

PRIVATE SECTOR: VANCOUVER FOOD SUPPLY SURVEY ANALYSIS

July 2020



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The effects of the COVID-19 pandemic have been felt world-wide and have resulted in unprecedented strains and disruptions within international and local food supply chains. The City of Vancouver's Emergency Operations Centre (EOC) conducted a survey in May 2020 of the 3,691 food businesses that operate in Vancouver in order to:

- Understand the impacts and challenges of COVID-19 on Vancouver's diverse food businesses and their supply chains,
- Review supports needed by Vancouver food businesses and assess which the City can provide or advocate for

Survey method

The survey was available to complete online in English, or over the phone in other languages if required by business contacts. The survey notification and translated instructions on how to participate in another language were distributed via the following channels:

- Posting on the City's COVID-19 webpage
- Email to 3,691 food businesses licensed through the City's License Office, and others connected via the Vancouver Economic Commission's email list and other network
- Targeted telephone outreach and phone interviews to a sample of Vancouver-based ethno-cultural food supply chain businesses to ensure participation by these often under-represented businesses

Surveys were completed between the dates of May 12 to 31, 2020. During that time, BC was in "Phase 1" and beginning to enter "Phase 2" of BC's Provincial Restart Plan (Phase 2 began on May 19). As context for interpretation of the results from the survey, the following business restrictions were in place during that time:

- Essential travel only within BC
- Physical distancing
- Business closures to help stop the spread of COVID-19¹

Survey results are available in Chinese (Traditional), English, Japanese, Korean, Punjabi, Tagalog and Vietnamese; the most requested preferred languages for future communications. The report will be shared with businesses that provided their contact information, the City's networks, and other interested parties. The information gathered in this survey will be reviewed by City staff and will help inform Vancouver's continued response to the pandemic over the coming months.

Survey results and analysis

RESPONSE RATE

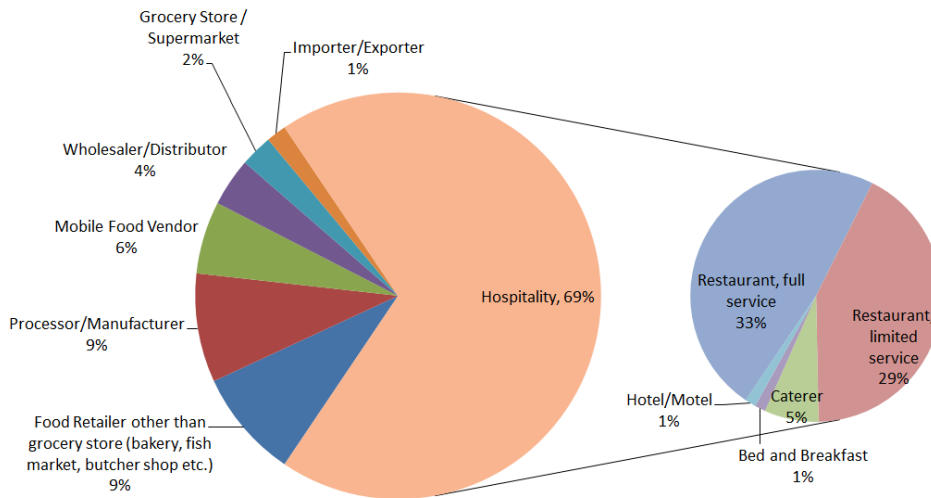
According to the City's License Office data, there are 3,691 food business brands/identities operating in Vancouver representing 4,195 food business locations as of April 30, 2020.

A total of 313 businesses responded to the survey, covering 484 business locations (some businesses have multiple locations). Fourteen businesses indicated that they have no Vancouver locations but may serve residents or businesses in Vancouver. Given their important role in Vancouver's food system, their responses have been included in the results.

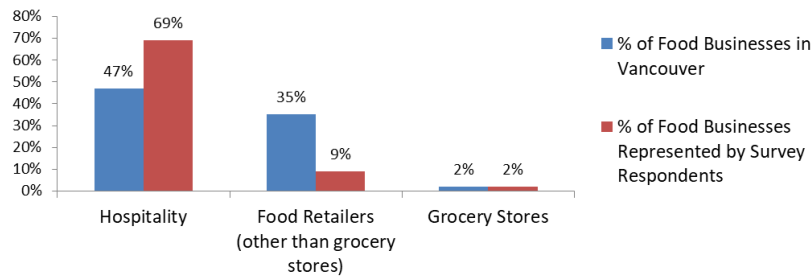
English was preferred as the language of communication for 82% of businesses. Of other language groups, the most commonly preferred languages were Korean (6%), Mandarin (4%), and Cantonese (3%).

¹ BC's Restart Plan: <https://www2.gov.bc.ca/gov/content/safety/emergency-preparedness-recovery/covid-19-provincial-support/bc-restart-plan>

Graph 1: Survey responses by business type (Total responses = 313)



Graph 2: Survey response rate compared with a selection of business types operating in Vancouver



BUSINESS CLOSURE STATUS

27% of businesses (85 businesses) reported that their businesses were closed either indefinitely or temporarily. These are collectively referred to as 'closed' businesses in this report.

Businesses reported that they had laid-off a cumulative total of 3,009 employees at the time of the survey. At least 88% of layoffs (2,647 total) were temporary and 12% (362 total) were permanent.

The data suggests that the smaller a business was (measured by employee numbers) the more likely it was to have closed (Graph 3). Notably, 40% of sole proprietor businesses with no staff employed reported having closed businesses.

Graph 3: Food business closure status by business size

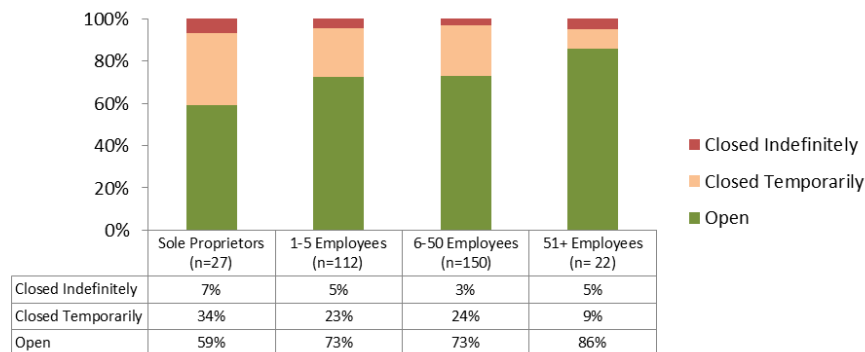


Table 1: Business closures by language group responses most affected by the pandemic

Language Groups	Percent Closed
Businesses preferring communication in English (256 total)	28%
Businesses preferring communication in Cantonese, French, Japanese, Korean, Mandarin, Punjabi, Spanish, Tagalog, Vietnamese, and other languages (57 total)	25%

Business respondents preferring to use Korean and Mandarin were more likely to have closed than other language groups. Of the Mandarin-preferring businesses (12 total) 42% were closed with 8% being closed indefinitely and of Korean-preferring businesses (20 total) 35% were closed, all of which were closed temporarily.

SUPPLY CHAIN ISSUES

Businesses were asked about the type of supply chain issues they were encountering and where along the food supply chain these issues were occurring. On average, open businesses reported experiencing an average of two different food supply issues such as shortages, ordering limits, delays, unavailable products, and surpluses. The types and frequency of issues experienced varied by business type (Table 2).

Table 2: Common Food Supply Chain Issues reported by food businesses

% of Open Businesses Experiencing Issues	Issue Type	Common Issues
79%	Food supply issues	<ul style="list-style-type: none"> • Shortages (44%), • Delays (39%), • Ordering limits (39%), • Unavailable products (39%)
39%	International supply chain issues	<ul style="list-style-type: none"> • Issues with: <ul style="list-style-type: none"> ○ Food from Asia (22%), ○ Food from USA (10%), ○ Food from Europe (7%)
80%	"Bottleneck" issues along the supply chain	<ul style="list-style-type: none"> • With Canadian Wholesalers (52%), • With Grocery Retailers (26%), • With Canadian Processors/Manufacturers (25%)
95%	Supply issues with particular food types	<ul style="list-style-type: none"> • Meat and other animal and vegetable proteins (52%), • Fresh produce (38%), • Baked goods and pasta (25%)

FOOD SURPLUSES AND WASTED FOOD

Of the open businesses (218 total), 19% reported that they had experienced food surpluses since the start of the pandemic in March. Food retailers and wholesalers/distributors reported more food surpluses than other business types, with 28% of food retailers and 25% of wholesalers/distributors reporting surpluses.

To assess the potential for food surpluses to be donated, businesses were asked if they had established food donation services.

- Of those open businesses with surpluses, 44% had donation services in place
- Of all businesses (including open and closed) 22% had donation services in place

Businesses were asked whether they were composting or landfilling foods more than usual because of supply chain issues and changing customer behaviour resulting from COVID-19. Of the 200 open businesses who answered this question, 35 (18%) indicated that they were composting or landfilling foods more than usual.

GROCERY/FOOD DELIVERY SERVICES

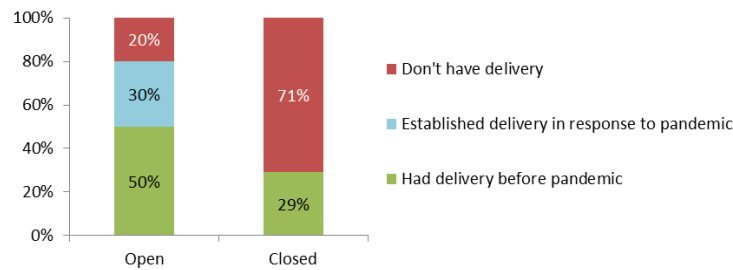
Grocery stores

Eight grocery store businesses representing nine locations responded to the survey; all were open for business. Of those grocery store businesses that answered questions about grocery shopping and delivery (4 total), one business offered online shopping with customer pick-up and one offered grocery shopping and delivery through a third party service.

Other food businesses suitable for delivery services

Caterers, restaurants, hotels and food retailers were grouped to assess their experience with delivery services. This business group is referred to as 'food businesses suitable for delivery' in this report. Two hundred and thirty nine businesses suitable for delivery (representing 383 locations) responded to the survey, of which 71% businesses were open for business and 29% were closed (Graph 4). The data suggests that businesses with delivery services (or those who started delivery services in response to the pandemic) may have been more resilient during the pandemic.

Graph 4: Food businesses suitable for delivery, status and delivery services



38% (92 businesses) of businesses responses from Grocery Stores, Caterers, Hotel/Motel, Restaurants and Food Retailers noted that they were interested in a webinar on delivery services.

PERSONAL PROTECTION EQUIPMENT (PPE) FOR OPEN BUSINESSES

32% of open businesses (228 total) responded to questions about PPE indicating that they did not have adequate PPE for the next two weeks. Surveyed businesses noted a variety of specific types of shortages (Table 3).

Table 3: PPE use and shortages reported by open food businesses

PPE Type	Percent of open businesses that used this item	Percent of open businesses with shortages of this item
Gloves	95%	12%
Faces Shields	61%	16%
Masks	88%	19%
Sanitizer	96%	15%

Of the 313 businesses surveyed, 72 (23%) indicated that they would like assistance from the City of Vancouver in sourcing PPE.

- 13% of businesses respondents wanted assistance with masks,
- 12% with sanitizer,
- 12% with plexiglass

Additional supports noted by businesses

- 46% of businesses indicated that they would like the temporary expansion of patios for outdoor food consumption.
- 50% of businesses asked that the City advocate to senior government for employee and business rent relief.

CONCLUSION

The toll of the pandemic has been unprecedented and the City would like to extend are heartfelt thanks to food businesses for their endurance and for the care they have taken to protect and sustain the City’s residents and workers. We would like to especially thank those who contributed their valuable time to this survey for their generous participation and thoughtful responses. A longer internal report will be shared with relevant City of Vancouver Departments to inform what the City actions or advocates for in the event of a second wave of COVID-19 infection and associated restrictions, and as part of the City’s recovery efforts.

If there are any questions or comments please email, covid-foodici_outreach@vancouver.ca.