



Report

# Canadian Insights: Dining Out Trends

July 2024



# Methodology



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Online survey with n=1528 Canadian residents 18 years or older, with quotas in place to generate a demographically representative sample that aligns with Statistics Canada estimates.

Respondents were randomly recruited using LEO's online panel.



## When

June 7<sup>th</sup>, 2024 to June 10<sup>th</sup> 2024



## Margin of Error

For comparison purposes, a probability sample of this size yields a margin of error no greater than  $\pm 2.50\%$  Canadian residents.



## Questions

Have questions about this report?

Please contact Paige Schoenfeld, Senior Vice-President at [pschoenfeld@leger360.com](mailto:pschoenfeld@leger360.com)

## Key Findings

### Canadians are tightening their wallets when it comes to dining out.

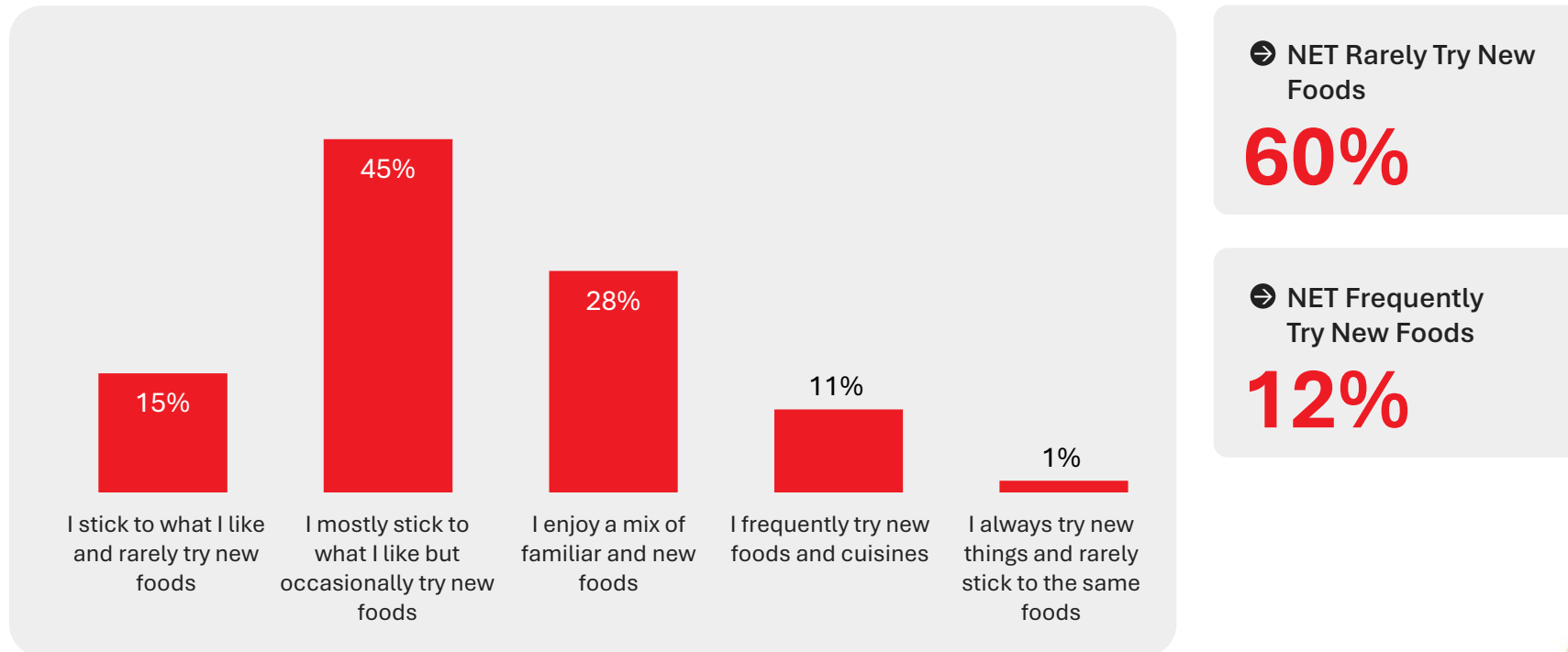
While many Canadians continue to dine out, a dramatic 88% look for value-priced options on a menu, and among those 50% are doing so more often than they did a year ago. This provides further evidence of the affordability crisis facing many Canadians today.

**One in four Canadians have dietary restrictions or preferences, and there are indications that these are growing in importance.** In an attempt to boost perceived value in their restaurant spending, Canadians have become more discerning in their menu choices. If they must pay higher prices to dine out, perhaps they need to know that they are getting the meal that they want (and are unlikely to take a risk otherwise).

**Younger Canadians are especially discerning and can be a tough group to please.** Canadians aged 18 – 34 are more likely than Canadians aged 35+ to have dietary restrictions and preferences and place a higher degree of importance on them (e.g., dairy-free, vegetarian or vegan). This likely reflects the fact that they have lower disposable incomes and need to ensure that dining out is worth the expense.

# Likelihood to Try New Foods

Canadians are risk-averse when it comes to trying new foods. Perhaps during these difficult economic times, many would prefer to stick with their tried-and-true restaurants and go-to menu items.

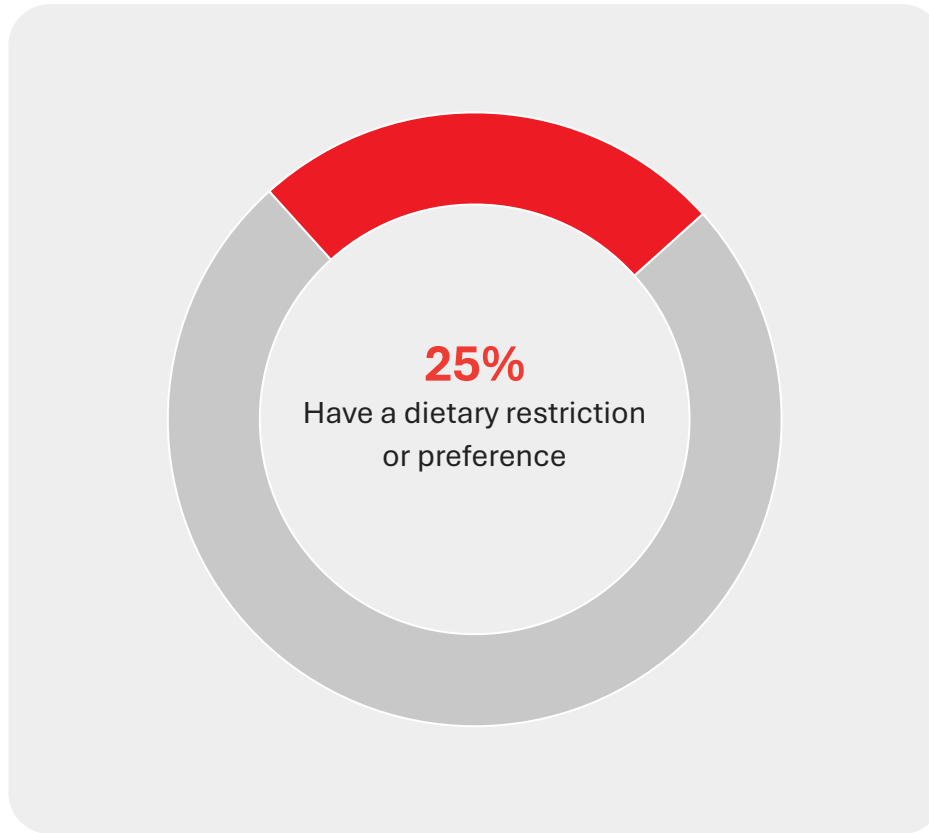


Base: Canadians (n=1,528)

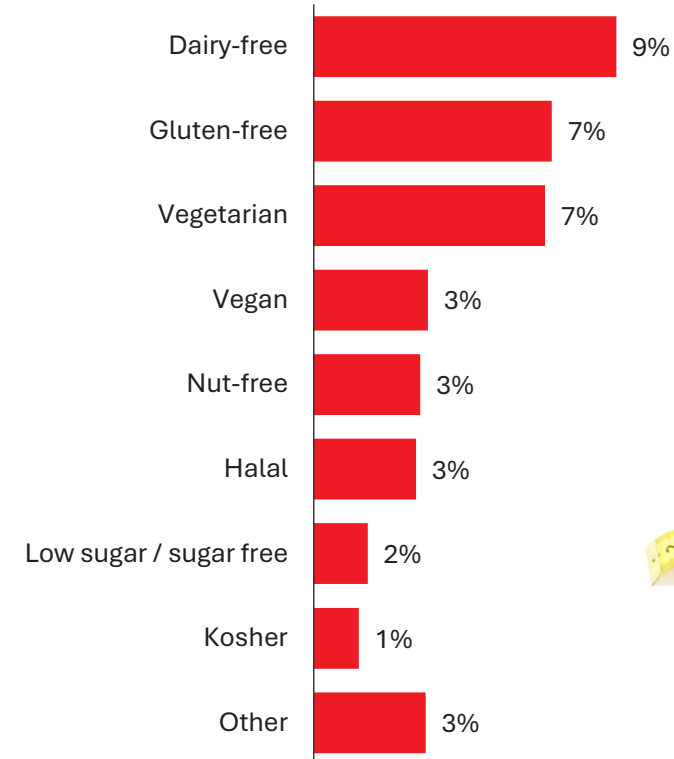
Q. Which of the following best describes you?

# Dietary Restrictions or Preferences

One in four Canadians have dietary restrictions or preferences. Dairy-free, gluten-free and vegetarian are the most predominant considerations. Those aged 18 – 34 are more likely to be dairy-free, vegetarian and vegan.



## Dietary Restrictions or Preferences

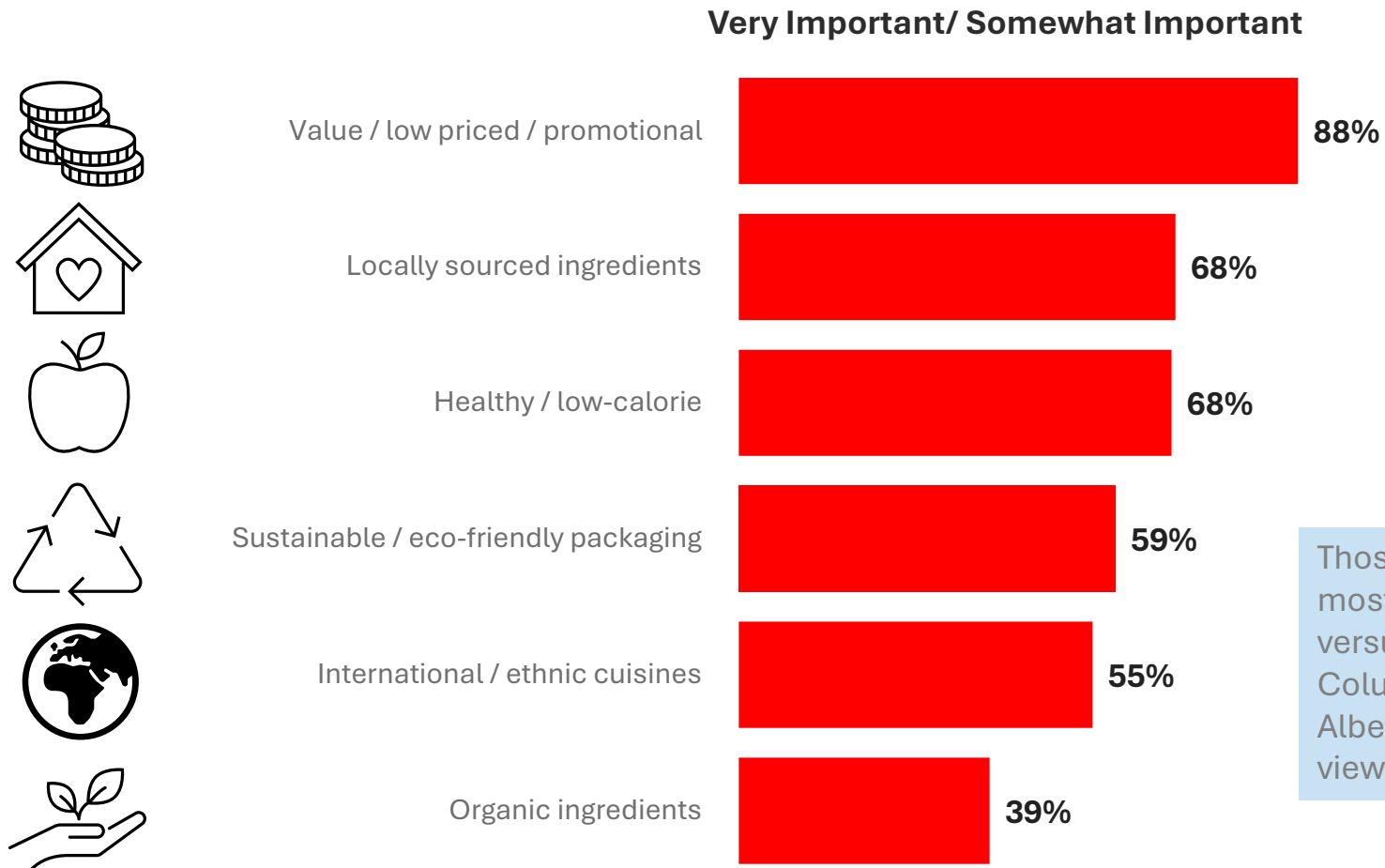


Base: Canadians (n=1,528)

Q. Do you have any dietary restrictions or preferences?

# Dining Out Priorities

Among the options presented, Canadians place the most importance on value-priced and promotional offerings. That said, the value equation extends beyond price – most notably, locally sourced ingredients and healthy/low-calorie options are also considered important.



Those aged 18 – 34 are more likely to view most of these options as important versus those aged 35+. Those in British Columbia are more likely than those in Alberta, Ontario and Atlantic Canada to view sustainable packaging as important.

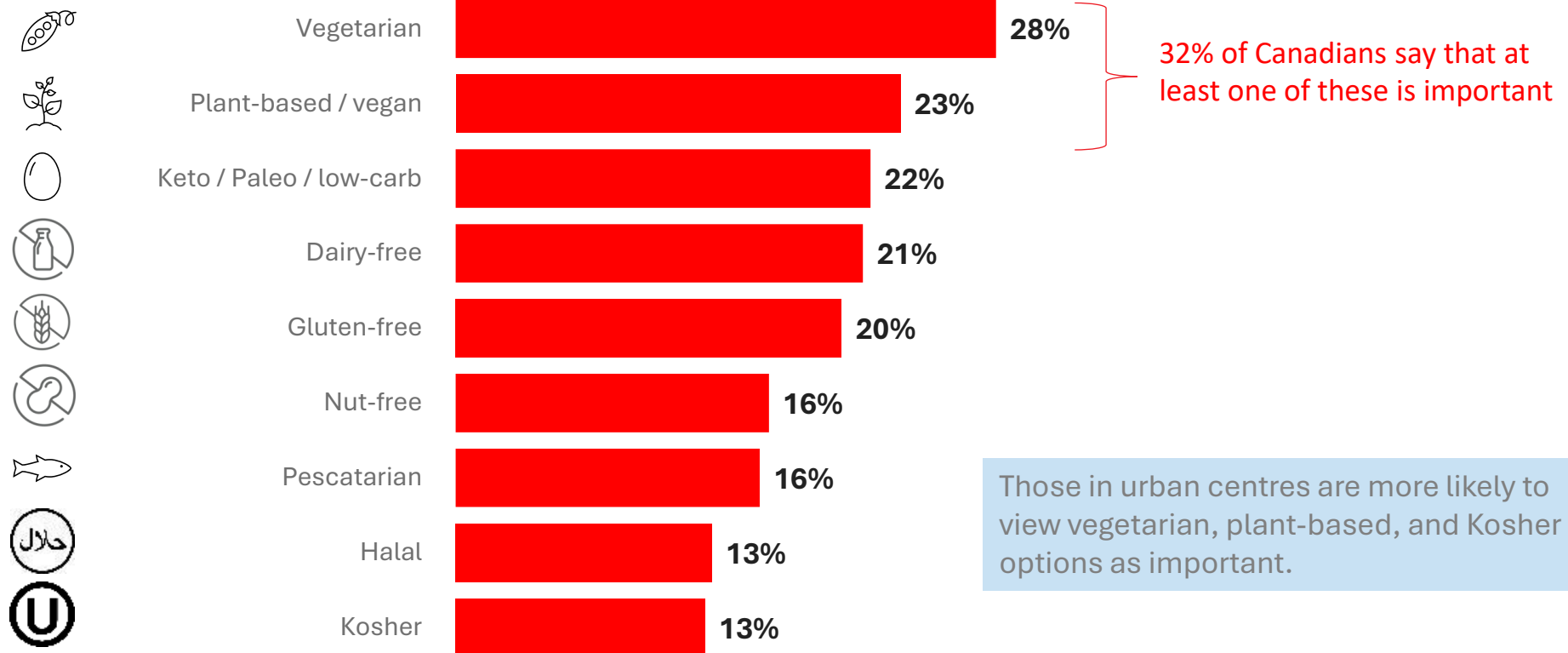
Base: Canadians who dine out or order takeaway (n=1,480)

Q. Of the times that you dine out or order take out, how important is it to you that the following options are available?

## Dining Out Menu Considerations

While restrictions may seem to cater to a small niche group, the demand for such options is actually more widespread. Restaurants can be confident that these offerings appeal to a broader audience. One in three want vegetarian and/or vegan options on the menu while another 16% look for pescatarian items. At the other end of the spectrum, one in five seek out Keto options. “Free-from” menu items (dairy, gluten and nuts) are also important to some Canadians, followed by cultural considerations (e.g., Halal and Kosher).

### Very Important/ Somewhat Important


















Base: Canadians who dine out or order takeaway (n=1,480)

Q. Of the times that you dine out or order take out, how important is it to you that the following options are available?

# Changing Needs When Dining Out

Among those who placed importance on each dining option, diners are becoming more discerning. Compared to one year ago, diners are increasingly prioritizing value-priced items and other specific dietary preferences and sourcing practices. The most significant shifts are towards value/low-priced options and healthier, more sustainable choices.

	 Value / low priced / promotional	 Locally sourced ingredients	 Healthy / low-calorie	 Sustainable / eco-friendly packaging	 International / ethnic cuisines	 Organic ingredients	 Vegetarian	
Importance	88%	68%	68%	59%	55%	39%	28%	
Net Change in Choice* (more often – less often)	+48%	+22%	+25%	+22%	+13%	+16%	+18%	
	 Plant-based / vegan	 Keto / Paleo / low-carb	 Dairy-free	 Gluten-free	 Nut-free	 Pescatarian	 Halal	 Kosher
Importance	23%	22%	21%	20%	16%	16%	13%	13%
Net Change in Choice* (more often – less often)	+12%	+9%	+20%	+18%	+3%	+10%	+10%	+1%

Base: Base: Canadians who dine out or order takeaway (n=1,480)

\*Base: Canadians who dine out or order takeaway and find the dining option important (n=varies)

Q. Would you say you are choosing the following options more often, less often, or the same as one year ago?



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# Respondent Profile



## Weighted and Unweighted Sample

The tables below present the distribution of respondents on key variables before and after weighting.

	Weighted	Unweighted
<b>Region</b>	<b>1,528</b>	<b>1,528</b>
British Columbia	213	156
Alberta	169	126
Saskatchewan/Manitoba	97	126
Ontario	593	610
Quebec	354	410
Atlantic	103	100
<b>Area</b>		
Urban	669	671
Suburban	566	570
Rural	268	271

	Weighted	Unweighted
<b>Gender</b>		
Male	744	739
Female	784	789
<b>Age</b>		
18-34	408	379
35-54	490	432
55+	630	717

## Contact Us

For more information on this study, please contact our experts:



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