

'FOODIE NATION'

SURVEY

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*Gusto TV Summary – World Flavour Survey
submitted by Nanos, September, 2014 (Submission 2014-475)*

Canadians into experimenting with international flavours

Italian tops list of international cuisine

The latest Gusto TV Nanos Food Nation survey suggests that more than eight in ten Canadians enjoy, to some extent, experimenting with international flavours while about one in ten are not into experimentation.

On the spice front almost four in ten Canadians (38%) said they were a very big fan of spicy foods while 23% were not into spice – the rest (38%) could swing either way when it comes to spicy food preferences.

Asked to pick their favourite international cuisine, Italian was clearly the front runner among Canadians at 33%. Asian cuisine as a group has a very strong following in Canada with Chinese (preferred by 14%), Thai (preferred by 10%), Japanese (preferred by 9%) and Indian (preferred by 8 percent) rounding out the top preferred international flavours.

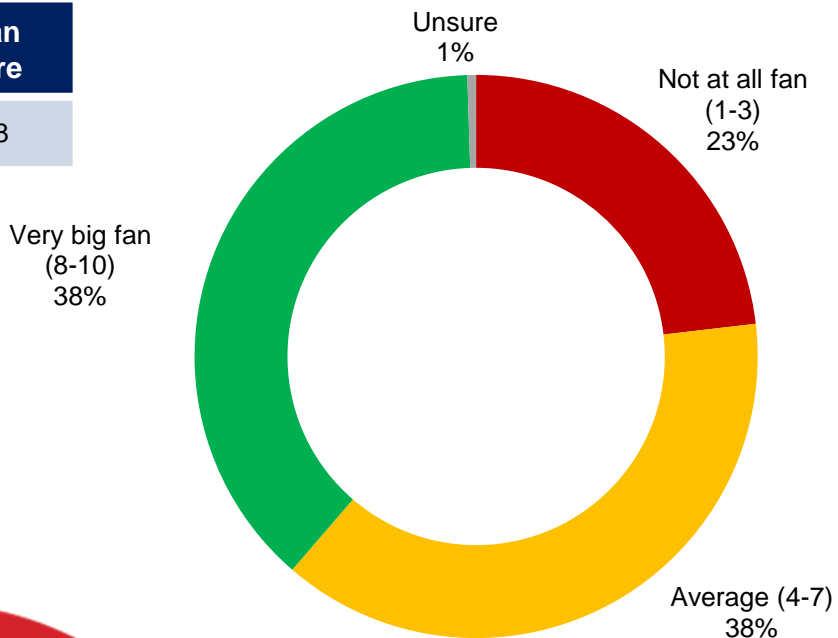


***Executive
Summary***

Fans of Spicy Food

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 13th and 16th, 2014, n=1,000, accurate ±3.1 percentage points, 19 times out of 20.

Mean score
6.18



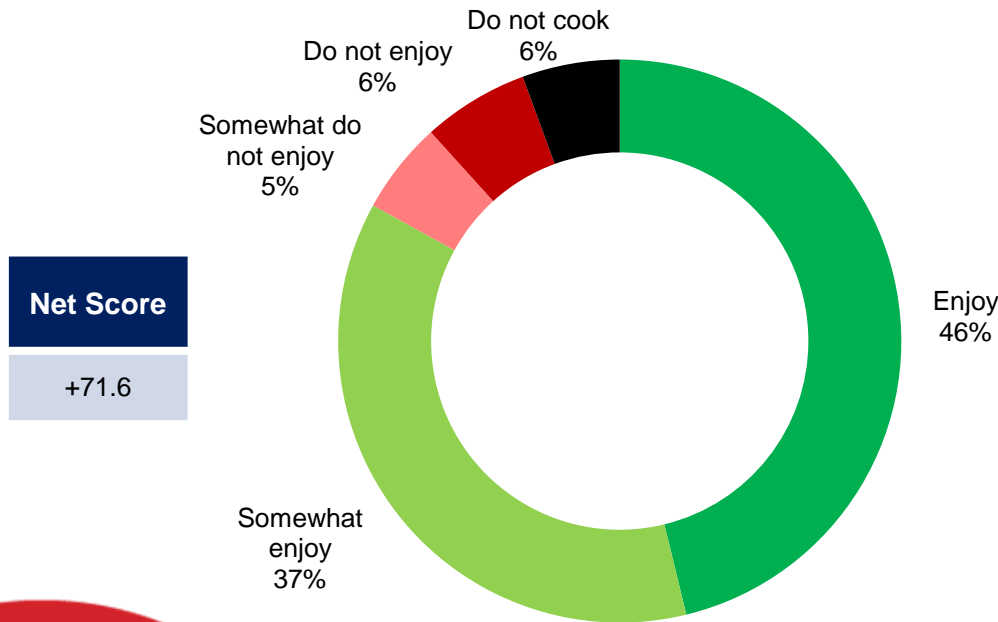
Subgroups	Mean scores
Atlantic (n=100)	5.73
Quebec (n=250)	6.26
Ontario (n=300)	6.48
Prairies (n=200)	6.09
British Columbia (n=150)	5.88
Male (n=488)	6.54
Female (n=512)	5.83
18 to 29 (n=205)	6.44
30 to 39 (n=169)	6.38
40 to 49 (n=208)	6.58
50 to 59 (n=178)	6.06
60 plus (n=239)	5.57

***Note: Charts may not add up to 100 due to rounding**

QUESTION – On a 10 point scale where 1 is not at all a fan and 10 is a very big fan, how much of a fan are you of spicy food?

Experimenting with International Flavours

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 13th and 16th, 2014, n=1,000, accurate ±3.1 percentage points, 19 times out of 20.



Net Score
+71.6

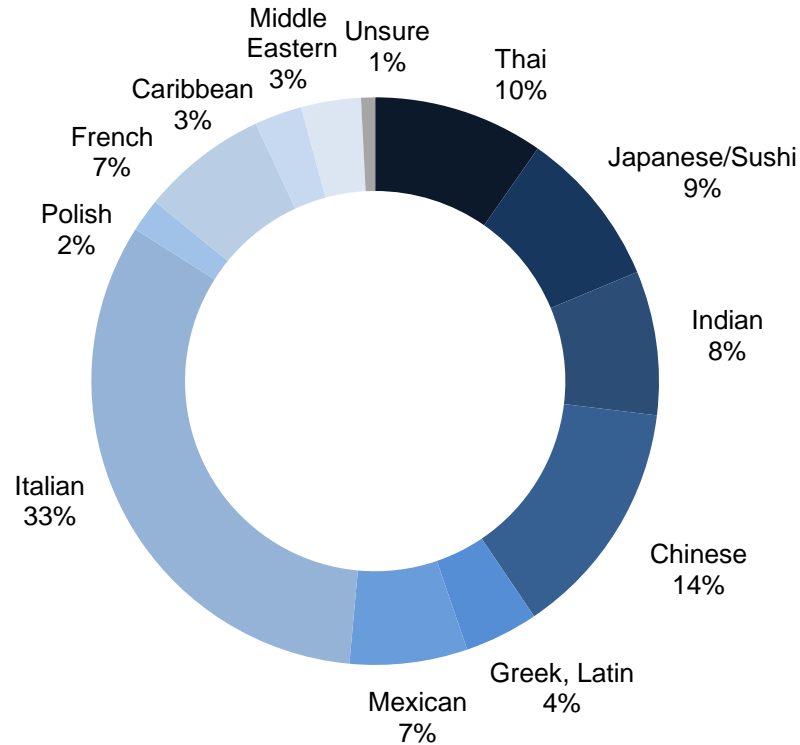
Subgroups	Enjoy/Somewhat enjoy
Atlantic (n=100)	76.5%
Quebec (n=250)	84.5%
Ontario (n=300)	84.2%
Prairies (n=200)	83.0%
British Columbia (n=150)	82.1%
Male (n=495)	82.1%
Female (n=505)	83.8%
18 to 29 (n=205)	91.5%
30 to 39 (n=169)	88.7%
40 to 49 (n=208)	83.8%
50 to 59 (n=178)	82.3%
60 plus (n=239)	71.2%

***Note: Charts may not add up to 100 due to rounding**

QUESTION –Do you enjoy experimenting with internationally-influenced flavours and dishes/recipes in your home cooking?

International Cuisines

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 13th and 16th, 2014, n=1,000, accurate ± 3.1 percentage points, 19 times out of 20.

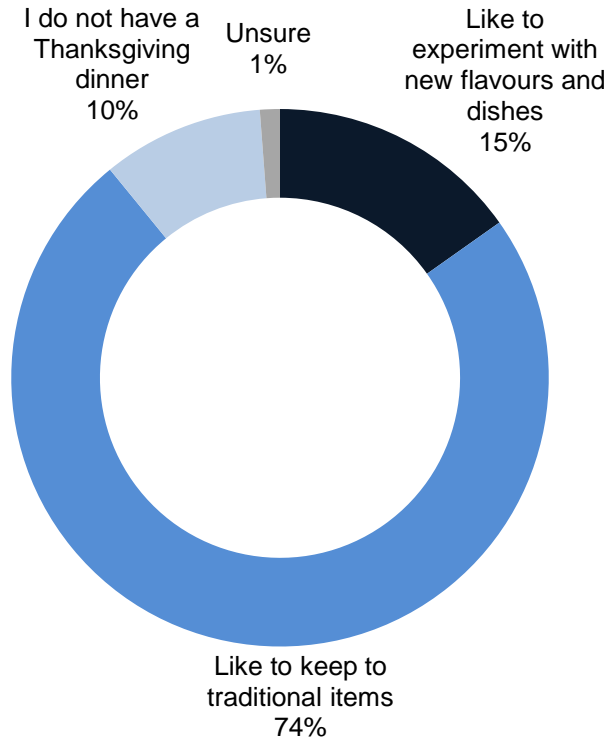


***Note: Charts may not add up to 100 due to rounding**

QUESTION – Please rank your top 3 types of international cuisines. [FIRST RANKED RESPONSE]

Thanksgiving Dinner

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 13th and 16th, 2014, n=1,000, accurate ±3.1 percentage points, 19 times out of 20.



Subgroups	Like to experiment
Atlantic (n=100)	12.1%
Quebec (n=250)	11.5%
Ontario (n=300)	18.2%
Prairies (n=200)	15.9%
British Columbia (n=150)	16.3%
Male (n=495)	13.3%
Female (n=505)	17.0%
18 to 29 (n=205)	12.1%
30 to 39 (n=169)	22.2%
40 to 49 (n=208)	15.4%
50 to 59 (n=178)	14.7%
60 plus (n=239)	12.9%

***Note: Charts may not add up to 100 due to rounding**

QUESTION – When it comes to your Thanksgiving dinner, would you say that you....? [ROTATE FIRST 2]



Methodology

Methodology

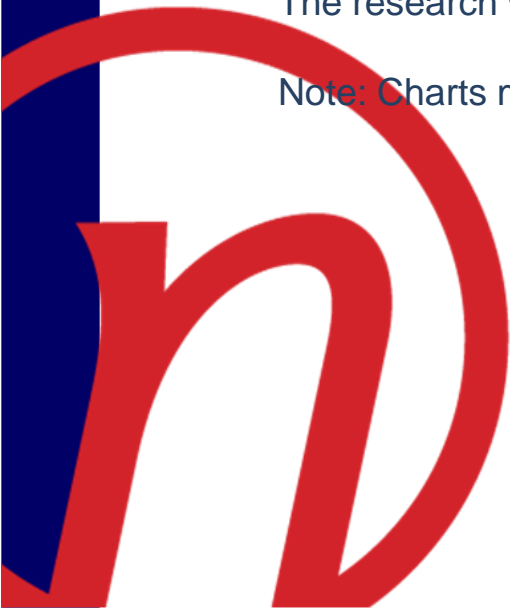
Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between September 13th and 16th, 2014. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by Gusto TV.

Note: Charts may not add up to 100 due to rounding.



About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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Tabulations



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		On a 10 point scale where 1 is not at all a fan and 10 is a very big fan, how much of a fan are you of spicy food?												
		Total	Not at all a fan (1)	2	3	4	5	6	7	8	9	Very big fan (10)	Unsure	
		Responses	Mean	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	
Region	Canada 2014-09	1000	6.18	10.8	5.7	6.6	5.8	7.8	7.0	17.5	13.1	9.4	15.6	.5
	Atlantic	100	5.73	15.7	8.3	5.0	8.7	7.9	8.3	6.8	14.9	9.2	15.2	.0
	Quebec	250	6.26	9.6	6.5	5.4	5.7	7.5	5.7	20.1	13.6	8.7	15.5	1.6
	Ontario	300	6.48	11.2	3.0	6.4	5.3	7.6	6.3	18.0	12.6	8.7	21.0	.0
	Prairies	200	6.09	8.4	7.0	9.6	4.8	8.0	8.7	16.7	13.0	9.5	13.6	.6
	British Columbia	150	5.88	12.0	6.5	6.3	6.3	8.5	7.2	20.6	12.3	12.3	7.9	.0
Gender	Male	495	6.54	7.9	5.4	6.3	4.2	8.1	6.2	18.3	15.0	10.2	17.8	.4
	Female	505	5.83	13.7	6.0	6.9	7.3	7.5	7.7	16.8	11.2	8.7	13.4	.7
Age	18 to 29	205	6.44	9.1	7.8	4.2	4.3	5.1	6.3	21.3	12.1	12.5	15.9	1.3
	30 to 39	169	6.38	12.0	4.3	3.1	5.9	6.5	4.8	26.3	10.3	11.6	15.3	.0
	40 to 49	208	6.58	7.9	6.5	5.7	4.3	6.8	7.6	16.3	16.2	7.2	21.6	.0
	50 to 59	178	6.06	12.7	5.7	8.0	5.5	7.1	8.8	10.8	15.5	9.8	15.8	.3
	60 plus	239	5.57	12.5	4.2	11.0	8.5	12.6	7.3	14.2	11.6	7.0	10.2	.8

Nanos conducted a RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between September 13th and 16th, 2014 as part of a Canadian omnibus survey. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.



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		Do you enjoy experimenting with internationally-influenced flavours and dishes/recipes in your home cooking?					
		Total	Enjoy	Somewhat enjoy	Somewhat do not enjoy	Do not enjoy	Do not cook
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-09	1000	46.2	36.8	5.3	6.1	5.6
	Atlantic	100	39.6	36.9	7.8	8.6	7.1
	Quebec	250	49.8	34.7	6.7	4.9	4.0
	Ontario	300	48.2	36.0	5.1	5.8	4.9
	Prairies	200	42.4	40.6	4.6	7.5	5.0
	British Columbia	150	45.6	36.5	2.6	5.6	9.7
Gender	Male	495	45.4	36.7	5.5	6.5	5.9
	Female	505	47.0	36.8	5.1	5.8	5.3
Age	18 to 29	205	51.1	40.4	4.1	.0	4.3
	30 to 39	169	48.3	40.4	4.8	2.6	3.9
	40 to 49	208	52.4	31.4	3.3	7.3	5.6
	50 to 59	178	44.9	37.4	5.1	9.3	3.3
	60 plus	239	36.0	35.2	8.5	10.5	9.7

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Please rank your top 3 types of international cuisines (first ranked response)

		Total	Thai	Japanese/Sushi	India	Chinese	Greek/Latin	Mexican	Italian	Polish	French	Caribbean	Middle Eastern	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-09	1000	9.7	9.0	8.2	13.6	4.2	6.7	32.5	1.9	7.2	2.7	3.4	.8
	Atlantic	100	6.0	8.8	7.9	19.0	5.9	10.0	31.6	1.4	4.2	.6	4.6	.0
	Quebec	250	10.8	5.0	10.3	9.7	1.4	3.0	36.2	1.6	12.4	2.9	5.8	1.0
	Ontario	300	12.5	10.8	9.4	13.1	2.9	3.3	32.4	2.5	5.9	2.4	3.7	1.1
	Prairies	200	7.8	5.6	6.1	16.7	8.4	10.2	32.3	2.9	4.5	3.8	1.1	.7
	British Columbia	150	7.3	17.1	5.5	13.4	5.0	12.6	27.6	.5	6.9	2.5	1.2	.5
Gender	Male	495	8.9	8.9	8.9	12.3	4.8	5.5	34.3	1.7	7.1	3.3	3.5	.9
	Female	505	10.4	9.1	7.6	15.0	3.7	7.8	30.8	2.2	7.2	2.0	3.4	.7
Age	18 to 29	205	10.6	18.3	7.8	13.7	4.4	6.2	32.2	1.1	2.4	3.3	.0	.0
	30 to 39	169	9.7	14.6	11.2	5.5	5.4	9.7	29.4	1.2	3.9	2.4	7.0	.0
	40 to 49	208	8.1	7.2	9.1	17.1	3.6	6.5	31.5	.6	5.5	4.0	6.3	.6
	50 to 59	178	10.7	4.9	6.1	13.7	4.7	4.8	37.8	3.9	7.6	1.6	2.5	1.7
	60 plus	239	9.6	1.8	7.2	16.2	3.5	6.5	32.0	2.9	14.8	1.9	2.1	1.5

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Please rank your top 3 types of international cuisines (second ranked response)

	Total	Thai	Japanese/Sushi	India	Chinese	Greek/Latin	Mexican	Italian	Polish	French	Caribbean	Middle Eastern	Unsure	
	Responses	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	
Region	Canada 2014-09	992	10.5	8.5	9.7	14.8	9.1	11.3	18.9	2.3	6.8	2.7	3.8	1.5
	Atlantic	100	9.2	1.9	11.6	16.8	8.9	10.5	21.8	2.7	9.0	1.4	3.6	2.5
	Quebec	247	12.2	12.9	6.7	13.8	10.1	10.3	19.8	.8	5.5	2.0	4.9	1.1
	Ontario	297	13.9	4.5	10.5	14.3	6.9	11.3	18.1	3.1	8.2	3.7	4.1	1.4
	Prairies	199	6.8	9.4	10.2	15.1	9.1	13.7	22.3	2.4	3.8	2.4	2.9	1.9
	British Columbia	149	6.9	12.2	11.3	15.4	12.2	10.1	12.7	2.8	9.0	3.1	2.9	1.5
Gender	Male	490	10.6	7.6	9.3	16.0	8.4	11.9	18.8	2.8	7.3	2.1	4.0	1.2
	Female	502	10.5	9.3	10.1	13.5	9.8	10.7	19.1	1.8	6.4	3.3	3.7	1.9
Age	18 to 29	205	9.6	13.2	12.3	10.0	9.0	12.0	23.2	2.0	4.0	1.1	2.3	1.1
	30 to 39	169	11.2	8.6	9.1	12.8	7.8	14.6	19.5	1.2	7.1	4.2	3.9	.0
	40 to 49	207	12.2	7.6	10.0	14.1	12.0	16.0	13.1	2.4	2.4	3.8	4.5	1.8
	50 to 59	175	11.3	7.9	7.2	17.6	10.4	7.8	17.9	1.9	9.9	1.9	4.2	2.0
	60 plus	235	8.8	5.5	9.5	18.7	6.6	6.8	20.6	3.5	10.7	2.6	4.3	2.4

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Please rank your top 3 types of international cuisines (third ranked response)

		Total	Thai	Japanese/Sushi	India	Chinese	Greek/Latin	Mexican	Italian	Polish	French	Caribbean	Middle Eastern	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-09	975	10.3	7.6	11.6	11.9	10.0	13.1	10.0	2.2	5.5	3.1	6.2	8.4
	Atlantic	97	9.2	4.9	11.3	9.8	10.6	11.5	12.6	2.9	9.8	.0	6.4	11.0
	Quebec	244	12.8	7.5	12.2	11.8	12.5	10.9	7.5	1.6	6.3	2.3	7.6	7.0
	Ontario	292	10.0	5.4	12.8	11.6	8.7	15.4	9.0	2.8	5.0	3.3	8.2	7.7
	Prairies	195	10.5	7.8	9.1	12.1	10.2	11.3	11.6	3.1	5.1	3.6	5.0	10.6
	British Columbia	147	7.3	13.6	12.1	13.4	7.7	15.8	12.3	.5	3.0	5.6	1.1	7.6
Gender	Male	484	9.7	6.9	11.6	11.7	11.5	11.0	12.3	2.5	5.1	4.2	4.2	9.2
	Female	492	10.9	8.3	11.7	12.0	8.5	15.2	7.7	2.0	5.9	2.1	8.1	7.7
Age	18 to 29	203	13.3	8.9	17.8	6.8	9.0	16.4	9.5	.0	3.8	5.2	7.3	2.0
	30 to 39	169	6.9	12.8	11.6	13.7	6.3	16.0	9.6	.0	2.0	2.7	6.4	11.9
	40 to 49	203	14.5	6.0	11.1	12.8	11.9	12.6	8.6	1.7	4.8	2.8	7.3	5.9
	50 to 59	172	8.9	7.0	9.3	10.7	11.4	12.5	11.4	4.6	6.9	2.4	6.7	8.2
	60 plus	228	7.5	4.5	8.4	15.0	10.9	9.0	10.8	4.4	9.3	2.5	3.7	14.0

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		When it comes to your Thanksgiving dinner, would you say that you...				
		Total	Like to experiment with new flavours and dishes	Like to keep to traditional items	I do not have a Thanksgiving dinner	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-09	1000	15.2	73.9	9.7	1.2
	Atlantic	100	12.1	84.0	3.8	.0
	Quebec	250	11.5	71.8	16.2	.5
	Ontario	300	18.2	72.4	8.2	1.3
	Prairies	200	15.9	76.0	5.2	2.9
	British Columbia	150	16.3	70.7	12.0	1.0
Gender	Male	495	13.3	78.0	7.4	1.3
	Female	505	17.0	69.9	12.0	1.2
Age	18 to 29	205	12.1	74.6	13.3	.0
	30 to 39	169	22.2	61.1	13.6	3.1
	40 to 49	208	15.4	78.9	3.9	1.7
	50 to 59	178	14.7	76.4	8.5	.4
	60 plus	239	12.9	76.1	9.9	1.2

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