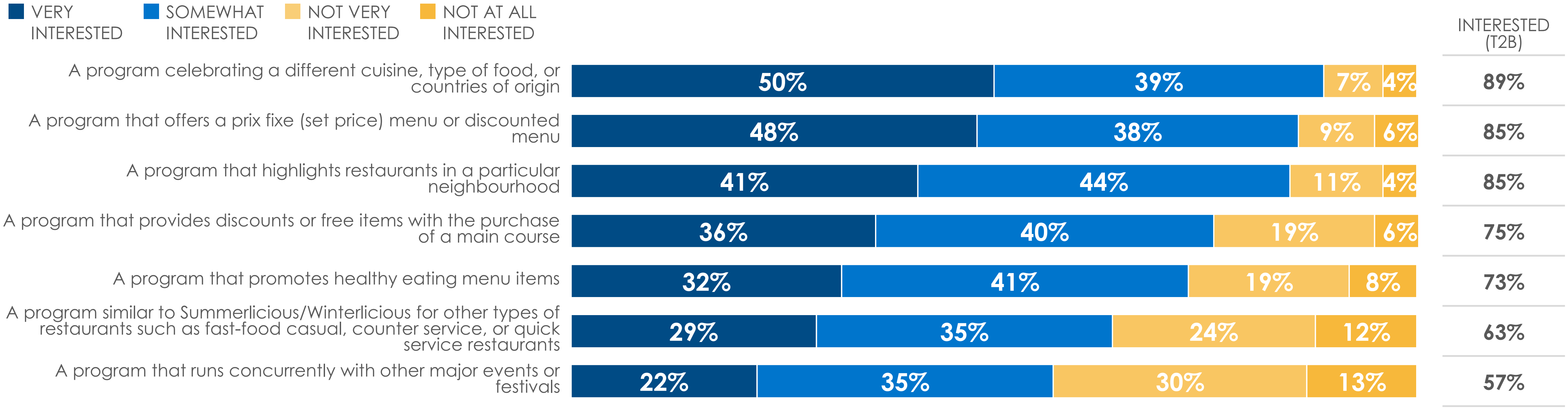
I do not like the set menu offerings and do not find the valuable. I prefer the normal menu offerings. I live in the city and eat out often enough that I find the programs to be a nuisance, I know they're good for the restaurants, but I do not enjoy them.

<3% Data not shown

Base: Those who not very or not at all likely to Summerlicious and/or Winterlicious (n=387)
Q44. Why would you not be likely to visit a restaurant in the City of Toronto for the Summerlicious or Winterlicious events in the future? Please do not include any personal information in your response.

Interest in Restaurant Programs

- There is considerable interest in all types of restaurant programs that might be offered by the City of Toronto. Interest is strongest in terms of seeing programs that celebrate different cuisines (89%), offer a prix fixe or discounted menu (85%), or highlight particular neighbourhoods of the City (85%).
- Interest in most types of promotional programs tends to be lower among the 75+ demographic and those that identify as having a disability. High income households ($100k+) are less likely to express interest in a program that provides discounts (70% vs. 82% under $100k) or a program similar to Summerlicious and/or Winterlicious for other types of restaurants (59% vs. 70%).
- Those living outside of Toronto in the GTA are more likely to say they are interested in a program that provides discounts or free items with the purchase of a main course (87% vs. 75% Toronto) or a program similar to Summerlicious/Winterlixious for other types of restaurants (76% vs. 63% Toronto).

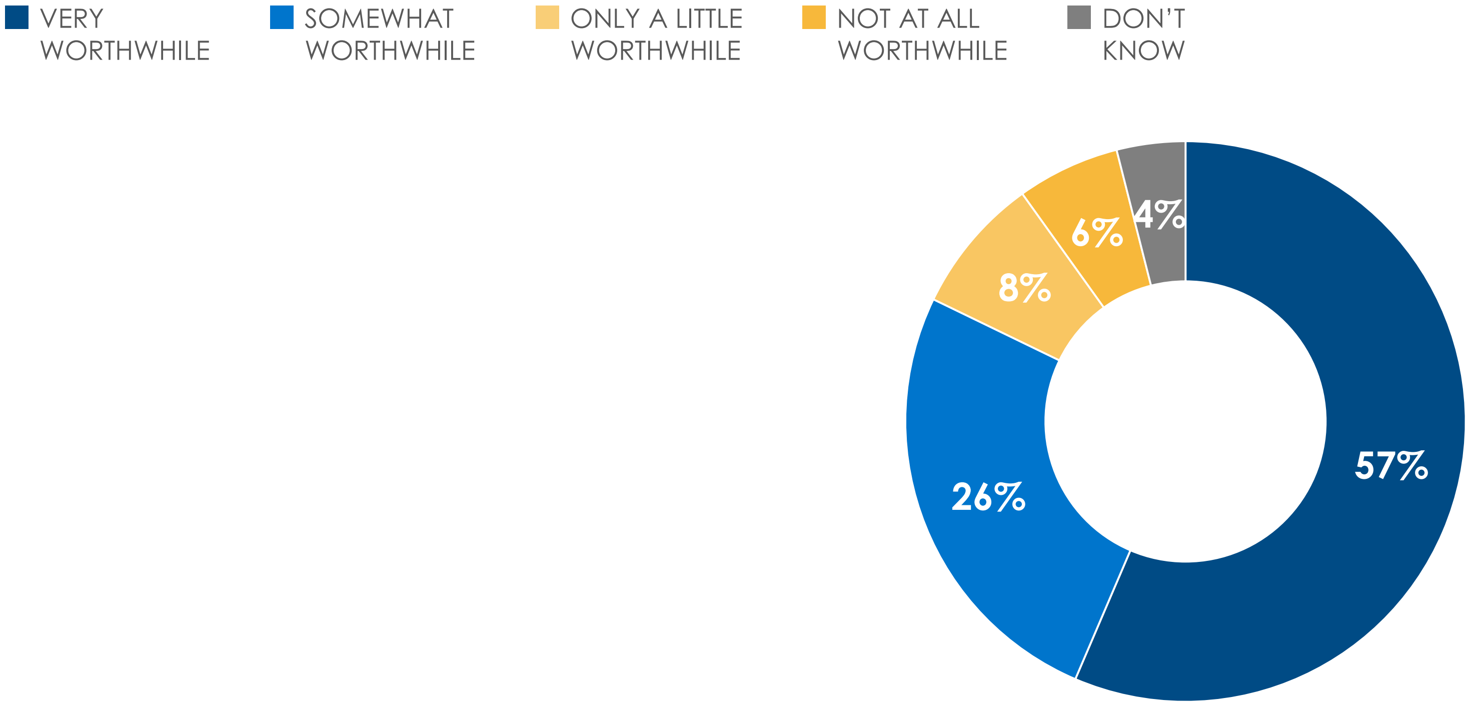


Base: All respondents (n=1493)
Q45. How interested would you be in visiting a restaurant that offered the following types promotional programs that could be offered by the City of Toronto?

PUBLIC OPINION ABOUT CoT RESTAURANT PROGRAMS

Worthwhile Effort of CoT Restaurant Programs

- At well over four in five (83%), the vast majority indicate that a restaurant promotional program produced and marketed by the City of Toronto, such as Summerlicious/Winterlicious, is a worthwhile effort on the part of the City.
- Those who live outside of Toronto in GTA (at 92%) are more likely than those in Toronto (82%) to rate the programs as being a worthwhile (very/somewhat worthwhile) endeavour.

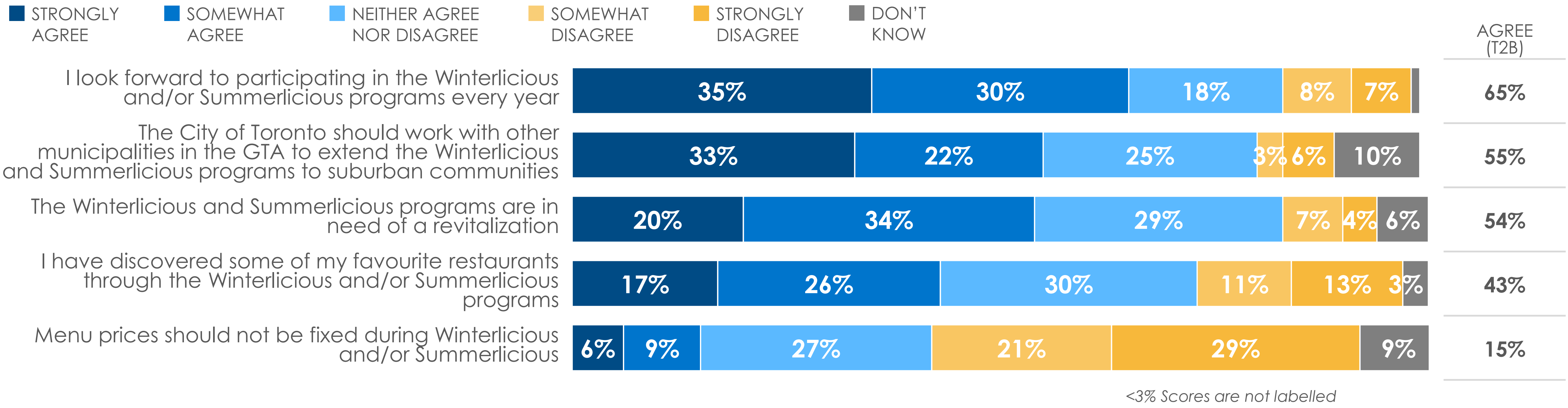


WORTHWHILE (T2B)
83%

Base: All respondents (n=1493)
Q50. Is a restaurant promotional program or event (such as Winterlicious/Summerlicious), produced and marketed by the City of Toronto to highlight Toronto's culinary industry, a worthwhile effort on the part of the City?

Views of Toronto's Restaurant Programs Among Participants

- Two-thirds (65%) of those that have participated in the Winterlicious/Summerlicious programs say they look forward to these events, every year, a figure which highlights the overall success of the licious programs. A majority thinks the City of Toronto should work with other municipalities in the GTA to extend the restaurant programs to suburban communities (55%). The vast majority does not agree with the idea that menu prices should not be fixed, a figure which suggests the current formula for the licious programs might be working fine.
- Those that do not identify as having a disability are among the most likely to favour the idea of extending the Winterlicious and Summerlicious programs to other communities located within the GTA (57% vs. 44% identify as having a disability). East York residents are among the least likely to claim to have discovered some of their favourite restaurants through the program (27% vs. 41% of all others).
- Those living in GTA but outside Toronto are more likely to say the City should work with other municipalities in the GTA to extend the restaurant programs to suburban communities (90% vs. 51% Toronto), admit that they have discovered some of their favourite restaurants through the program (72% vs. 40%), and claim to look forward to participating in the Winterlicious and/or Summerlicious programs every year (84% vs. 64%).

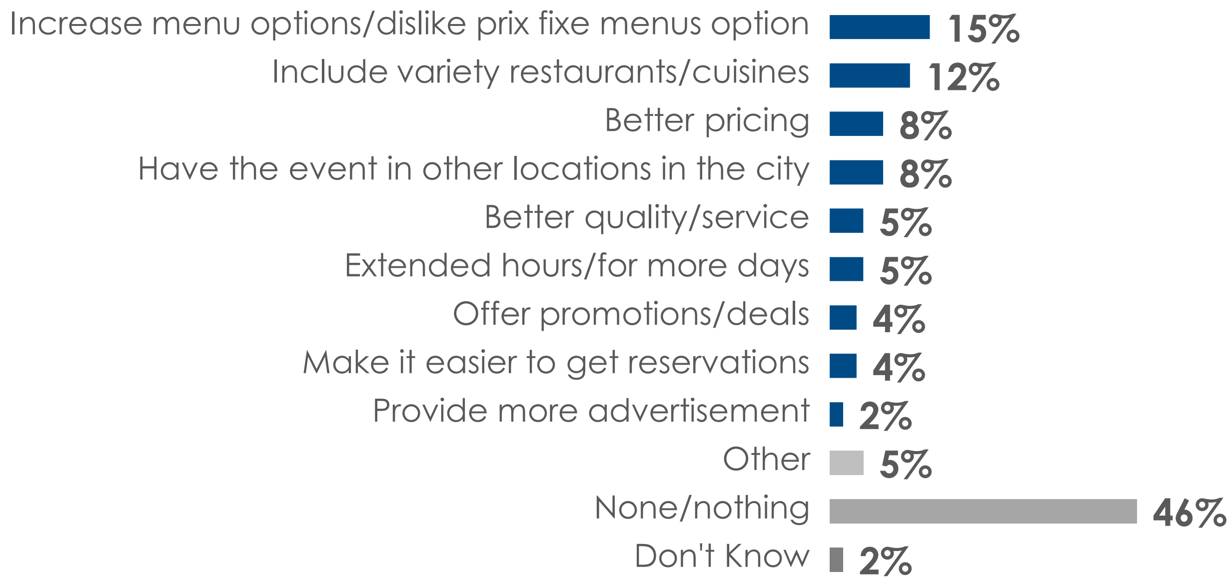


<3% Scores are not labelled

Base: All respondents (n=1493)
Q46. Please rate the extent to which you agree or disagree with each of the following statements, as they relate to restaurant events in Toronto.

Suggestions for Enhancing CoT Programs

- When those who participated in Summerlicious and/or Winterlicious were asked what, if anything, they would change about the programs, a variety of responses were provided, with suggestions to increase menu options (15%), include variety of restaurants/cuisines (12%), better pricing (8%), and have the event in other locations in the city (8%) topping the list.
- Within Toronto, residents of Scarborough are among the most likely to favour the idea of having the event in other locations in the city (25% vs. 5% of all other Toronto residents).



Smaller servings for cheaper prices. Chance to try several sampler size meals

More restaurants and the weeks offering these programs should be extended a little longer as reservations do get filled up quickly at popular restaurants

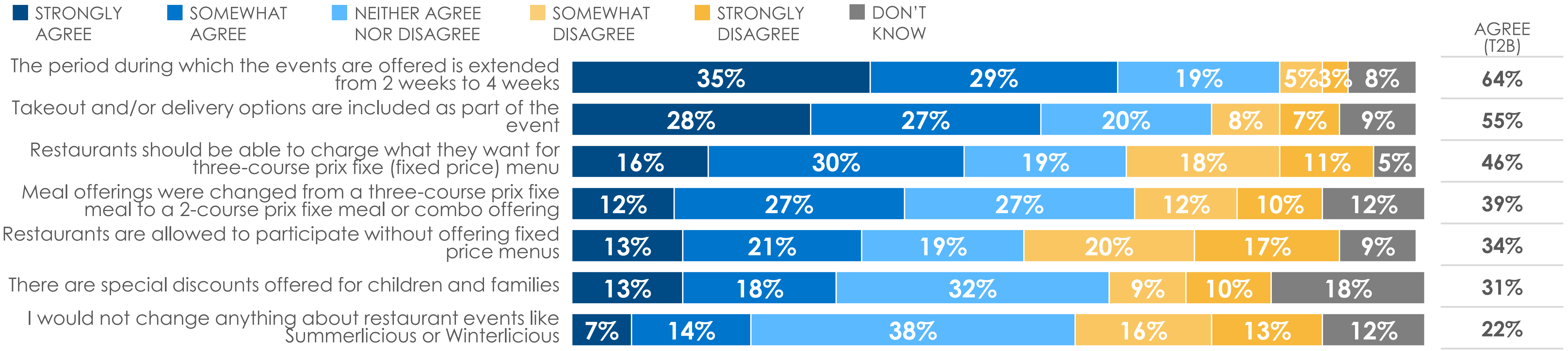
I would make them less expensive and offer different price points. When the program first started, it was so fun to visit a few on the list. Now it seems out of reach for most peoples' budgets esp during these challenging times

Run program longer timeframe. Restaurants in GTA, Newmarket, Thornhill, Pickering etc. are areas to be included. More menu choices

Base: Those who participated in Summerlicious or Winterlicious (n=1191)
Q47. If you could change the Winterlicious and Summerlicious programs, what, if anything, would you do differently? Please be as specific as possible. Please do not include any personal information in your response.

Attitudes & Opinions Towards Restaurant Program Reform

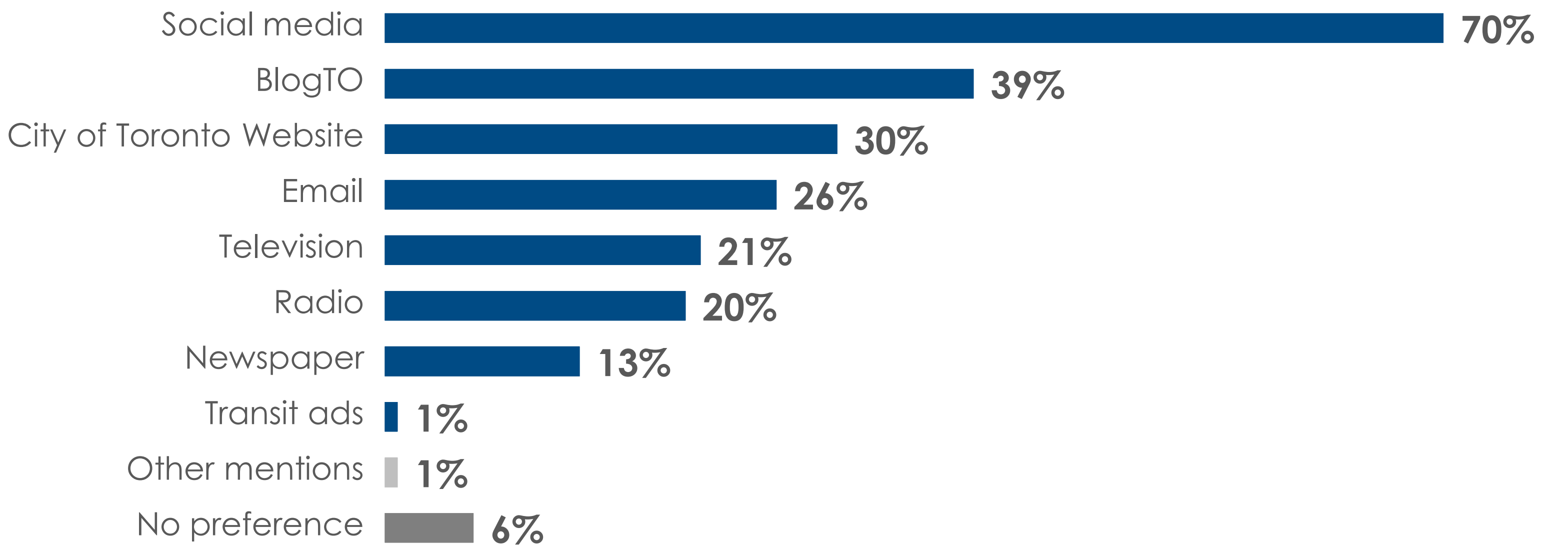
- Just one in five (22%) agree with the idea that nothing in connection with the Summerlicious and Winterlicious program needs to change. Two-thirds (64%) want to extend the promotional period of the restaurant programs from 2 weeks to 4 weeks. A majority (55%) would also like to see takeout and/or delivery options included as part of the event. One-third (34%) think restaurants should be allowed to participate without offering fixed price menus.
- Those that do not identify as having a disability are among the most inclined to want to see the program duration extended from 2 weeks to 4 weeks (66% vs. 56% identify as having a disability), pivot to a two-course offering (41% vs. 31%), or say they would change nothing about the program (23% vs. 16%). Within Toronto, those living downtown are less likely to favour the idea of switching to a two-course offering (38% vs. 44% of all others).
- Toronto residents are more likely to agree with the idea that restaurants should be able to charge what they want for a three-course prix fixe meal (48% vs. 33% GTA outside Toronto) yet are also more inclined to think meal offerings ought to be changed to a two-course offering (41% vs. 29%). This group is less likely to say they would change nothing about the programs (21% vs. 33%), think special discounts should be offered for children/families (30% vs. 43%), and want to see the duration of the program extended from 2 weeks to 4 weeks (63% vs. 77%).



Base: All respondents (n=1493)
Q48. Please rate the extent to which you agree or disagree with each of the following statements, as they relate to restaurant events in Toronto.

Preferred Communication Channel

- Social media tops the list (70%) as the preferred media channel through which information about programs and events that promote Toronto restaurants can be communicated.
- Those living in Toronto are more likely than those living outside of Toronto in the GTA to cite BlogTO (41% vs. 26%) and newspapers (13% vs. 6%) as preferred channels.

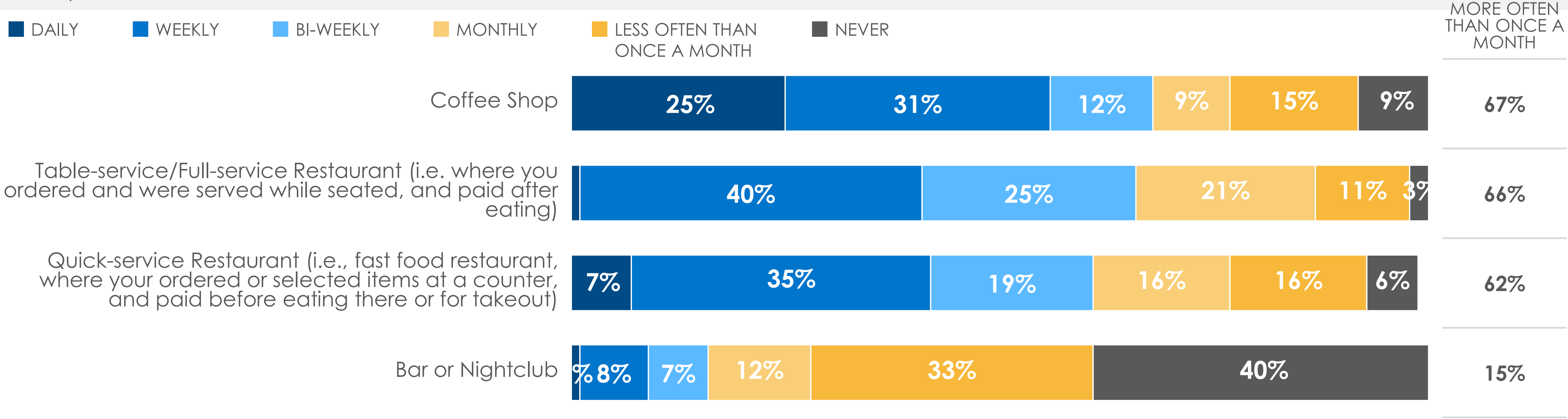


Base: All respondents (n=1493)
Q49. How would you prefer to hear about programs and events that promote Toronto restaurants, such as Winterlicious and Summerlicious? Select up to three responses.

CONSUMER DINING HABITS & BEHAVIOURS

Pre-Pandemic Dining Habits

- Prior to the COVID-19 pandemic, around two-thirds say they visited coffee shops (67%) and table-service/full-service restaurants (66%) more often than once a month, followed by quick-service restaurants (62%) and bars/nightclubs (15%).
- Among Toronto residents, those living in East York are less likely to report eating at a quick-service restaurant on a weekly basis, or more often (25% vs. 42% of all others). High income households ($100k+) are among the most likely to say they visit table-service restaurants on at least a weekly basis or more often (49% vs. 35% of all others). Those that do not identify as having a disability are more likely to eat at quick-service restaurants on a weekly basis, or more often (44% vs. 33% identify as having a disability).
- Those living in the GTA outside of Toronto are statistically more likely to visit coffee shops (67% vs. 56% Toronto) or quick-service restaurants (60% vs. 41%).

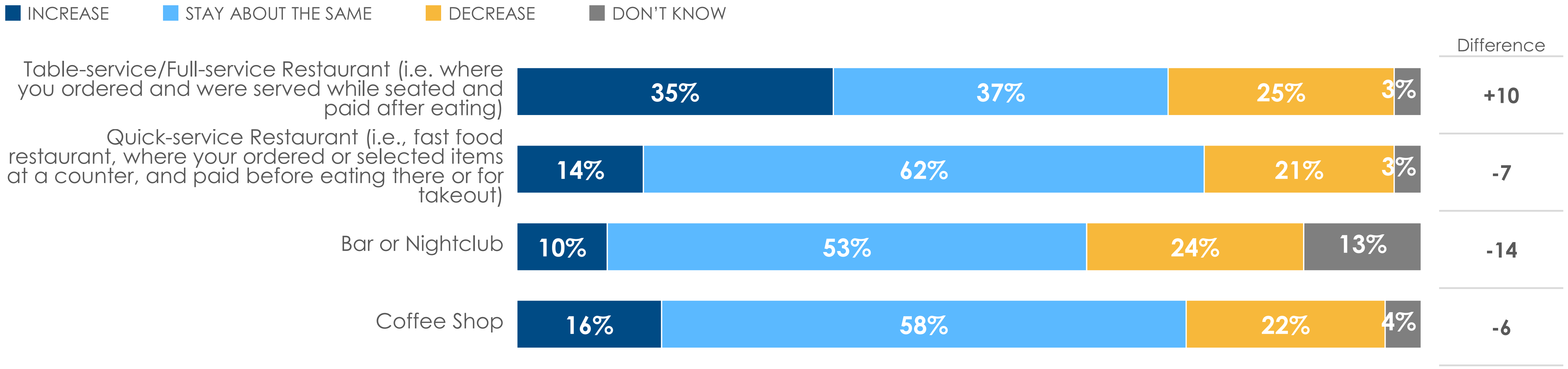


<3% Scores are not labelled

Base: All respondents (n=1493)
Q32. Thinking back to before the COVID-19 pandemic (prior to March 2020), how often did you typically visit each of the following for an in-person experience?

Expected Dining Habits (Post-Pandemic Restrictions)

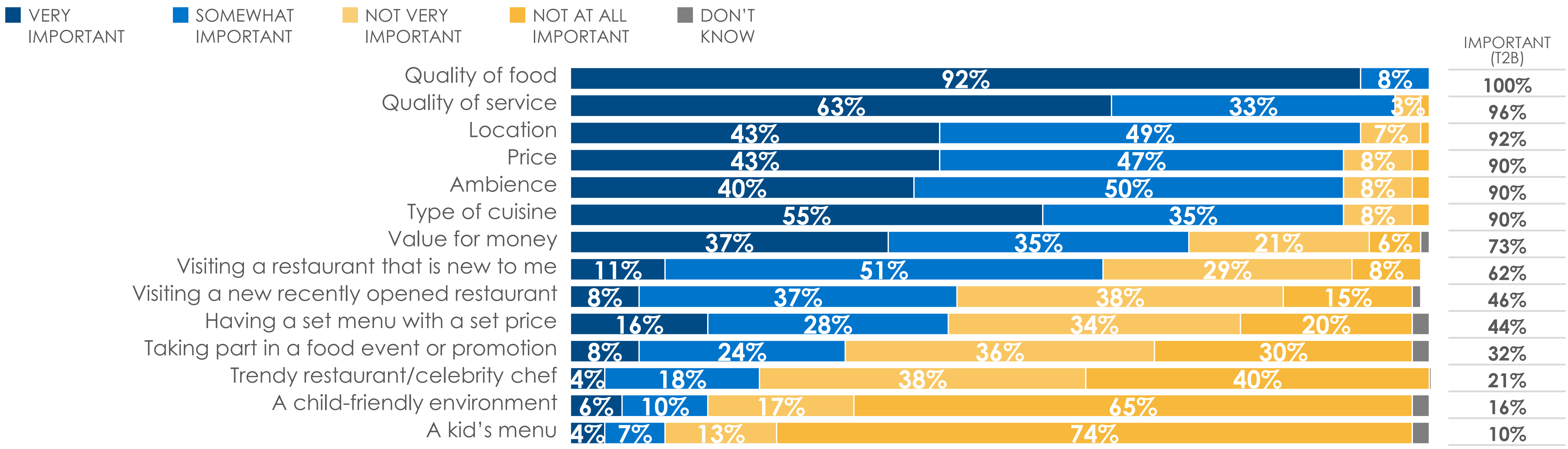
- When asked to consider the removal of COVID-19 mandates and restrictions, around one-third (35%) say they expect their frequency of in-person Table-service/Full-service Restaurant visits to increase, compared to pre-pandemic levels. For all other types of restaurants, around half expect their frequency of in-person restaurant visits to stay about the same as it was, prior to the pandemic. Among those who do not expect their dining habits for Quick-service restaurant, bar or nightclub, and coffee shop to return to pre-pandemic levels, a higher proportion expect in-person visits to decrease rather than increase.
- Those who do not identify as having a disability (37% vs. 22% identify as having a disability) are more likely to expect to increase their in-person visits to Table-service/Full-service restaurants. High income households ($100k+) (13% vs. 21% under $100k) and Toronto residents living outside of the East York borough (15% vs. 30% East York) are among the least likely to expect to increase their in-person visits to coffee shops.
- Those living outside of Toronto in the GTA (46% vs. 34% of Toronto residents) are more likely to expect to increase their in-person visits to table-service restaurants.



Base: All respondents (n=1493)
Q33. With the removal of Covid-19 mandates and restrictions, do you expect your tendency to visit each of the following for an in-person experience over the next year to increase, decrease, or stay about the same as it was, prior to the pandemic?

Importance of Factors when Going to a Restaurant

- Quality of food (100%) and service (96%) are deemed the most important considerations by those who ate at or ordered from restaurants in the past month. Location (92%), price (90%), ambience (90%), and cuisine type (90%) are also perceived as being important by the vast majority within this group. Taking part in a food event or promotion (32%), attending a trendy restaurant (21%), and having a kid's menu (10%) or child-friendly environment (16%) are thought to be of less importance.
- Those living outside of Toronto in GTA are more likely to say taking part in a food event or promotion (51% vs. 30% Toronto), visiting a recently opened restaurant (54% vs. 45%), trendy restaurants (31% vs. 20%), and good value for money (80% vs. 71%) are important considerations. This group is, however, less likely to think location is important (84% vs. 93%).

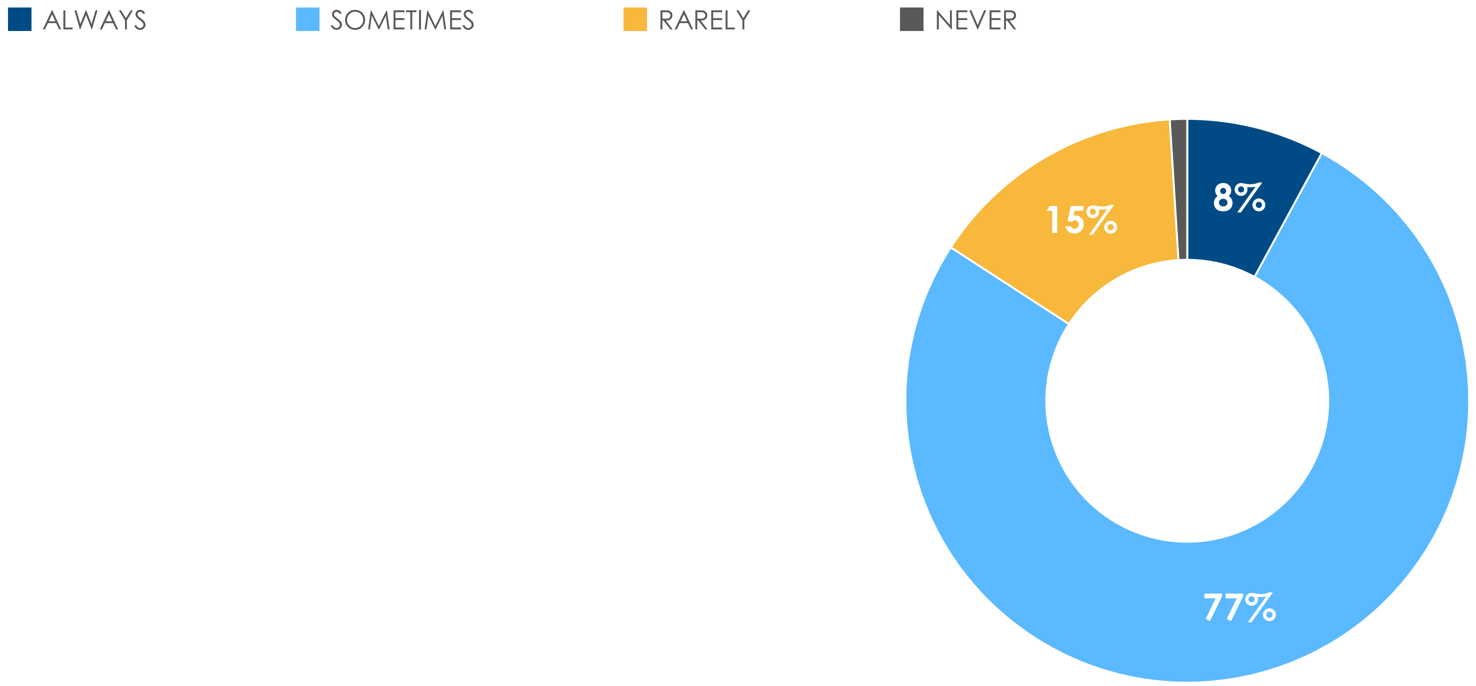


<3% Scores are not labelled

Base: Those who ate at a restaurant or ordered takeout/delivery from restaurants in the past month and did it before the COVID-19 pandemic (n=1493)
Q34. When considering going out to a restaurant, how important are each of the following to you?

Choosing New vs. Familiar Dining Experience

- Most (77%) admit they will choose a new dining experience over something familiar at least sometimes, though just eight percent (8%) say they will always do this. As many as one-in-seven (15%) indicate that they *rarely* will choose a new dining experience.
- Likelihood to always want to choose a new dining experience tends to decrease with age.



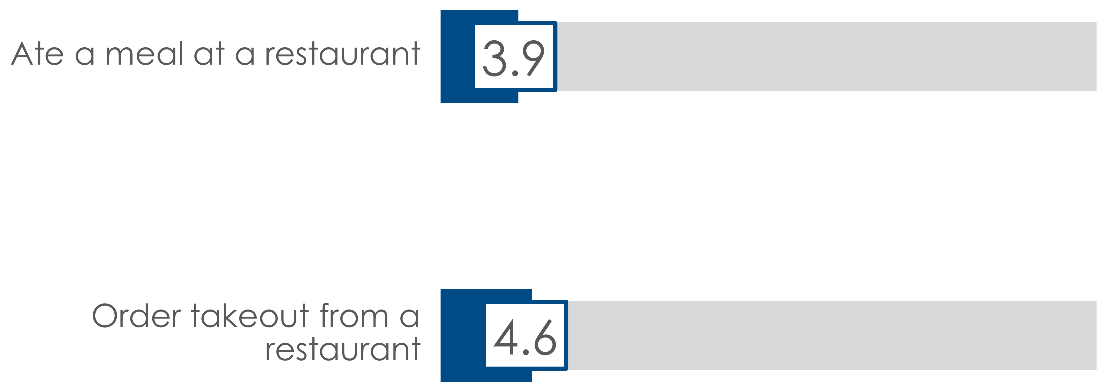
<3% Scores are not labelled

Base: All respondents (n=1493)
Q35. How often do you choose a new dining experience as opposed to frequenting restaurants you are familiar with?

Consumer Dining Habits

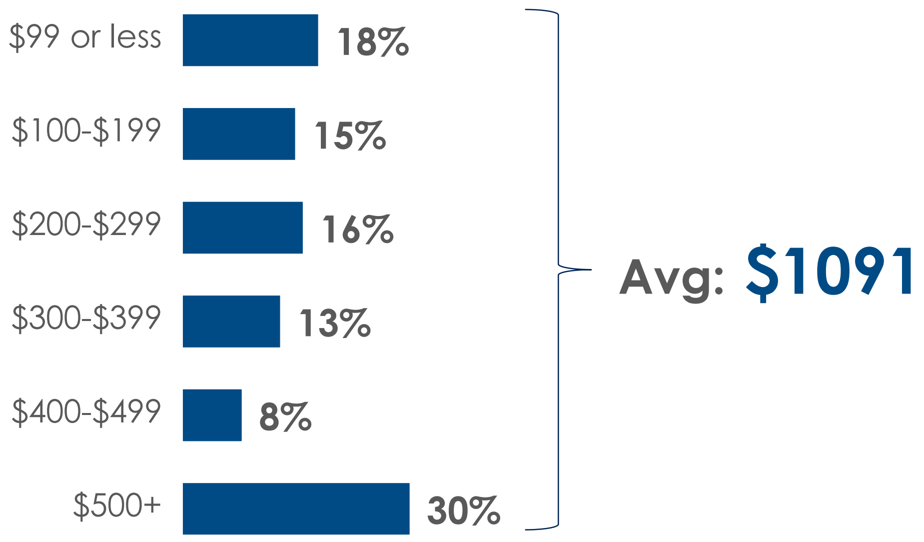
- On average, those that responded to the public survey report eating a meal at a restaurant about four times and ordering takeout from a restaurant about five times in the past month. A plurality (30%) of those who ate at or ordered takeout from restaurants in the past month claim to have spent at least $500 on this, in the past month.

Frequency of Restaurant Dining



Base: All respondents (n=1493)
Q30. In the past month, how many times would you say you did each of the following...

Monthly Spending on Restaurants



Base: Those who ate at a restaurant or ordered takeout/delivery from restaurants in the past month (n=1468)
Q31. In the past month, how much did your household spend, on average, eating at a restaurant or ordering takeout/delivery from restaurants?

APPENDIX: DEMOGRAPHICS & FIRMOGRAPHICS

Demographics of Respondents to Online Panel Representative Survey

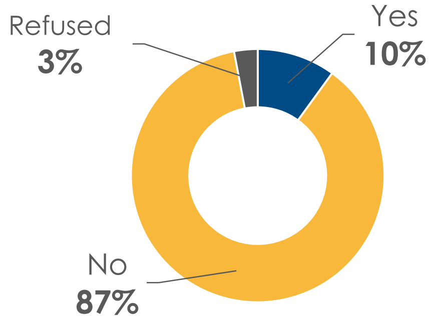
GENDER

47%	Male
52%	Female
0%	Another gender
0%	Prefer not to answer

AGE

18-24	11%
25-29	8%
30-54	47%
55-64	15%
65-74	10%
75+	9%

DISABILITY



ETHNICITY

Asian	29%
Canadian	18%
Caucasian/ European	17%
White(unspecified)	9%
British	4%
African/ black	4%
Irish	3%
Italian	2%
Jewish	2%
Other	9%

EDUCATION

Less than high school	1%
High School or equivalent	15%
Degree or diploma from a college or university	57%
Graduate or professional degree (examples: Master, PhD, MD or LLB/JD)	27%

EMPLOYMENT STATUS

Employed full-time	52%
Employed part-time	8%
Self employed	9%
Unemployed but looking for a job	3%
Unemployed, not looking for a job	2%
Retired	20%
Full-time parent, homemaker	2%
Student/Pupil	4%
Prefer not to answer	1%

INCOME

<$30K	7%
$30K to <$50K	11%
$50K to <$70K	14%
$70K to <$100K	19%
$100K to <$150K	19%
$150K+	18%
Don't know	2%
Prefer not to answer	10%

Demographics of Respondents to Online Non-Representative Survey

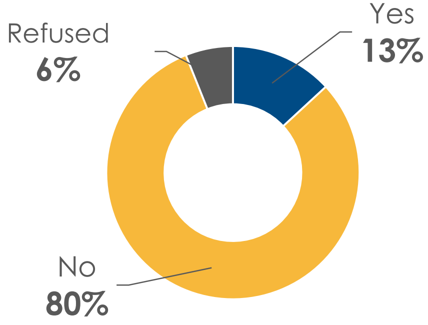
GENDER

Male	22%
Female	74%
Another gender	2%
Prefer not to answer	3%

AGE

13 to 17	
18 to 24	2%
25 to 29	6%
30 to 54	40%
55 to 64	26%
65 to 74	18%
75+	6%
Refused	2%

DISABILITY



ETHNICITY

Canadian	45%
English	11%
Chinese	10%
Jewish	6%
Irish	5%
Scottish	5%
Italian	4%
French	3%
Indian	3%
Filipino	2%
German	2%
Polish	2%
Caucasian/ European	2%
American	2%
Ukrainian	2%
Other	2%
Prefer not to answer	10%

EDUCATION

Less than high school	1%
High School or equivalent	7%
Degree or diploma from a college or university	57%
Graduate or professional degree	29%
Prefer not to answer	7%

EMPLOYMENT STATUS

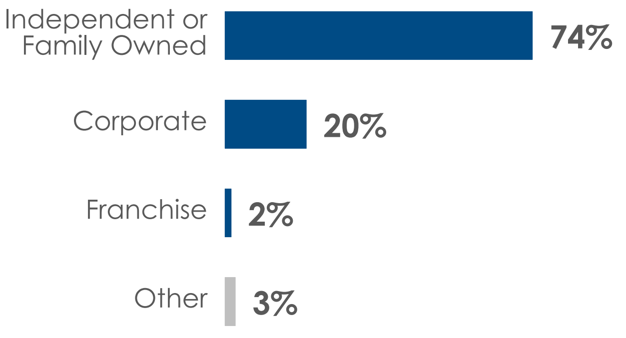
Employed full-time	48%
Employed part-time	4%
Self employed	10%
Unemployed - looking for a job	2%
Unemployed - not looking for a job	1%
Full-time parent, homemaker	1%
Retired	26%
Student/Pupil	2%
Prefer not to answer	6%

INCOME

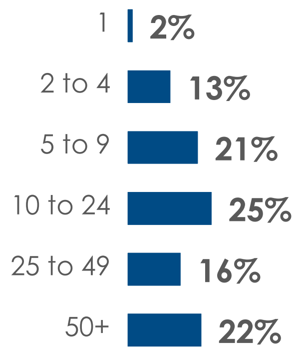
<$30K	3%
$30K to <$50K	5%
$50K to <$70K	8%
$70K to <$100K	17%
$100K to <$150K	20%
$150K+	23%
Don't know	1%
Prefer not to answer	22%

Firmographics of Respondents to Online Non-Representative Survey

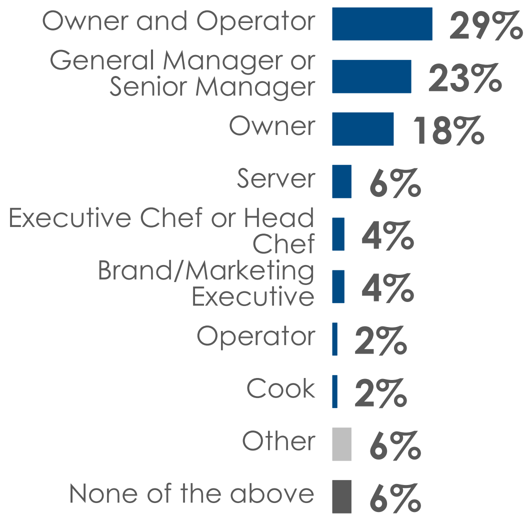
RESTAURANT OWNERSHIP



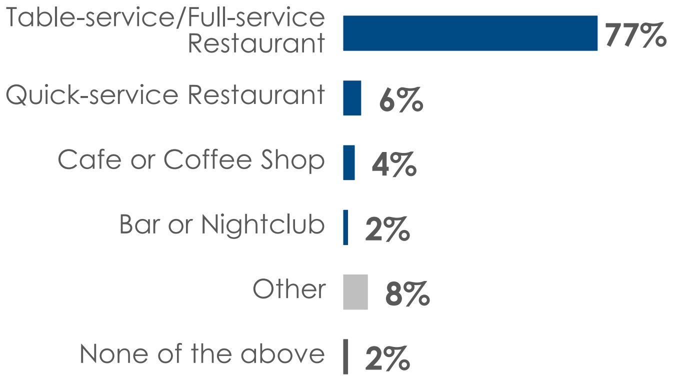
NUMBER OF EMPLOYEES



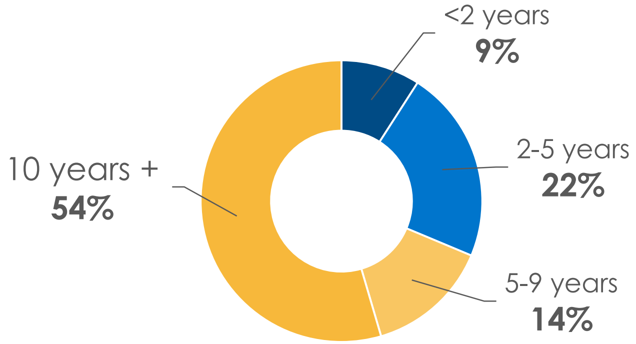
JOB TITLE



RESTAURANT TYPE



YEARS IN BUSINESS



APPENDIX: ADDITIONAL QUALITATIVE CONSIDERATIONS

Appendix: Additional Suggestions From the Qualitative Research

The below may be beyond the scope of the current report but emerged as potential added considerations.

1 **Develop a marketing approach during the programs months that pushes the City of Toronto to be regarded as a "foodie destination."** Several participants emphasized that promoting Toronto as a culinary destination and food-related area which distinct, diverse, unique, and remarkable restaurants would help promote these programs and improve the City's support for restaurants. This was offered as a marketing and advertising suggestion that was emphasized to draw customers to the area.

2 **Additional support with participating in these programs.** A handful of participants mentioned that the City could provide additional support and resources to restaurants that joined these programs to attract more restaurants. The support and resources recommended were multiple: assistance with building the menu options and pricing, support with the application, aid with fees (e.g., subsidy), help with connecting restaurants to resources such as staff, and overall support during the programs months in case issues were to arise with their participation (e.g., staff shortages). Restaurants brought up that a customer service line for the CoT programs and a place to go to for additional information on resources would be beneficial.

"I think there's an opportunity to develop a really quirky, playful, fun, easy marketing platform to promote all those drivers that you want to enhance, outdoor dining, foot traffic, more traffic. There's something playful there, and I don't know what it is….Engage the industry. Get the industry engaged. They want to be part of the discussion."

"So, what could the City do to support those restaurants that feel they've lost the foot traffic there? Maybe zeroing down on areas of the city, as opposed to this blanket, this works for the entire city."

