

# 2024 Canadian Diner Trends Report



# Introduction

The past year has seen significant changes in Canadian dining habits. They're now dining out less than they did a year ago and many are opting to order takeout more frequently instead – a shift in behaviour that suggests that the current economic situation is putting pressure on Canadians' wallets and causing them to trim their restaurant budgets.

Despite this shift in consumer behaviour, the good news is that there's still a strong desire among Canadian diners to visit restaurants and savour the full service dining experience, with 25% still dining out weekly or more often. Canadians have a strong appetite for new restaurants, too, with two-thirds trying a new restaurant every few months or more frequently.

So, what matters most to Canadians when they decide where to dine? Value for money, convenience, and quality of food all play a big role in deciding when and where to eat, and can motivate diners to choose certain restaurants over others. In contrast, a restaurant's online reviews, social media presence, and cachet are all less significant considerations for today's value-conscious consumers.



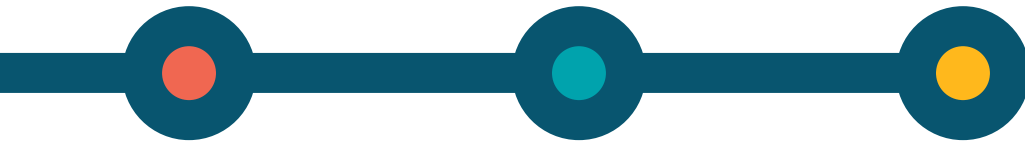
The role of technology in the dining experience has also undergone a bit of a shift. On the whole, Canadian diners appreciate restaurant technology, especially when it makes visiting or ordering from restaurants faster and more convenient. However, when tech replaces too much of the human element in the customer experience, diners are unlikely to come back for seconds.

To better understand these emerging dining trends and the nuances between generations, we recently surveyed more than 1,000 diners from across Canada. With extensive data on diner frequency, values, habits, and more, our findings reveal just how much has changed in the past year, as well as emerging trends to watch. For restaurateurs, this data provides valuable insight into what today's diners want and what's required to provide the best possible guest experience.

# Objective

This report provides restaurant owners, operators, and other restaurant industry professionals with an in-depth look at how diner habits and preferences are changing and what diners want out of their dining experiences today. Armed with this information, restaurateurs will be able to:

- 1 Better navigate current challenges
- 2 Anticipate upcoming trends
- 3 Identify new solutions to provide the best possible guest experience



# Methodology

We partnered with research firm [Maru/Matchbox](#) to survey 1,000 diners in Canada. Our research was conducted from September 12th to September 21st, 2023. Survey results are accurate +/- 3% for the general population of Canadian diners.

# Table of Contents

**6** Report Highlights

**8** **What Diners Want:**  
Frequency & Preferences

Dine-In & Takeout Frequency  
Takeout & Delivery Preferences  
Dine-In Preferences

**22** **How Diners Decide:**  
Decision-Makers & Motivators

Decision-Making Factors  
Online Motivators  
Menu Trends

**31** **What Deters Diners:**  
Sensitivities & Deal-Breakers

Price & Wait Time Sensitivities  
Biggest Deal-Breakers

**38** **How Diners Engage:**  
Loyalty & Communication

Loyalty & Rewards  
Communication Trends

**48** Emerging Diner Trends

**54** Conclusion

**55** About TouchBistro

**56** Respondent Profile



# Report Highlights

Our respondents gave us a unique opportunity to understand not only what gets diners through the door, but also what keeps them out. And as we uncovered, quality food, a convenient restaurant location, and value for money are high priorities for Canadian diners.

## Here's a preview of some of our key findings:

---

### Canadians Dining Out Less Frequently, but Takeout is Slightly Up

Overall, Canadians are dining in less than they did in 2022 (down 13%), due to the impact of inflation on discretionary spending for many households. While some are trading restaurant visits for home-cooked meals to save money, others are simply shifting their spending to takeout. In fact, 31% of Canadians are now ordering takeout at least once a week (up 6%).

**25%**

of Canadians say they dine out weekly or more often – down from 38% who said the same in 2022

---

### Diners Increasingly Sensitive to Price Hikes

The number of Canadians concerned about menu price increases has risen. This year, 30% reported that if a restaurant bumped up its prices, this would *significantly* impact their interest in dining there (up 7% from 2022). This is more evidence that consumers are feeling a financial pinch and the data holds true for takeout and delivery, too. A third (33%) of diners reported that if a restaurant raised its prices, this would *significantly* impact their interest in ordering takeout/delivery.

**30%**

say that if a restaurant increased its prices, it would *significantly* impact their interest in dining there

---

### Great Food and Service Beat Out Flashy Tech

Overall, Canadians are largely focused on the fundamentals of hospitality. Quality food and attentive, customer-centric service are much greater priorities than advanced technology like QR code menus or self-serve kiosks. Among Canadian diners, 85% prefer to order from a physical menu and speak with a server – a sentiment that rings true across generations. 76% of Canadians also prefer when a server takes their payment at the table, which indicates that they appreciate technology like mobile payment terminals, but still crave human interaction.

**85%**

of diners prefer to order from a physical menu and speak with a server (versus using a kiosk or QR code)

# Report Highlights

## Reward Program Membership (and Engagement) on the Rise

Canadians' affinity for restaurant loyalty programs is increasing, with 29% reporting that they currently belong to a reward program (up 6% from 2022). Among these diners, 33% visit a restaurant at least once a week – and that number jumps to 40% for those ordering takeout. This suggests that reward program members may be more resilient and more likely to keep ordering, even in a more uncertain economy.

# 29%

of Canadians are now members of a loyalty program (up from 23% in 2022)

## The Dining Experience Starts Online

Before deciding on a new restaurant, 79% of Canadian diners *always or often* look at the menu online. Loyalty program members are the most likely to look up a restaurant's menu online (55% always do this) and visit the restaurant's website (43% always do this). For restaurateurs, this highlights the importance of having an online presence as a way to make a standout first impression.

# 79%

of diners say they *always or often* look at a restaurant's menu online before visiting

## Canadians Prefer Pickup Over Delivery

When ordering food to go, 39% of Canadians prefer to pick it up themselves to avoid delivery fees, while just 22% favour delivery. In addition, many Canadians are choosing to deal directly with restaurants to get takeout, with 33% preferring to call the restaurant to place their order and 19% opting to use the restaurant's website. However, many Gen Z diners (27%) prefer to order through third-party apps, suggesting that there's no one-size-fits-all solution when it comes to off-premise dining.

# 39%

prefer to pick up to-go orders in order to save on delivery fees

## For Today's Diners, Time is Precious

Canadian diners are not only price-sensitive – they're also *time-sensitive*. The average time they'll wait for a table is just 18 minutes, with a wait time of more than 20 minutes becoming a huge deterrent. And when it comes to delivery, diners report that they'll wait a maximum of just 32 minutes, on average.

# 18 Minutes

is the average amount of time diners will wait for a table when dining in

# What Diners Want: Frequency & Habits

Canadian diners are looking for convenience and connection this year. On the whole, they're dialing back on dining out and calling in more takeout orders instead. But when they do venture out, they're craving the human element in the dining experience. They want to spend their hard-earned dollars visiting restaurants that go above and beyond when it comes to guest service, especially those prioritizing hospitality over flashy technology.



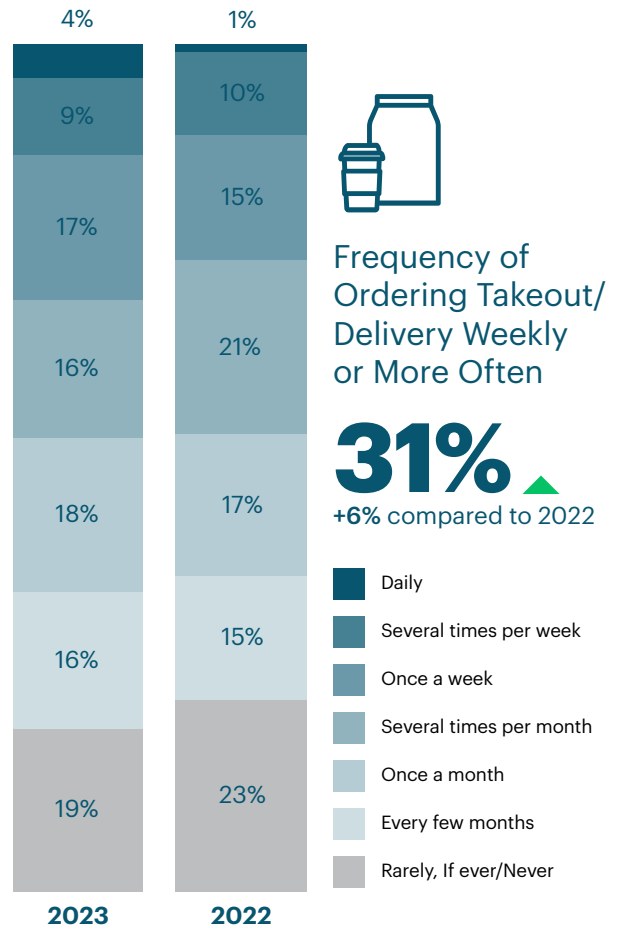
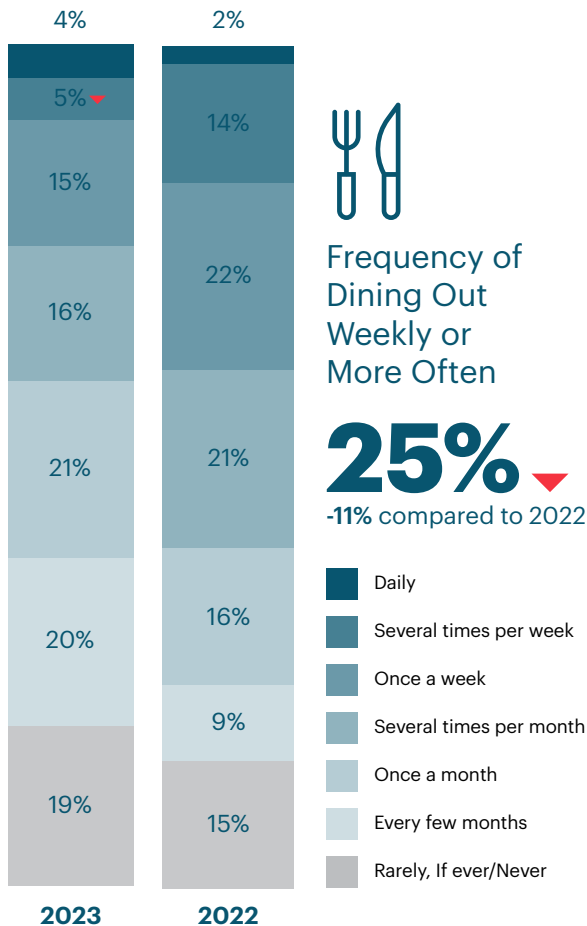


# Dine-In & Takeout Frequency

## Canadians Dining Out Less, Spending the Same

The number of Canadians who dine out at least once a week has dropped from 38% to 25% this year due to high inflation and a need to save money. However, their average spend has stayed about the same (\$56 on dine in and \$39 on takeout). It's likely that higher menu prices are causing overall spending to hold steady, even though Canadians are dining out less.

However, not all groups have cut back on restaurant visits to the same extent. Younger consumers and loyalty program members are still eating out regularly, with 50% of Gen Z and 33% of loyalty program members visiting restaurants weekly or more often. If these groups are able to weather current economic conditions, they will represent a lucrative market for restaurants in the year ahead.



**“Price doesn’t just influence the places that we choose to eat at, it also impacts how often we eat out. We’re definitely eating out less often.”**

(Female, 25, Carstairs, AB)

**\$56** ▼

Average Spend  
on Dine-In

(**-\$1** from 2022)

**\$39** ▼

Takeout  
(**-\$2** from 2022)

**50%**

of Gen Z dine  
out weekly or  
more often

**33%**

of loyalty  
program  
members dine  
out weekly or  
more often

### Takeout Takes the Lead

While in-person dining is down, takeout and delivery is up. Our research shows that 31% of Canadians are ordering takeout at least once a week, compared to just 25% in 2022. And that number jumps all the way to 40% among loyalty program members. Convenience may be driving this trend, especially considering that younger generations are getting takeout most often, with 49% of Gen Zs and 42% of Millennials ordering it at least once a week.

**“I dine in probably once a week. But I get takeout like three to four times a week. I used to dine in a lot more before the pandemic, but now it's just so easy to get takeout, especially with Uber Eats.”**

(Male, 26, Barrie, ON)



## Quality Time Outshines Fancy Extras

When they do dine out, Canadian diners mainly care about spending quality time together and that's reflected in the types of venues they visit. Canadian diners most often look for family style restaurants (31%), fast casual spots (20%), and fast food joints (17%). The latter two are especially popular among busy Gen Zs, Millennials, and loyalty program members looking for quick and easy options. In contrast, older Canadians, who generally eat out less, tend to prefer family style restaurants where they can spend time with family and friends.

In addition, many Canadians primarily dine out with their significant other (51%) or family (42%), but rarely alone. In fact, 86% reported that they *never* dine alone. So while consumers may be more comfortable dining solo these days, the reality is that dining out is still very much a social activity and experience for the vast majority of Canadians.

**86%** Never dine out alone

## Type of Restaurants Diners Look for Most Often When Dining Out

Family style 31%

Fast casual 20%

Fast food 17%

Bar/grill 15%

Fine dining 8%

Brasserie/bistro/cafe 7%

Other 2%



## Canadians Choose Independent Venues Over Chains

Diners in the Great White North are more likely to seek out independent restaurants (34%) over chains (30%). Interestingly, their American neighbours seek out chains more often than independent venues (37% vs. 35%).

While there is a lot of love for independent restaurants, there are some generational preferences at play. Chain restaurants tend to be large enough to have many locations, reward programs, and consistent menus, which is why Gen Z diners tend to prefer them (42%). In contrast, Boomers have more time to dedicate to discovering local gems which is why they largely prefer independent restaurants – only 26% of Boomers prefer chains.

## Type of Restaurants Diners Look for Most Often When Dining Out

Chain/franchise	30%
Local/independent restaurant	34%
Part of a restaurant group	4%
Don't choose based on ownership	28%
Don't know/none	3%
None	1%



Vancouver diners look for **local, independent joints (38%)** significantly more than **chains/franchises (19%)**



## Younger Diners on the Hunt for New Restaurants

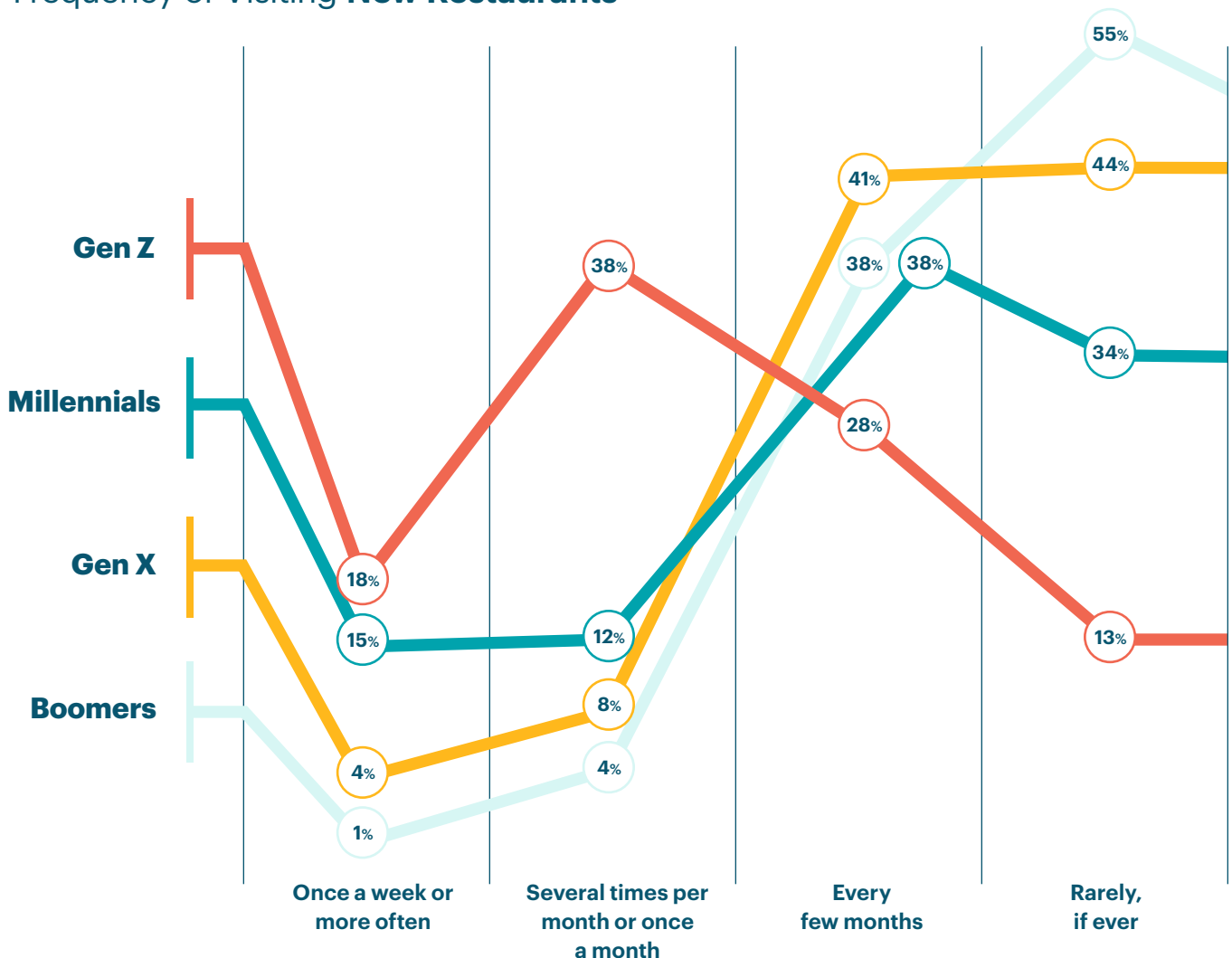
Similar to 2022, less than half of Canadian diners (38%) try a new restaurant every few months, and another 42% say they rarely, if ever, try new restaurants. This trend is more pronounced among Boomers, with only 4% of Boomers saying they try a new restaurant once a month. In fact, 55% of Boomers say they rarely, if ever, try new restaurants.

While Canadian diners tend to stick to the spots they know, this isn't the case for all generations. Gen Zs are big fans of dining at new places, with more than a third (38%) reporting that they visit new restaurants at least once a month. This suggests that with the right marketing to the right audience, restaurants can bring in this adventurous young audience. But it's equally important that operators continue to nurture their existing customer base, as these guests provide the bulk of recurring revenue.

## All Diners

<b>3%</b> Daily	<b>8%</b> Once a month
<b>2%</b> Several times per week	<b>38%</b> Every few months
<b>3%</b> Once a week	<b>42%</b> Rarely, if ever
<b>2%</b> Several times per month	<b>2%</b> Never

## Frequency of Visiting New Restaurants



# Takeout & Delivery Preferences

## Canadians Prefer Pickup

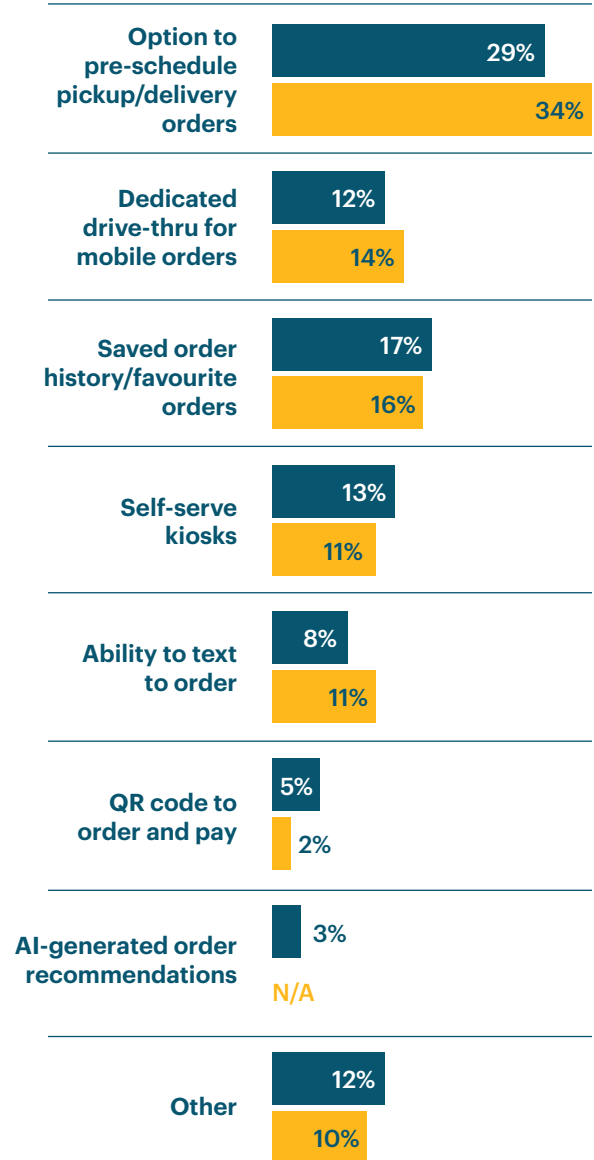
When ordering food to go, 39% of Canadians prefer pickup because it helps them skip pricey delivery fees. This year, the preference for grabbing takeout via walk-in has also significantly increased (from 15% to 22%), further highlighting diners' concerns about delivery costs. These habits hold true across generations, with the exception of Millennials (26% prefer delivery). And unlike their American counterparts, it seems that Canadians are not big fans of the drive-thru – just 16% of Canadian diners prefer the drive-thru versus 26% of American diners.

Canadians also want to see restaurants implement certain takeout and delivery innovations, with 29% reporting a desire to pre-schedule their pickup and delivery orders. In addition, 28% of Gen Z diners are seeking the ability to save their order history and favourite orders, mainly due to their desire for speed and convenience.

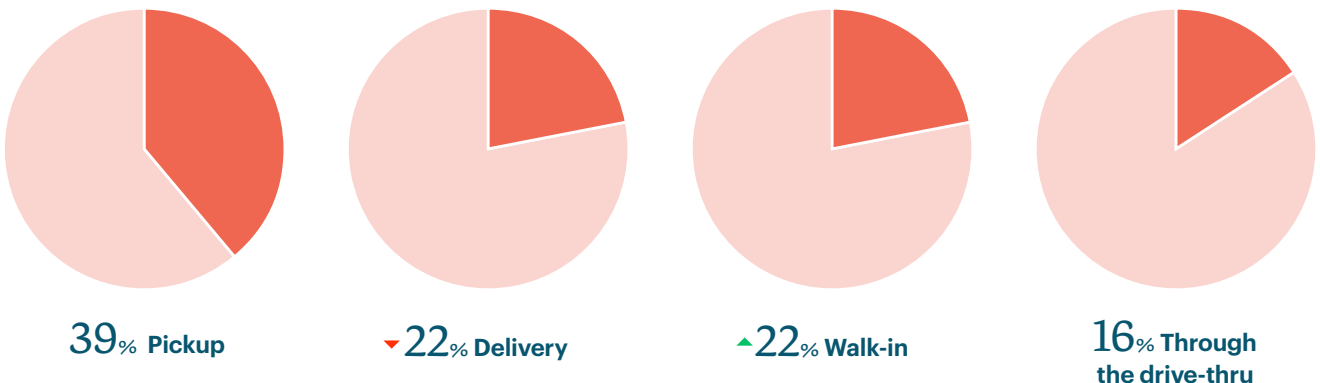
In contrast, QR code ordering and AI-generated order recommendations were very low on the list of desired innovations, with just 5% and 3% respectively wanting these options.

## Most Desired Takeout Innovations


2023  
2022



## Preferred Takeout Method



(vs. 26% of American diners)



“I feel a bit bad sometimes when I order Uber Eats. I feel bad that it takes a long time for you to get your food because [the drivers] are making multiple stops and I don't know that they're getting paid fairly for that [time]. And then I feel the pressure when ordering too because it asks you to give money to the restaurant.”

(Female, 25, Carstairs, AB)

## Canadians Divided on Third-Party Apps

As for how they're placing their takeout and delivery orders, most Canadians prefer to use the phone (33%) or on a restaurant's website (19%), primarily to avoid the delivery fees often charged by third-party apps.

However, the data varies by generation, with Boomers overwhelmingly favouring phone-in orders (48%), while Gen Zs largely opt for third-party apps (27%). Meanwhile, Millennials are split, with 23% saying they prefer third-party apps and another 23% saying they prefer the phone.

There are a number of reasons why Canadians seem to be divided when it comes to third-party apps. Among Canadians who don't use third-party apps, the cost and the ethical concerns around drivers' payment play a role. The time of delivery is also not always guaranteed, which is another concern. Despite these qualms, Canadians do see the value and convenience of third-party apps. Canadian diners say they turn to third-party apps when their local restaurants don't have an online presence or a delivery system, when these apps offer discounts, or when the location of a restaurant is further than they're willing to drive.

### How Diners Usually Place a To-Go Order

	2023	2022
Order over the phone	33%	42%
Directly through a restaurant's website	19%	26%
Through a third-party app	15%	20%
Through the restaurant's own app	12%	N/A
Through a discovery app	2%	2%
Through the restaurant's Google listing	1%	N/A
Other	10%	5%





## Uber Eats is the Top Third-Party App



Among Canadians who do use third-party apps, Uber Eats is the clear favourite, with 68% of Canadian diners using this app. However, SkipTheDishes is more popular among older diners. This differs considerably from the U.S., where 79% of diners prefer DoorDash, making it America’s number one third-party app.

And the top app is not the only difference between the two markets. In Canada, the delivery market is overwhelmingly dominated by Uber Eats, DoorDash, and SkipTheDishes (the big three). In contrast, there is far more competition in the U.S., where Grubhub, Postmates, and Delivery.com all have a decent slice of the market as well.

## Which Third-Party Ordering Apps Canadians Are Using

	2023	2022
Uber Eats	68% ▲	64%
SKIP THE DISHES	52% ▼	59%
DOORDASH	46% ▲	42%
Postmates	1%	4%
GRUBHUB	3%	2%
RITUAL ▼	3%	6%
delivery.com	0%	3%
Other	1%	2%

## Popularity of Third-Party Ordering Apps by City

	Uber Eats	SKIP THE DISHES	DOORDASH	RITUAL ▼
Toronto 	68%	43%	32%	5%
Vancouver 	59%	36%	64%	5%

“Uber Eats or any of those kinds of food apps are strictly last on my list, just because of the cost factor.”

(Male, 46, Vancouver, BC)



## Dine-In Preferences

### Human Connection is the Key Ingredient

Overwhelmingly, Canadian diners want to order from physical menus and speak with a server when they go to a restaurant (85%). This is the case across generations, revealing just how crucial the human element is to Canadians' dining experience and how important customer service still is to a restaurant's success.

While Gen Zs (25%), Millennials (30%), and loyalty program members (27%) are slightly more open to automation than older diners, our research shows that, ultimately, Canadians are not yet comfortable with a fully automated dining experience. Our qualitative interviews revealed that they're concerned with being forced to download an app simply to view a restaurant's menu, accessibility issues due to screen sizes, and a potentially complicated process to customize orders. They also don't want to worry about whether their automated order was received by the kitchen.

**"I don't like QR codes because I feel like they take jobs from people. And, it's like, if you start doing QR codes, then what's next? Robotic waiters? I know it's a big jump, but I just don't like the way that technology is going right now."**

(Male, 26, Barrie, ON)

While there is certainly a place for restaurant tech (especially when it comes to improving efficiency), the data suggests that an easy, seamless, and human-led customer service experience is still the expectation for today's diners.

### Preferred Method of Placing an Order

**5%**  
Through a self-serve kiosk

**6%**  
Through an iPad or tablet at the table

**4%**  
Through a QR code

**85%**

Viewing a physical menu and speaking directly with a server

## When it Comes to Payments, Let Servers Take the Lead

When it comes time to pay the bill, the vast majority of Canadian diners (76%) prefer that a server brings over a payment terminal and processes their payment tableside, further underscoring the value of one-on-one interactions with guests.

However, there are some differences between generations. Boomers in Canada have a much stronger preference for paying with a server in some capacity (84%), while Gen Zs, Millennials, and loyalty program members are more open to self-serve payment. Among younger diners and loyalty program members, 14% prefer self-checkout via QR code at the table – a level of interest that, while not high, indicates openness to restaurants offering some level of automation.

## Preferred Payment Experience When Dining In



**14%** Server takes the payment and processes it away from the table



**76%** Server brings a handheld payment terminal to the table

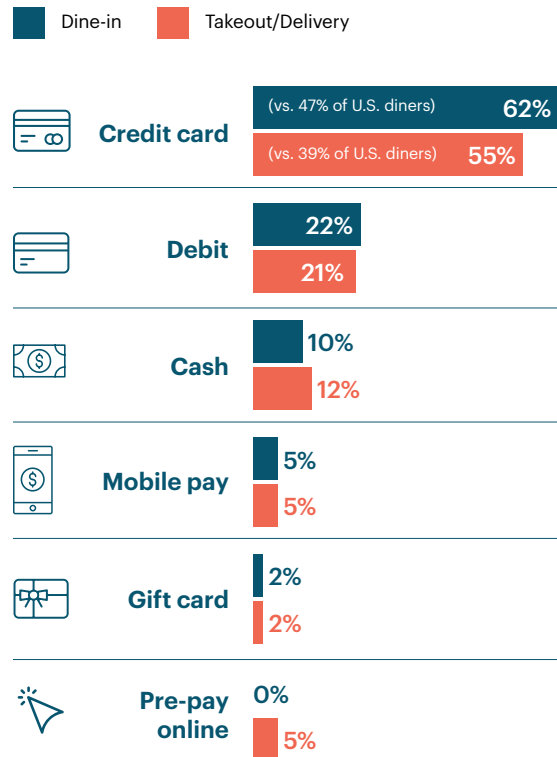


**9%** Self-checkout via QR code payment at the table

## Canadians Big Fans of Paying by Credit Card

Similarly to what we found in 2022, Canadians largely prefer to use their credit cards when purchasing from restaurants (62% prefer to pay by credit card for dine-in and 55% for takeout/delivery). The affinity for credit cards is significantly higher in Canada than the U.S., with only 47% of Americans preferring credit for dine-in and 39% for takeout/delivery. This means that for restaurants north of the border, fast and efficient payment processing technology is even more essential.

## Canadians' Preferred Payment Methods



**“I prefer someone to process my payment... [If] you're going to have a server for [part of the meal], then part of the tip would be them closing out your order and taking the payment. I'd rather just have full end-to-end experience and pay for that service.”**

(Female, 44, Toronto, ON)

### No Reservation? No Problem

Reservation trends vary among diners overall, with 31% reporting they *occasionally* make a reservation when they dine out, 37% reporting they *rarely* make a reservation, and another 22% reporting they *never* make a reservation. This trend is similar across generations, suggesting that Canadians trend to have more spontaneous dining preferences and that permitting walk-ins is essential to win their hearts (and their wallets).

**“I’m not usually making reservations, but it depends. If I’m going to my favourite restaurant for our anniversary or my birthday, then I would likely make a reservation. Or if it was a gathering of friends, then I’m more likely to make a reservation. But usually it’s just me and my partner, or me and one friend, so then I would not make a reservation.”**

(Female, 44, Toronto, ON)



### Frequency of Making a Reservation

2023	Always/most of the time	Occasionally	Rarely	Never
	<b>10%</b>	<b>31%</b>	<b>37%</b>	<b>22%</b>
2022	Always/most of the time	Occasionally	Rarely	Never
	<b>14%</b>	<b>31%</b>	<b>36%</b>	<b>19%</b>

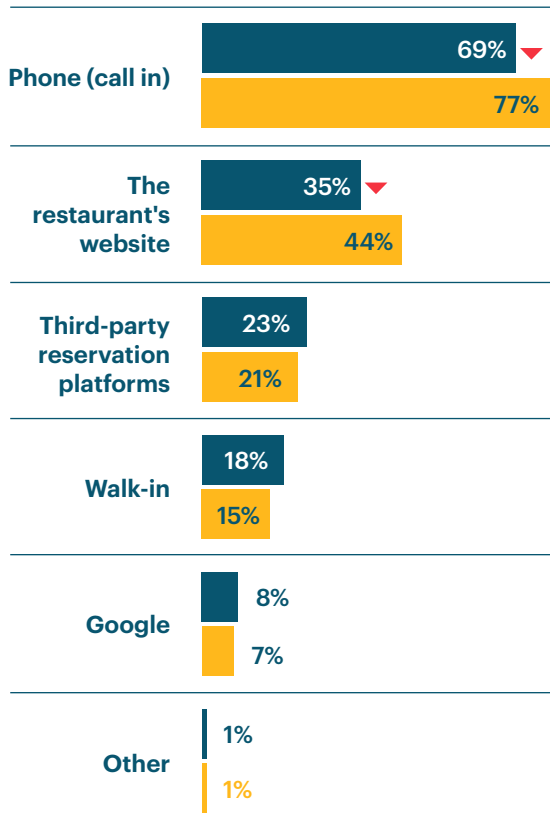
## (Don't) Hold the Phone

The majority of Canadian diners prefer to make reservations by phone (69%), followed not very closely by the restaurant's website (35%). Interestingly, an affinity for the phone isn't limited to older generations; it's the top reservation method for all diners. So, although some restaurants may be looking for ways to automate reservations, a direct line of contact is still important.

And while only 23% reported using third-party reservations platforms like OpenTable, use of these apps has seen a 2% uptick year-over-year. Millennials are also much bigger users of third-party platforms (32%) – even more so than their Gen Z peers (just 19%). 42% of Millennials also prefer to use a restaurant's own website to make a reservation, suggesting that while the call-in is king for now, the tide may be turning.

### Channels Used to Make Reservations

2023  
2022



**41%** of Vancouver diners make reservations through restaurant websites vs. **34%** of Toronto diners.



# How Diners Decide: Decision-Makers & Motivators

While each generation prioritizes different factors, overall, Canadian diners value the cornerstones of hospitality, quality food and service, when they choose where to eat. They're less interested in the bells and whistles, and not likely to be swayed by influencers' opinions, either.



# Decision-Making Factors

## Good Food Above All Else

Even with all the changes to diner habits in recent years, Canadians still want to see restaurants serving up quality cuisine. In fact, it's the deciding factor for 60% of diners when choosing where to eat. Next up are value for money and a convenient location, sharing second place for 51% of diners respectively. Cuisine type follows as the deciding factor for 48% of diners. And when diners are looking to visit new a restaurant they've never been to before, food quality (62%), cuisine type (56%), and value for money (53%) are also the top three deciding factors. All of this suggests that simply serving great food at a reasonable price will always be essential to keeping diners coming back.

However, restaurateurs should note that value for money and deals/specials are slightly more important to diners when choosing a *new* restaurant for takeout specifically, primarily due to the fees attached to takeout and delivery orders.

When it comes to some of the more nuanced generational differences, Millennials care most about value for money (57%), which isn't surprising as many have growing families. On the other hand, quality of food is paramount to Gen Xers (62%), while Gen Zs are the generation most influenced by deals/specials offered (34%). Gen Z diners are also much more likely to take reviews into consideration when making dining decisions (32%), versus just 5% of Boomers who said the same.

**“When we go out, type of food would definitely be the number one [factor]. Second is location and third is price.”**

(Female, 44, Toronto, ON)

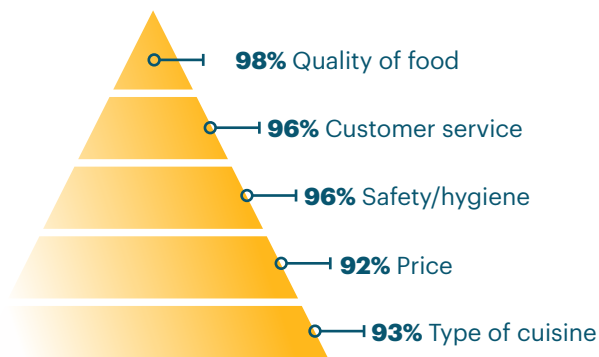
## How Diners Decide Where to Dine

Quality of food	60%
Value for money	51%
Convenient location	51%
Type of cuisine	48%
Deals/specials being offered	28%
Recommendations of family/significant other	24%
Recommendations of friends/colleagues	20%
Online reviews/ratings	15%
Dietary restrictions/preferences	7%
Curated lists (e.g. Top 10 new restaurants, 5 cafes to try, etc.)	5%
Recommended by an influencer online	3%
Popularity on social media	5%
Other	1%
None of the above	2%

## Customer Service and Cleanliness Also Critical

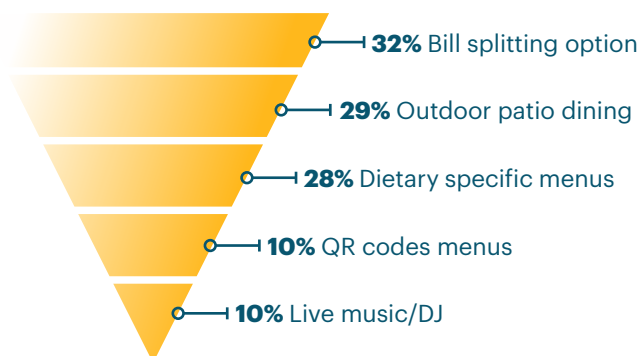
While Canadians are driven largely by their cravings, there are many other factors that they take into consideration when dining at a restaurant. Quality of food matters most (98% said it was important), followed by customer service (96%), and safety/hygiene (96%). The fact that customer service ranks so far up the list – above price and location – only further reinforces consumers’ desire for hospitality.

The least important factors to Canadian diners are QR code menus (only 10% said these are important), live music or a DJ (10%), and diet-specific menus (28%). This data reinforces the sentiment that consumers largely dislike using QR codes, but it also suggests that anything that takes the focus away from the dining experience (like live music) could deter some consumers.



### Factors **Most** Important When Dining-In

### Factors **Least** Important When Dining-In



**“I’m always sort of looking for different types of food that I want to explore – like what’s in the area or what I haven’t tried before – which is what I do with Uber Eats now. So I’ll type in, you know, ‘sushi’ and then see what comes up. And then base my decision on reviews, delivery time, and price.”**

(Female, 44, Toronto, ON)



## Decided to Try a **New** Restaurant Based Solely on the Following



Type of cuisine  
**82%**



Recommendation of family/  
significant other  
**75%**




Convenient location  
**76%**





## Convenience Key for Boomers, While Gen Z Swayed by Value


Most Canadians (82%) choose new restaurants solely based on cuisine type, while three quarters (75%) have been enticed by the recommendation of family or a significant other, the location (76%), the quality of food (74%), and the value for money (73%).


But while some of these decision-making factors span generations, there are some key differences between how older and younger diners choose new restaurants. For instance, when asked if they have ever decided to choose a new restaurant based on a single factor, some unique trends emerged. Gen Z diners tend to be swayed by value for money (78%), while Millennials pay most attention to positive online reviews (58%). In contrast, 69% of Gen Xers decide based on deals and specials, while 79% of Boomers are focused on finding a convenient location. All of this suggests that while some things are table stakes (like great food), other factors (like positive online reviews or tempting deals) can be used to sway different target audiences. It's also clear that restaurant operators must strike a balance between these competing factors, in order to appeal to a broad audience.

 **78% of Gen Z diners** have made the decision to try a new restaurant based entirely on value for money

 **58% of Millennials** have made the decision to try a new restaurant based entirely on positive online reviews

 **69% of Gen X diners** have made the decision to try a new restaurant based on deals and specials being offered

 **79% of Boomers** have made the decision to try a new restaurant based entirely on it being a convenient location



“The first factor typically is location. So wherever we are at that moment on our way home, if it's en route, that will be where we go. The second priority would be if we're craving anything specific.”

(Male, 46, Vancouver, BC)

# Online Motivators

## Online Menus Prove Essential

While not every diner makes decisions based on what they see online, that doesn't mean an online presence isn't important for restaurants. In fact, it's essential. Why? One thing most Canadian diners do before deciding on a new restaurant is look at the menu online (41% *always* do this and a further 38% *often* do it). In addition, 33% *always* look at the restaurant's website and 22% *always* look at reviews.

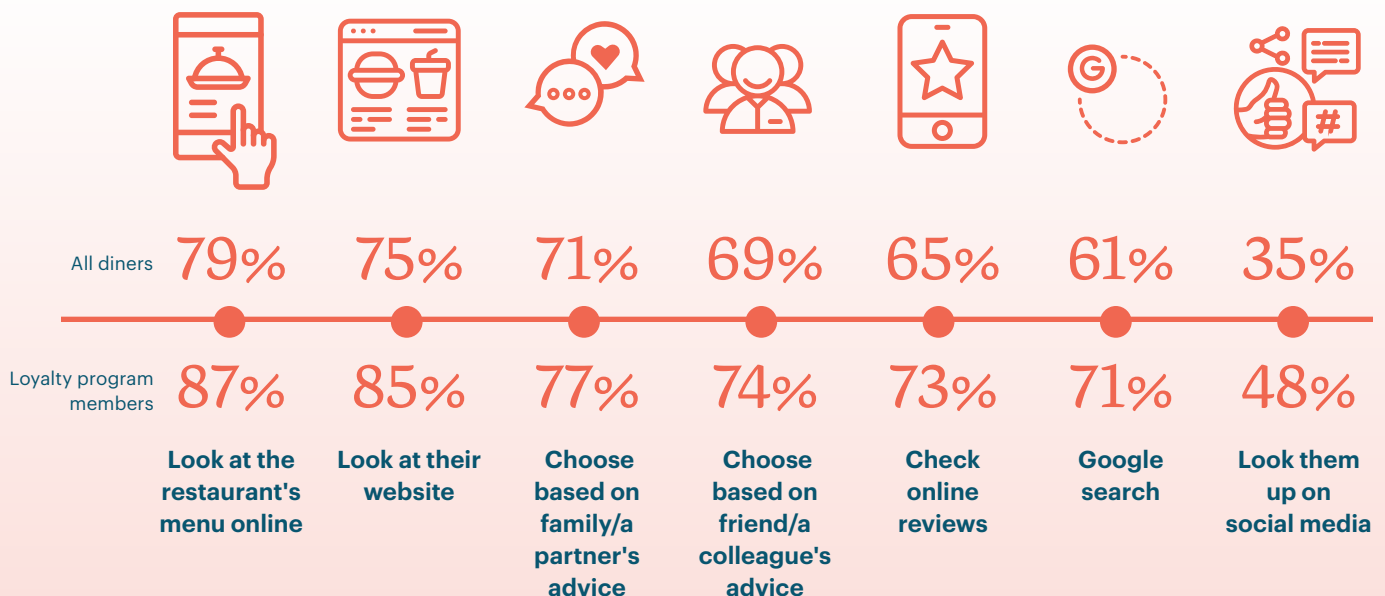
Among younger diners, 32% of Gen Zs and 30% of Millennials *always* do a Google search before visiting a restaurant. And overall, loyalty program members are the most likely to look up a restaurant's menu online (55% *always* do this) and visit the website (43% *always* do this), suggesting that for frequent diners, their first experience with a restaurant often starts online first.



**“Before going somewhere new, I always look at their menu. I like to evaluate the menu options, but also know what the cost per menu item is. I also sometimes look at Instagram to see what the food looks like before I go.”**

(Male, 26, Barrie, ON)

## Steps Diners Always/Often Take Before Deciding on a New Restaurant

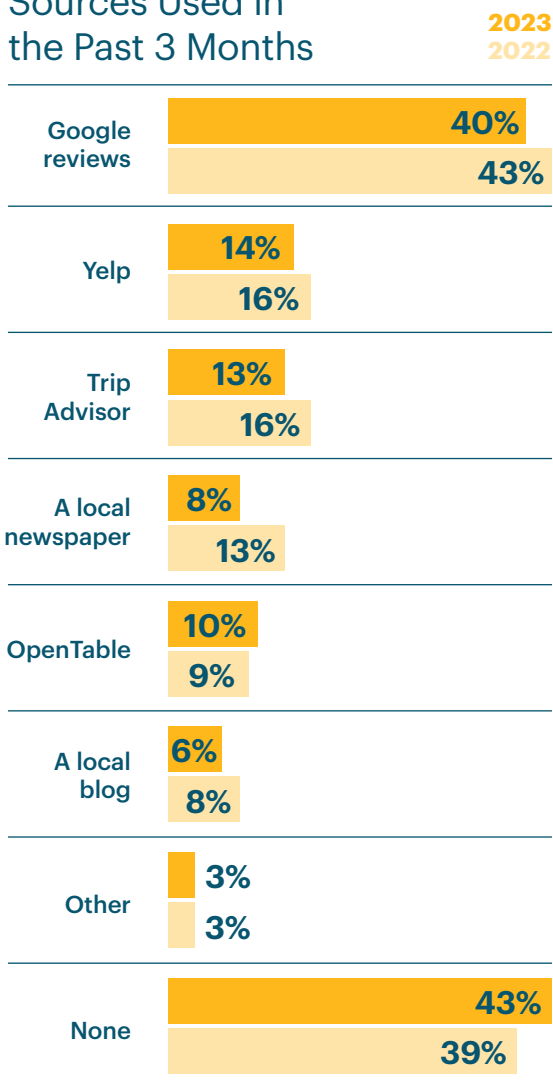


## Reviews Hold Less Clout, But Google Still Ranks #1

Interestingly, Canadians seem to be using restaurant reviews slightly less than in the past to choose a place to eat. This year, 43% of diners reported not using *any* review source in the past six months, versus 39% who said the same in 2022. However, 40% of Canadians *do* report using Google to read restaurant reviews, making it the top review source among those who do read reviews.

Mirroring a trend from last year, Yelp is far less popular in Canada than in the U.S. In fact, only 14% of Canadians reported using Yelp in the past six months, compared to 31% of Americans.

### Restaurant Reviews Sources Used in the Past 3 Months



## Social Media Has Less Impact

What's less important to Canadian diners? A restaurant's popularity on social media. In fact, 70% of diners report that *none* of the major social media platforms have any influence over where they choose to dine, versus 60% who said the same in 2022.

Among diners who *are* influenced by social media, most platforms saw their clout hold steady from 2022, except for Facebook, which dropped from 17% to 10% in terms of average influence. However, Instagram is an increasingly influential platform, particularly for Gen Z (25%), Millennials (30%), and loyalty program members, so restaurants that target younger crowds would be wise to keep this in mind.

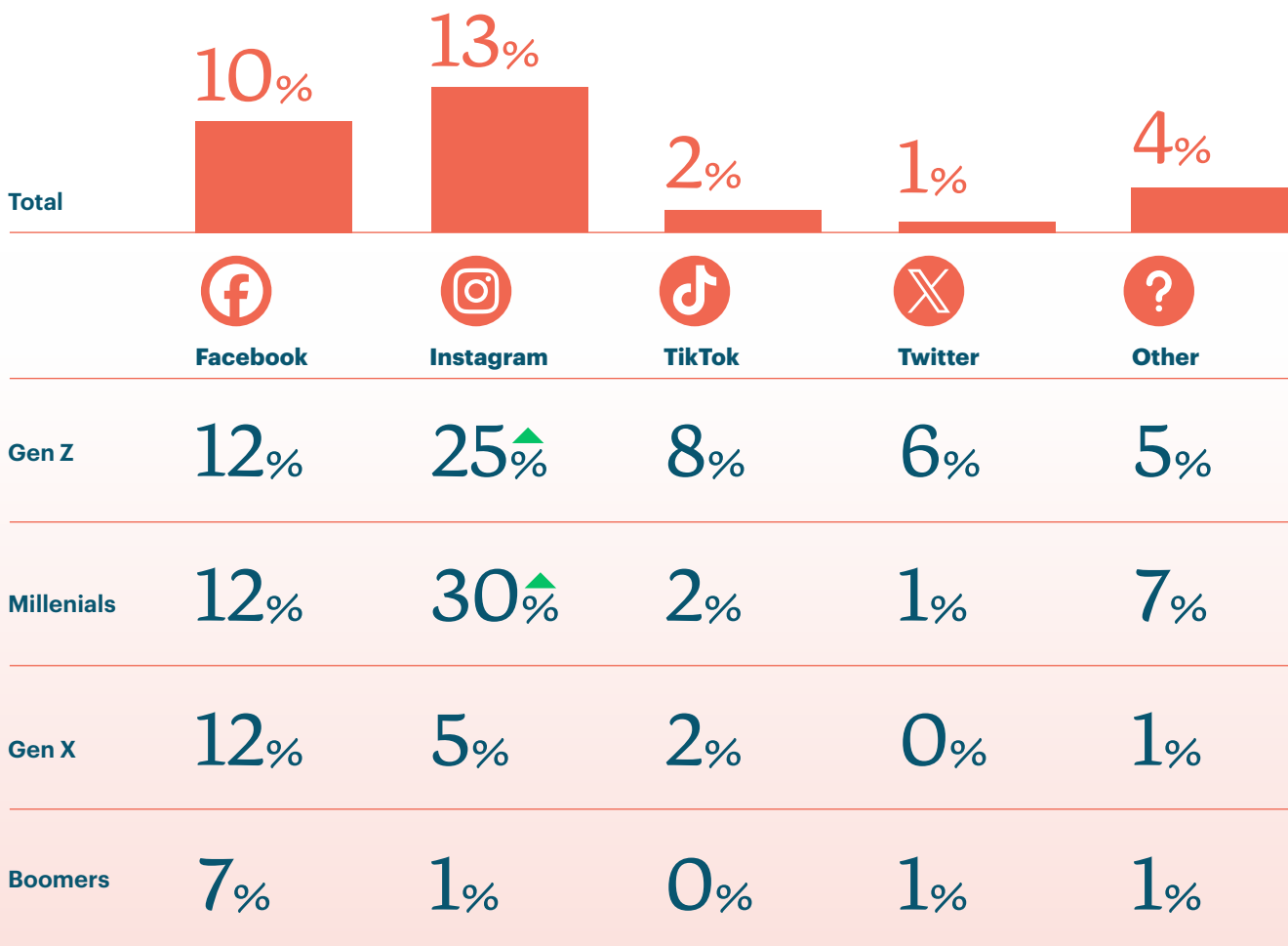
**"I don't like using Facebook, but for some restaurants, Facebook is their website, so I'll use it if I need to."**

(Male, 26, Barrie, ON)

# 70%

Say social media has **no influence** on where they choose to dine (vs. 60% in 2022)

## The Influence of Social Media Platforms on Where Diners Choose to Dine



# Menu Trends

## Canadians Have an Appetite for Local Food

It's clear that food is the driving factor for the majority of restaurant visits, which begs the question of what *kind* of food can get diners in the door. And as it turns out, locally sourced ingredients can be a motivating factor.

When choosing where to dine, 67% of Canadians report they'd be *very* or *somewhat* likely to pick a restaurant with locally sourced ingredients. In addition, nearly a third (30%) would be *very* or *somewhat* likely to choose a place with vegetarian options. Gen Xers are the most influenced by locally sourced ingredients (71%), while Millennials are most swayed by vegetarian offerings (39%), and Gen Zs by gluten-free offerings (34%).

While it may not be necessary for restaurants to completely overhaul their menus to make a ton of accommodations, it is clear that catering to specific dietary preferences can help to capture the attention of large swaths of consumers.

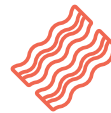
## Diners Who Would be Very Likely/Somewhat Likely to Choose a Restaurant Based on Specific Offerings



**67%**  
Locally sourced ingredients



**30%**  
Vegetarian



**23%**  
Diet-specific (i.e. keto, paleo, etc.)



**23%**  
Gluten-free



**23%**  
Vegan



**16%**  
Halal or Kosher



# What Deters Diners: Sensitivities & Deal-Breakers

It goes without saying that restaurateurs need to know what gets diners in the door, but it's equally important to understand what keeps them out. And these days, it turns out that negative feedback from friends is just as likely to turn diners off as a health inspection warning.



# Price & Wait Time Sensitivities

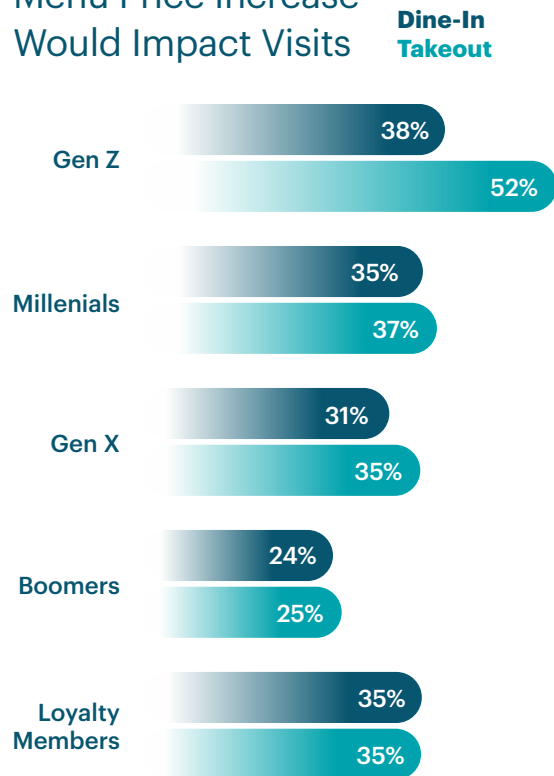
## Leave Price Hikes Off the Menu

In today's uncertain economy, fewer Canadians are dining out and price hikes are one of the biggest culprits. Nearly a third (30%) of diners reported that if a restaurant raised its prices, this would *significantly* impact their interest in dining there (up from just 23% who said the same in 2022). In addition, 46% said it would *somewhat* impact their interest, suggesting that even those who can spend a little more are feeling less comfortable doing so.

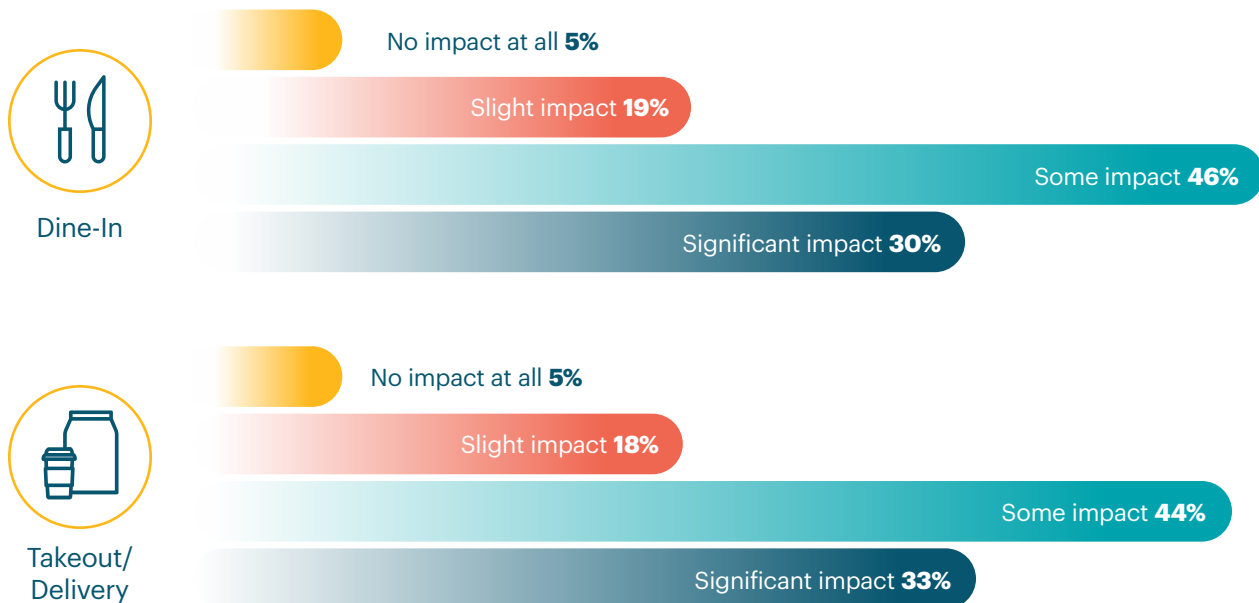
Canadian diners feel similar about takeout, with 33% reporting that if a restaurant bumped up its prices, this would *significantly* impact their interest in ordering takeout/delivery from there, while 44% said it would *somewhat* impact their interest.

Restaurants must also understand they could risk pushing away a full quarter of customers with *any* price increase. This means they'll need to be strategic when raising prices, and ultimately should not up their prices by more than 10%.

## Menu Price Increase Would Impact Visits



## Impact of Menu Price Increases on Willingness to Visit



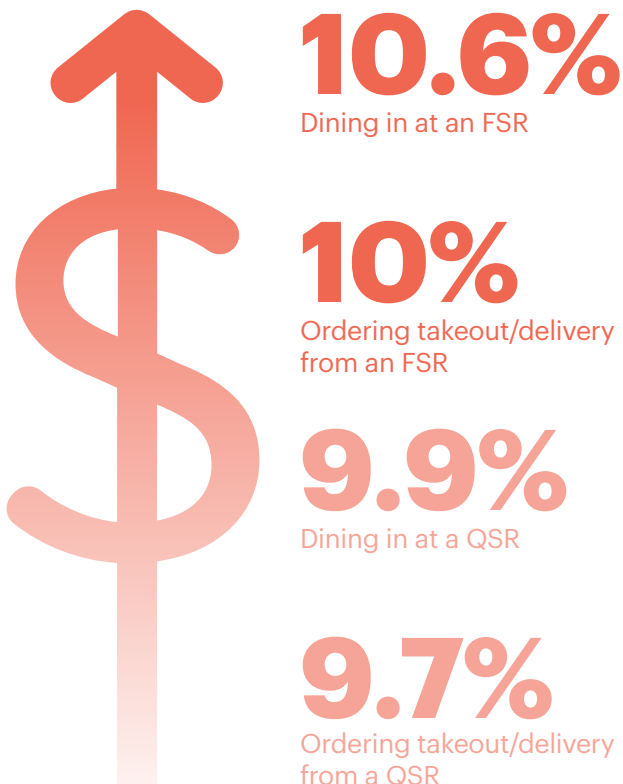


## Gen Z Most Sensitive to Price Increases

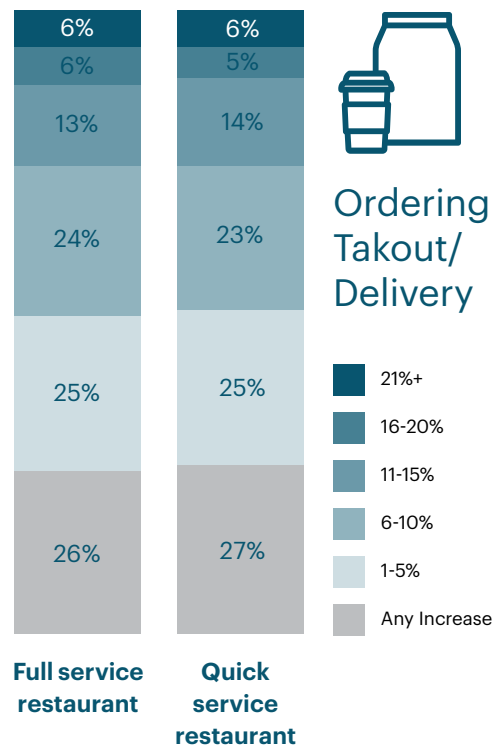
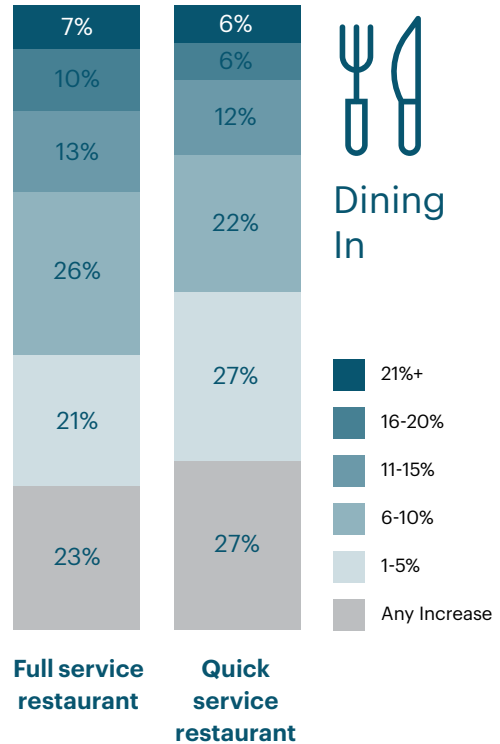
Younger Canadians are the most sensitive to price hikes, with 38% of Gen Zs reporting that increases would *significantly* impact their interest in dining in, versus 24% of Boomers who said the same. This also holds true when it comes to ordering takeout: 52% of Gen Z reported that price hikes would have a *significant* impact on their dining decision.

These numbers aren't surprising, given that most Gen Zs have less disposable income than older Canadians. This group is particularly vulnerable to economic shifts, which is key for restaurateurs to remember, since Gen Zs are valuable customers who spend more at restaurants than any other age demographic.

## Maximum Price Increase Diners are Willing to Tolerate



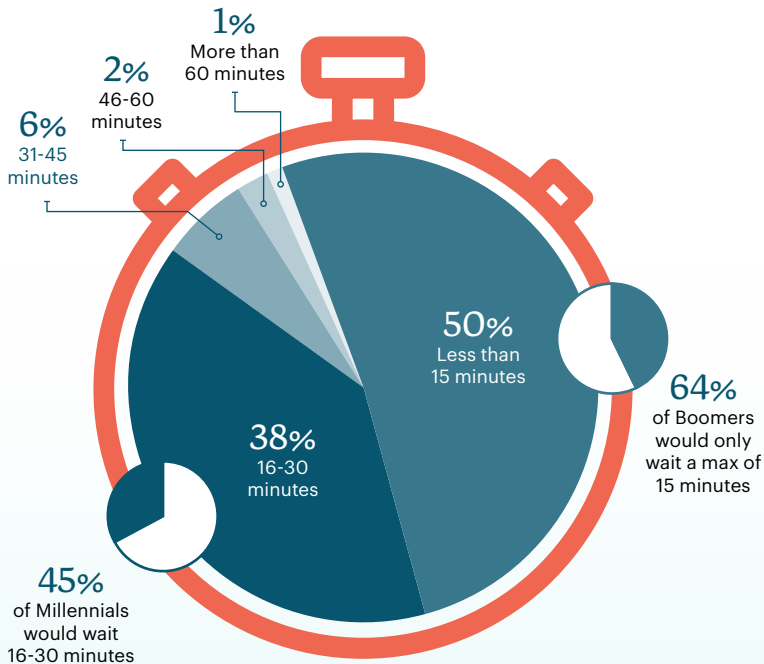
## Maximum Menu Price Increase Before Stopping Visits



## Long Wait Times Leave a Bad Taste

Canadian diners often choose restaurants based on convenience, so it's no surprise that having to wait more than 20 minutes for a table is a big deterrent. The average time diners will wait for a table is **just 18 minutes** (even less than Americans at 22 minutes). In addition, a full 50% of Canadians will only wait up to 15 minutes for a table, while just 2% will wait 45 to 60 minutes.

By generation, Boomers are the most impatient when waiting for a table, with 64% reporting they'd only wait up to 15 minutes. Millennials are the most patient with 45% saying they would wait 16 to 30 minutes. But regardless of the generational differences, it's clear that keeping wait times under 20 minutes is essential to keeping the majority of diners happy.



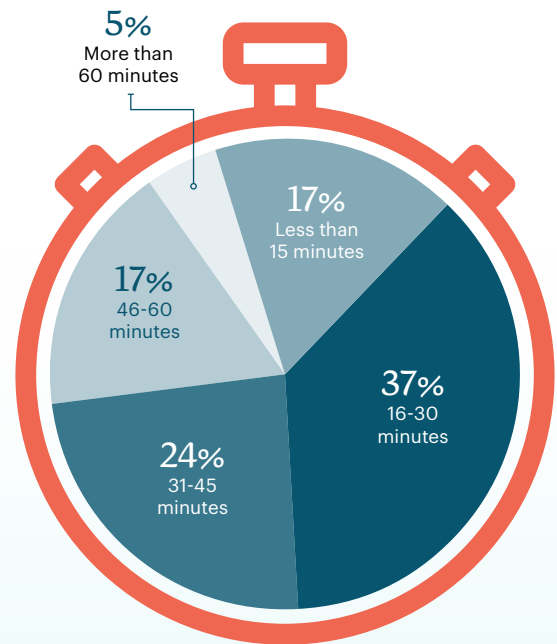
# 18 Minutes

maximum amount of time diners would wait for a table, on average

## Canadians Will Wait for Delivery, But Not Too Long

While Canadians are not very patient about waiting for a table, they are slightly more patient when waiting for a delivery order, thanks to the comfort of waiting at home. On average, diners reported they would wait a maximum of **32 minutes** for a delivery order before cancelling it, and 24% would even wait up to 45 minutes.

Again, Boomers are the most impatient, with 24% saying they would wait less than 15 minutes for a delivery order. For restaurants with an older clientele, getting delivery orders out the door quickly is all the more important.



# 32 Minutes

maximum amount of time diners would wait for delivery before canceling it, on average

## Biggest Deal-Breakers

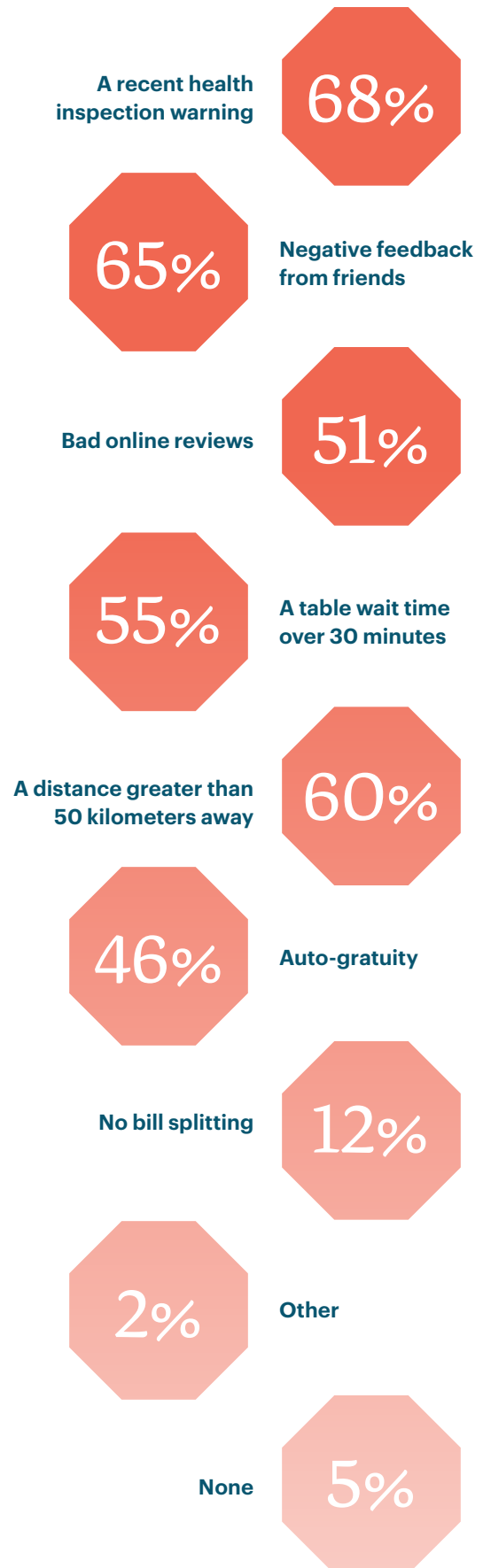
### Word of Mouth Matters More Than Ever

Unsurprisingly, a health inspection warning is the biggest deterrent to visiting a restaurant, with 68% of Canadian diners put off by this. What is surprising is that a near equal number (65%) would also steer clear after hearing negative feedback from friends. Among Gen Z diners, the statistics are even more striking, with only 34% turned off by a health inspection warning, but 58% put off by bad online reviews. For restaurateurs, this signals that cleanliness and positive feedback (via word of mouth and online) are both imperative to maintain.

However, it's worth noting that negative online reviews are slightly less of a deterrent than in 2022, falling from 57% to 51% this year. This mirrors a larger trend of reviews being a little less influential in Canada than in the past, especially among certain diners. In fact, Boomers are concerned about something else entirely: wait times. Wait times are actually the highest deterrent for this group, with 65% of Boomers reporting that they'd be deterred by a wait time of over 30 minutes.



### Restaurant Visit Deterrents





“We really are depending a lot on word of mouth recommendations and reviews to determine if the food quality is good or not.”

(Male, 46, Vancouver, BC)



### Inaccurate Orders a Major Pet Peeve

Aside from lengthy wait times, the biggest frustration among Canadian diners when ordering takeout or delivery is that the order is inaccurate when it arrives – 36% say it’s their number one issue. In addition, 26% expressed frustration about their food being cold.

And these concerns are even more pressing for younger diners. Among Gen Zs, 41% reported that cold food was their number one frustration with takeout and delivery. This generation is also more put off by pickup orders not being ready upon their arrival than older cohorts and loyalty program members. All of this suggests that restaurants need to ensure takeout and delivery orders are not only accurate, but that they also stay hot en route, which may require simplifying or optimizing current operations.

**“Sometimes, when I order Uber Eats, it takes a long time to get the food because they’re making multiple stops... If I walk into a place, I would prefer to order it and wait for 10 minutes or whatever it is, rather than having my food sit there and get cold.”**

(Female, 44, Toronto, ON)

### Biggest Frustrations When Ordering Takeout/Delivery



# How Diners Engage: Loyalty & Communication

Competition is fierce in the restaurant industry, so it's crucial for restaurateurs to find ways to continuously keep their venue top of mind with diners. And on the topic of keeping diners engaged, this year's data shows that loyalty program membership is on the rise in Canada. The key to success with these programs? Providing easy access, as well as more control over how diners can cash in on their rewards.



## Loyalty & Rewards

“Outside of fast food, most local restaurants I’ve been to don’t have loyalty programs.”

(Male, 46, Vancouver, BC)

### QSR Loyalty Membership Most Popular

This year, more than a quarter (29%) of Canadian diners reported being part of a loyalty program (up 6% from 2022). Millennials are the most likely to belong to this kind of a program, with 38% reporting that they’re currently part of one.

Among Canadians, 82% are members of a QSR reward program, meaning the majority belong to loyalty programs at QSRs chains like Starbucks, McDonald’s, and Tim Hortons. Loyalty membership drops to just 27% for FSRs and 14% for independent restaurants. However, our research shows that the main barrier to Canadians joining loyalty programs is access, since many local joints don’t offer these programs or do not promote them as heavily as QSR chains, making them difficult to join. Therefore, investing in promotion to drive greater awareness is sure to be money well spent for restaurateurs.

### Member of Restaurant Loyalty Program by Restaurant Type



**82%**

Quick service chains



**27%**

Full service chains



**14%**

Local/Independent restaurants

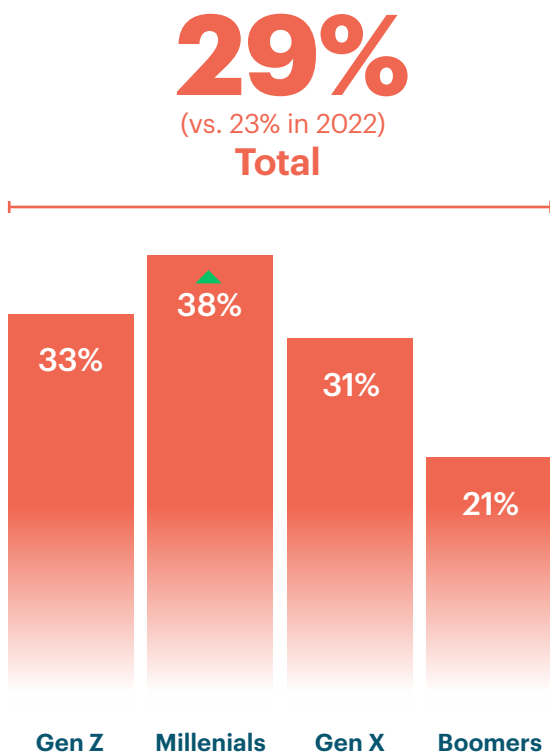


## Diners of All Ages Engage with Reward Programs

Overall, Canadians' engagement with loyalty programs is varied. While 35% engage with these programs at least once a week (up from 31% who said the same in 2022), nearly a quarter (27%) say they only do so every few months, if ever. Regardless, Canadians are using reward programs on a daily basis much more often than a year ago, primarily due to inflation and the desire to get more bang for their buck(s).

Since Millennials are most likely to be part of a loyalty program, it's unsurprising that they engage with these programs the most. An impressive 20% of Millennials do so daily. Interestingly, 28% of Boomers also engage with these programs a few times per week, suggesting that restaurants shouldn't limit their loyalty efforts to younger diners alone.

## Member of Restaurant Loyalty Program by Generation



## Frequency of Engaging with Loyalty Programs



engage once a week or more often  
**35%** ▲



“I'd prefer points over menu items only because then I get to choose what menu items I get. Like sometimes McDonald's says 'here's your free pop.' But I don't really want pop from McDonald's – I can go get a pop from the dollar store. I want free fries or a free burger or something.”

(Male, 26, Barrie, ON)



## Canadians Want Control Over Their Rewards

When it comes to the kinds of perks Canadians prefer, 54% are partial to points-based rewards while 53% enjoy cash back and discounts. The takeaway for restaurateurs? Loyalty program members don't want restaurants to limit their rewards to a specific menu item that they might not enjoy. Rather, they prefer being able to select an appetizer, dessert, or another item that they *actually* want at a discount or for free.

**"I generally prefer a points system that I can use to get a discount on different items. I prefer points over free menu items because then I get to choose what menu items I actually get."**

(Male, 46, Vancouver, British Columbia)

### Types of Rewards Diners Prefer



**53%**  
Cashback/discounts



**54%**  
Points-based rewards



**30%**  
Promotional rewards (i.e. BoGo)



**33%**  
Item-based rewards



**5%**  
Subscription-based rewards



**12%**  
None



# Communication Trends

## Access to Valuable Perks is Paramount

Canadians view loyalty programs as a way to supplement their spending at restaurants, and therefore expect to receive discounts and free items for being a member. However, restaurants should also include extra perks such as additional customization opportunities, early access to new items, and more ordering options, to further entice Gen Zs, Millennials, and loyalty program members. Overall, *value* is the biggest motivator for joining a reward program.

Perks are also useful in email marketing, with 36% of Canadians willing to subscribe to restaurant email lists to access discounts or coupons. A further 23% would sign up to collect rewards and free items. This is key information for restaurateurs, given that most Canadian diners want to receive communication from them via email (46%), compared to only 6% who prefer text messages.

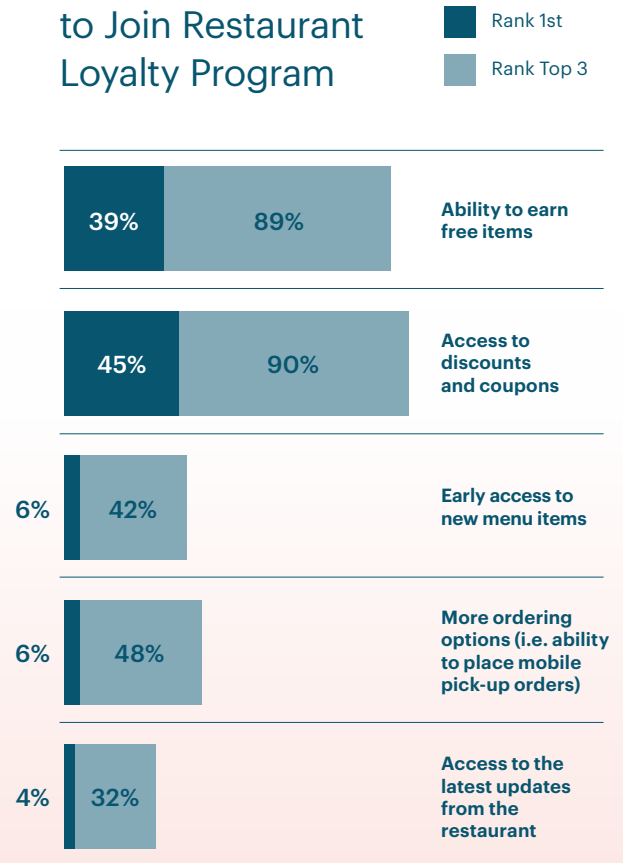
However, most diners don't care too much if the offers are specific to their exact preferences. In fact, when asked whether they prefer general or personalized offers, a whopping 71% of Canadians reported a preference for general offers, compared to just 29% who wanted personalized offers – a figure that may be influenced by concerns about how restaurants collect and use customer data and how personalized offers are generated.

Despite this, 39% of Gen Zs and 37% of loyalty program members do have an appetite for personalized offers, so it might be worthwhile for restaurants to offer some level of personalization, especially for their most valuable loyal members.

**“I really like coupons and discounts. For instance, I have a McDonald’s coupon for a \$1.75 cheeseburger right now. I’m gonna go get that cheeseburger either today or tomorrow, before that offer expires. Those limited-time offers are something that always draws me right in.”**

(Male, 26, Barrie, ON)

## Impact on Deciding to Join Restaurant Loyalty Program



## Preferred Way to Hear from Restaurants



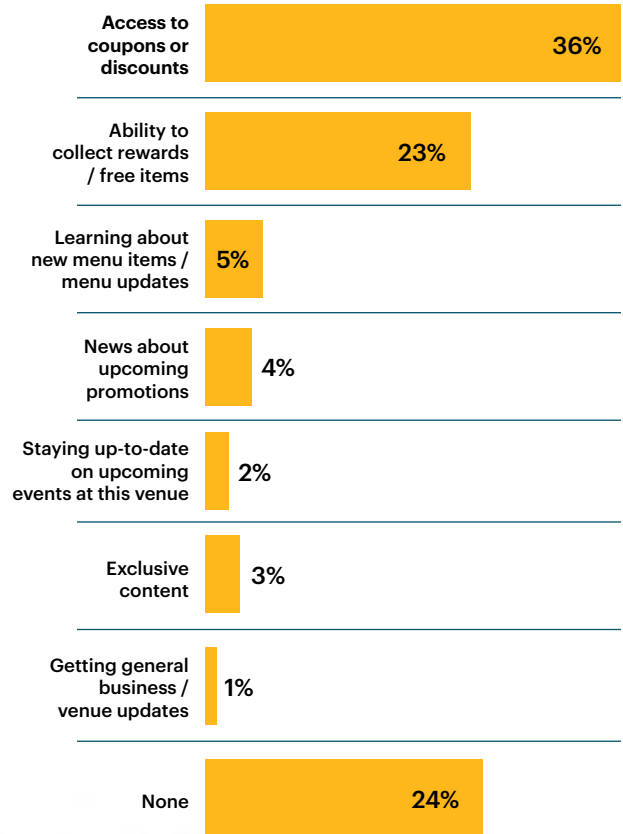
5%  
Social media

1%  
Other

2%  
Push notifications

5%  
In-app messages

## Influencers to Restaurant Emails



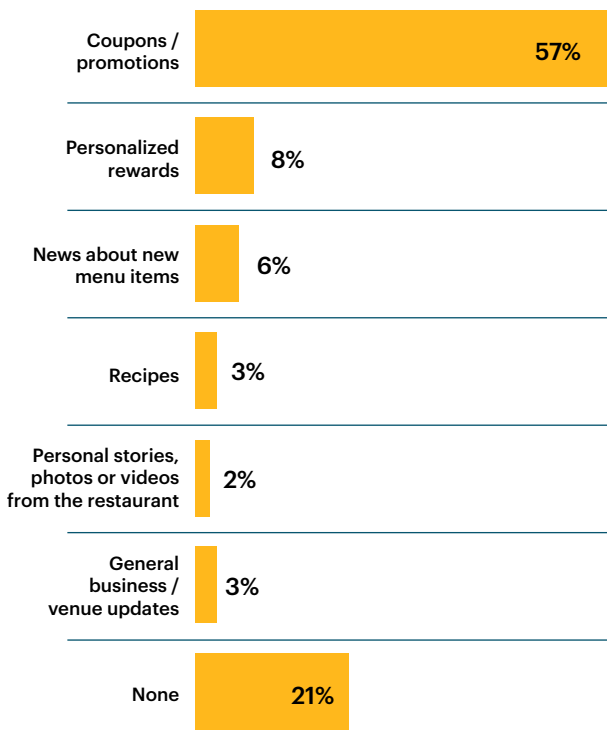
## Limit Email Communication to Avoid Unsubscribes

As for what makes Canadians unsubscribe from restaurant email lists, 45% report that receiving emails too frequently would cause them to opt out. The sweet spot for sending emails is about once a month, as 24% of diners prefer this. And when restaurants do send emails, the ones most likely to get opened are those including a coupon or promotion – 57% of diners say they would open this type of content.

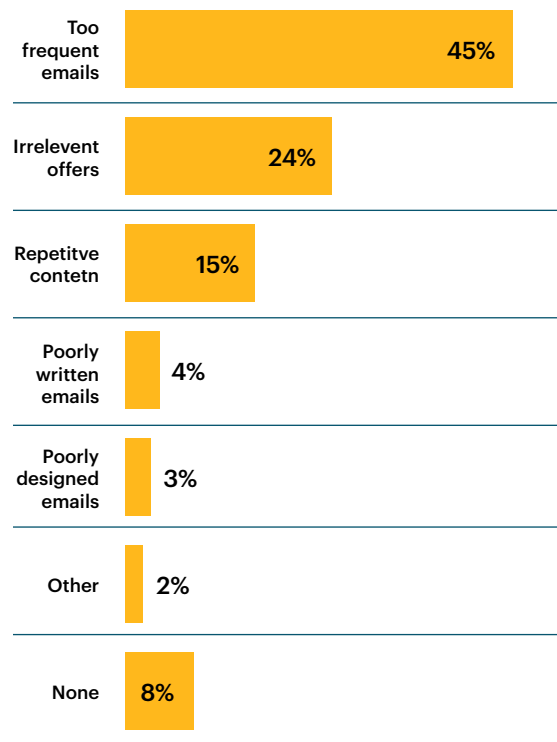
In their emails, restaurants should focus on appealing to loyalty program members and younger Canadians, since Boomers (for the most part) have no interest in being a part of a restaurant’s email list.



### Influencers to Open Restaurant Emails

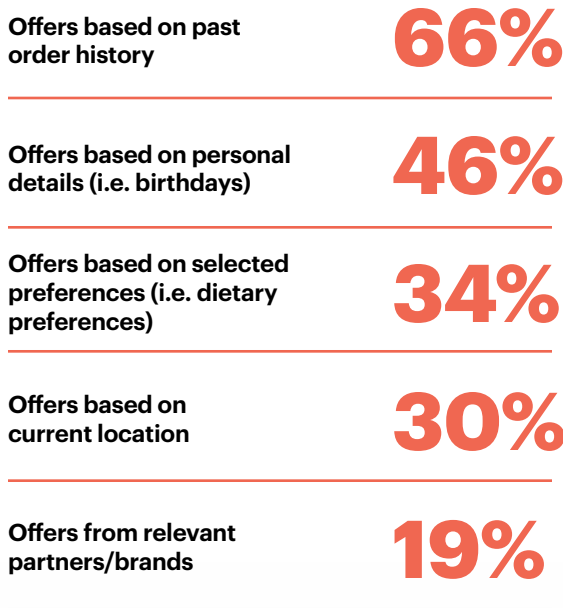


### Reasons to Unsubscribe from Restaurant Emails



# 74% of loyalty program members want to see offers based on past order history

## Personalized Offers Canadian Diners Would Like to Receive



## Past Order History is Key to Personalization

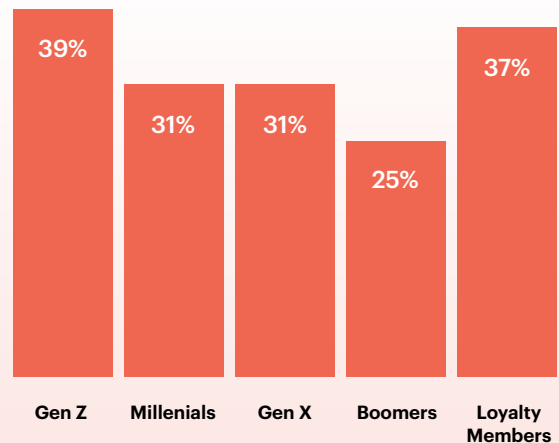
Among the 29% of Canadian diners who do appreciate personalized offers, it turns out that they primarily want to receive offers based on their past order history (66% want to see this). This preference was even higher among Loyalty program Members, with 74% of members reportedly wanting offers based on their past order history. Additionally, 46% of Canadians reported wanting offers based on personal details like their birthday.

Across generations, 42% of Gen Xers desire offers based on dietary preferences, while 24% of Gen Zs would like offers from relevant partners and brands. In short, the more that restaurateurs can tailor personalized rewards by age and demographics, the better. And with customers creating data at every interaction, operators have plenty of information at their fingertips that can help them figure out exactly which offers will resonate most.

# 29%

Prefer personalized offers

by Generation and Loyalty Members



"What I like about Uber Eats is that the promotions are a little bit better. Sometimes I'll get a notification saying, 'hey, here's an offer just for you,' and then I'll switch over into the app."

(Male, 26, Barrie, ON)

# Emerging Diner Trends

After taking a deep dive into the evolving landscape of diner preferences and behaviours, it's clear that while certain trends are becoming more mainstream, others are only just starting to take shape. The restaurateurs who keep an eye on these trends and adjust their businesses accordingly will stay ahead of the competition.

**Here are five emerging diner trends to watch in Canada, plus the key takeaways for restaurateurs.**



# 1

## Menu Price Increases Due for a Pause

Inflation in Canada has dropped over the past year, but consumers are still feeling the effects of cost of living increases (plus new pressures from rising debt levels, reduced savings, and the compound impact of inflation) and, as a result, their appetite for menu price hikes has evaporated. While diners are still eating out, they're doing so less frequently because of price increases.

If menu prices continue to rise at a rate faster than inflation, the reality is that fewer diners will be visiting restaurants. In fact, 30% of Canadians say a price hike would *significantly* impact their decision to dine at a particular restaurant – and that number jumps to 38% among Gen Zs specifically, which is the group that dines out the most.



### Takeaway for Restaurants

Restaurateurs have been fortunate that diners have absorbed price increases until now, but in 2024, they should look for other ways to manage costs and should be especially cautious about introducing any new service fees. If they must raise prices, targeting premium items only, while holding off on bumping up prices for lunch specials or happy hour, is a smart move. The message from diners is clear: restaurants shouldn't raise their menu prices by more than 10%, as that is the highest increase most consumers say they can absorb. And we'd be remiss if we didn't reiterate that 24% cannot absorb any price hikes at all.



# 2

## A Digital-First Approach

One of the first things Canadian diners do before visiting a new restaurant is to look at the menu online (41% *always* do this) or the restaurant's website (33% *always* do this). Loyalty program members are the most likely to look up a menu online (55% *always* do this) and visit the website (46% *always* do this). This is crucial information for restaurateurs, especially those who haven't paid a ton of attention to their digital presence in the past – it's a need-to-have now, not just a nice-to-have!

Considering that Canadians turn to third-party apps when their local restaurants don't have an online presence or delivery system, this means it's time for restaurateurs to show some love to their digital real estate, or risk losing business to the competition.



### Takeaway for Restaurants

Today's operators must think carefully about the customer journey and assume that a diner's experience with their restaurant will almost always start online. As such, restaurateurs need to put in the effort to optimize their digital presence, from how their website ranks in Google searches to whether the user experience is intuitive. Leaving these items up to chance means restaurants will risk losing potential customers.



# 3

## Delivering Added Value

It's clear that value is a major driver for enticing consumers to join both restaurant loyalty programs and email lists (36% will subscribe to emails for access to discounts or coupons). And considering how sensitive diners are to price hikes, offering value will be even more crucial in the year ahead. However, this doesn't simply mean offering tons of freebies and discounts. It's more about delivering the *perception* of value.

For instance, many restaurants need to cut costs, and as a result may need to change their loyalty programs so consumers must now spend more to earn a free item. In this situation, operators can still offer greater value by giving diners more flexibility in how they redeem points (i.e. allowing them to choose from multiple types of free items as opposed to just one, or giving them added customization options). This way, restaurateurs don't have to sacrifice their bottom line, and consumers also feel like they're receiving added value. And considering the fact that 54% of Canadians prefer points-based rewards, this type of setup can be particularly enticing.



### Takeaway for Restaurants

Reinforcing the message that they're delivering value by offering flexible perks (like more options in reward programs) is an excellent way for restaurants to delight diners without breaking the bank. Brands have already begun to leverage this strategy, and savvy restaurateurs would be wise to do the same.



# 4

## Loyalty Programs Built for Power Users

The most frequent diners are loyalty program members. In Canada, 40% of reward program members order takeout at least once a week and 33% dine at a restaurant at least once a week. This highlights the power of loyalty programs to keep diners engaged with, and purchasing meals from, restaurants, even when the economy is less than stellar.

In 2024, restaurateurs should focus on their “power loyalty users” – the most active and highest spending reward program members. As [QSRweb reports](#), 80% of restaurants’ revenue can come from their top 20% of customers. In fact, half of all loyalty visits come from the most active 10% of members, according to research from [Paytronix](#). This level of engagement is not surprising, given that our own research shows that 9% of Canadians use their loyalty programs on a *daily* basis (up from just 4% who said the same in 2022).

And, given that most diners are unable to absorb additional price increases in 2024, focusing on encouraging your most loyal customers to visit more frequently and spend more during those visits is a great way to boost revenue without price hikes.



### Takeaway for Restaurants

All restaurants – especially QSRs – should focus on engaging their power loyalty users to reap the rewards of loyalty programs. The key is to offer personalized rewards, like offers based on past order history (74% of loyalty program members in Canada appreciate this), or the ability to earn cash back or allocate points toward an item diners actually want to order, rather than a generic free item.



# 5 Technology, But With a Human Touch (“Tech Lite”)

While diners appreciate the convenience of restaurant tech (like online ordering), they don’t want a fully automated customer experience. Most Canadian diners (85%) prefer the face-to-face experience of ordering from a server, while only 4% prefer self-serve QR codes. This preference is even more pronounced among older generations, with 97% of Boomers and 91% of Gen Xers preferring to order from a server.

However, that is not to say that Canadian diners are tech-averse when it comes to restaurants. Gen Zs, Millennials, and loyalty members are more open to automated means of dining out and are more comfortable trying out new restaurant technology. That being said, operators need to strike a balance between a more traditional and a more automated dining experience to keep diners happy and comfortable.



## Takeaway for Restaurants

Staying on top of industry innovations and being open to technological change is a savvy business move. However, when considering which new tech to implement, it’s essential to consider the user experience from the customer’s perspective. Does it enhance their dining experience or take away from the convenient – yet human – experience we know they desire? This is especially important if a restaurant’s primary customer base skews slightly older.



# Conclusion

Economic uncertainty will keep both diners and restaurateurs on their toes in 2024, as Canadians watch their spending while they wait to see whether inflation will continue to drop. The good news? Consumers are still dining out. They're just more sensitive to price increases than they were in 2022, and they want to make sure the customer experience at the restaurants they choose to visit is worth the cost. This is critical for restaurateurs to remember.

For savvy operators, shifting diner trends present a moment of opportunity. By responding to these changes, restaurants can create stronger and more long-lasting connections with their guests, leading to more loyal regulars choosing their venues.

There's a lot to celebrate within the hospitality industry in 2024. Diners have made it clear they want to interact with restaurants and servers, rather than automated or third-party platforms. This means restaurateurs have a direct line of communication with customers – one that can help them better understand and proactively meet the needs of discerning diners. The operators that rise to the challenge will be the ones with success on the menu in 2024.





TouchBistro is an all-in-one POS and restaurant management system that makes running a restaurant easier. Providing the most essential front of house, back of house, and customer engagement solutions on one easy-to-use platform, TouchBistro helps restaurateurs streamline and simplify their operations, increase sales, and deliver a great guest experience.

To find out if TouchBistro is the right fit for your restaurant, get in touch today.

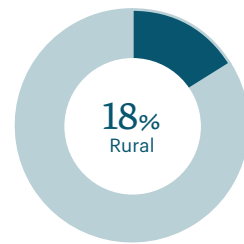
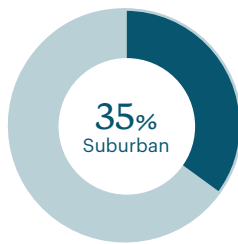
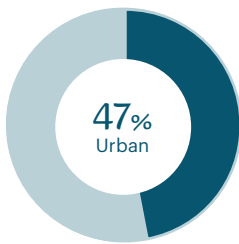
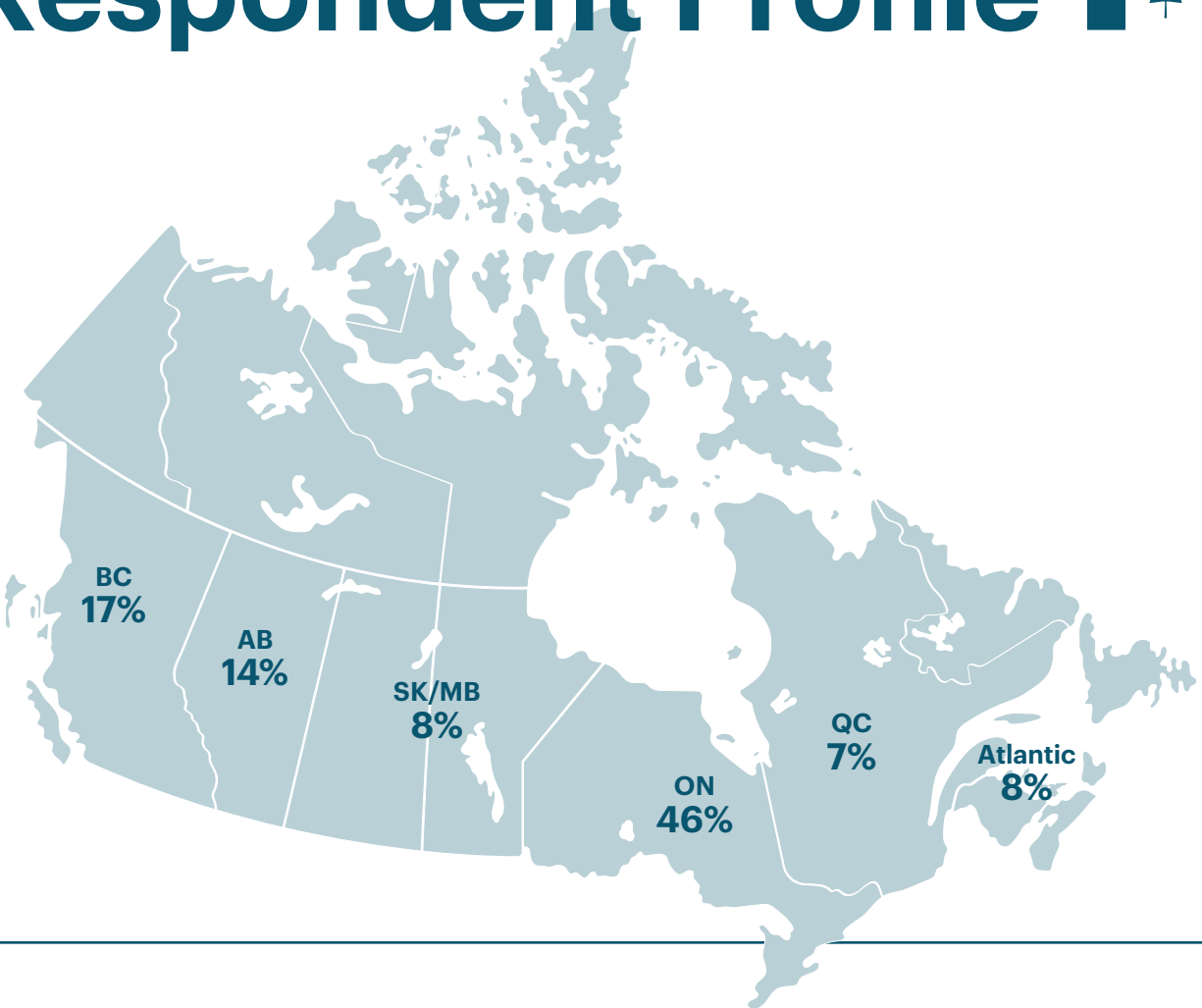
[Learn More](#)



Maru/Matchbox is our group of highly skilled research practitioners with deep advisory expertise. As part of the Maru Group, we are a different breed of global insight partner, built on proprietary software that enables our experts to connect with the people that matter most to our clients.



# Respondent Profile



**Gender**  
Male **49%**  
Female **51%**

**Age**  
18-34: **29%**  
35-54: **34%**  
55+: **38%**

**Income**  
<\$50K (NET): **21%**  
\$50K - \$99K (NET): **34%**  
\$100K+ (NET): **30%**  
Undisclosed: **15%**





Everything you need to run  
your restaurant, **all in one place.**

**[touchbistro.com](https://touchbistro.com)**