

An *Inside Look* at *Eating Out*

NIQ Syndicated Study on Out-of-Home Dining
NIQ FOODIE SYNDICATED REPORT



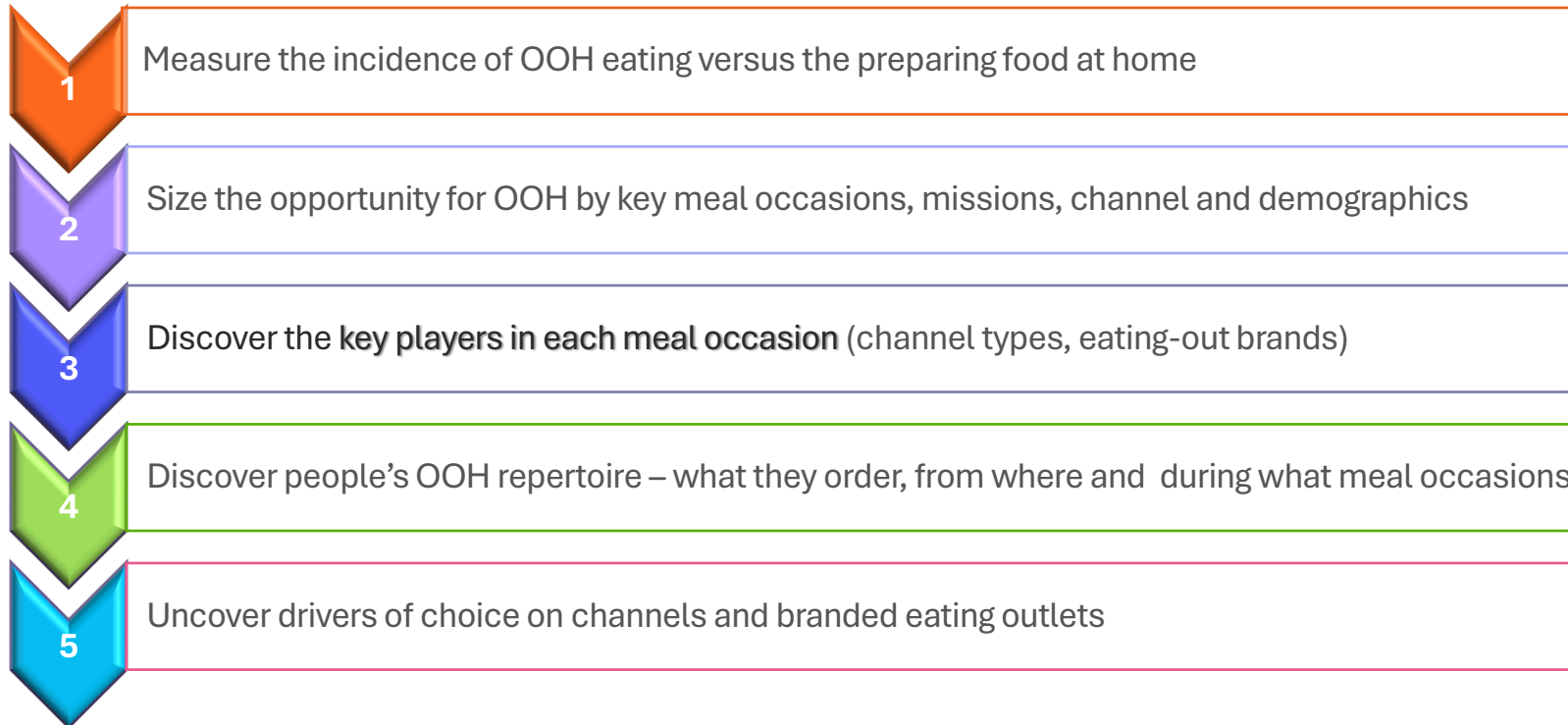
NIQ

How Do Filipinos **Eat OOH** Today?

NIQ Philippines continues the Foodie Report in 2026: Capturing the out-of-home (OOH) eating landscape and unearthing opportunities for businesses such as:

- Quick service restaurants, casual dining, convenience stores, dessert shops, etc., – whether existing or new/incoming entrants
- Malls and other business establishments seeking strategic Tenancy Mix selection
- Manufacturers of Food Solutions & Ingredients, Beverages, Desserts, etc.,

This report aims to:



What is our Approach?

Integrated Qualitative and Quantitative modules for a comprehensive and more in-depth view.

FGDs

Explore:

Needs, decisions

Experience, imagery

Whitespaces



UAI

Measure:

Incidence, behaviors,
considerations,
patronage

Diary

Track:

Occasions, spend

Missions, frequency

Repertoire, food pairs



Determine Incidence of Eating-Out vs Cooking at Home

Which eating occasion is likely more home-cooking than sourced OOH? Skipped?

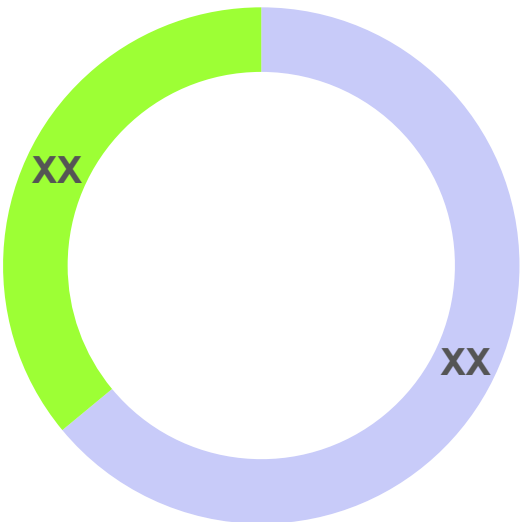
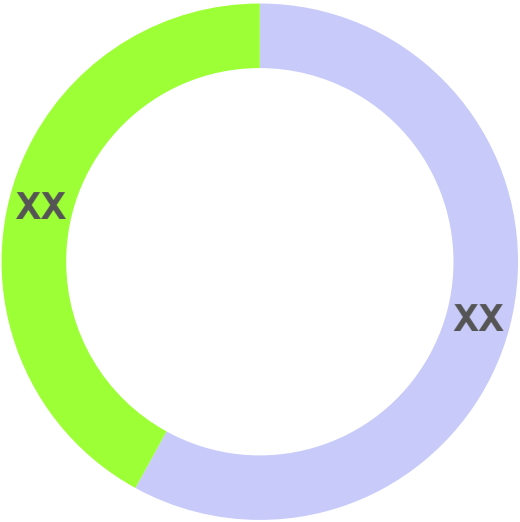
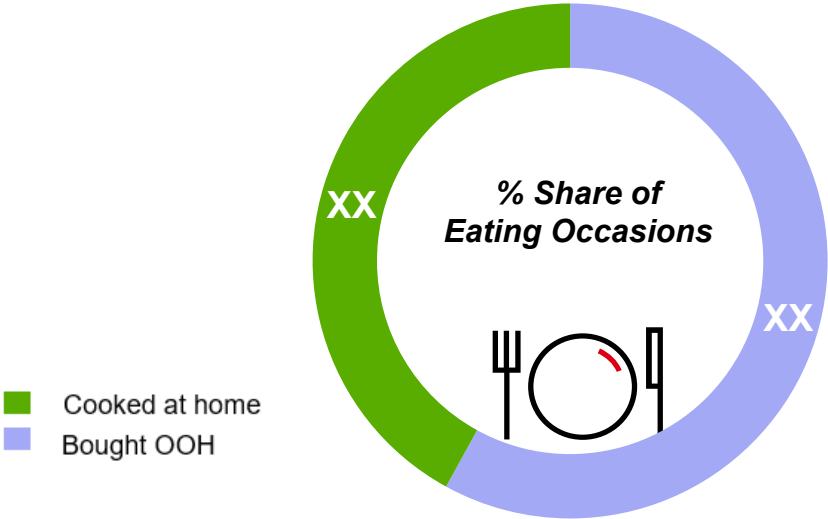
SAMPLE OUTPUT

WHAT IS THE SHARE OF EATING FOOD COOKED AT HOME VS OUT OF HOME? (%)

TOTAL (REGARDLESS)

WEEKDAY

WEEKEND



Meal Occasion	Cooked at Home	Bought OOH	Skipped
Breakfast	XX	XX	XX
Morning snack			
Lunch			
Afternoon Snack			
Dinner			
Midnight snack			

Cooked at Home	Bought OOH	Skipped

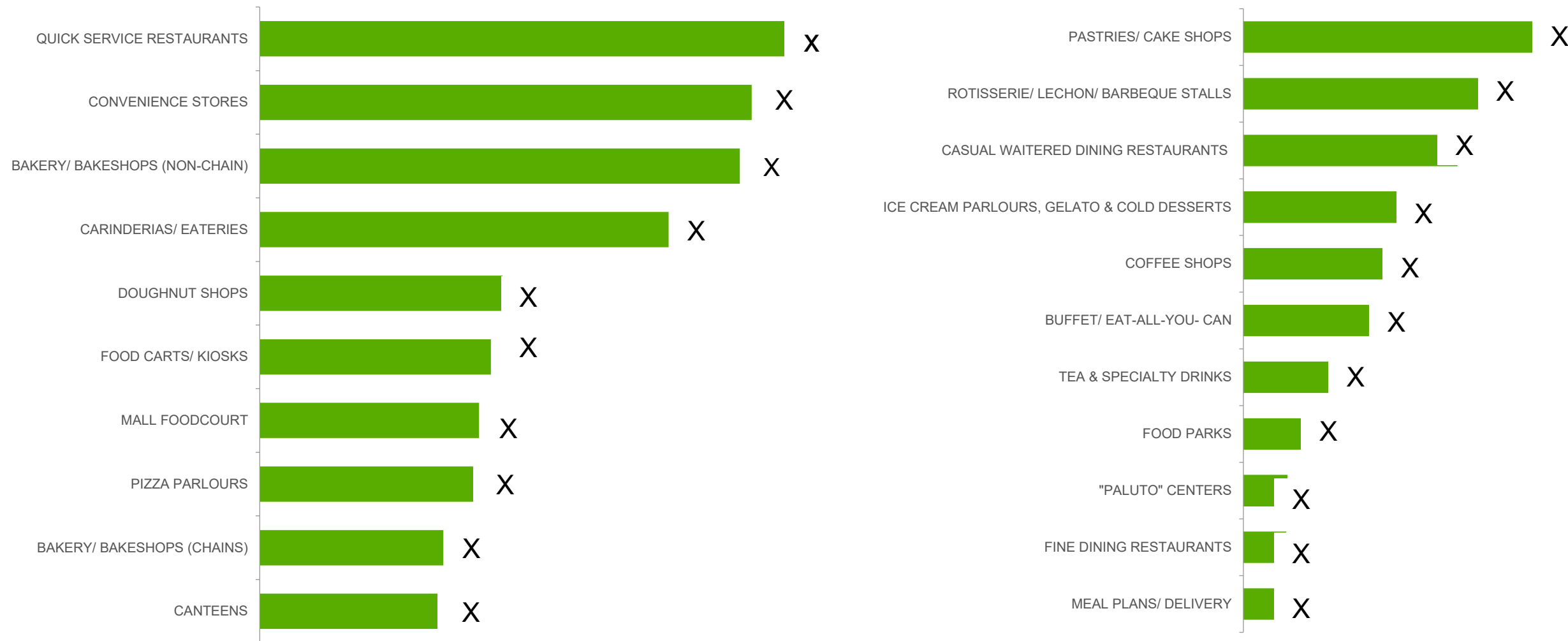
Cooked at Home	Bought OOH	Skipped

Establish the Channels Where the Market Eats & Where the Opportunity is Biggest

Profile of specific retailers may be determined if with sufficient base.

SAMPLE OUTPUT

INCIDENCE PER FOOD OUTLET PAST 3 MONTHS



Note: Figures are for illustration purposes only

Uncover the Opportunities in Food & Beverage Formats

What kind of [food / bev /dessert] do they [eat /drink] for certain meal occasions?

SAMPLE OUTPUT

WHAT DO THEY EAT OUT OF HOME? (%)

Breakfast

Rice and viand (81) (78)
 Hot Drinks (67) (56)
 Bread/Sandwich with Spread (24) (22)
 Bread Only (20) (16)
 Cold Drinks (15) (15)
 Rice only (14) (12)
 Instant Noodles (12) (9)
 Sweet Snacks (11) (9)

AM Snacks

Bread/Sandwich with Spread (50) (42)
 Hot Drinks (34) (32)
 Bread Only (30) (28)
 Cold Drinks (28) (26)
 Sweet Snacks (11) (13)
 Instant Noodles (10) (10)
 Rice and viand (8) (7)
 Salty Snacks (0) (11)

Lunch

Rice and viand (87) (90)
 Cold Drinks (22) (18)
 Rice only (22) (17)

PM Snacks

Cold Drinks (39) (29)
 Bread/Sandwich with Spread (37) (31)
 Hot Drinks (30) (21)
 Sweet Snacks (26) (26)
 Bread Only (24) (21)
 Salty Snacks (19) (22)
 Instant Noodles (8) (10)

Dinner

Rice & Viand (94) (93)
 Cold Drinks (16) (13)
 Rice Only (12) (13)

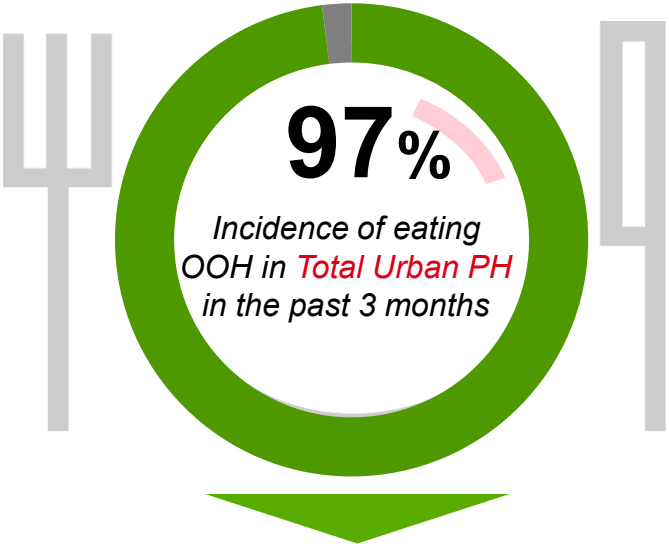
Midnight Snacks

Bread/Sandwich with Spread (32) (31)
 Hot Drinks (26) (27)
 Instant Noodles (23) (23)
 Bread Only (17) (14)
 Cold Drinks (14) (16)
 Salty Snacks (16) (13)
 Sweet Snacks (6) (11)

Profile Consumers in Specific Outlet Types

INCIDENCE, OUTLET TYPES & AVERAGE SPEND ON OOH

HOW BIG IS THE OOH EATING MARKET?



7 Outlet types

AVE. NO. OF OUTLETS PATRONIZED IN PAST 3 MONTHS

SEGMENT	Ave # of Outlets
Females	7
Males	7
ABC1	8
C2	7
D	6
16-25 years old	8
26-35 years old	7
36-45 years old	7
46-65 years old	6

ESTIMATED SPEND (PHP)

Php XXXX / person per week
(regardless of outlet type)



SEGMENT	Ave spend
Females	
Males	
ABC1	
C2	
D	
16-25 years old	
26-35 years old	
36-45 years old	
46-65 years old	

On the Menu

Information List

- Sizing the OOH eating Market
 - Eating OOH vs Food prepared at home
 - Attitudinal assessment vs previous year
 - Future intent to eat OOH
- Patronage of food channels
- Profile of OOH patrons
- OOH patronage dynamics – Past week
 - Channels patronized
 - Eat out mission
 - Meal occasion
 - Weekday vs Weekend dynamics
 - **Food and beverage ordered – food+bev+desserts pairing**
 - Transaction type (Dine-in, Take out, Delivery, Drive thru)
 - For delivery – whether used Foodpanda/Grab/etc
 - Whether used promotion
 - Spend per occasion
 - Companion
 - Mode of payment
- **Considerations / Drivers of Choice on where to eat**
 - **In-Premise, Takeout, Delivery**
- Sources of Awareness on where to eat OOH
- Patronage of OOH Outlets – Usage in Past 6 Months, Past 3 Months, Last Visit, Most Often
- **Assessing Experience of Eating Places (Outlets)**



Extras & Sides

Separate section on hand-crafted beverages and desserts

- Incidence of consumption of Hand-crafted drinks & desserts
 - Ever, P12M, P3M, Past Month, P7D
- Profile of consumers of hand-crafted drinks & desserts
- Attitudes/Imagery of beverages & desserts
- Frequency of consumption
- Occasions for consumption
- Sources/Brands consumed
 - Ever Patronize, Past 12 Months/ 3 Months, Past Month, Past 7 Days
- Food pairing with hand-crafted drinks and desserts
- Companions when consuming beverages and desserts

Hand-crafted beverages

- Coffee
- Tea
- Milk Tea
- Fruit juices
- Shakes
- Smoothies
- Yoghurt drinks
- Floats

Desserts

- Ice cream / gelato
- Sundae
- Popsicles
- Shaved ice desserts (halo-halo, Bingsu)



Three Courses in One Integrated Report

QUANTITATIVE PHASE

Habits, Usage & Attitudes Survey

- Males and Females
- 18-65yo, from ABCD homes
- Urban areas in the PH
- PDM on food for self or for family
- Must have purchased/eaten from any OOH outlet in the past 3 months
- Door to door, Face to face CAPI
- Random Sampling

AREA COVERAGE	600
Metro Manila	150
Urban North Luzon	75
Urban Central Luzon	75
Urban South Luzon	100
Urban Visayas	100
Urban Mindanao	100

Five Day Consumption Online Diary

- Males and Females
- 18-65yo, from ABCD homes
- Urban areas in the PH
- PDM on food for self or for family
- Must have purchased/eaten from any OOH outlet in the past 3 months
- Online diary for 1 week, at least 3 weekdays and 2 weekends

AREA COVERAGE	600
Metro Manila	150
North Luzon	75
Central Luzon	75
South Luzon	100
Visayas	100
Mindanao	100

QUALITATIVE PHASE

Online mini-Focus Groups

- Same respondent profile as the Quant Phase
- Eight mini-FGDs done online
- Metro Manila + 1 provincial area
- Covering key life stages and SEC
 - Single / no children
 - Families with kids
 - Working adults
 - ABC1 vs C2D

Foodie Food Diary List

Viand (“Ulam”) list

- Fried Chicken
- Fried Pork (e.g., Tocino, Sausage, etc.)
- Fried Beef (e.g., Beef Tapa, Samgyupsal, etc.)
- Fried Seafood (e.g., Fish, Shrimp, Duck, Crab, ukoy, etc.)
- Fried Street food (e.g., kwekwek, fish ball, etc.)
- Egg (Fried, Boiled, Poached, etc.)
- Hotdog (whether fried/steamed)
- Ginisa/Sauteed Vegetable (e.g., monggo, chopsuey, gising-gising, sitaw, okra, pinakbet, etc.)
- Tomato-Based Saucy Dish with Pork (e.g., Asado, Menudo, Caldareta, etc.)
- Tomato-Based Saucy Dish with Chicken (e.g., Asado, Afritada, etc.)
- Tomato-Based Saucy Dish with Beef (e.g., Asado, Menudo, Pochero, etc.)
- Tomato-Based Saucy Dish with Fish and other seafood (e.g., Sarsiadong Isda, etc.)
- Soy-Based Saucy Dish with Pork (e.g., Adobo, Bistek Tagalog, Pata Tim, Humba, etc)
- Soy-Based Saucy Dish with Chicken (e.g., Adobo, Soy Sauce Chicken, etc)
- Soy-Based Saucy Dish with Beef (e.g., Beef Salpicao, Beef Pares, Bistek Tagalog, etc)
- Soy-Based Saucy Dish with Fish and other bases
- Other Saucy Dishes (e.g., Curry, etc.)
- Soupy Dish with Pork (e.g., Sinigang, Nilaga, Bola-bola, etc.)
- Soupy Dish with Chicken (e.g., Sinampalaukang Manok, Tinola, Chicken Sotanghon, etc.)
- Soupy Dish with Beef (e.g., Bulalo, Kansi, Tinola, Nilagang Baka, etc.)
- Soupy Dish with Fish or other seafood (e.g., Sinigang na Hipon, Sinigang na Bangus, Dinengdeng, etc.)

- Steamed/Boiled Dish (e.g., Steamed Siomai, fish, dimsum, etc.)
- Grilled Dish with Chicken (e.g., Chicken Inasal, Isaw, Lechon Manok)
- Grilled Dish with Pork (e.g., Inihaw na Liempo, Barbecue, Lechon)
- Grilled Dish with Beef (e.g., Lechon Baka)
- Grilled Dish with Fish or Other Seafood (e.g., Grilled Scallops, Inihaw na Pusit)
- Roasted Chicken
- Roasted Pork
- Roasted Beef
- Dimsum (e.g., steam/fried siomai, shark's fin, etc.)
- Tofu or plant-based "meat "dishes (whether fried, tomato or soy-based saucy dish, sauteed, etc.)
- Ginataang Gulay/Vegetables Dishes (e.g., Laing, Ginataang kalabasa, etc.)
- Ginataang Meat or Fish Dishes (e.g., Bicol Express, etc.)

Pizza / Pasta / Other Snacks

- Red/tomato-based pasta (e.g., spaghetti, etc.)
- White/cream-based pasta (e.g., carbonara, Truffle Cream / Creamy Mushroom, Cacio e Pepe, etc.)
- Oil-based pasta (e.g., Aglio Olio, Pesto, etc.)
- Pizza (e.g., all meat pizza, pepperoni, shrimp, etc.)
- Tacos
- Wraps
- Baked Mac
- Lasagna

Noodles

- Dry (e.g., Pancit Bihon, Pancit Palabok, Pancit Canton, Sotanghon Guisado, etc.)
- With Soup (e.g., Mami, Miswa, Sotanghon Soup, etc.)
- Fried Noodles
- Instant noodles (Paluto)

Porridge

- Rice-based salty/savoury (e.g., lugaw, arroz caldo, etc.)
- Rice-based sweet (e.g., champorado, etc.)

Rice

- Plain White Rice
- Plain Non-white Rice (brown rice, black rice, red rice)
- Fried rice (e.g., garlic, java, spam, etc.)
- Flavored rice (e.g., adobo, tinapa, turmeric, bagoong, etc.)

Bread / Other

- Pinoy Tasty/Loaf
- Pandesal / other bakery bread
- Sweet (e.g., Pan de coco, Biscocho, Ensaymada, etc.)
- Savory (e.g., Empanada, Garlic Bread, Pizza Bread, etc.)
- Waffles / Pancakes
- Fried bread (kariman, corndog)

Foodie Food Diary List, *continued*

Burgers & Sandwiches

Beef based Burger/Sandwich

Chicken based Burger/Sandwich

Seafood based Burger/Sandwich (e.g., Tuna, Fish Fillet, etc)

Pork based Burger/Sandwich (e.g., Ham Sandwich, Bacon Sandwich, etc.)

Spread Sandwich (e.g., Peanut Butter, Cheese, Chocolate, etc.)

Combo Sandwich (e.g., Ham & Egg Sandwich, Bacon & Egg Sandwich, etc.)

Hotdog Sandwich

Siopao (e.g., asado, bola-bola, fried siopao, etc.)

Sweet siopao (e.g., ube pao, chocolate, etc.)

Sides

Vegetable-based side dishes (e.g., ensalada, coleslaw, kimchi, etc.)

Fruit-based side dishes (e.g. fruit salad, mangga't bagoong, pomelo salad, som tum, fried banana, etc.)

Pasta-based side dishes (e.g., macaroni Salad, macaroni & Cheese, etc.)

French Fries

Mashed Potato

Condiments

Bagoong (alamang/isda)

Barbecue Sauce

Chicken Oil

Chili Garlic Oil

Gravy

Hot Sauce

Kalamansi

Ketchup (Tomato/Banana)

Mayonnaise

Patis/Fish Sauce

Salad Dressing

Sarsa (e.g., Mang Tomas)

Sili

Suka

Toyo

Dessert

Pastries (e.g., cookies, macaron, tarts, etc.)

Ice Cream / Gelato / Frozen Yogurt

Cake (e.g., Brazo de Mercedes, Sans Rival, etc.)

Pies (e.g., Buko Pie, Apple Pie, etc.)

Confections (e.g., Candy, Meringue, Chocolate, Yema, etc.)

Pudding / Flans / Gelatin-based dessert (e.g., leche flan, buko pandan)

Kakanin/malagkit/sticky rice-based (e.g., biko, sapin-sapin, bibingka, palitaw, suman, kutsinta, puto, kalamay, mochi, etc.)

Coconut/Gata-based desserts (i.e., ginataang bilo-bilo, ginataang mais, etc.)

Fried sweet desserts (i.e., banana cue, camote cue, maruya, turon)

Mixed ingredients cold desserts (e.g., halo-halo, mais con hielo, saging con hielo, fruit salad, buko pandan, etc.)

Soy-based snacks (e.g., Taho)

Beverages

Bottled water

Soda / Softdrinks

Juice

Fruit Shake

Hot Coffee

Iced Coffee

Iced Tea

Hot Tea

Alcoholic beverage

Yogurt-based drink

Sago't Gulaman/ Samalamig/ Palamig

↓

Softdrinks, Juice & Tea: Breaks available if packaged, hand crafted or dispenser.

Coffee: Whether 3in1, soluble, packaged, hand crafted or dispenser

PROJECT INVESTMENT & CONFORMÉ

Description: FOODIE A Syndicated Study that explores the out-of-home (OOH) eating landscape in Urban locations nationwide	Investment
☐ Foodie Report 2026 (Full report)	PHP 650,000
☐ Foodie 2026 Results Presentation	PHP 50,000

Notes:

All quotation options are subject to 12% VAT.
A signed Conformé and PO (if required for billing) will be needed to avail the Report.
NIQ Terms and Conditions for standard syndicated research studies apply (please refer to next pages).

Conformé:

Signed for CLIENT

CLIENT

Deliverables:

Foodie Report will be delivered end Sept 2026.
Payment Terms: 100% upon submission of the Full Report.
Please make all checks payable to NielsenIQ Philippines, Inc.

Signed for NIELSENIQ PHILIPPINES, INC.

MUKUND SHARMA
Vice President, Strategic Analytics & Insights | SEA TT

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- 3.2. Indemnification.** NIQ services are intended for internal use by Client, and Client agrees to indemnify and hold harmless NIQ, its officers and directors against all claims, damages, loss or expenses arising from Client’s disclosure of Information or from Client’s use of Information or Property other than in strict compliance with the present General License Terms.

4. NIQ Quality pledge and indemnification

- 4.1. Service Execution Standards.** NIQ shall act and perform the Services in accordance with: (i) the professional standards applicable to the market research industry; (ii) with due care; (iii) in compliance with all applicable laws, government regulatory requirements, and any other agreed-upon written instructions, specifications, guidelines, or requirements.
- 4.2. Disclaimer of Accuracy and Client Responsibility.** The Client acknowledges that the Services deliverables provided are based on estimates derived from NIQ’s market research methodologies and are inherently subject to external factors beyond NIQ’s control. Such factors may include, but are not limited to, sample size variations, public sentiment fluctuations, and inherent statistical or scientific limitations affecting data extrapolation. Consequently, NIQ does not guarantee absolute accuracy or completeness of the deliverables. The Deliverables are intended for informational purposes only and should not be relied upon as a substitute for financial, investment, legal, business, or other professional advice. The Client assumes full responsibility for its decisions, actions, and the manner in which it utilizes the Services, including ensuring compliance with all applicable laws and regulations.
- 4.3. Remedies for Errors in Deliverables.** NIQ will use reasonable efforts to correct any material error identified in the Deliverables. If NIQ fails to correct such an error, NIQ will refund the Client the Charge paid for the part of the Project affected by the error. The foregoing refund is the Client’s sole and exclusive remedy for any error, inaccuracy, delay, or failure to deliver Services.
- 4.4. Intellectual Property Indemnification.** NIQ shall indemnify Client, its affiliates, and their respective officers, directors, shareholders, employees, and agents against any damages, loss, or expenses arising from any claim, demand, cause of action, suit, or proceeding (“Claim”) brought by a third party against Client alleging that Client’s permitted use of the Deliverables infringes any patent, copyright, trade secret or other proprietary rights of the claimant; except to the extent attributable to combination with or modification by any other content, materials or technology, and provided that Client has complied with all the present Terms, Client gives NIQ prompt written notice of such Claim, and grant NIQ sole control of the Claim including right of settlement.
- 4.5. Limitation of Liability.** NIQ’s total aggregate liability for any direct loss, damage, or expense arising under this Agreement shall be limited to the Charges paid by the Client for the Services during the twelve (12) calendar months immediately preceding the claim. Nothing in these terms shall operate to exclude any liability that cannot be legally excluded, including but not limited to liability for fraud, willful misconduct, gross negligence, death, breach of law, or personal injury caused by negligence, or any other liability that cannot be limited or excluded under applicable law. Beyond the aforementioned provisions, neither Party shall be liable, whether in contract, tort, or otherwise, for any direct, indirect, consequential, or incidental loss, expense, or damage arising out of or in connection with this Agreement except as otherwise required by applicable law.

5. NIQ Charges and Client payment for NIQ Services.

- 5.1. Taxes.** The Client agrees to pay the Charges specified in the SOW. The Client shall also be responsible for any applicable Value Added Tax (VAT) or similar taxes. If the tax rules of the country in which Client is based require certain taxes to be withheld on the Charges (withholding taxes or “WHT”), then the Parties agree that the relevant amount of WHT shall be added on top of the Charges and then withheld from the resulting WHT inclusive amount.
- 5.2. Payment obligations.** Payments should be made within the timelines set out on the invoices. NIQ reserves the right to suspend the Services until all outstanding Charges, including any applicable late payment interest, have been fully paid. Any overdue amounts shall accrue interest at a rate of



THANK YOU

*As a next step, let's continue the discussion to ensure our approach meets your needs.
Please do not hesitate to contact us with any comments or questions.*

