

# Barriers and opportunities for out of home food waste

Appendix – QSRs



# Introduction

- The slides in this pack present key results from a survey conducted as part of the WRAP research study on out of home food waste prevention.
- The survey was conducted via ICM's online panel on behalf of Brook Lyndhurst and WRAP.
- A total of 1,103 individuals were asked about their experiences the last time they ate at a Quick Service Restaurant; the results are based on the answers given by those individuals.
- Respondents were separated into two broad groups:
  - People who reported having not finished eating their meal on the occasion in question were classified as '**meal leavers**'.
  - People who reported not having left any food at the end of their dining experience were classified as '**non-meal leavers**'.
- As with any survey, the results are subject to statistical limitations, but the results presented give a powerful initial insight into who wastes food when eating out at a QSR; why; and what might be done about it.

# Guide to the slides

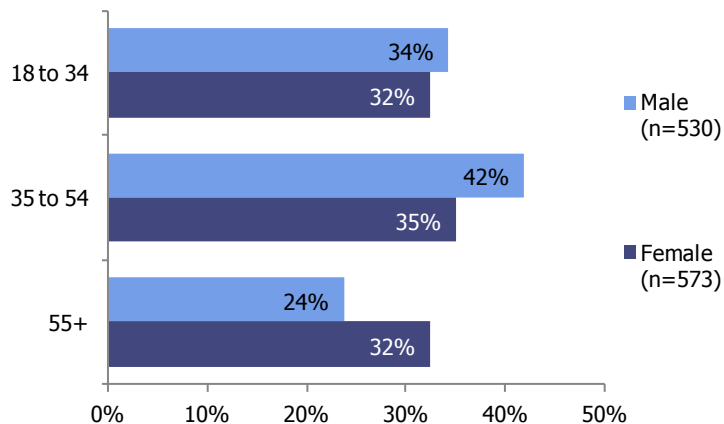
- **Slides 5, 6 and 7** present characteristics of the survey respondents who had eaten in a QSR and of the occasion to which their answers referred;
  - **Slides 8 to 14** focus on 'meal leavers' – who they are, what food they left, and why;
  - **Slides 15 to 21** present findings on the attitudes towards food waste of all the survey respondents, together with suggestions from respondents on what might be done to reduce food waste; and
  - **Slide 22**, finally, presents key points from across the findings.
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- The charts and tables in the slides follow a common format, so that:
    - Where there is a particularly noteworthy finding in a chart or a table, the relevant figure(s) have been circled in red;
    - Where there is a statistically significant difference between meal leavers and non-meal leavers at the 5% risk level (95% confidence interval), this is highlighted in charts and tables using `\*`;
    - Where a `Q` is followed by a letter (e.g. QE) or number (e.g. Q1) this refers to the specific question in the online questionnaire;
    - Irrelevant responses with low percentages (e.g. 'don't know' or 'not applicable') have been removed. This means that percentages for a single code question may not always add up to 100% or that counts/frequency do not add up to the base shown;
    - Due to rounding and weighting the counts may not always exactly add up to the base shown;
    - Analysis that drew from questions that were not prompted (i.e. open-ended) are marked; and
    - Where different bases are used this is highlighted in a footnote on the slide.

# Statistical notes

- The achieved sample for QSR eaters (1,103) was weighted to make it representative of the UK population known to eat in QSRs.
- The effective base tells us the impact of the weights on our sample. The effective base for this sample is 460.
- The weighting efficiency is the ratio of the effective base to the sample. The weighting efficiency for this sample is 41.7%.
- The range of weighting factors on this sample was 0.06 to 6.23.
- Margins of errors at a 95% confidence interval express the amount of random sampling error in a survey's result. The larger the margin of error, the less confidence one should have that the reported results are close to the 'true' values for the whole population. There is a 95% chance that the true value lies within the range given.
- In the most strict sense margins of errors should only be applied to randomly selected samples that are nationally representative. Below we list some examples of applying margins of errors to this sample.
  - When looking at a proportion of the total sample of QSR eaters (1,103) a response at 50% has a margin of error of  $\pm 2.95\%$  while a response at 10% has a margin of error of  $\pm 1.77\%$  for a 95% confidence level;
  - When looking at a proportion of the QSR meal leavers sample (197) a response at 50% has a margin of error of  $\pm 6.98\%$  while a response at 10% has a margin of error of  $\pm 4.19\%$  for a 95% confidence level;
  - When looking at a proportion of QSR non-meal leavers sample (906) a response at 50% has a margin of error of  $\pm 3.26\%$  while a response at 10% has a margin of error of  $\pm 1.95\%$  for a 95% confidence level.

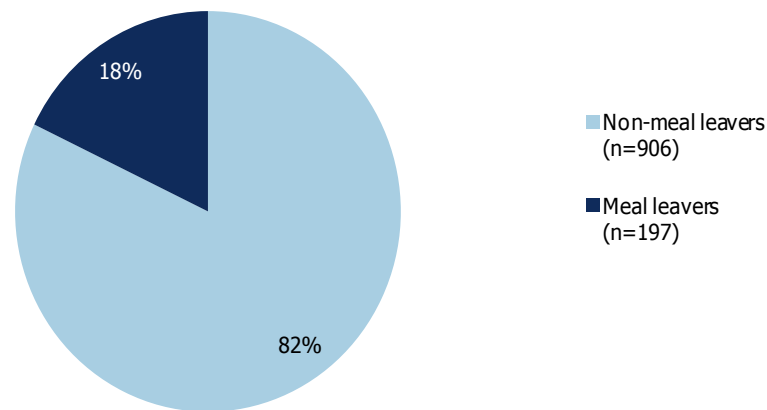
# Who eats in QSRs?

**Age and gender profile**



Base: All respondents (1,103)

**Proportion of meal leavers**

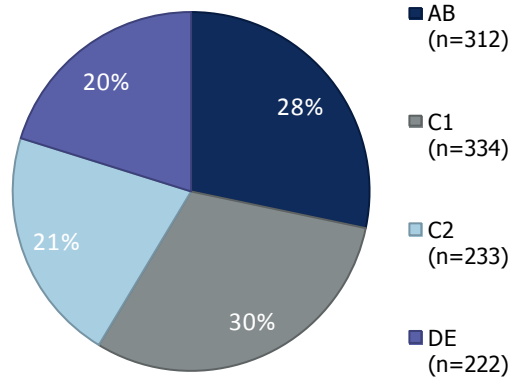


Base: All respondents (1,103)

- 52% of those who ate in QSRs were women
- Three quarters of men who ate in QSRs were under 55
- 18% of QSR eaters were meal leavers

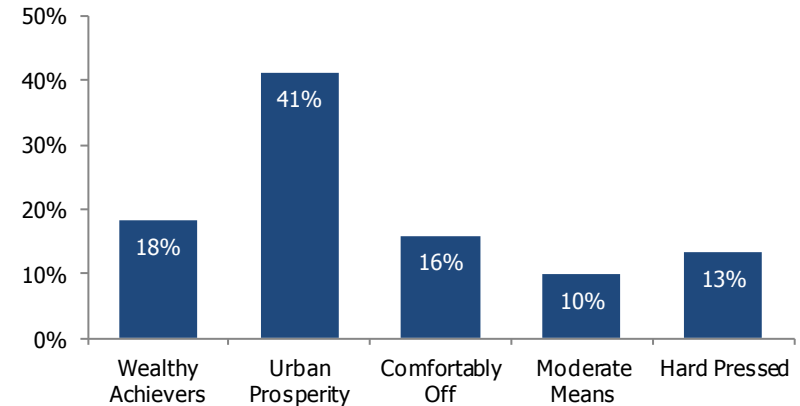
# Who eats in QSRs?

**Social grade**



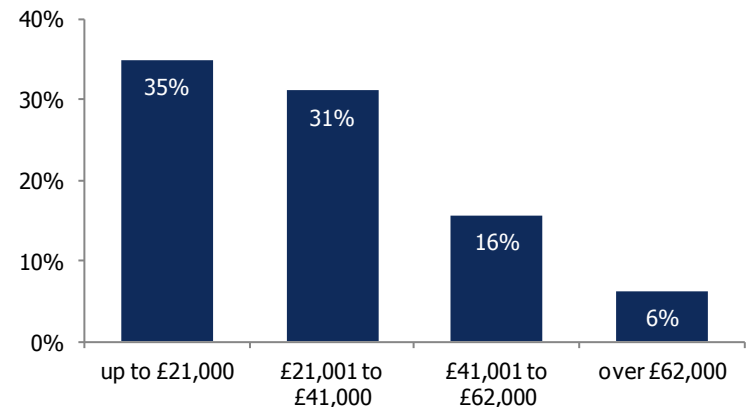
Base: All respondents (1,103)

**Acorn classification**



Base: All respondents (1,103)

**Household income**



Base: All respondents (1,103)

- 58% of QSR customers are from a higher social grade (AB, C1);
- This is echoed by the Acorn classification: 59% of QSR diners are 'Wealthy Achievers' or 'Urban Prosperous';
- 67% of QSR customers have an income lower than £41,000.

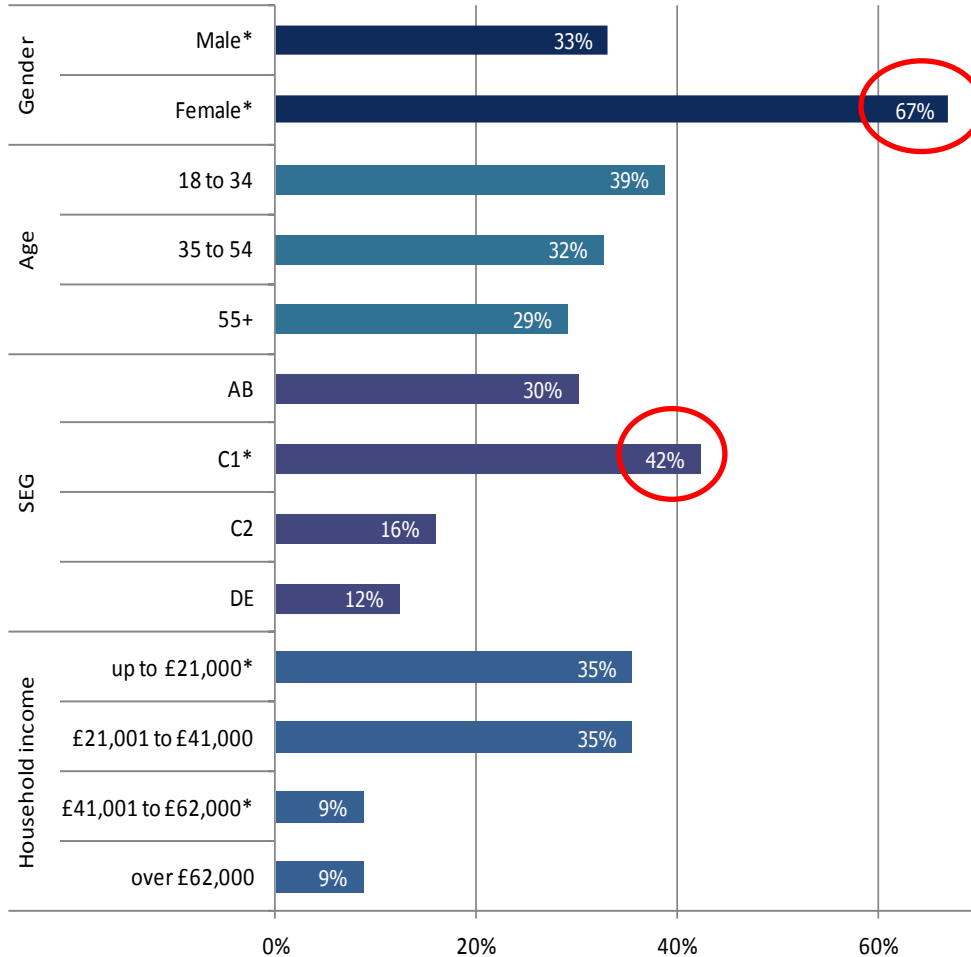
# Eating out experience

Base: 1,103 (All respondents)	Frequency	%
<b>QE. Date of eating out occasion</b>		
In the last week	490	44%
In the last 2 weeks	268	24%
Between 2 weeks and a month ago	206	19%
Between 1 to 2 months ago	106	10%
<b>QF. Description of the outlet</b>		
Fast food outlet	684	62%
Cafe	253	23%
Casual dining restaurant	154	14%
<b>Q1. Type of meal</b>		
Lunch	619	56%
Evening meal	205	19%
Other daytime meal or snack	180	16%
<b>Q7. Have they eaten there before?</b>		
Yes - this restaurant/outlet	790	72%
Yes - another one in the same chain	199	18%
<b>Q8. Familiarity with the menu</b>		
Very	375	34%
Quite	543	49%
Not very	132	12%

- 44% of QSR eaters ate out in the last week;
- Most described the QSR they ate in as a fast food outlet;
- They mainly ate lunch at the QSR;
- Familiarity with QSRs was very high. 90% had been to the same QSR or one of the same chain before, and 83% were familiar with the menu.

Percentages less than 10% of the total base (1,103) are not displayed

# Profile of people who leave food in QSRs

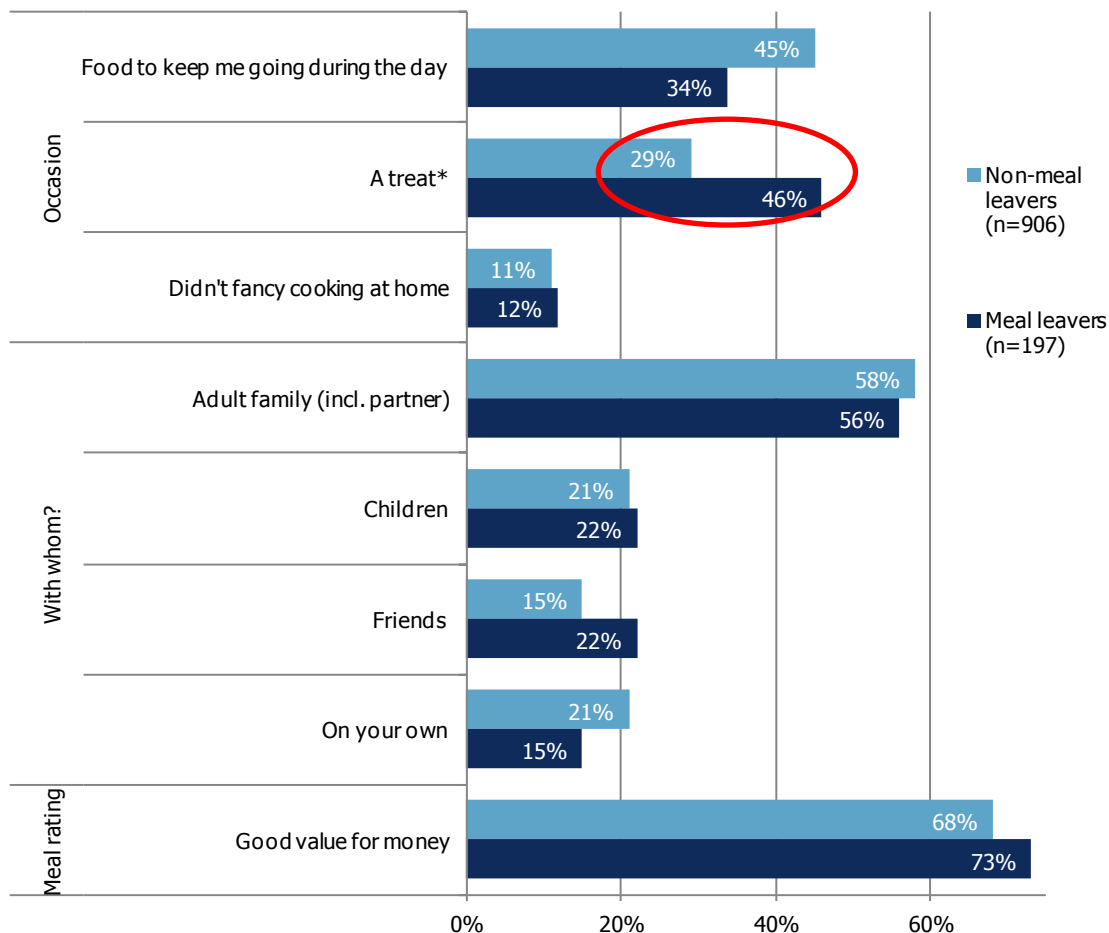


This chart breaks down meal leavers in the sample by socio-demographics:

- Meal leavers in QSRs were more likely to be women than men;
- 42% of meal leavers in QSRs were from social class C1;
- Almost three quarters of those who were meal leavers in QSRs had incomes below £41,000.



# Profile of people who leave food in QSRs



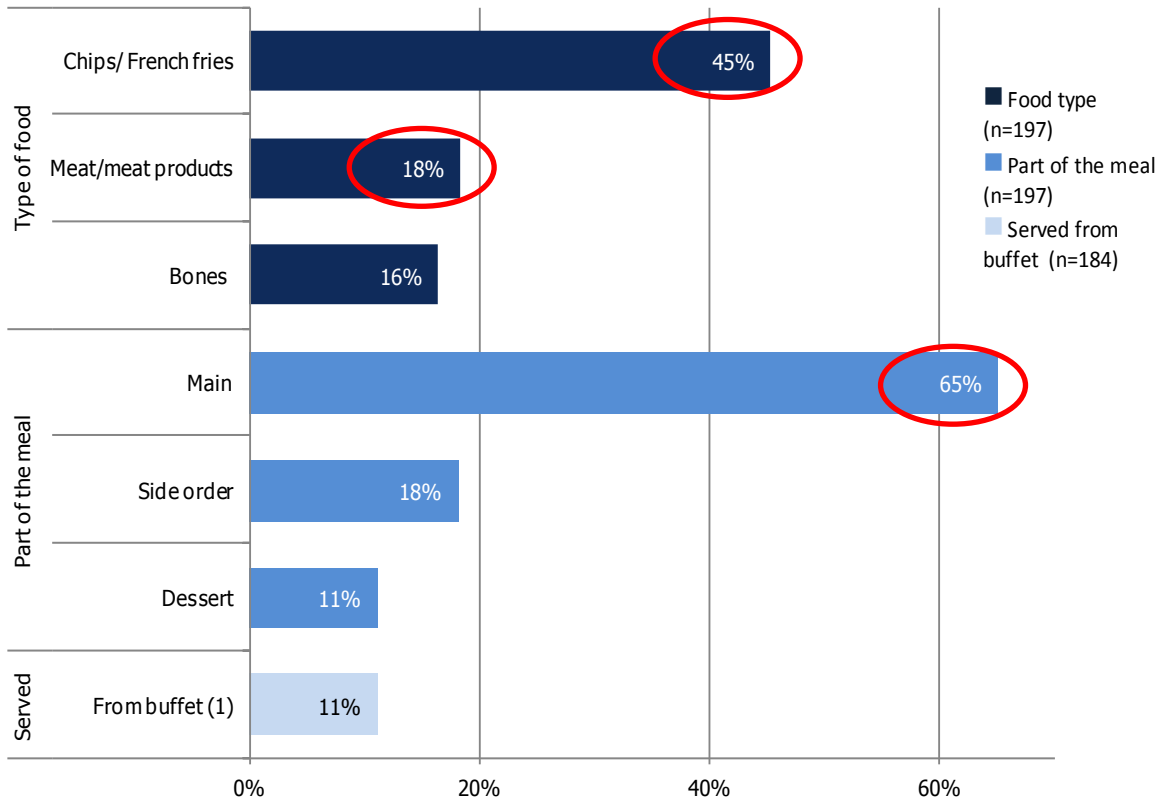
This chart breaks down both meal leavers and non-meal leavers by details of the eating out occasion:

- Those who left food when eating out in QSRs were much more likely than non-leavers to be eating at the QSR for a treat (47% v 29%);
- In all other respects, there were few differences between meal leavers and non-meal leavers in QSRs.

This chart shows a selection of variables for which the response is greater than 10% of the total base (1,103)

# Food left in QSRs

% of meal leavers who left:

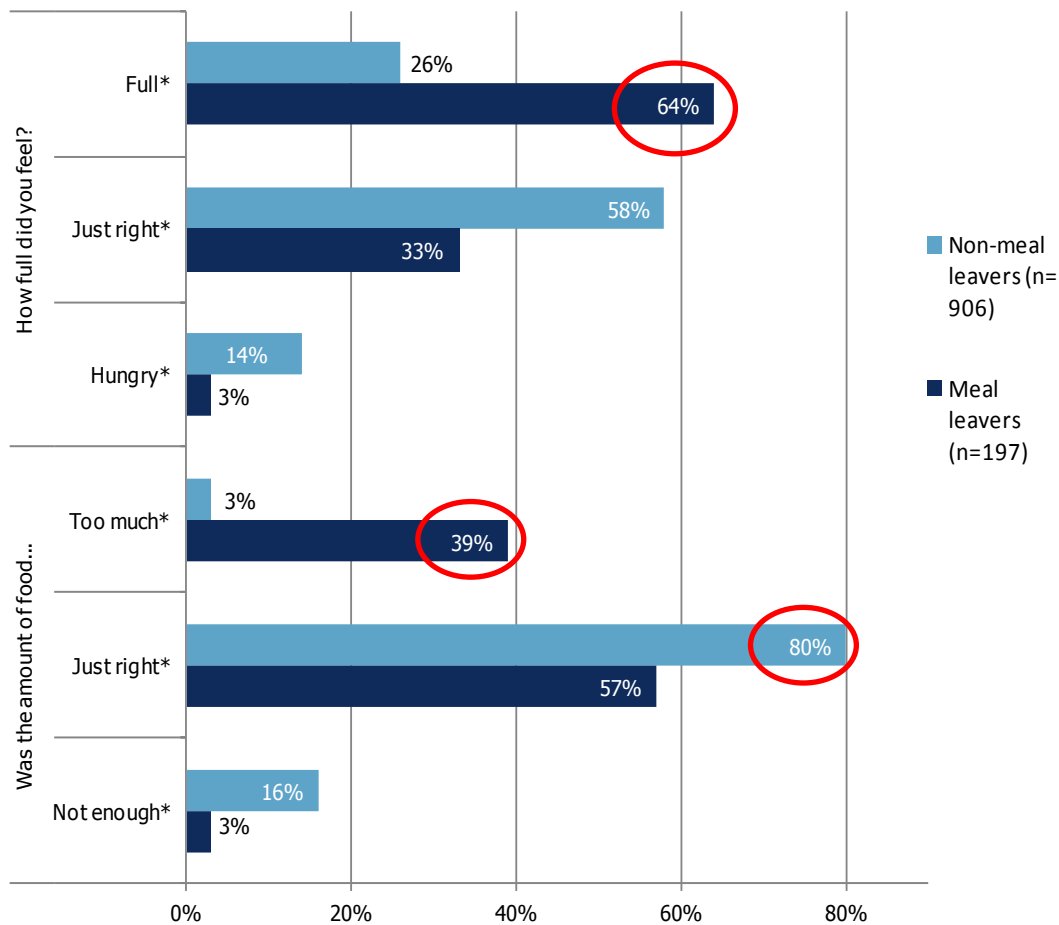


- Chips and French fries were the most left foods in QSRs, with nearly half (45%) of meal leavers failing to finish them;
- Meat and meat products were also commonly wasted in QSRs (18%);
- 65% of meal leavers left food from the main part of their meal.

Percentages less than 10% are not displayed

(1) Base for this specific question is all meal leavers who served themselves from a buffet or a counter and all meal leavers who cited a type of food left at Q29.

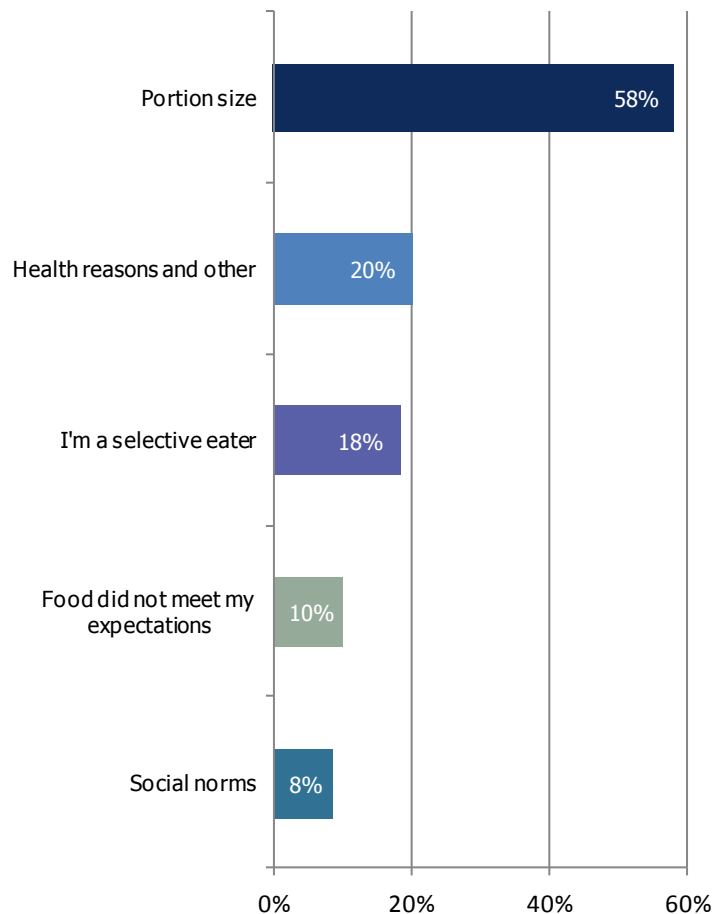
# How full are you after a QSR meal?



➤ Most (64%) of meal leavers felt full at the end of the meal while just a third felt just right;

➤ While most non-meal leavers (80%) found their meal just the right size, over a third (39%) of meal leavers found it too much.

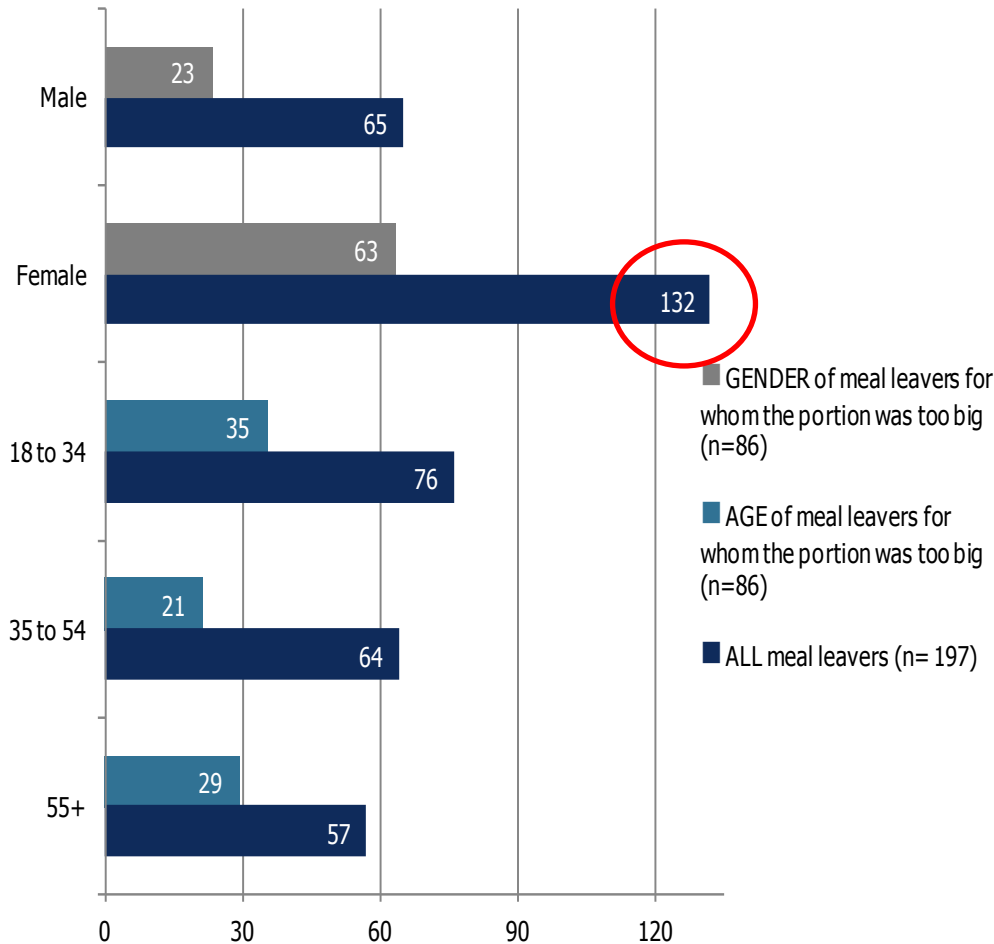
# Reasons given for leaving food



Base: All meal leavers (n= 197)

Base: 197 (All meal leavers) Q32 multicode		%
<b>Portion size</b>		<b>58%</b>
The portion was too big		45%
Full (unspecified)		6%
I ordered/served myself too much		6%
Food proportions wrong		2%
<b>Health reasons and other</b>		<b>20%</b>
I'm watching my weight		12%
Inedible		7%
Didn't have enough time		1%
<b>I'm a selective eater</b>		<b>18%</b>
I left things I didn't like		12%
I didn't like the taste		5%
I am a fussy eater		3%
<b>Social norms</b>		<b>8%</b>
It's normal to leave a bit of food		6%
I didn't want to appear greedy		1%
Other people left their food		1%
<b>Food did not meet my expectations</b>		<b>10%</b>
Food was poor quality		5%
Food was badly cooked		5%
The food was/went cold		3%

# Who finds the portions too big?



This chart [which shows actual numbers rather than percentages] shows that:

- Women account for around two thirds of meal leavers in QSRs, and around three quarters of those who waste food and find the portions too big;
- In terms of age bands, all groups show a roughly similar likelihood of being a meal leaver and of finding the portions too large.

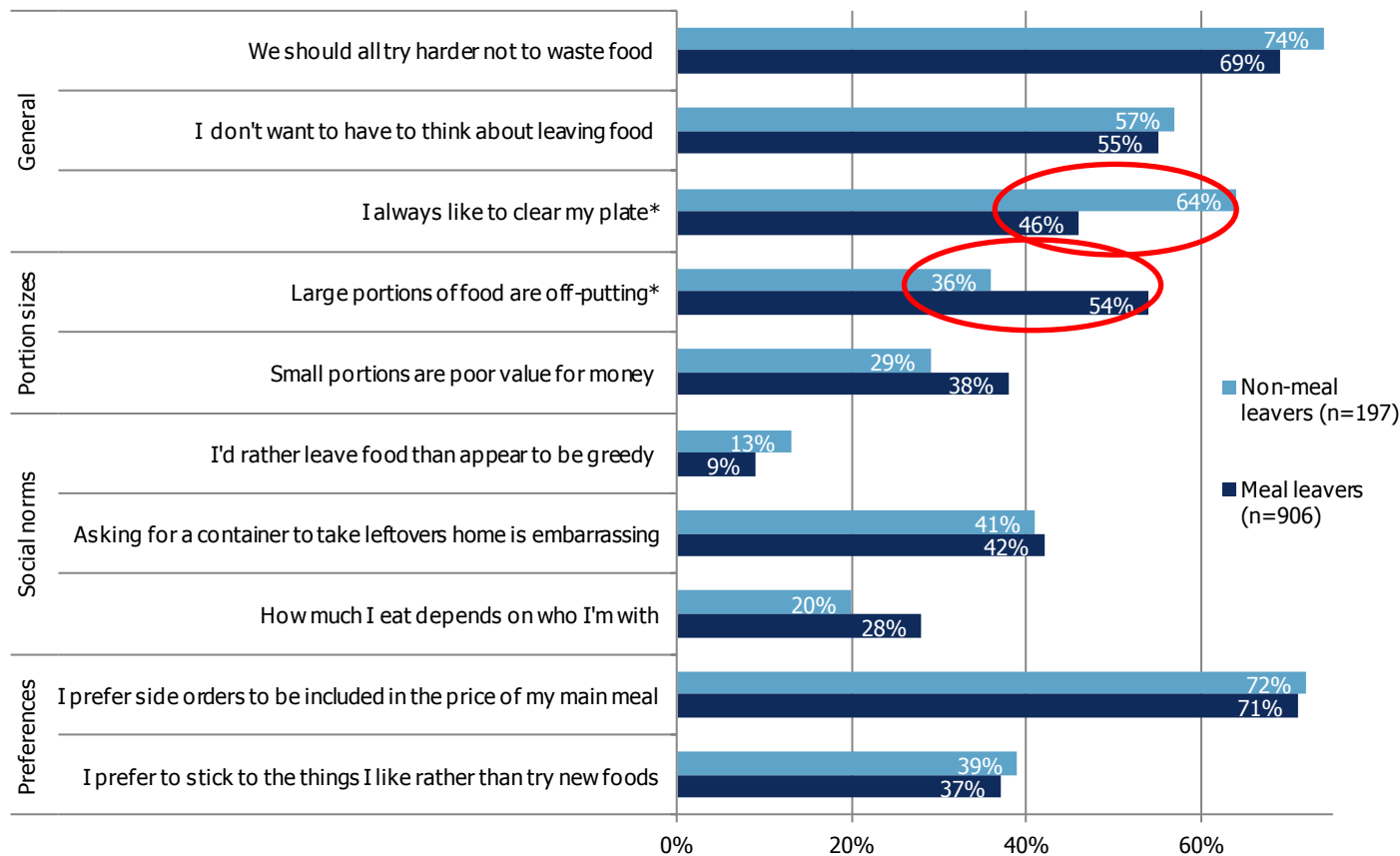
NB: Sample of those who found the portions too big includes a small number of individuals who wasted drinks rather than food

# How are portion sizes experienced?

Base: 1,103 (All respondents) % of respondents who have done/agree with the following:	Total	Meal leavers (n = 197)	Non-meal leavers (n=906)
<b>Q42. General behaviours</b>			
Ever asked for advice on portion size	28%	36%	26%
Ever asked for a smaller portion*	32%	41%	30%
Ever asked to have a starter as a main meal*	42%	55%	40%
<b>Q12. When ordered-this occasion:</b>			
Knew what size the portion was going to be	87%	81%	88%
There was a choice of portion size	57%	64%	55%
Asked for information on portion size*	3%	8%	2%
<b>Q14. Staff behaviours-this occasion:</b>			
Ask if you wanted sides or extras*	35%	49%	31%
Suggested specials	8%	8%	8%
Offer any advice on portion size	6%	5%	7%
<b>Q19. The amount of food served was:</b>			
Too much*	10%	39%	3%
Just right*	76%	57%	80%
Not enough*	14%	3%	16%
<b>Q22. At the end of the meal, you felt:</b>			
Full*	33%	64%	26%
Just right*	54%	33%	58%
Hungry*	12%	3%	14%

# Attitudes towards leaving food when eating out

% of respondents who agree with the following statements:



# Attitudes towards leaving food in general

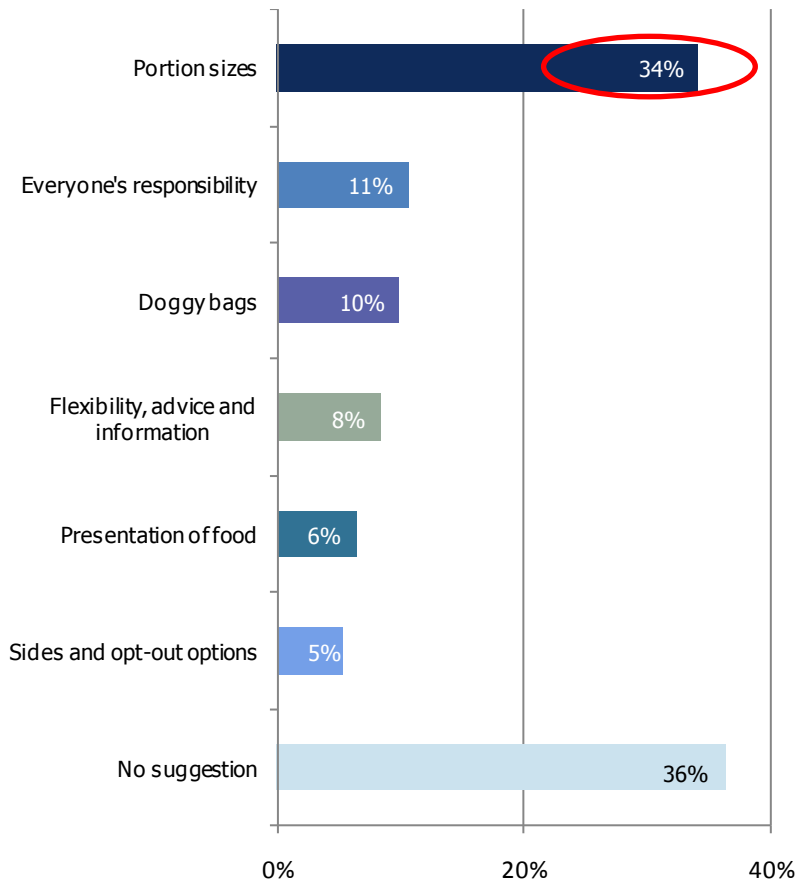
Base: 1,103 (All respondents) % of respondents that:	Total	Meal leavers (n= 197)	Non-meal leavers (n=906)
<b>Q36. Often leave food:</b>			
<b>At home</b>			
Eat a meal cooked at home	21%	28%	19%
Eat a take-away meal at home*	9%	25%	5%
<b>Out of home</b>			
Served at your table*	6%	19%	3%
From a counter/self-service	5%	19%	2%
<b>Q37. 'Bothered' if leaving food:</b>			
<b>At home</b>			
Eat a meal cooked at home	28%	28%	28%
Eat a take-away meal at home	28%	33%	27%
<b>Out of home</b>			
Served at your table	33%	35%	32%
From a counter/self-service	26%	28%	25%



# Concern about food waste

<b>Q38. Top 5 reasons for being bothered</b> % of those who said there were bothered	<b>Total (n=627)</b>	<b>Meal leavers (n=504)</b>	<b>Non-meal leavers (n=123)</b>
It's a waste of money	78%	74%	79%
It's a waste of good food*	77%	66%	80%
It makes me feel guilty	30%	30%	29%
It's bad for the environment	15%	19%	14%
It makes me look fussy	10%	6%	11%
<b>Q39. Top 5 reasons for not being bothered</b> % of those who said there weren't bothered	<b>Total (n=400)</b>	<b>Meal leavers (n=316)</b>	<b>Non-meal leavers (n=84)</b>
I'd rather leave food than eat too much	35%	38%	34%
I've paid for it so it's up to me if I want to leave some food	38%	39%	37%
Don't consider it a problem	24%	26%	24%
It's not something I think about	28%	22%	30%
If I don't like it I can't do anything about it	21%	32%	18%

# What can be done to help reduce plate waste?

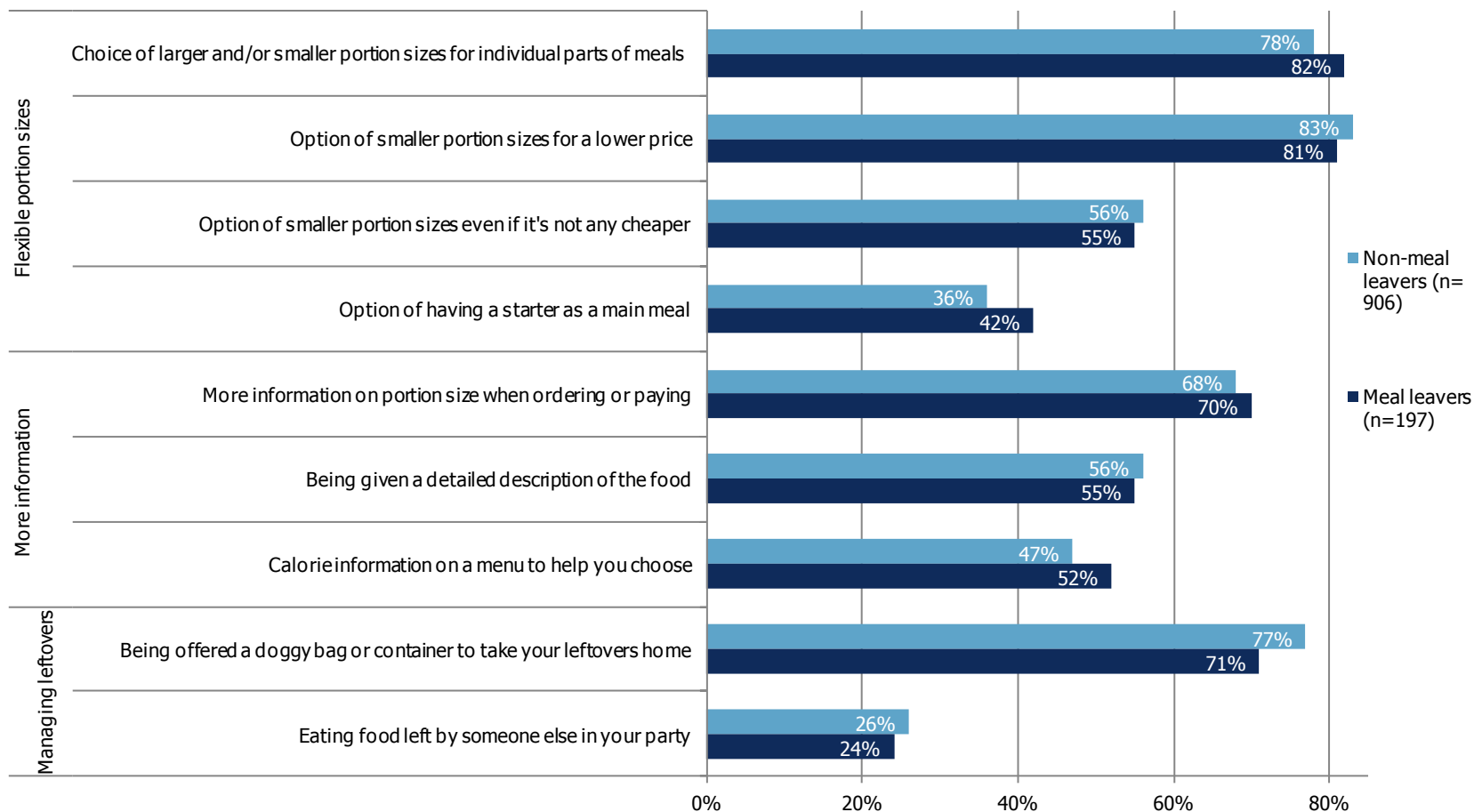


Base: All respondents (n= 1,103)

Base: 1,103 (All respondents) Q40 spontaneous response	Total	Meal leavers (n=197)	Non-meal leavers (n=906)
<b>Portion sizes</b>	<b>34%</b>	<b>45%</b>	<b>32%</b>
Offer a choice of portion sizes	15%	24%	13%
Smaller portions	14%	20%	13%
Vendor to correct portion sizing	4%	-	4%
<b>Everyone's responsibility</b>	<b>11%</b>	<b>8%</b>	<b>11%</b>
It is down to choices individual diners make	6%	6%	6%
Order less and don't overload plate	3%	2%	3%
<b>Doggy bags</b>	<b>10%</b>	<b>9%</b>	<b>10%</b>
Make doggy bags available	5%	5%	5%
Actively offer or automatically give doggy bags	5%	3%	5%
<b>Flexibility, advice and information</b>	<b>8%</b>	<b>6%</b>	<b>9%</b>
Clearer advice and description of portion sizes	6%	5%	6%
Better information/flexibility about meal components	2%	2%	2%
<b>Presentation of food</b>	<b>6%</b>	<b>5%</b>	<b>7%</b>
Change quality and presentation of the food	5%	3%	5%
<b>Sides and opt-out options</b>	<b>5%</b>	<b>3%</b>	<b>6%</b>
Offer sides (e.g. salad, chips) as optional	2%	1%	2%
Option to opt out of items more choice of sides	2%	-	3%
<b>No suggestion</b>	<b>36%</b>	<b>30%</b>	<b>38%</b>
Don't know	10%	10%	10%
Never / don't waste food	9%	5%	10%
No response/none/nothing	8%	6%	9%
Other	4%	4%	4%
Rarely waste food	3%	-	3%

# Proposed options

**% of respondents who are in favour of the following:**



(1) 26% of meal leavers are 'neither in favour nor against' against 17% of non-meal leavers. This difference is significant.

(2) Only 1% of non-meal leavers are 'strongly against' while 4% of meal leavers are strongly against.

# What do customers ask for when eating out?

Base: 1,103 (All respondents) Q42 single code % of respondents that said 'Yes' when asked 'Have you ever done any of the following?'	Total	Meal leavers (n= 197)	Non-meal leavers (n= 906)
<b>Information</b>			
Asked for a detailed description of the food	22%	24%	21%
<b>Meal options</b>			
Asked not to have part of the meal	53%	58%	52%
Asked to have a starter as a main meal*	42%	55%	40%
<b>Portion sizes</b>			
Asked for a smaller portion*	32%	41%	30%
Asked for advice on portion size when ordering	28%	36%	26%
<b>Doggy bags</b>			
Asked for a doggy bag/container to take food home	51%	57%	50%

# Behaviours and attitudes towards doggy bags

Base: 1,103 (All respondents)	Total	Meal leavers (n=197)	Non-meal leavers (n=906)
<b>Q40. Spontaneous mention of doggy bags as an option to help you waste less food</b>	10%	9%	10%
<b>Q41. In favour of being offered a doggy bag</b>	76%	71%	77%
<b>Q42. Have asked for a doggy bag to take food home</b>	51%	69%	76%
<b>Q44. Were embarrassed to ask for a doggy bag</b>	38%	37%	39%

# Key points

- The proportion of meal leavers (18%) in QSRs is lower than for all other venues, but this is still nearly one in five QSR customers.
- Two thirds of meal leavers in QSRs were women.
- Nearly half of those who wasted food left chips or French fries; nearly one in five (18%) left meat;
- 10% of all those eating at QSRs felt that their meal as a whole was too much.
- Most of those who left food in QSRs (58%) blamed the size of the portion.
- Those who left food did so despite the fact that they were more likely to have taken an interest in, or asked questions about portion size at the point of ordering.
- Nearly half of those who left food had been asked by staff if they wanted sides or extras, compared to less than a third of those who didn't leave food.
- Those who left food in QSRs may be those who left food in other places also. When compared to non-meal leavers they were more likely to say that they found large portions of food off-putting (54%) and less likely to say that they always cleared their plate when eating out (46%).
- Just over a third (34%) of QSR customers felt that reducing portion sizes would reduce plate waste in QSRs.
- Over half (57%) of QSR customers were bothered by food waste, which they saw as a waste of money (78%) and as a waste of good food (77%).