

# REACT Survey – July 2022



# SURVEY METHODOLOGY

*Findings in this report are from a monthly survey conducted by Angus Reid on behalf of Restaurants Canada with a nationally representative sample of 1,500 Canadians who are members of the online Angus Reid Forum. For comparison purposes only, a sample of this size would result in a margin of error of +/- 2.6 percentage points, 19 times out of 20.*



# REACT Survey

## – Restaurant Expectations And Consumer Trends –

### HIGHLIGHTS

#### Canadians Dine Out More Frequently in July

- With warmer weather, patios open and pent-up demand, a greater share of Canadians purchased lunch, dinner or a snack from a restaurant once a week or more in July compared to June. The share of 18 to 34 year olds that purchased dinner from a restaurant *once a week or more* rose to 46% in July compared to 41% in June.

#### Albertans More Likely To Dine Out in August

- Alberta is forecast to lead the country in economic growth in 2022. As a result, Alberta is the only region where a greater share of respondents expect to purchase from a table-service restaurant in August more often (17%) compared to less often (16%). In contrast, one in four respondents in Quebec said they expect to dine out at a table-service restaurant less often – the highest share in the country. It was a similar trend for quick-service restaurants in Quebec, where 20% of respondents said they expect to order from QSRs less often in August compared to July.

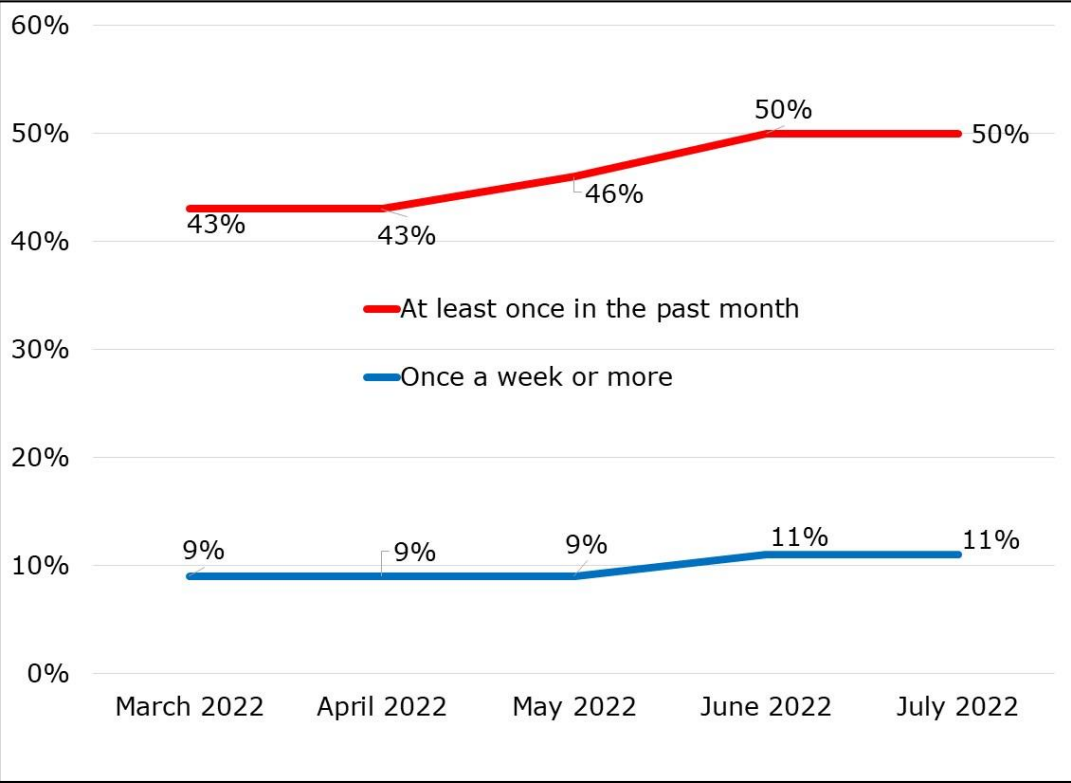
#### Restaurant Purchases Climb Higher in Calgary

- Traffic to restaurants in Calgary rebounded in July with a sharp increase in the share of respondents that purchased lunch, dinner or snack *once a week or more*.



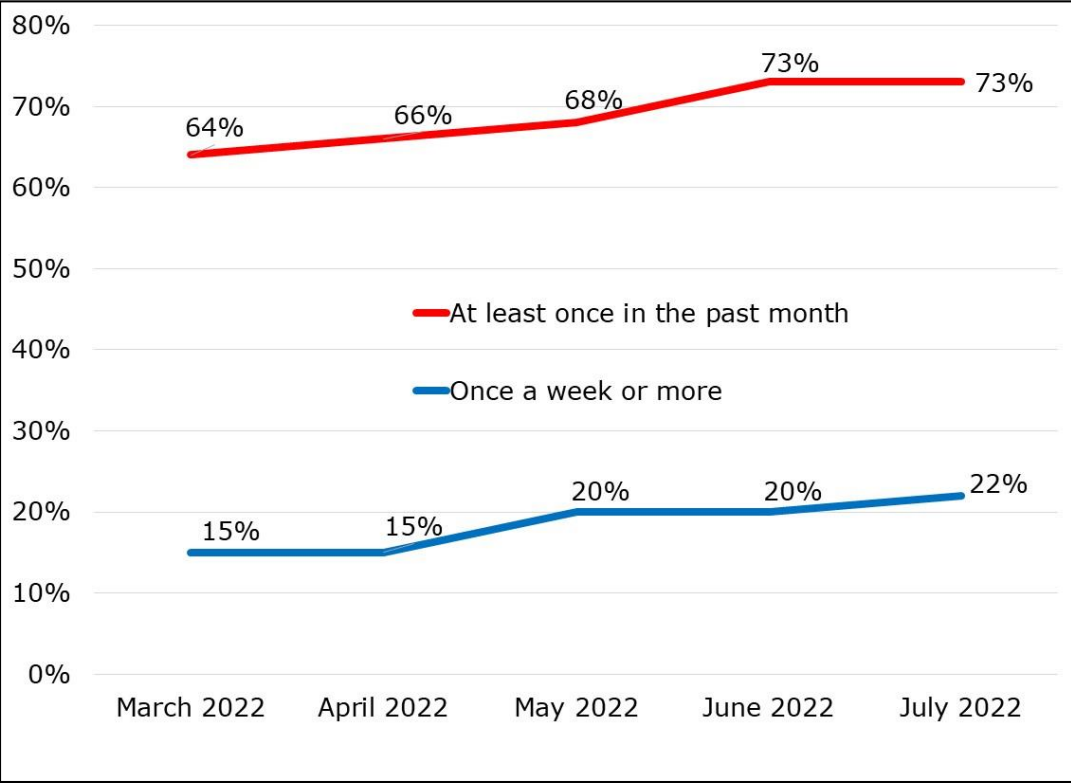
# Share of Canadians who dined at, or ordered takeout or delivery, from a restaurant for the following dayparts.

## Breakfast



- Half of Canadians ordered breakfast from a restaurant *at least once* in July, unchanged from June. British Columbians are the most likely to order breakfast from a restaurant, with 57% purchasing breakfast *at least once* in July and 15% ordering breakfast *once a week or more*.

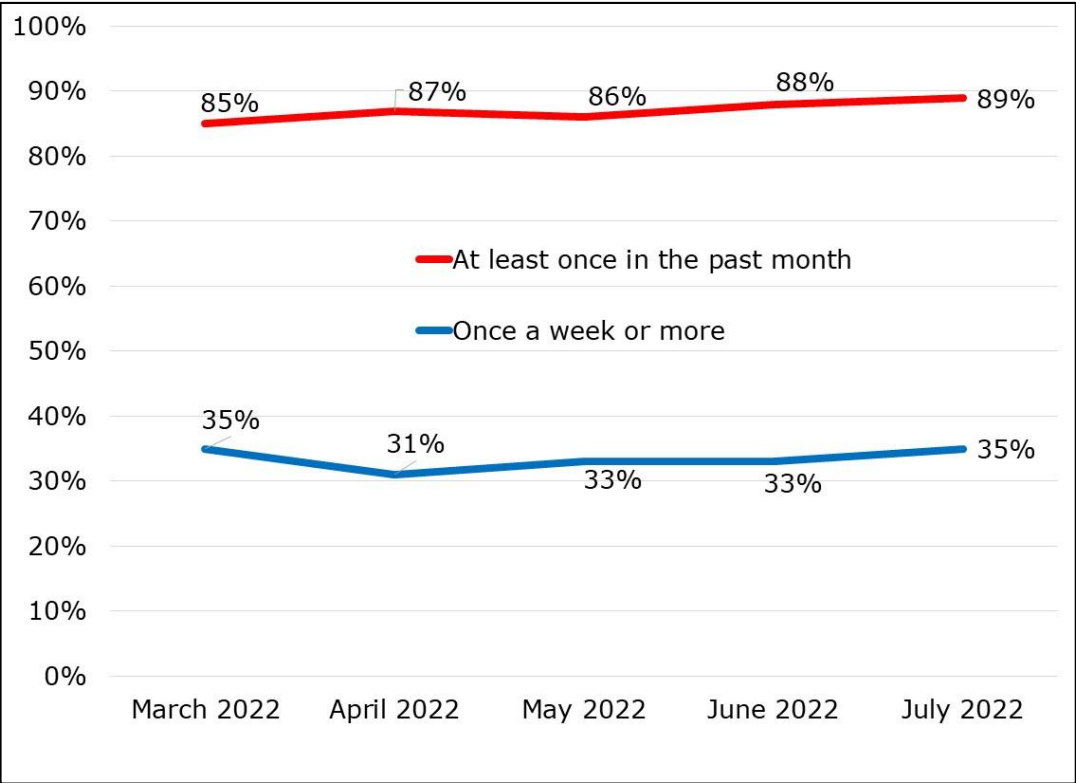
## Lunch



- The share of Canadians who purchased lunch from a restaurant *once a week or more* rose to 22% in July, as more frequent visits from Ontario and Quebec offset declines in Atlantic Canada.

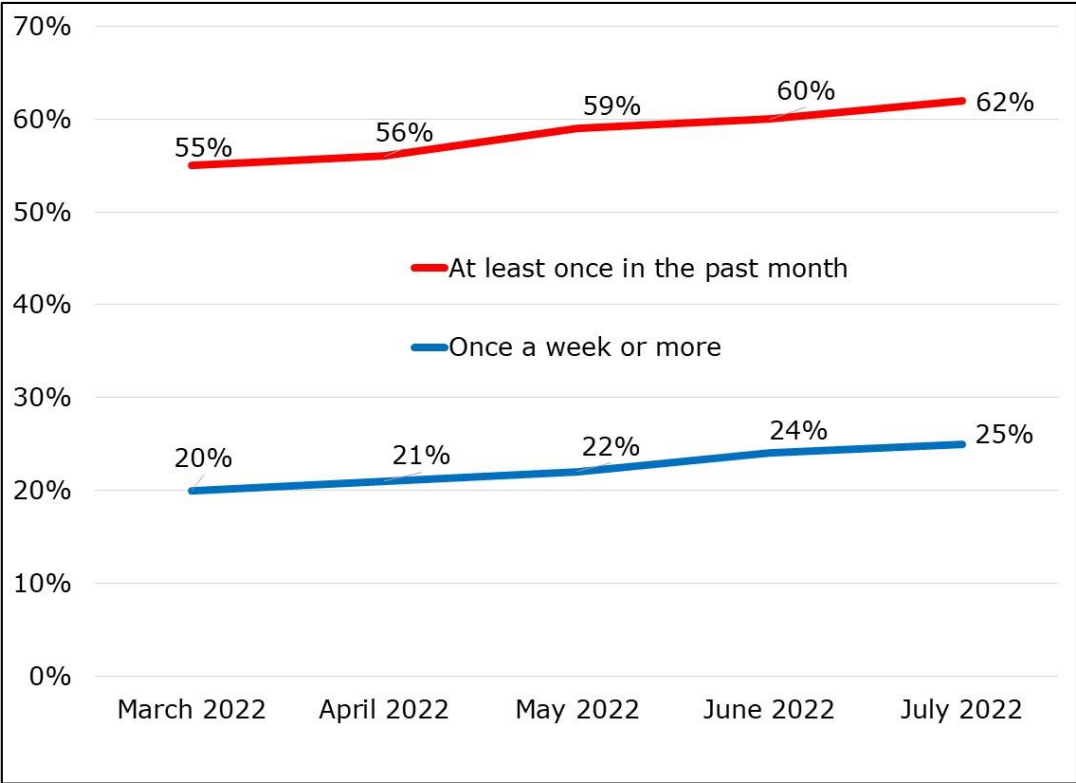
# Share of Canadians who dined at, or ordered takeout or delivery, from a restaurant for the following dayparts.

## Dinner



- The share of Canadians who purchased dinner from a restaurant *once a week or more* rose two-points to 35% in July. The increase was driven by 18 to 34 year olds, where 46% purchased dinner from a restaurant *once a week or more*, up from 41% in June.

## Coffee or Snack Break



- The share of Canadians who purchased a coffee or snack from a restaurant *at least once* in July rose to 62% -- the fourth consecutive monthly increase.

## Share of Canadians who dined at, or ordered takeout or delivery, from a restaurant *once a week or more* in July.

	TOTAL	Vancouver	Edmonton	Calgary	GTA	Ottawa	Montreal
Breakfast	11%	16%	14%	10%	14%	11%	9%
change over last month	0%	4%	7%	-3%	-7%	-1%	0%
Lunch	22%	26%	14%	37%	30%	20%	18%
	2%	-2%	1%	16%	1%	2%	2%
Dinner	35%	46%	33%	42%	48%	40%	33%
	2%	10%	1%	12%	-4%	1%	4%
Coffee or snack break	25%	37%	26%	34%	29%	25%	13%
	1%	18%	8%	14%	-7%	8%	-7%

- A greater share of respondents in Vancouver and Edmonton purchased breakfast from a restaurant *once a week or more* in July.
- The share of respondents in Vancouver and Calgary who purchased a snack from a restaurant *once a week or more* rose sharply in July, offsetting a decline in visit frequency in the GTA and Montreal.

Share of Canadians who expect to dine at, or order takeout or delivery, from the following foodservice establishments more often, less often or about the same compared to the previous month.

Quick-service Restaurant

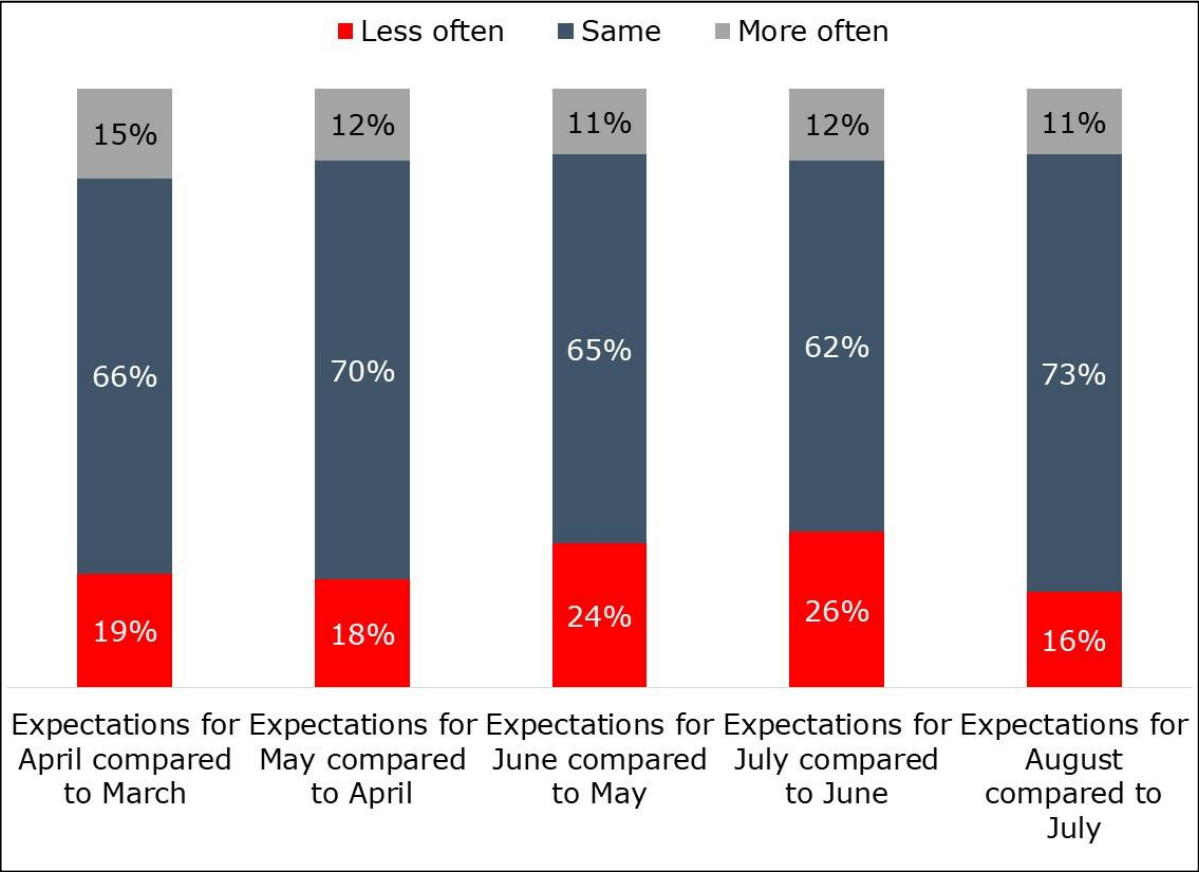
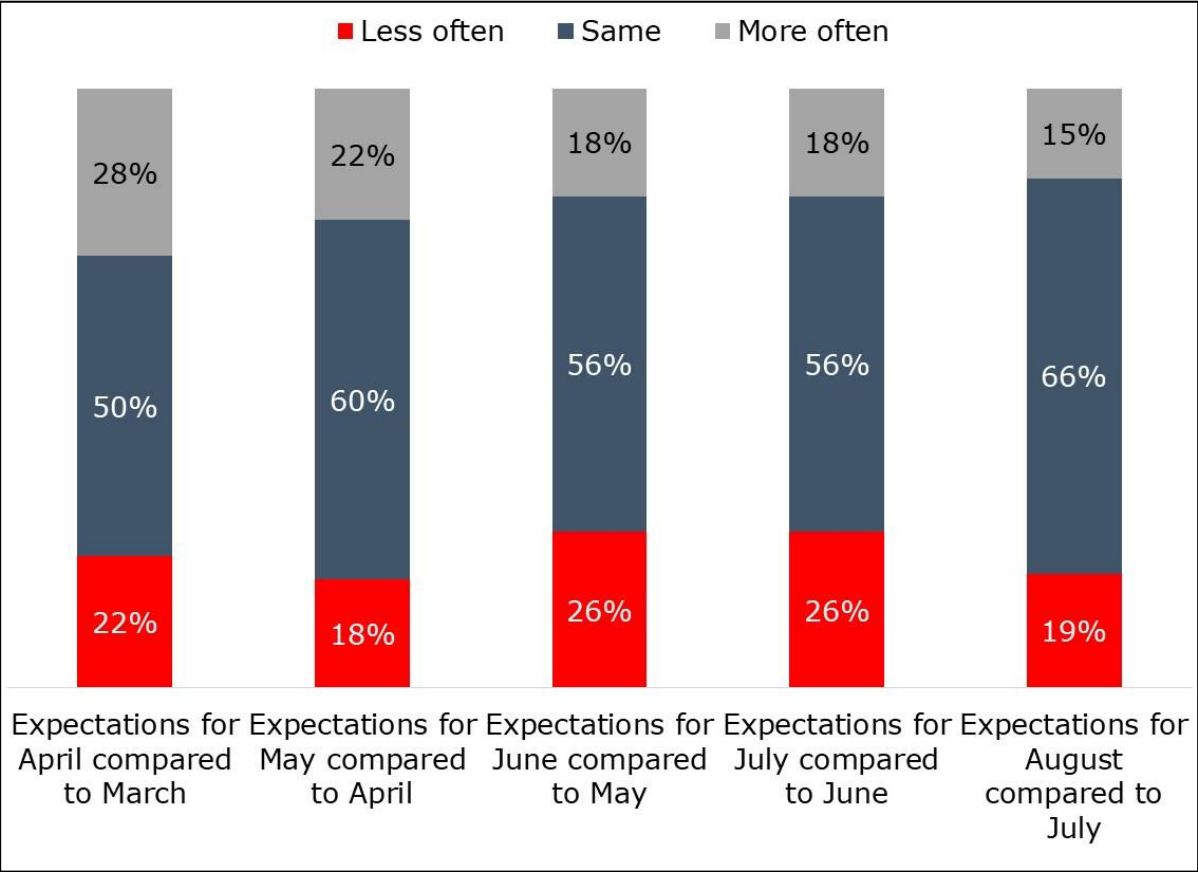


Table-service Restaurant



- Despite high inflation and tumbling consumer confidence, the majority of Canadians expect to order from a restaurant *about the same* in August compared to July. In fact, fewer Canadians expect to order from a restaurant *less often* in August compared to July.

# TABLES



# In July 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

## BREAKFAST

	Total	18-34	35-54	55+
Never <i>change over last month</i>	50% 0%	45% 2%	47% -1%	56% -2%
Once	19% -2%	18% -3%	20% -3%	19% 0%
2-3 times	20% 2%	23% 3%	22% 4%	17% 2%
4-5 times	6% 0%	7% -1%	6% -1%	5% 0%
6 times or more	5% 0%	7% -1%	5% 1%	3% 0%

- 33% of 35 to 54 year olds in Canada ordered breakfast from a restaurant *two or more times* in July, up from 29% in June.
- Despite a slight dip in visits in July, 18 to 34 year olds are still much more likely to purchase breakfast from a restaurant *once a week or more* compared to other age cohorts.

## LUNCH

	Total	18-34	35-54	55+
Never	27% 0%	23% 1%	22% -2%	35% 1%
Once	20% -2%	17% -5%	21% 0%	22% -1%
2-3 times	31% 0%	32% 2%	32% -1%	28% 0%
4-5 times	13% 0%	16% 1%	14% 0%	9% -1%
6 times or more	9% 2%	12% 1%	11% 3%	6% 1%

- 25% of 35 to 54 year olds purchased lunch from a restaurant *once a week or more* in July, up 3 points over June.
- 28% of 18 to 34 year olds purchased lunch from a restaurant *once a week or more* in July, the highest of any age cohort and up 2 points over June.

# In July 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

## DINNER

	Total	18-34	35-54	55+
Never <i>change over last month</i>	11% -1%	7% -3%	7% -1%	17% 0%
Once	16% -3%	13% -3%	17% -1%	19% -4%
2-3 times	38% 2%	34% 1%	38% 1%	40% 3%
4-5 times	25% 2%	31% 4%	27% 2%	18% 0%
6 times or more	10% 0%	15% 1%	11% -1%	6% 1%

- 93% of Canadians under the age of 55 purchased dinner from a restaurant *at least once* in July compared to 83% of those 55 and older.
- 46% of 18 to 34 year olds purchased dinner from a restaurant *once a week or more* in July, up 5 points compared to June.

## COFFEE OR SNACK BREAK

	Total	18-34	35-54	55+
Never	38% -2%	31% -4%	35% -1%	46% -1%
Once	11% -3%	11% -2%	10% -4%	13% -1%
2-3 times	26% 3%	29% 5%	26% 3%	23% 1%
4-5 times	12% 1%	16% 4%	13% 1%	9% 0%
6 times or more	13% 1%	13% -3%	16% 1%	9% 1%

- Snacking traffic rose across all age groups in July.
- 29% of 18 to 34 year olds purchased a snack from a restaurant *once a week or more* in July compared to 18% of those 55 years or older.

# In July 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

## BREAKFAST

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
Never <i>change over last month</i>	43% -1%	55% 3%	46% -12%	52% 2%	46% -4%	52% -5%
Once	21% -6%	13% -8%	21% 2%	19% -1%	21% -1%	18% 6%
2-3 times	21% 1%	21% 2%	26% 10%	18% 1%	22% 5%	21% 1%
4-5 times	7% 1%	7% 4%	5% 0%	6% -1%	6% -1%	5% -2%
6 times or more	8% 5%	4% -1%	2% 0%	5% -1%	5% 1%	4% 0%

- A greater share of respondents in Saskatchewan and Manitoba purchased breakfast from a restaurant at least once in July, rising to 54% compared to 42% in June.

## In July 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

### LUNCH

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
Never <i>change over last month</i>	25% 5%	22% -8%	26% -2%	29% 2%	29% -3%	22% 0%
Once	16% -5%	21% -4%	16% -7%	20% -4%	22% 1%	28% 15%
2-3 times	34% 0%	33% 7%	33% 4%	28% -1%	31% -1%	34% 0%
4-5 times	15% 0%	14% 5%	19% 3%	13% 0%	10% -1%	7% -15%
6 times or more	10% 0%	10% 0%	6% 2%	10% 3%	8% 4%	9% 0%

- The share of Albertans who purchased lunch from a restaurant *two or more times* in July rose by 12 points to 57%.
- The share of Atlantic Canadians who ordered lunch at least *once a week or more* fell from 31% in June to 16% in July. Atlantic Canadians also cut back on their frequency of ordering dinner from a restaurant in July.



## In July 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

### DINNER

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
Never	12%	5%	6%	9%	16%	13%
<i>change over last month</i>	4%	-11%	-3%	0%	1%	-2%
Once	11%	17%	23%	14%	20%	23%
	-7%	3%	-1%	-6%	1%	5%
2-3 times	38%	43%	38%	38%	35%	37%
	-5%	4%	3%	6%	-3%	3%
4-5 times	27%	23%	24%	28%	22%	18%
	7%	3%	4%	2%	1%	-4%
6 times or more	12%	12%	9%	11%	7%	9%
	1%	1%	-3%	-2%	0%	-2%

- The share of Albertans who purchased dinner from a restaurant *at least once during the past month* jumped from 84% in June to 95% in July, the highest share in the country.
- The share of British Columbians who purchased dinner from a restaurant *at least once a week* increased to 39% in July compared to 31% in June.

# In July 2022, how many times did you dine at or order takeout or delivery from a restaurant for the following dayparts?

## COFFEE OR SNACK BREAK

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
Never <i>change over last month</i>	34% 2%	31% -11%	32% -13%	34% 0%	54% 3%	33% -3%
Once	13% -7%	7% -3%	16% 4%	11% -3%	10% -2%	16% 4%
2-3 times	22% -6%	33% 3%	23% 1%	29% 8%	20% 1%	24% -1%
4-5 times	15% 5%	12% 3%	15% 1%	12% -1%	11% 3%	17% 6%
6 times or more	16% 6%	17% 8%	14% 7%	14% -4%	5% -5%	10% -6%

- Snacking frequency rose sharply in British Columbia, Alberta and Saskatchewan/Manitoba in July.
- The share of respondents who ordered a snack *at least once a week or more* in July climbed to 31% in British Columbia (from 20% in June), to 29% in Alberta (from 18% in June) and to 29% in Saskatchewan/Manitoba (up from 21% in June).
- In contrast, the share of respondents who ordered a snack *six or more times* in July fell in Ontario, Quebec and Atlantic Canada.

# Will you be dining at or ordering takeout or delivery from the following foodservice establishments more often, less often or about the same **in August compared to July?**

## QUICK-SERVICE RESTAURANT

	Total	18-34	35-54	55+
A lot more often	2%	2%	2%	1%
<i>change over last month</i>	<i>0%</i>	<i>-1%</i>	<i>0%</i>	<i>-1%</i>
A little more often	9%	11%	9%	8%
	<i>0%</i>	<i>-2%</i>	<i>3%</i>	<i>-2%</i>
About the same amount	73%	68%	73%	76%
	<i>11%</i>	<i>11%</i>	<i>8%</i>	<i>12%</i>
A little less often	10%	12%	11%	8%
	<i>-6%</i>	<i>-6%</i>	<i>-6%</i>	<i>-6%</i>
A lot less often	6%	7%	5%	7%
	<i>-4%</i>	<i>-2%</i>	<i>-4%</i>	<i>-4%</i>

## TABLE-SERVICE RESTAURANT

	Total	18-34	35-54	55+
A lot more often	2%	2%	3%	2%
	<i>-1%</i>	<i>-1%</i>	<i>1%</i>	<i>-1%</i>
A little more often	13%	15%	12%	12%
	<i>-2%</i>	<i>0%</i>	<i>-3%</i>	<i>-3%</i>
About the same amount	66%	61%	65%	71%
	<i>9%</i>	<i>7%</i>	<i>6%</i>	<i>14%</i>
A little less often	12%	14%	12%	9%
	<i>-1%</i>	<i>-2%</i>	<i>-1%</i>	<i>-2%</i>
A lot less often	7%	7%	8%	6%
	<i>-5%</i>	<i>-6%</i>	<i>-3%</i>	<i>-8%</i>

- Across all age groups, the majority of respondents said they would maintain their visit frequency to quick- and table-service restaurants in August compared to July.
- Despite rising inflation and higher interest rates, the share of Canadians who expect to make *fewer* purchases from a quick-service restaurant in August fell to 16% compared to 26% the previous month. It was a similar trend for table-service restaurants as only 19% of respondents expect to make *fewer* purchases at a table-service restaurant in August compared to 25% the previous month.

Will you be dining at or ordering takeout or delivery from the following foodservice establishments more often, less often or about the same **in August compared to July?**

## QUICK-SERVICE RESTAURANT

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
A lot more often	0%	2%	3%	2%	2%	0%
<i>change over last month</i>	-2%	0%	3%	-1%	-1%	-1%
A little more often	11%	11%	10%	8%	9%	9%
	3%	5%	5%	-3%	0%	-3%
About the same amount	72%	73%	76%	74%	68%	76%
	6%	7%	14%	10%	13%	11%
A little less often	8%	12%	8%	10%	10%	10%
	-10%	-3%	-15%	-3%	-9%	-4%
A lot less often	9%	2%	3%	5%	10%	5%
	3%	-9%	-7%	-4%	-3%	-3%

- Most Canadians expect they will *maintain* their visit frequency to quick-service restaurants in August compared to July.
- The share of respondents who expect to order from a quick-service restaurant *less often* tumbled in Alberta (from 26% in July to 14% in August) and in Saskatchewan/Manitoba (from 33% in July to 11% in August).



Will you be dining at or ordering takeout or delivery from the following foodservice establishments more often, less often or about the same **in August compared to July?**

## TABLE-SERVICE RESTAURANT

	British Columbia	Alberta	Sask/MB	Ontario	Quebec	Atlantic
A lot more often	0%	2%	2%	3%	2%	2%
<i>change over last month</i>	-3%	0%	2%	0%	-1%	1%
A little more often	12%	15%	13%	12%	13%	15%
	-2%	4%	7%	-5%	-4%	0%
About the same amount	69%	67%	67%	68%	60%	69%
	9%	10%	6%	12%	5%	13%
A little less often	8%	12%	15%	12%	13%	12%
	-7%	-6%	-2%	1%	0%	-4%
A lot less often	11%	4%	3%	6%	11%	2%
	3%	-9%	-13%	-7%	-2%	-10%

- Alberta is the only region where a greater share of respondents expect to purchase from a table-service restaurant in August *more often* (17%) compared to less often (16%).
- One in four respondents in Quebec said they expect to dine out at a table-service restaurant *less often* – the highest share in the country.

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## FOR FURTHER INFORMATION

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