

## Similarities and Differences in US and Canadian Restaurant Marketing Strategies: A Cross-Border Analysis of Menu Offerings

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### Abstract

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As an important marketing tool, restaurant menus communicate food and beverage offerings and position the establishment in the minds of consumers. The aim of this study is to compare restaurant menus from the US and Canada to test for similarities and differences between the two markets. Over 50 restaurants were visited in each county (n=111) and 13 features of the restaurants were analyzed for dining styles, product selection, and food trends. Similarities between the two markets were most evident in fine dining restaurants, while most of the differences were found in casual dining restaurants. The primary contribution of this paper lies in the data-driven approach and insights gained by analyzing both market similarities and differences.

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**Keywords:** Restaurants, Menus, Marketing Strategies, Cross-border Analysis.

### 1. Introduction

As more people consume meals outside home, the foodservice industry continues to grow in the U.S. and Canada. With increased competition and a wide variety of products or services offered by restaurants in each country, identifying and comparing the key elements of the marketing strategy could shed light on similarities and differences between the two markets. Restaurant businesses considering crossing the border in either direction might consider information found on restaurant menus to help identify appropriate marketing strategies for entering a foreign market. Menu is considered to be the single most important marketing tool used to promote the sale of restaurant products (Kershaw, 2009). Once it is viewed by the guest, it can directly influence not only what they will order, but ultimately how much they will spend (Wansink, 2005). Restaurants have increasingly become aware of the importance of proper menu design and its power on every aspect of the organization. Therefore, it is not uncommon for the menu to be regularly examined, changed, and improved as it is a key focal point of foodservice operations.

While the US and Canada offer each other attractive foreign market opportunities, there remain considerable risks in adapting a marketing strategy to a foreign environment. Many successful businesses in their home markets have failed to adapt to what appears to be a nearby, friendly market with a free-trade agreement. For example, successful American retail chains such as Target (Dahlhoff, 2015), Best Buy and Big Lots (La Monica, 2015) have failed in their expansion into Canada. American restaurant chains such as Chi Chi's, Ben & Jerry's and Fudruckers also failed in Canada (FGH International, 2017). According to this source, Wendy's, Taco Bell and Burger King struggle to maintain reasonable market shares while McDonald's has made operational adaptations to the Canadian market by offering *poutine* (a regional dish of Quebec) on their menus. Tim Horton's, a historically Canadian-based chain, has also struggled when entering the U.S. market (Kopun, 2014).

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In our exploratory study of 111 restaurant menus on both sides of the border, we analyze 13 features of the restaurants marketing strategies, largely found on menus, with the intention of identifying geographically-based marketing strategies. We hope that both our approach to studying the market and our findings provide useful ideas for restaurants considering initial entry into a foreign country and the importance of a rigorous examination of both the similarities and differences between markets.

## **2. Literature Review**

Although comparing restaurant menus, as a means of understanding international differences in foodservice product-markets, is not a widely conducted type of research, a similar study by Heroux (2002) found more similarities than differences between the United States and Canada. Ferley (1999) explored similarities and differences in the culture of Canadians and Americans as far as how these differences were reflected in the consumption of foodservice related products. There were similar patterns in the consumption of fresh vegetables, ketchup, and vinegar. However, Americans consumed greater quantities of bottled water, iced tea, sparkling water, root beer, sport drinks, table syrup, toaster products, and hot sauces. Canadians, on the other hand, consumed greater quantities of wine, and dined out less often than Americans.

The Business Development Bank of Canada (2013) identified rising health awareness as a consumer trend in Canada. Their study indicated that the aging Canadian population is becoming more aware of healthy choices in food and other products, and are willing to pay a premium for healthy products. Garbinski (2015) suggests that Canadians do not just enjoy better tasting food, but they also enjoy a healthier diet. They have a penchant for real versus processed food, and even a small restaurant will serve homemade soups and entrees and use fresh toppings, nothing frozen or canned. According to FHGI, a Canadian-based boutique consulting firm specializing in foodservice, franchise and hospitality industries, the failure of successful American restaurants chains when they establish operations in Canada is largely due to differences in consumer preferences. Canadians demand higher quality ingredients and healthier foods than Americans. As similar as the two cultures may be, there are differences in the restaurant industry in four areas: taste, operating costs, tax, and marketing boards controlling market prices (e.g., wine and alcohol). The three latter factors contribute to higher cost structures which translate to higher prices in the restaurant industry in Canada.

For the purposes of this study we are primarily concerned with similarities and differences related to taste and market preferences and will omit further discussion of regulatory and operational issues. Our research question is whether similarities and differences in restaurant marketing strategies can provide useful insights for restaurant operators seeking to cross the US-Canadian border.

### **2.1 Marketing Strategy and Restaurant Menus**

The menu is the single most important marketing tool that a restaurant can use to guide customers and influence their selection making (Kershaw, 2009). Heimann (2011) asserts that a menu can be a marketing tool, a branding opportunity, an indicator of cuisine, and a barometer of taste. Tangible and intangible aspects of the menu affect customers' perceptions of their restaurant experience (Wansink, 2005). Hansen (2005) claims that the primary product of restaurant is a meal-experience, and it is constituted by many components such as food, beverages, atmosphere, social factors, and management. Consumer-driven menu engineering is associated with all aspects of marketing strategy.

In a study by Rausyan (2011) menu design elements such as cover, size, item descriptions, font style, and pictures all had a significant effect on customers purchase intention, with quality of the menu cover being the most influential factor. Creative and attractive menu design also directs customers' attention to the items that the restaurant wishes to feature by placing items in sweet spots that attract the focus of customers (Yang, 2012). Menu items with attractive names and descriptions provide important cues, aimed at enticing the consumer and highlighting the characteristics of the product (McCall, 2008; Shoemaker, 2005). Lockyer (2006) evidence that complex descriptions and wording combined with sensory characteristics of menu items significantly influence the customers' menu item preferences and perceptions. The perceived attractiveness of menu items may favorably influence the actual consumption experience.

Menu planning has broader implications than the specific item selections of consumers. From an operations perspective, menu design encompasses consideration of what will be produced, what type of equipment and ingredients are needed, and which qualifications employees should have to prepare and serve products.

Therefore, selecting menu items with respect to sales forecasting, cost and profit analysis, consistent quality, minimization of service failures, and assuring food safety are all essential components of management control aspects that must be built into menu design. According to Taylor (2007) managers must be able to evaluate menu items based on labor attributes assessing all of the steps in the food flow, from ordering and receiving of ingredients to the final production and plating. The viability of restaurants marketing strategies must be built into menu planning and design for paper/hard-copy menus, online menus, and account for drink menus, table tents, and menu boards (Rapp, 2013).

Menu planning must be done on a regular basis to accommodate changes in consumer demands, economic conditions, competition, and suppliers. A process for developing new menu items, or menu innovation, is a significant aspect of menu planning. A study by Amjadi (2015) concludes that a few minor changes on a menu greatly affected purchasing behavior of consumers and in some instances was linked to two-fold increases in restaurant earnings. Changes to the menu may appeal to one group of customers while alienating another. Glanz(2007) emphasized that changing menu's content is an important component of menu planning, and their study revealed that the major criteria of menu changes are whether the new menu item will attract new customers or maintain the existing customer base, and how it will affect sales and profit.

In both the US and Canada health trends are becoming an increasingly important aspect of menu planning, even in quick service segment(DiPietro, 2004). It is of great importance that restaurateurs include nutritional information, appealing food pictures, and health symbols to provide customers with the information they require (Musiker, 2014). Roberto (2014) states that accurate and easy-to-understand nutrition labeling should be printed on restaurant menus as an important strategy for restaurants to educate consumers about food's nutritional content, portion size awareness, and to motivate them to make healthier choices. Thilmany (2004) provides evidence that consumers are increasingly concerned with the origin of their food willing to pay more for locally grown products. As consumers become more knowledgeable about nutrition and even farming practices, menu planning and design has become more challenging, impacting the search, selection, preparation, and promotion of healthy menu options.

### **3. Purpose of the Study**

The purpose of this study is to examine restaurant menus in the US and Canada to further our understanding of marketing strategy similarities and differences. In one of the most important bi-lateral trading relationships in the world, substantial economic integration and cross-border traffic is found in the region spanning Quebec, New York, and Vermont Church and Heroux, 1999). The importance of this trading relationship justifies efforts to gain a nuanced understanding of the challenges that restaurants face when crossing the border in either direction. The similarities and differences between restaurant marketing strategies may appear more obvious or more subtle in different aspects, having the potential to confound new entrants' strategy making processes.

### **4. Methodology**

Following a methodology established in a cross-border comparative study of marketing strategies of restaurants in the US and Canada (Heroux, 2002), this exploratory study examined a census of the restaurants in the contiguous regions of southwestern Quebec and northern New York/Vermont. The online Yellow Pages directory for the United States and Canada was used to identify the listed restaurants in the geographic regions along the border. Large, well-known franchises were largely omitted from the sample to focus our attention on independently owned and operated businesses that presumably have substantial control over their marketing strategy, including menu design. One consequence of this selection criterion was to greatly reduce the number of fast-food establishments in the data. The region under study included 55 restaurants located in Old Montreal (Quebec) in Canada, and 56 from the Plattsburgh (New York) and Burlington (Vermont) contiguous-region in the United States.

Our methodology focuses on collecting objective data from restaurant menus as well as one subjective observation about dining atmosphere. The data collection and recording was conducted by International Marketing students who received training on a standardized approach to data collection and entry. Students were shown how to find their assigned restaurants and gather data without disrupting business operations. Teams of three trained observers visited three establishments on each side of the US and Canadian border. The qualitative item of dining atmosphere was classification as "fast," "casual," and "fine". The three students in each team had to come to agreement on the classification of their restaurants' dining atmosphere.

We analyzed product offerings on the menus by counting the number of appetizers, soups, salads, entrees, and desserts that are offered to customers. While the count offers a quantitative dimension of the number of offerings, it also represents a qualitative breadth of choices to customers. Additionally, a greater number of appetizers and/or desserts may reflect consumer needs/wants for a longer duration meal, a more elaborate dining experience, and/or more time for socializing. We also analyzed the menus for food trends. Menus were coded, Yes or No, for explicitly identifying menu items as being healthy, vegetarian, gluten free, locally sourced, or organic. We made no attempt to verify these claims, only to account for their inclusion in the menu.

**5. Findings**

The data was analyzed in two phases using SPSS, first by comparing means between countries using an independent samples T-test and then by a forward-step logistic regression of menu items against the dependent variable of country. As an exploratory study, statistical significance was evaluated at a 90% confidence level. Significant differences in the means are shown for all restaurants, a subset of casual restaurants, and a subset of fine dining establishments (see table 1).

**Table 1: Menu Content Comparison in the US and Canada**

All Restaurants					Sig. difference 2-tailed	Casual Dining Restaurants			Sig. difference 2-tailed	Fine Dining Restaurants			Sig. difference 2-tailed
Menu feature	Country	N	Mean	Std. Dev.		N	Mean	Std. Dev.		N	Mean	Std. Dev.	
Atmosphere	USA	56	2.07	0.53	<b>.000</b>	40				10			
	CAN	55	2.59	0.56		18				34			
Take out available	USA	56	0.80	0.40	<b>.000</b>	40	0.90	0.30	<b>.030</b>	10	0.30	0.48	.973
	CAN	55	0.44	0.50		18	0.67	0.49		34	0.29	0.46	
Delivery available	USA	56	0.25	0.44	<b>.054</b>	40	0.25	0.44	<b>.083</b>	10	0.00	0.00	.266
	CAN	55	0.11	0.31		18	0.06	0.24		34	0.12	0.33	
Appetizer selections	USA	56	10.02	7.18	<b>.070</b>	40	9.85	7.65	.283	10	10.80	6.07	.201
	CAN	55	7.73	5.96		18	7.83	5.95		34	7.88	5.99	
Soup selections	USA	54	2.19	2.11	<b>.009</b>	38	2.24	2.05	.264	10	2.20	2.44	.177
	CAN	52	1.25	1.44		18	1.67	1.61		31	1.03	1.35	
Salad selections	USA	56	4.07	3.07	.229	40	4.50	3.06	.942	10	2.50	1.90	.686
	CAN	55	3.44	2.42		18	4.56	2.45		34	2.79	2.27	
Entrée selections	USA	55	28.80	21.41	<b>.003</b>	39	29.56	19.81	<b>.091</b>	10	15.90	11.69	.628
	CAN	55	18.75	11.96		18	21.14	8.81		34	18.06	13.65	
Dessert selections	USA	52	4.17	5.02	.786	37	4.70	5.46	.907	9	3.44	3.91	.766
	CAN	54	3.94	3.43		18	4.56	3.75		33	3.88	3.30	
Health section	USA	56	0.30	0.46	<b>.058</b>	40	0.35	0.48	<b>.017</b>	10	0.20	0.42	.881
	CAN	55	0.15	0.40		18	0.06	0.24		34	0.18	0.46	
Vegetarian symbol	USA	55	0.16	0.37	.257	39	0.18	0.39	.519	10	0.10	0.32	.710
	CAN	55	0.09	0.29		18	0.11	0.32		34	0.06	0.24	
Gluten free symbol	USA	55	0.15	0.36	.225	39	0.13	0.34	.858	10	0.10	0.32	.710
	CAN	55	0.07	0.26		18	0.11	0.32		34	0.06	0.24	
Locally grown symbol	USA	55	0.42	0.50	<b>.001</b>	39	0.36	0.49	<b>.015</b>	10	0.70	0.48	<b>.011</b>
	CAN	55	0.15	0.36		18	0.06	0.24		34	0.21	0.41	
Organic symbol	USA	56	0.20	0.40	.480	40	0.20	0.41	.165	10	0.30	0.48	.585
	CAN	55	0.15	0.36		18	0.06	0.24		34	0.21	0.41	

The differences in mean scores between all the restaurants on either side of the border were surprisingly high, which is at odds with previous findings that many similarities will be evident. Further analysis suggested that these differences may be related to dining atmosphere. We find that fine dining was more prevalent in Canada than the US (34 compared to 10) and that casual dining was more prevalent in the US (40 compared to 18) and disaggregated the data accordingly. The number of significant differences between means is greatly reduced from all restaurants (8 of 13), to 5 out of 12 menu items in the casual dining segment, and only 1 out of 12 items in the fine dining restaurants. While the markets may differ substantially in terms of atmosphere, similarities in the markets seem to be more prevalent in fine dining establishments and less prevalent in casual dining establishments.

The only significant difference in the fine dining restaurants is that in the US there is a significantly larger identification of locally sourced foods, 70% in the US compared to 21% in Canada ( $\alpha$  .011). Differences are more pronounced in the casual dining segment. We find that 90% of casual restaurants in the US offer take-out compared to 67% in Canada ( $\alpha$  .03) and 25% of casual restaurants in the US offer delivery compared with 6% in Canada ( $\alpha$  .083). Menu selection and number of items offered is similar in both countries with the exception of entrees where the casual restaurants in the US offer an average of 29.56 options compared to 21.14 in Canada ( $\alpha$  .091). In casual US restaurants, 35% offer a section identifying healthy foods compared with 6% in Canada ( $\alpha$  .017). In casual US restaurants 36% identified foods as locally sourced compared to 6% in Canada ( $\alpha$  .015).

In an attempt to more succinctly capture the similarities and differences in marketing strategies between the two countries, we performed a logistic regression analysis. The binary nature of the dependent variable, US or Canada, called for logistic regression (Tabachnick and Fidell 2001). All 13 items were regressed in the equation and 102 cases or 91.9% of the sample was analyzed (see table 2).

Unweighted Cases <sup>a</sup>		N	Percent
Selected Cases	Included in Analysis	102	91.9
	Missing Cases	9	8.1
	Total	111	100.0
Unselected Cases		0	.0
Total		111	100.0
a. If weight is in effect, see classification table for the total number of cases.			

Based on our literature review and our analysis of means-differences, we used forward-step regression to include only the items in the regression model that provide a better explanation of which country the menu targets. Menu items are added to the model until the next item added no further explanatory value, in this case that happened after the 4th menu item. At the fourth step the Nagelkerke R Square value reached .485, and was not significantly improved in the subsequent step (see table 3). The Omnibus Tests of Model Coefficients shows that the 4th step was significant, that the block of 4 variables are significant, and that the model is significant (see table 4). Finally, the Hosmer and Lemeshow Test's insignificant Chi-square statistic suggests acceptable goodness of fit (see table 5).

Step	-2 Log likelihood	Cox & Snell R Square	Nagelkerke R Square
4	95.285 <sup>b</sup>	.363	.485
a. Estimation terminated at iteration number 4 because parameter estimates changed by less than .001.			
b. Estimation terminated at iteration number 5 because parameter estimates changed by less than .001.			

**Table 4: Omnibus Tests of Model Coefficients**

		Chi-square	df	Sig.
Step 4	Step	4.428	1	.035
	Block	46.078	4	.000
	Model	46.078	4	.000

Step	Chi-square	df	Sig.
4	8.834	8	.357

The forward-step regression added four items that were correlated with county and did not add the remaining nine items that did not correlate with country. By using these four variables in conjunction, the model accurately predicts whether a menu is from the US or Canada 76.5% of the time. These variables classified 35 of 50 US restaurants and 43 of 52 Canadian restaurants correctly (see table 6).

**Table 6: Classification Table<sup>a</sup>**

		Observed	Predicted		Percentage Correct
			country		
			USA	Canada	
Step 8	country	USA	35	15	70.0
		Canada	9	43	82.7
	Overall Percentage				

a. The cut value is .500

The four variables of Atmosphere, Number of Soups, Number of Entrées, and Locally Sourced when placed together provide our best indicators of country targeted by the menu. A casual atmosphere, more soup offerings, more entrée offerings, and more items identified as locally sourced would correctly indicate that the restaurant is from the US 76% of the time. Restaurant atmosphere remains the most influential difference between the markets (Exp(b) 5.635). By this analysis we observe that 9 of the items could be classified as similarities between the two markets and 4 would be differences (see table 7).

		B	S.E.	Wald	df	Sig.	Exp(B)
Step 4 <sup>d</sup>	Atmosphere (casual/fine)	1.729	.496	12.139	1	.000	5.635
	Number of soups	-.281	.142	3.935	1	.047	.755
	Number of entrées	-.038	.018	4.586	1	.032	.963
	Locally sourced	-2.557	.669	14.590	1	.000	.078
	Constant	-1.881	1.228	2.348	1	.125	.152
a. Variable(s) entered on step 1: atmosph.							
b. Variable(s) entered on step 2: localgrow.							
c. Variable(s) entered on step 3: entrée.							
d. Variable(s) entered on step 4: soup.							

**6. Discussion and Implications**

Our anticipation that the marketing strategies of restaurants in the two markets would have similarities and differences were supported by the data, 9 similarities and 4 differences were found in the logistic regression analysis. There is a major difference in restaurant atmospheres (casual and fine) that may create some confusion in analyzing market similarities and differences. The greater number of fine-dining establishments in the data, and restaurant populations, says a lot about the differences in the markets that could be misinterpreted. While there are more fine dining restaurants in Canada, it appears that the fine dining has substantial similarities with US fine dining establishments.

We found 9 of 13 similarities in the logistic regression analysis of all restaurants, but 11 of 12 similarities found in fine dining restaurants in the means-differences analysis. Similarities seem to be most prevalent in fine dining. Fine dining similarities in the two countries may reflect more universal ideas or expectations about what constitutes a fine dining experience. These ideas and expectations about fine dining may go back to a European influence shared by both countries. In the US there may be fewer fine dining offerings, but when a restaurant offers fine dining it may be in accordance with a more universal standard.

While our data does not speak specifically to the underlying forces driving menu design, we surmise that the similarities and differences between the markets are not isolated to strictly bi-lateral forces.

We found 4 of 13 differences in the logistic regression, but 5 of 13 in means-differences analysis of casual restaurants. It appears that many of the differences in marketing strategies may be isolated in the casual dining segments. There may be a generally broader notion of what is appropriate in the casual dining sector, less of universal standard, and more room for innovation. The casual dining restaurants in the US offer significantly more take-out and delivery options for their customers while the Canadian restaurants are more oriented toward in-restaurant dining. The casual restaurants in the US offer significantly more entrée selections, more healthy options, more locally-sourced items. These differences suggest that the US restaurants are more accommodating of different service preferences, offer more selections, and more focus on health or food trends. These factors may suggest greater efforts to satisfy different needs and wants in the market, perhaps suggesting more market diversity in the US than in Canada.

## 7. Limitations and Future Research

This comparative exploratory study used a census of the restaurants in one limited geographic area of one cross-border region of the United States and Canada. As a result, the sample size is limited, and generalization of the results should be undertaken with caution. Future research could extend the scope to include more cross-border regions of both countries to increase generalization of the findings. In addition, instead of sampling through a census of restaurants in two cross-border regions, sampling could be done by pairing similar restaurants in each region for comparison, although the overall restaurant profile differences found in this research would be lost with this methodology.

## 8. Conclusion

This study of menus in two countries to examine marketing strategy similarities and differences was designed to provide greater insights into the nuances of foreign market entry. Restaurants, diets, and dining rituals offer compelling and accessible information about important aspects of national culture, consumption patterns, and marketing strategies. We used menus because of their strong representation of marketing strategy. We used our data to show that sometimes apparent similarities and differences can be deceiving. We hope that our attention to this issue and efforts to develop research methods to examine these issues, while exploratory, are useful to researchers and practitioners.

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