



Food for Thought

Out-of-Home Dining

In troubled times, global diners seem to be searching for comfort in the familiar. A Nielsen survey of Internet users in 52 countries, finds diners choosing restaurants that serve their local cuisine and offer value.

What's on the Menu?

Quick, define "Canadian cuisine." It may not seem as readily identifiable as the national cuisine of other countries, but when it comes to dining out, that's what Canadian consumers are seeking.

When asked about their favourite restaurant meals, consumers around the world gave "cuisine of my country" as the number one answer (27% of people surveyed by Nielsen). That held true for Canadians too, 26% of whom gave the same response.

Globally, the favourite food runners-up were Chinese (26%) and Italian (17%). In Canada, the order was reversed; as a first choice, 21% of Canadians like to eat Italian out, and 13% Chinese (just beating out American food, which 12% of Canadians prefer).

On the Canadian list of first choices for cuisine, that was followed by Thai (5%), French and Japanese (4% each), Vietnamese (3%), and Indian and Mexican (1% each). For American diners, in contrast, Mexican was the number three choice (16%, not surprising given the country's large Hispanic population), after American food (37%) and Italian (19%).

The world's most patriotic restaurant-goers are Italians, with 92% saying they prefer their local cuisine, followed by consumers in Turkey (82%) and India (81%).

The only consumers who pick anything other than their local cuisine as their favourite fare are the people of Australia and Singapore (Chinese is their favourite), Hong Kong (who most prefer Japanese cuisine), and the United Arab Emirates (citing Indian food). Preferences in Singapore and UAE are likely driven by ethnicity, with Singapore's population made up of 75% Chinese and UAE being around 50% South Asian.

Frequent Diners

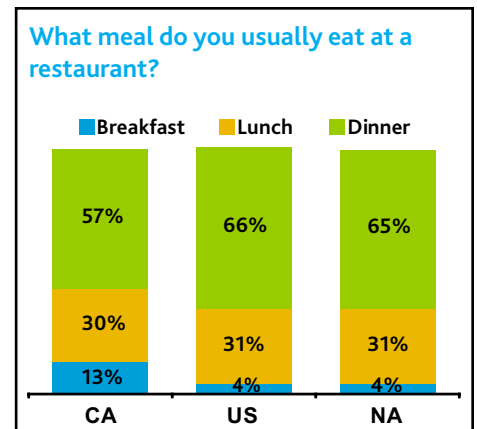
Just over one-third of Canadians eat out at least once a week, with 24% going to a restaurant once or twice weekly, 9% eating out three to six times a week, and 2% eating out every day. Another 26% of Canadians eat out two to three times a month.

The most frequent restaurant-goers in the world? The people of Hong Kong, with 66% eating out at least once a week – and 22% eating out every day.

Overall, consumers in the Asia Pacific dine out more often than consumers in other regions. In contrast, Europeans are the least likely to venture out for a meal; more than half (56%) said they frequent restaurants just once a month or less. That's reflective of local cultures. Many Asian countries emphasize out-of-home socializing, but Europeans are more likely to share a meal around the family table.

Breakfast, Lunch or Dinner?

The most popular out-of-home meal is easily dinner, cited by 60% of global consumers and 57% of Canadians. That



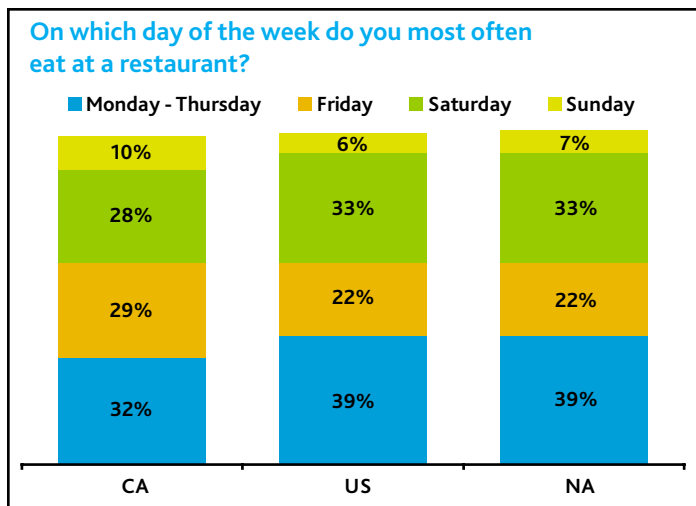
number is even higher in the U.S.; for 66% of Americans, dinner is the meal they usually eat out. In Latin America, where lunch is the main meal of the day, 73% of consumers said that's the most likely meal to have in a restaurant.

Canada did lead the world in one category – the highest percentage of consumers who named breakfast as the meal they usually eat out. Globally (and in the U.S.), 4% picked breakfast vs. a whopping 13% in Canada.

Weekday Choice

Canadians also differed somewhat from world opinion in another respect. Globally, Saturday is the clear favourite night of the week to eat out, named by 37% of respondents. In Canada, Saturday received 28% of the votes; Canadians are more likely (32%) to eat out on a Monday to Thursday, followed by Friday (29%). Americans are even more likely to pick a weekday to eat out (39%).

On Sunday, however, we seem to prefer home cooking; on a day when 14% of the world eats out, just 10% of Canadians do, and even fewer Americans (6%).



Dining Companions

Consumers worldwide most often go to a restaurant with family and/or friends (55%), by a two-to-one margin over their partner (27%). Nine per cent dine with work colleagues (20% in Brazil, the highest figure). Just 7% eat alone.

In Canada, the margin is much closer; 43% prefer to eat out with family and/or friends, and 38% with our partner. And it's not unusual to see a table for one; 12% of Canadians eat out alone, a higher percentage than in any other country except Taiwan.

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Cuisine, Cost and Convenience

When choosing a restaurant, what are the three most important factors to Canadians? Cuisine, cost and convenience.

The number one answer is type of cuisine (34%). Next, 22% said "reasonably priced food", and 14% said a "location close to home/school/work."

For Americans, type of cuisine (37%) and cost (27%) are both a little more important than they are to Canadians. Canadians, on the other hand, are more likely than Americans to cite "healthy food options" (6% vs. 4%) as a primary consideration when choosing a place to eat.

What are the two main things you consider when choosing a restaurant?

	Global	CA	US
The type of cuisine	33%	34%	37%
Reasonably priced food	21%	22%	27%
Convenient location close to home/work/school	10%	14%	13%
Healthy food options	6%	6%	4%
Good hygiene standards	10%	5%	2%
My family members' preferences	5%	5%	5%
Special offers /promotions	2%	4%	4%
Not enough time to prepare my own meal	2%	2%	2%
Service	2%	2%	1%
My friends' preferences	2%	1%	2%
Near to good parking facilities	1%	1%	1%
The décor/ambiance	2%	1%	0
Recommendation from friends	2%	1%	0
Brand image	1%	0	-
Internet reviews	0	-	0
The latest 'in' place	0	0	-
Other	1%	1%	2%

For Canadians, considerations such as décor and ambiance (1%), service (2%), and even not enough time to prepare a meal at home (2%) were well down on the list.

Conclusion

For restaurants in Canada and around the world, offering local cuisine at a reasonable value seems like the recipe for success. With more than six in 10 Canadians (61%) going to restaurants at least two to three times a month, dining out remains one of the most popular out-of-home activities.