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I. FOOD AND THE INTERNET

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Food is our common ground, a universal experience."

CHEF JAMES BEARD



How many memories have been captured after these two all-important words – "say cheese!"

Food is both a necessity and a pleasure. It's part of our daily lives and even part of our everyday language. We break bread, while remaining cool as a cucumber. We bring home the bacon thanks to our job as a bean counter. Some of us drink like a fish and occasionally eat humble pie. Food is important and universal to be sure.

What else connects us that is both a necessity and a desire? The internet.

According to theoretical physicist, cosmologist and author Stephen Hawking, "We are all now connected by the internet, like neurons in a giant brain." Given the universality of both food and the internet, CIRA decided to explore the intersection between the two.

The internet is vast and the topic of food is endless. The following report provides a taste of these two ingredients.



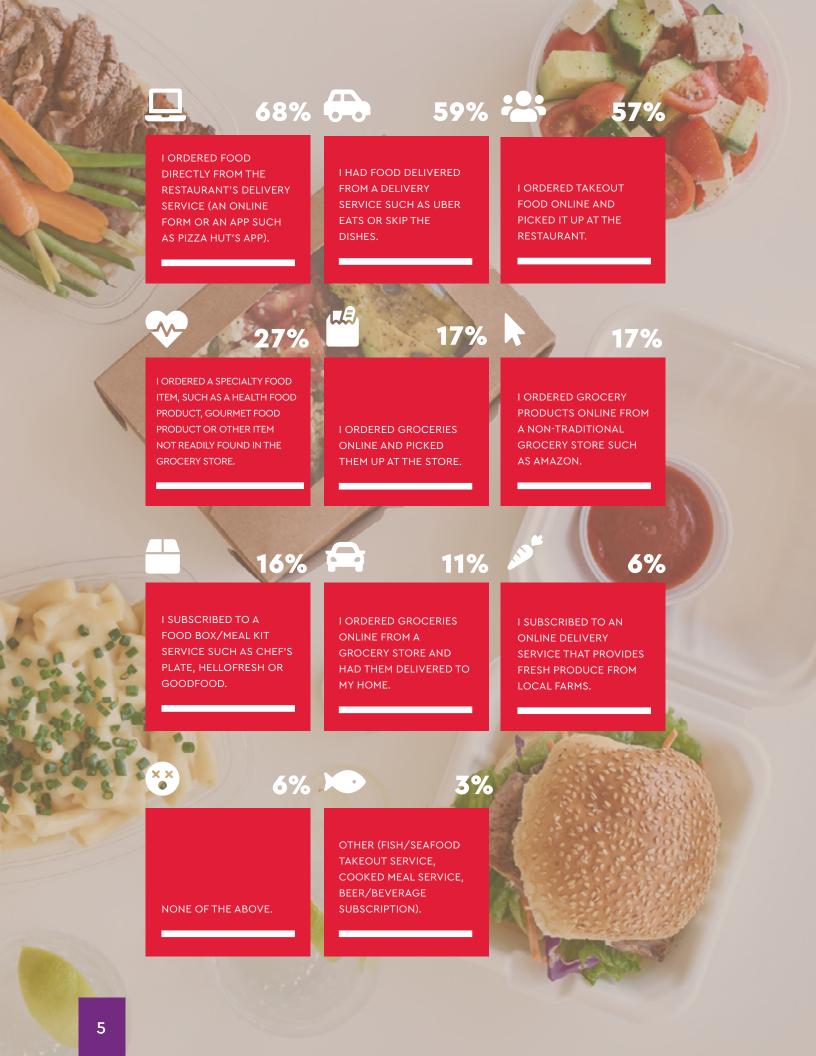
II. THE PROOF OF THE PUDDING IS IN THE EATING

According to <u>Canada's Internet Factbook</u>, nearly a quarter of Canadians who shopped online in the past year purchased food through the internet. That number jumped from just 14 per cent two years ago. Canadians are getting on board with buying food online.

There are many ways to access food through the internet. Groceries can be ordered online and picked up at a local grocery store. Alternatively, groceries can be delivered from that same store or a less traditional source such as amazon.ca. Takeout meals can be ordered through a restaurant's website or mobile app, or delivered by a service like Skip the Dishes. The internet has even made it easier for fresh ingredients to be delivered to your door through food box subscription services, helping the busy millennial make a home-cooked meal on a weeknight. Food and the internet have never been more connected.

Since Canada's Internet Factbook did not include information about what food Canadians purchased online, CIRA sent out a short survey on Twitter, LinkedIn and Facebook in September to find out more. Although not scientific, the results provide interesting insight on how Canadians use the internet to eat.

There were 128 respondents from across Canada, aged 18+, and the questions were simple - of the options provided, in which ways have you ordered food online?

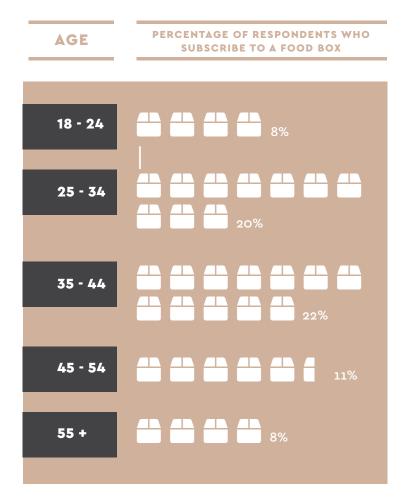




Ordering restaurant takeout is the most common way respondents purchased food through the internet. That includes ordering on the restaurant's website or mobile app or via a delivery service such as <u>Skip the Dishes</u>. Ordering specialty food, such as health food or gourmet food items, was also a popular choice with over a quarter of respondents noting they have done that in the last year. Purchasing groceries was the next most popular response at 17 per cent, whether from a traditional grocery store or less traditional source like Amazon.

An <u>article in The Conversation</u> from November 2017 notes that Canadians are slower to embrace online grocery shopping than Americans and outlines some of the reasons. This includes a Canadian market dominated by a small number of players and the continued preference of customers in Canada to shop for groceries in-person.¹

While online grocery shopping begins to take shape in Canada, online takeout delivery services are more established. Two brothers from Saskatchewan, Josh and Chris Simair, founded Skip the Dishes in 2012. From 2013 to 2016 the company reported an over 10,000 per cent revenue growth and was recognized as a Technology Fast 50 winner by Deloitte in 2017. Just Eat acquired this Canadian company in 2016 and Skip the Dishes continues to be a popular choice among Canadians, even as new competitors enter the market.



WHEN IT COMES TO BUYING FOOD ONLINE, AGE IS JUST A NUMBER

Actress Joan Collins once said, "Age is just a number. It's totally irrelevant unless, of course, you happen to be a bottle of wine." This mostly rings true when examining online food purchasing habits by age, particularly when it comes to online takeout orders. Yet, age does come into play when ordering a subscription food box online such as HelloFresh. In this case, roughly 20 per cent of 25 to 44 year-olds have done this in the last year, whereas only 8 to 11 per cent of younger and older respondents order food online this way. The convenience of pre-arranged ingredients is most appealing to the age group that includes busy young professionals and parents of young children.

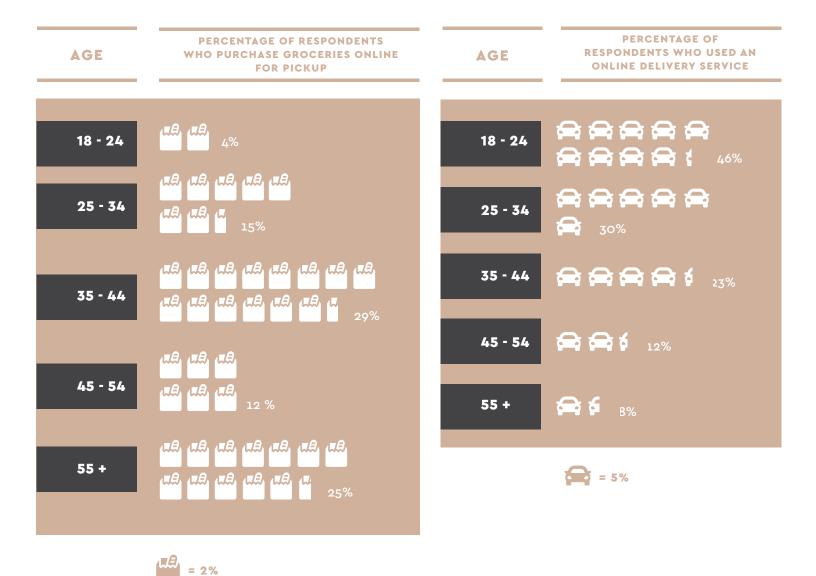


= 2%



Also interesting, 35 to 44 year-old respondents, as well as those who are 55 or older are more likely to have ordered groceries online than Canadians in other age categories.

CIRA's survey also showed that ordering food via a takeout delivery services was an action many had done for the first time in the last 12 months, especially among 18 to 34 year-olds.



With the convenience store 7-Eleven now in the delivery game thanks to Berlin-based food delivery app Foodora, maybe in addition to healthy ingredients for a home-cooked meal or delivery from a favourite Thai restaurant, Canadians will also embrace Slurpees to their front door. With the internet and food, the options are endless.



III. THE INTERNET PROMOTES THE LOCAL FOOD MOVEMENT

Every Canadian who has made guacamole in February knows that supermarkets stock diverse foods from around the world thanks to the rise in global trade. However, access to global foods is a relatively new phenomenon and while convenient, it comes with downsides.

The logistics of transporting food across long distances adds to our carbon footprint. The quality and freshness of the food can suffer due to its long journey to Canada. Not to mention, purchasing imported fruits and vegetables can significantly impact on your wallet. Thus, a revived focus on local food has taken place in Canada.

Buying local products to support your country's economy is nothing new. Canada's Internet Factbook 2018 found that 62 per cent of Canadians prefer making online purchases from Canadian businesses. As well, a 2013 report from the Business Development Bank of Canada showed that of those Canadians who buy local produce, 97 per cent do it to support local economy and 96 per cent do it to support local farmers.²

When it comes to local food, it's more than a trend: it's a movement, and the internet acts as a tool for food producers and retailers to promote their products to the Canadian market. While it's difficult (nearly impossible) to adhere to a strictly local diet in Canada, many Canadian consumers make an effort to buy local food. To support this demand, some Canadian businesses use their .CA domain to brand themselves Canadian online, helping promote local Canadian food.

.CA WEBSITES CONNECT CANADIANS TO LOCAL FOOD

Good things grow, in Ontario. Ontario residents reading this will recognize those words and likely have its jingle running through their heads on repeat (sorry about that). This is the local food movement in action.

Foodland Ontario is a government-led initiative that promotes local food. Their webpage on ontario.ca communicates the benefits of local food from a few perspectives. It's good for



communities from an economic perspective, good for the environment (for those looking to reduce the carbon footprint their food consumption creates) and good for the consumer: locally-grown food is nutritious, fresh and tastes great.

Another example is the government of Manitoba, which has an online <u>Local Produce Guide</u> that includes tips on how Manitobans can source local food, including an <u>interactive map</u> displaying locations that offer local produce.

Provincial governments are not the only ones getting in on the local food movement. Eat Alberta is a non-profit association helping Albertans learn about local food through content and events. Its website eatalberta.ca is stocked full of resources about great Alberta food.

The We Heart Local Partnership Program, featured on weheartlocalbc.ca and the SaskMade Market Place at saskmade.ca are two more examples where residents in B.C. and Saskatchewan can learn about local food, find recipes and purchase local food products.

MEAL SUBSCRIPTION BOXES

Meal subscription boxes deliver ingredients to prepare a healthy meal at home. Through the click of a button, Canadians receive a product that provides both convenience and good food.

"The benefits of being a HelloFresh customer are many, but at the top of the list are, certainly, the convenience and simplicity of having fresh, pre-portioned ingredients and easy-to-follow recipe cards delivered right to your door, so you can cook a tasty home-cooked meal in 30 minutes or less," says Ian Brooks, CEO and founder of HelloFresh Canada. This meal subscription service delivers seasonal, farm-fresh ingredients via its website, hellofresh.ca.

"Buying local is a top priority for HelloFresh Canada," says Brooks. "Our philosophy is to support Canadian ingredient suppliers whenever possible. HelloFresh Canada gets its high-quality ingredients from a vast network of ingredient suppliers from across Canada. Whether it's Hooked Inc.'s wild-caught and traceable salmon, Seaway Farms' fresh Ontario Peaches, or tasty cheese from BC's Village Cheese Co., we're all about exposing our customers to delicious Canadian ingredients."



Other subscription services across Canada are Hamilton-based <u>Dinnerlicious</u>, Vancouver-based <u>Fresh</u> <u>Prep</u> and <u>goodfood</u>, which serves multiple locations in Canada. All of these services offer some options for mixing in local ingredients into the recipes – and all promote their "Canadian-ness" through a .CA domain.

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We expect to see the internet continue to influence eating habits by expanding customer palettes through thoughtfully-curated menus like HelloFresh."

IAN BROOKS, HELLOFRESH CANADA

"The internet has completely revolutionized the way Canadians cook and eat and HelloFresh is a perfect example of this. We plan the menu, order the ingredients, deliver the meal kits, and you cook! With the click of a button, Canadians are exposed to new dishes, flavours and cuisines," says Brooks.

According to CIRA's survey, shared via social media in September 2018, 16 per cent of respondents used an online meal subscription service in the past 12 months – an activity most popular amongst the 35 to 44-year-old segment of respondents. With a <u>market of \$150 million</u>, it will be interesting to see if this business model will remain lucrative long term.

Brooks is confident it will. "Meal kits are on the rise. In fact, a recent study by the <u>NPD Group</u> revealed that the category shows upward growth in Canada. We expect to see the internet continue to influence eating habits by expanding customer palettes through thoughtfully-curated menus like HelloFresh."

FARM-TO-TABLE RESTAURANTS

Farm-to-table restaurants across the country use their websites to communicate their differentiator: the focus on using local food in their recipes.



Vancouver restaurant Fable (a portmanteau of farm + table) features a menu with products sourced from local farms. "The whole concept of Fable is basically knowing where your food comes from, and ground-up cooking," notes Fable chef Trevor Bird on fablekitchen.ca.

Another example is Ruby WatchCo. in Toronto. This vision-turned-reality is based on Chef Lynn's philosophy that food should be locally grown, harvested and raised, and cooked to perfection with heart. Its website, <u>rubywatchco.ca</u> serves as more than just a static page – it's a virtual blackboard – with an updated daily menu based on seasonal items, a gallery to show off their space and mouthwatering menu items and an online booking system to make reservations.

A Haligonian locavore will be pleased to find that Chives Canadian Bistro uses its website, <u>chives.ca</u> to display a seasonal menu. While keeping the exact ingredients vague, visitors can see that their offerings include things like a farmers market salad inspired by what they found at the market last week and sorbet made with local fruit.

MORE GREAT FOOD-RELATED .CA DOMAINS

CIRA is the operator of the .CA domain name registry and there are many .CA websites actively sharing information with Canadians on how to cook good food, promoting local food and helping get food to Canadians' doors. Here are a few more shining examples of Canadian businesses doing it well.



Antigonish-based family business, Peace by Chocolate, shares the importance of peace and inclusion in Canada.

READ MORE ABOUT
PEACE BY CHOCOLATE.



Canadian start-up proves that healthy snacks don't need to be boring or tasteless.

READ MORE ABOUT NAKED SNACKS.



Their website adds modern pizazz to a timeless brick-and-mortar restaurant.

READ MORE ABOUT FAIROUZ.



IV. FEEDING HUNGRY CANADIANS WITH HELP FROM THE INTERNET

In Canada, 4 million people are struggling to put enough food on the table.³ However, the internet provides solutions that can make more food available for those who need it most.

The internet is revolutionizing the food distribution system and changing how Canadians struggling financially access food. CIRA has supported several food-related projects through its Community Investment Program, which provides \$1 million in grants annually to non-profits, charities and academic institutions doing good work through and for the Canadian internet. This includes grants provided to the Wilfrid Laurier Centre for Sustainable Food Systems, Moisson Montreal and the Cowichan Green Community.

MAKING LOCAL FOOD MORE ACCESSIBLE

A food desert is an urban area where residents have little or no access to stores and restaurants that provide healthy and affordable foods. These have emerged over the past 20 years across the country, and are especially concerning in low-income neighbourhoods.⁴

The Wilfrid Laurier Centre for Sustainable Food Systems is addressing the disconnect between these neighbourhoods and local farms. With support from CIRA's Community Investment Program, the Centre is creating an <u>online tool</u> connecting urban food insecure communities with rural ecological farmers across the Waterloo region of Ontario. This online farmers' market brings fresh food to neighbourhoods and reduces the social isolation of rural farmers.

Theresa Schumilas, lead of the project and herself a farmer, has studied and practiced sustainable food systems for more than 20 years. She's seen firsthand the shift in how Canadians access food and the impact on local farmers.

"We're losing small and mid-sized farmers consistently in Canada, in part because the big grocery stores are buying in such bulk from large farms, it forces upstream consolidation," she says. "A further concern is that these big grocery stores, which are often located on the outskirts of the city, can be

³ Food Banks Canada, <u>https://foodbankscanada.ca</u>

⁴ Food deserts in Winnipeg, Canada: a novel method for measuring a complex and contested construct, Government of Canada, Health Promotion and chronic disease Prevention Canada, Vol. 37, No 10, October 2017, https://www.canada.ca/en/public-health/services/reports-publications/health-promotion-chronic-disease-prevention-canada-research-policy-practice/vol-37-no-10-2017/food-desserts-winnipeg-novel-method-measuring-complex-contested-construct.html



inaccessible and because they focus on carrying undifferentiated products from all over the world (food from nowhere) people don't really know where their food is coming from."

Consumers want greater authenticity and traceability. They want to know where their food is coming from, and farmers markets address this demand. Despite this, and despite a resurgence in the local food movement, after a decade of increasing popularity of local farmers markets, according to Schumilas, the trend is levelling out or even decreasing.

She notes that the benefit of the CIRA-funded project is that it's scalable as long as the network of farmers and community is willing to participate. The online farmers market has already attracted interest across Ontario with plans to expand across the country.

Canadians can also connect to local farms online through Community Supported Agriculture (CSA) programs. For example, Halifax residents can purchase food from local farms through Maple Bloom Farm Community Supported Agriculture (CSA). It's an example of the internet connecting consumers with local food producers through the click of a button.

While only 6 per cent of respondents to CIRA's survey shared on social media in September 2018 had used an online service to connect to a local farmer, perhaps with more initiatives like the one CIRA-funded with the Wilfrid Laurier Centre for Sustainable Food Systems, this number will inch upwards.

REDUCING FOOD WASTE

At the same time as people are going hungry in Canada and around the world, about one third of all food produced is lost or wasted each year. ⁵

Moisson Montreal, the largest food bank in Canada, is leading the way in reducing food waste. The organization works with grocery stores and retailers, collecting surplus food and distributing it to over 200 community organizations across Montreal.

In 2019, they will launch an online volunteer platform that registers and records information about volunteers and affects communications. Moisson Montreal relies on 60 volunteers every day. Richard Daneau, executive director, says this platform will be essential with many benefits.



"All our volunteer management is done manually so this online system will make it more efficient," he says. "Indirectly, the online service will reduce food waste because it helps staff have better visibility on which volunteers will be coming in and they can then assign the workload more effectively."

Moisson Montreal only collects food close to the end of its shelf life and the goal is to connect the food to community agencies as quickly as possible, so this improved efficiency increases impact. Last year the organization distributed 16 million kilograms of food that otherwise would have gone to the landfill.

There's an online network connecting food banks in Canada and this has allowed us to better share these resources with others".

RICHARD DANEAU, MOISSON MONTREAL

Moisson Montreal also created an elearning application with support from CIRA in 2015 to train thousands of people involved with food banks and grocery stores across Quebec on the grocery store recovery program, which redistributes food that is still good for consumption.

Through these initiatives, Moisson Montreal has become a digital leader among food banks in Canada and Daneau sees this nimble and innovative approach as effective in tackling issues around hunger and food waste.

"There's an online network connecting food banks in Canada and this has allowed us to better share these resources with others. Our digital projects help us, not only in Montreal but across Canada," says Daneau.



Moisson Montreal is not the only program CIRA has supported to reduce food waste through the internet. The Cowichan Green Community in B.C. created a <u>Food Recovery Online Tool</u> that connects businesses with surplus food to community organizations providing food to those in need.

Innovative projects like these show the incredible potential of the internet to tackle issues of food insecurity and hunger.





V. CHOOSING BETWEEN FOOD AND THE INTERNET

While the link between food and the internet is positive for many people and organizations across the country, for some Canadians the connection isn't as encouraging.

In 2016, ACORN Canada released the results of a 2015 survey of 232 low-to-middle-income individuals from across Canada in a report called <u>Internet for all: Internet use and accessibility for low-income Canadians</u>⁶. In it, 60 per cent of respondents indicated that the price of high-speed internet was extremely high, they couldn't afford it and because they need it, they have to take money out of their budget for other things. Of those "other things", 71 per cent indicated food.

"Often, the internet is the highest household expense, outside of rent and hydro," says Alejandra Ruiz-Vargas, an ACORN Canada leader and member. "Yet for a service that is so essential, this seems really unfair."

I've had to give up food, sometimes my rent money. Some of my bills didn't get paid because I wanted to have the internet".

KELLY LALANDE, ACORN CANADA

ACORN Canada member Kelly Lalande shared her firsthand experience with this difficult choice. "Before getting a \$10 a month internet package with the Toronto Community Housing Corporation in 2016, it was very hard to afford internet. It affected my budgeting and meant I took money from elsewhere. At the time, I had to give up a lot. I'm on medication for epilepsy and I've had to give up money for medication. I've had to give up food, sometimes my rent money. Some of my bills didn't get paid because I wanted to have the internet."



Writer and communications consultant Natalie Campbell of Campbell Communications in Hay River, Northwest Territories commented on the double impact of high-priced internet and high-priced food in northern communities. "The high cost of healthy food is already a problem in most communities in the Northwest Territories, particularly those that are remote, and consequently obesity rates in children are alarming," says Campbell. "Having even less money to access healthy food because of expensive internet, in addition to other expensive life necessities, definitely contributes to food insecurity."

ACCESS TO FOOD AND NUTRITION INFORMATION ONLINE

When looking at the internet's connection to food, another consideration is how internet access connects users to knowledge about food and nutrition. ACORN Canada's 2018 report Access to the Digital Economy and Health⁷ explored this issue through two focus groups with its members in Surrey and Burnaby, B.C.

The report features the following quote from one focus group participant, "I was really sick a few years ago and I didn't really know if I was going to make it, but I'm alive today. When I was sick and I was home, I kept forgetting what kinds of foods I was supposed to be eating. So for me the internet was really essential because I would go online and be like, 'Oh yeah, I'm supposed to be eating this' and 'Oh yeah, I'm supposed to be doing that'."

The internet can also help users save money on food. One focus group respondent said, "I actually go online a lot to look at all the flyers to see what's on sale, because I have a small budget so I look if the apples are on sale...I use my disability bus pass and go out to all the stores. I will buy one thing over here and go all the way over there to get another thing. Then I'll walk back to get another thing. Then I will look back when I get home and say it says, 'You've saved \$67'. Holy smokes, I'm rich! That's another \$67 I can use in two more weeks.'

On that issue, Ruiz-Vargas notes the catch-22. "If you can't afford the internet, you can't do that."

CONNECTING FAMILIES

In June 2018, the Canadian government announced the <u>Connecting Families</u> program, which includes a \$10 per month internet service for some low-income families in Canada as well as the distribution of devices to some of those homes. According to the program website, "Despite the importance of high-



speed internet, almost half of Canadian households with an annual income of \$30,000 or less do not have access." This program will positively impact families who qualify for it across Canada.

"Broadly speaking, it's a great thing that there is a program to help low-income families get affordable internet access," says Shelley Robinson, executive director of National Capital Freenet, a not-for-profit internet service provider (ISP) in Ottawa. "But I worry about people who desperately need the internet and don't meet the criteria. That's seniors and single people who are really struggling. They aren't captured by this program."

Natalie Campbell shared her concern that the program may not curb the effects of expensive internet in northern communities. "If applicable to residents of rural and remote northern communities, where internet is among the most expensive in Canada, the federal Connecting Families initiative could go a long way to help low-income families access healthy food if this is what they choose to prioritize. However, this would be contingent on which service package is eligible for the subsidy. Consider that in Uluhaktok, the highest home internet plan gets you 45 GB of data at five Mbps down and one Mbps up at a whopping \$229.95 per month. Without an unlimited data plan, overages add up quickly and people may choose to prioritize spending more money on more internet rather than healthier food choices."

Connecting Families may be a solution for some Canadians who currently adjust their food budget to afford internet and this is a good thing. Unfortunately, without support for those who are ineligible, the struggle to pay for internet continues, forcing many to choose between food and the internet.

A BETTER ONLINE CANADA INCLUDES A FULL PANTRY

While Canada is moving in the right direction in helping Canadians connect, Canadians still pays a lot for internet. According to the Organisation for Economic Co-operation and Development (OECD), a high-end internet package on a fixed broadband connection (defined as having at least 200 GB/month of data allowance at speeds of at least 25 Mbp) in Canada is \$53.26 while the OECD average is \$34.17. These high prices make the choice between food and the internet all the more necessary for some.

CIRA's overarching strategic goal is to build a better online Canada, and this includes increasing access to this vital resource for all Canadians so they can benefit from Canada's digital economy.



The gap between us: Perspectives on building a better online Canada, a report CIRA released in June 2018, provided insight on Canada's digital divide through the eyes of organizations across the country working on the frontlines of Canada's internet. The report shared the challenges these organizations face, what Canada is getting right and recommendations to improve Canada's internet. One recommendation was to develop a national affordability program that considers both price and quality.

National Capital FreeNet's executive director Shelley Robinson commented for the report that, "Some low-income folks scrimp on food so they can afford phones and home internet access. Many people think everyone has internet and it really is not the case. Then governments start digitizing their services, and it becomes more onerous for people to apply. Targeted programs like those for families and community housing tenants are great, but we need to ensure everyone has access they can afford."

CIRA envisions a Canada where nobody needs to choose between buying groceries and paying their internet bill. We see the internet as an essential component of day-to-day life, as Canadians perform important tasks like accessing food and nutrition information or planning their online food orders.





∨I. THE INTERNET AND FOOD: TWO PEAS IN A POD

Food and the internet have clear connections and CIRA chose to explore them because of their universality. They provide both sustenance and pleasure. They are both local and global. Most importantly, they are both an integral part of Canadians' day-to-day lives – or should be.

Food is but one example of a connection that can be lost for Canadians who lack internet access. But half a loaf is better than no bread, as they say. With commitments by the Canadian government and the actions of internet advocates and organizations like CIRA, a better (and less hungry) online Canada is gradually becoming a reality.

Organizations are using innovation and technology for social good and CIRA will continue to partner with them, supporting initiatives that strengthen the Canadian internet along the way.

As more Canadians get online, more Canadian businesses will benefit from it. From .CA websites promoting local food like <u>selectnovascotia.ca</u>, amazing Canadian restaurants like <u>joebeef.ca</u> and <u>atelierrestaurant.ca</u> and farmers who sell fresh produce, eggs and other food products to Canadians like <u>farmfolkcityfolk.ca</u> – the options are endless and possibilities exciting to imagine.

Cartoonist Charles M. Schulz once said, "All you need is love. But a little chocolate now and then doesn't hurt." From our perspective, neither does a little internet.



VII. ABOUT CIRA AND THIS REPORT

CIRA is a member-based, not-for-profit organization, which manages the .CA internet domain on behalf of all Canadians, develops and implements projects that support Canada's internet community and representing the .CA Registry internationally. CIRA is building a better online Canada through the Community Investment Program by funding innovative projects led by charities, not-for-profits and academic institutions that are making the internet better for all Canadians. Every .CA domain name registered or renewed contributes to this program. To date, CIRA has provided \$5.45 million in contributions.

Information found in this report was gathered in September and October 2018 through online sources, existing CIRA data and materials, interviews and a survey prepared by CIRA and shared on Twitter, Facebook and LinkedIn. There were 128 respondents from across Canada, aged 18+.

<u>Canada's Internet Factbook 2018</u> sparked the idea for this report. This factbook is produced annually by CIRA based on the results of a survey of over 1,000 Canadian internet users across Canada on their online habits and activities, as well as their perceptions of Canada's internet.

Visit <u>cira.ca</u> to learn how CIRA is building a better online Canada.