

RECIPE FOR SUCCESS

How allergy-aware restaurants drive loyalty and boost their bottom line

Consumer report on the dining experiences of Canadians with food allergy



Executive summary

Food allergies drive consumer choices and loyalty in the Canadian dining scene for more than 3 million Canadians affected by them. With an estimated \$6.5 billion* spent annually by these households on dining out, establishments that are allergy-aware have a huge opportunity to grow their share of this underserved market.

In fact, 80% of food allergic consumers and 44% of people without food allergies say that allergen management policies influence their decisions when choosing a restaurant. These are among the findings from the research we commissioned to understand how food allergies impact Canadians' dining-out choices and spending habits. This report, *Recipe for Success: How Allergy-Aware Restaurants Drive Loyalty and Boost Their Bottom Line*, reveals key drivers of spending choices by people impacted by food allergy when eating out. It identifies untapped opportunities for Canadian foodservice businesses to grow their market share by addressing the concerns of this segment.

Key learnings:

1 Allergy awareness is good for business

Foodservice establishments that prioritize allergy awareness have a significant opportunity to capture a loyal and underserved market. Over 3 million Canadians, including 600,000 children, are impacted by food allergy, so accommodating food allergic patrons and providing access to ingredient information can drive consumer loyalty and improve the bottom line.

2 Safety and confidence drive restaurant choice for all diners, food allergic or not

For food allergic consumers, safety and access to ingredient information are paramount when choosing where to eat. According to our research, food allergies influence dining choices for 80% of food allergic consumers and 44% of non-food allergic consumers when eating out with others.

3 Food allergic consumers are less price-sensitive

Food allergic consumers place a higher value on safety and ingredient transparency over cost, making them a valuable consumer segment. Cost is a primary concern for 65% of non-allergic consumers, whereas only 39% of food allergic consumers prioritize price.

4 Food allergic consumers exhibit strong loyalty

A significant 86% of food allergic consumers say their food allergies influence their loyalty to certain restaurants. Establishments that have processes to serve people with food allergy can build a loyal customer base and encourage repeat business.

5 Food allergic consumers influence group dining choices

Food allergic individuals often dictate restaurant choices when dining with friends and family. Their preference for restaurants with clear allergen policies and ingredient information means these establishments can attract larger dining groups, expanding their customer base.

*Stats Can, 2021, Average household spend; food purchased at restaurants

Executive summary

What you can do:

Restaurants and other foodservice operators can capture a greater share of the market by following these five steps:



1 TRAIN AND EDUCATE STAFF

- ▶ Build food allergy knowledge through targeted allergen training and emphasize the importance of taking it seriously.



2 ASK, SHARE, AND COMMUNICATE

- ▶ Ask diners about food allergies at the time of ordering.
- ▶ Include allergen disclosure options in online ordering platforms and written materials.



3 CHECK INGREDIENTS

- ▶ Offer ingredient information to help food allergic consumers make informed choices.
- ▶ Leverage opportunities through technology for ingredient transparency rather than causing communication challenges for food allergy requests.



4 PREPARE FOOD SAFELY

- ▶ Develop written protocols for the flow of safe meal preparation and how to respond to allergic reactions.
- ▶ Establish a standard to support staff in providing safe dining experiences for food allergic consumers.



5 DELIVER THE RIGHT MEAL, THE RIGHT WAY

- ▶ Develop processes and checkpoints to ensure the right meal is delivered to the food allergic consumer.




▶ **Download** our **free** training resources for restaurants and foodservice operators at [ThinkFoodAllergy.ca](https://www.thinkfoodallergy.ca)

Survey methodology

A third-party research firm, Strategic Navigator, conducted an online survey in late 2023 using the following criteria for recruitment:



FOOD ALLERGIC

Sample size: 1,000

- 18+** years of age
-  Resides in Canada
-  Has food allergy/is a parent of a child with food allergy
-  Allergy was diagnosed/confirmed by a medical professional

NON-FOOD ALLERGIC

Sample size: 500

- 18+** years of age
-  Resides in Canada
-  Does not have food allergy or a child with food allergy



Survey insights

Food allergic diners eat out as often as those without food allergy

The majority (96%) of food allergic consumers dine out, dine in, or order food from restaurants at a frequency comparable to their non-food allergic counterparts (98%).

Q How often, if ever, do you do the following?

ORDERING FOOD FROM A RESTAURANT - average times a year



DINING IN A RESTAURANT - average times a year



ORDERING THIRD-PARTY DELIVERY - average times a year



EVER DINE OUT/ORDER FOOD FROM A RESTAURANT



DINE OUT/ORDER FOOD FROM A RESTAURANT - at least once a week



● Food allergic ● Non-food allergic

Survey insights

▶ Similar to those without food allergy, food allergic consumers dine out across all foodservice formats

Food allergic consumers dine out across all foodservice formats less frequently than their non-food allergic counterparts. One of the largest gaps is in the frequency of dining at quick-service restaurants, even though it's the most common choice for both groups.

Q How often do you dine out at or order food from the following types of restaurants/foodservice establishments?

PERCENT WHO DINE OUT AT/ORDER FOOD FROM THE FOLLOWING RESTAURANT TYPES AT LEAST ONCE A MONTH

FAST FOOD/QUICK-SERVICE RESTAURANTS



INDEPENDENT RESTAURANTS



RESTAURANTS SPECIALIZING IN A CERTAIN TYPE OF CUISINE



FULL-SERVICE CHAINS



● Food allergic ● Non-food allergic

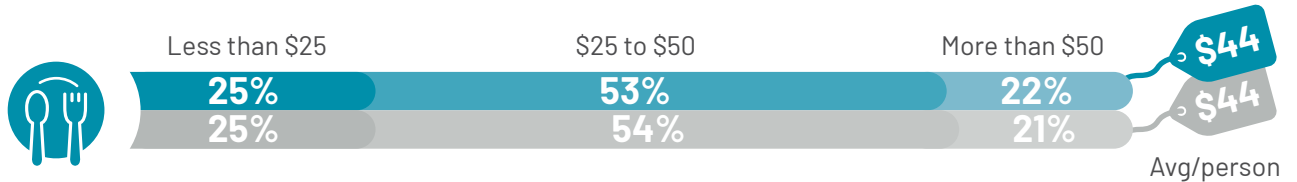
Survey insights

The food allergic consumer spends just as much compared to their non-food allergic counterparts

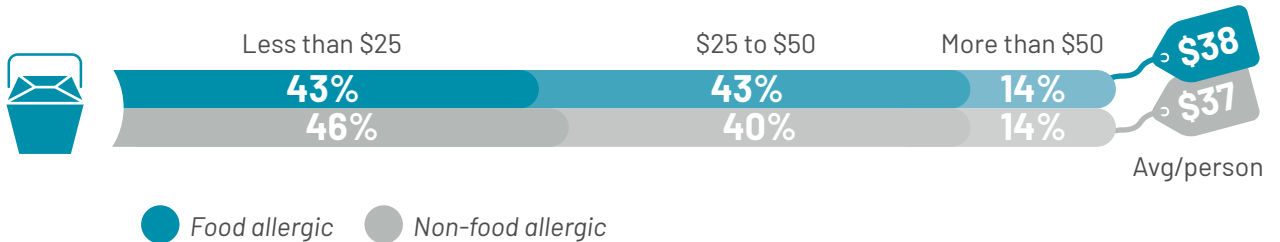
Food allergic consumers hold similar spending estimates as their non-food allergic counterparts, with an average spend of \$38-\$44 per person when dining out or ordering food from a foodservice establishment.

Approximately how much do you typically spend per person when ordering food from a restaurant or foodservice establishment?

AMOUNT SPENT PER PERSON WHEN DINING OUT AT A RESTAURANT/FOODSERVICE ESTABLISHMENT



AMOUNT SPENT PER PERSON WHEN ORDERING FOOD FROM A RESTAURANT/FOODSERVICE ESTABLISHMENT



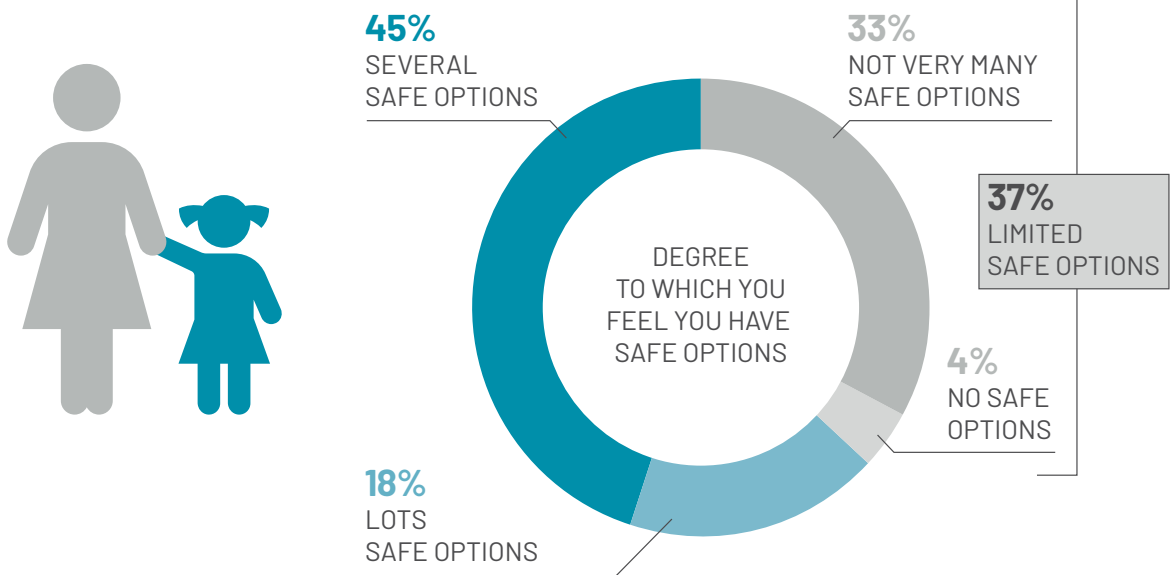
● Food allergic ● Non-food allergic

Survey insights

Choices are limited for food allergic consumers

A significant portion of consumers report feeling limited with safe food options, which limits their foodservice choices.

Q When it comes to your child's food allergy and dining out/ordering food, do you feel you have...



"I estimate that as a family, we eat out only 20% of the time we otherwise would, due to not feeling safe. In other words, there's a huge untapped market for restaurants."

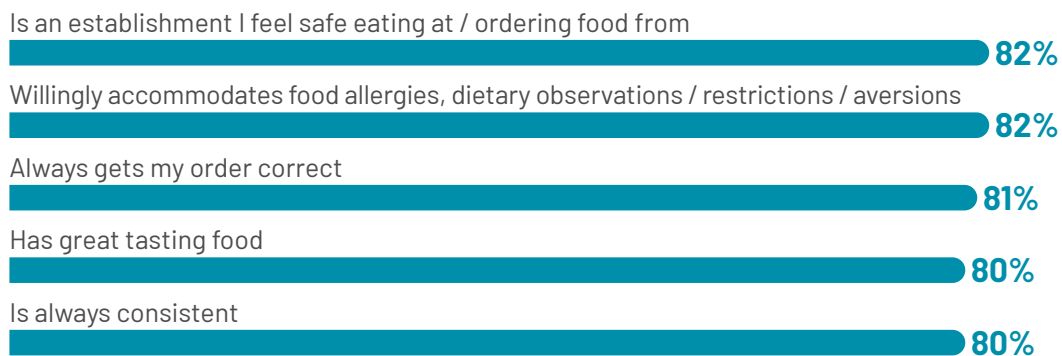
Survey insights

Willingness to accommodate, order accuracy, consistency, and measures that make food allergic consumers feel safe drives their decisions on restaurant selection

When choosing where to dine out or order from, food allergic consumers consider various factors beyond just taste and cost. More importance is placed on the restaurant's willingness to accommodate their allergy, order accuracy, consistency, and general safety practices. On the contrary, non-food allergic consumers prioritize price, great tasting food, and quality of ingredients.

Q How important are the following factors when deciding which restaurant/foodservice establishment to dine out at or order food from?

TOP 5 KEY DRIVERS OF RESTAURANT SELECTION – FOOD ALLERGIC



TOP 5 KEY DRIVERS OF RESTAURANT SELECTION – NON-FOOD ALLERGIC



Survey insights

Safety concerns outweigh cost as the barrier for food allergic consumers to eat out more often

Allergen management practices significantly influence how often food allergic consumers dine out, where among the non-food allergic, cost/too expensive is by far the number one concern.

Q Which of the following, if any, represent barriers for you when it comes to dining out from a restaurant or foodservice establishment, or prevents you from doing so more often?

FOOD ALLERGIC TOP 3 BARRIERS

53%

RISK OF CROSS CONTAMINATION

47%

LACK OF ACCESS TO INGREDIENT INFORMATION

46%

MEALS ARE NOT SAFE FOR FOOD ALLERGY

NON-FOOD ALLERGIC TOP 3 BARRIERS

65%

COST/TOO EXPENSIVE

30%

PREFER HOME COOKED MEALS

24%

NOT CONVENIENT

Safety is essential and there's a need for improvement

Consumers with food allergy are at risk of reactions and/or have experienced reactions when eating out, indicating a need for change:

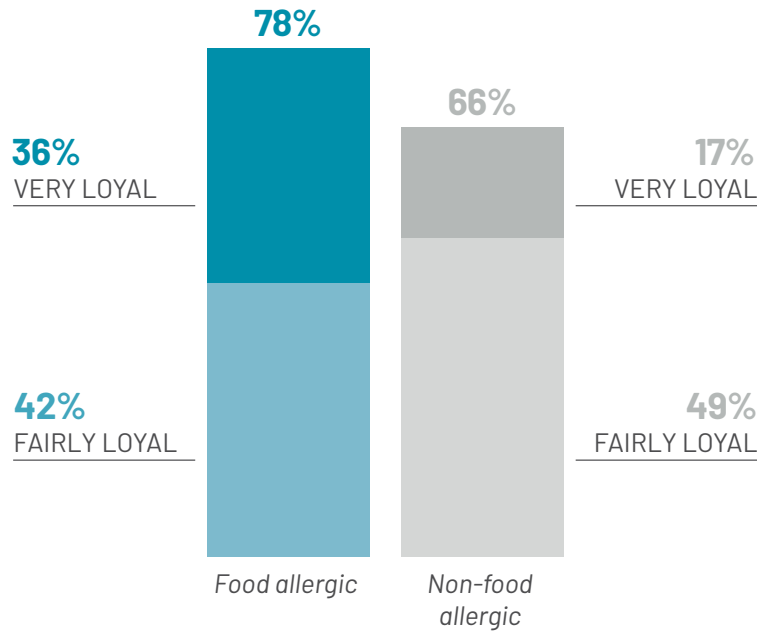
52% of food allergic consumers have **experienced a near miss** in their lifetime, which means they ordered something that was supposed to be safe for them, but it came with their allergen

33% of food allergic consumers **experienced a severe allergic reaction** while dining out/ordering in, 78% of which indicated the establishment had been informed of their food allergies

Loyalty runs high among food allergic consumers

Food allergic consumers express a much higher degree of restaurant loyalty with 36% of them saying that they are very loyal and typically always visit the same places. By contrast, only 17% of non-food allergic consumers say the same.

Q When it comes to dining out or ordering food from a restaurant, how loyal would you say you are? Do you typically visit or order from the same place(s) or are you always trying new places?

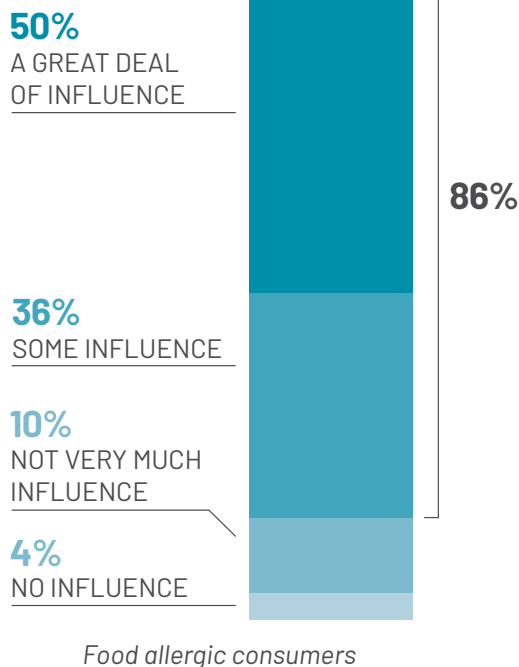


“People with food allergy need to eat and are very loyal to establishments that provide them with a safe experience. Meeting their needs is important and good for business.”

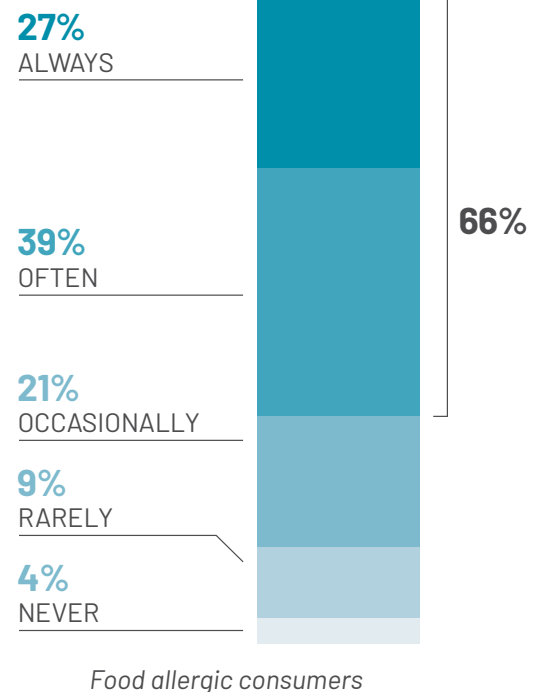
▶ Allergy policy/ingredient transparency drives loyalty

50% of food allergic consumers indicate that their own or their child’s food allergy significantly influences their level of restaurant loyalty. In fact, two-thirds of food allergic consumers say they often or always choose specific restaurants because of their allergen policy or the availability of ingredient information for menu items.

Q How much influence does your food allergy have on your level of restaurant loyalty?



Q How often, if ever, do you choose specific restaurants because of their allergen policy or availability of ingredient information for menu items?

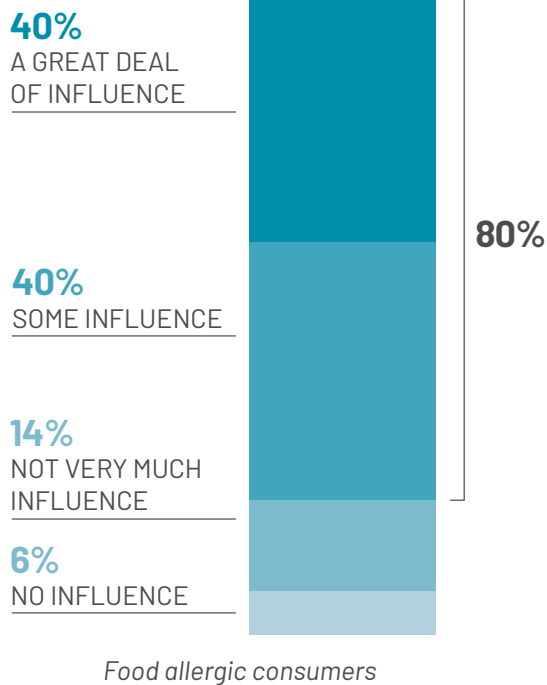


“In our experience over the last 18 years in dealing with restaurants, it is rare where we feel that restaurants truly understand. We have left restaurants before being seated on countless occasions. When we find a safe restaurant, it makes us very loyal customers.”

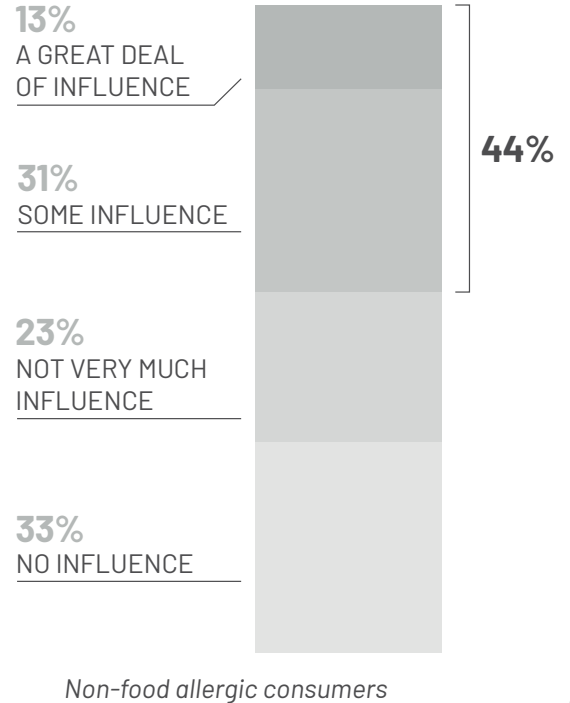
Food allergy drives a choice in restaurant – even for those who are not allergic

Food allergic consumers prioritize restaurants that demonstrate a willingness to accommodate their condition and provide accurate ingredient information. However, nearly half of the non-food allergic consumers (44%) also consider food allergy when selecting a restaurant when eating out with others, indicating a broader awareness on the seriousness of the condition and allergen-related concerns impacting a larger consumer base.

Q When dining out or ordering food with those outside your immediate household (e.g., friends, extended family, sports teams), how much influence, if any, does your food allergy have on the restaurant selection?



Q When dining out or ordering food with those outside your immediate household (e.g., friends, extended family, sports teams), how much influence, if any, do food allergies have on your restaurant selection?



Final thoughts

The results of this survey demonstrate how allergy-aware foodservice operators can create a recipe for success by driving loyalty and boosting the bottom line, considering food allergic individuals:

- ▶ spend equivalent amounts as those without food allergy
- ▶ display significantly higher restaurant loyalty with less focus on cost
- ▶ drive restaurant choices even for non-food allergic consumers

YET

- ▶ lack options, despite their interest in eating out more often

The survey results also indicate that food allergy needs to be a top priority from a food safety perspective. Businesses that create and consistently implement set processes for ordering, preparing, and delivering safe food options can significantly enhance their appeal to food allergic consumers. By prioritizing safety, these businesses not only mitigate food safety risks but also cultivate strong loyalty with this important consumer segment.



Path forward

- ▶ Enhance your food allergen management practices and become an industry champion in serving the food allergic consumer.
- ▶ Download our free foodservice resources and tools at [ThinkFoodAllergy.ca](https://www.thinkfoodallergy.ca), including training videos, posters, and other useful tools.



Food allergy facts

The food allergy landscape in Canada: size of consumer market

The market for food allergic consumers in Canada is considerable and continues to grow.



Currently there are more than **3 MILLION CANADIANS** affected by food allergy, including **600,000 CHILDREN**, translating into **1-IN-13 CANADIANS** who are directly impacted.

When considering that individuals dine out with others, **THIS IS A SIZEABLE MARKET**.

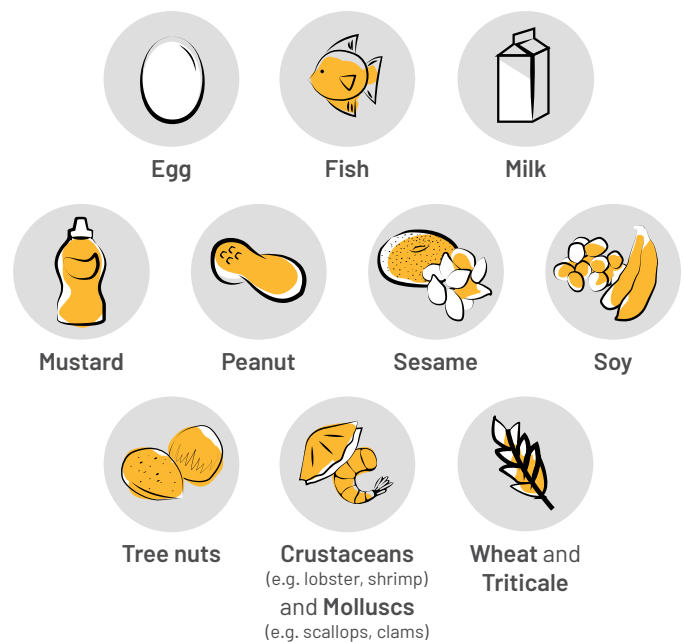
In fact, **50% OF CANADIAN HOUSEHOLDS ARE IMPACTED** by food allergy in that they take actions to support someone in their community or social circle with food allergy.

Managing food allergy

Food allergic consumers rely on foodservice operators to provide access to complete and accurate ingredient information to enable safe meal choices.

Most individuals manage this condition by avoiding their allergen to prevent an allergic reaction. For some, a small amount of an allergen can trigger a severe allergic reaction.

With over 170 foods that have been reported to trigger an allergic reaction, providing access to accurate ingredient information might seem daunting. A person can become allergic to almost any food, but the priority food allergens are the most common. In Canada, there are 10 priority food allergens, defined by Health Canada. While all food allergies need to be taken seriously, foodservice operators will most often encounter requests for the top 10 priority food allergens.



Food Allergy Canada is a national charity and the country's leading patient organization committed to educating, supporting, and advocating for the more than 3 million Canadians impacted by food allergy. We focus on improving daily quality of life by providing education and support needed to effectively navigate this medical condition, building informed and supportive communities, and acting as the national voice on key patient issues.

Learn more and download free resources at

ThinkFoodAllergy.ca