

Barriers and opportunities for out of home food waste

Appendix – Wales



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 1,366 individuals were asked about their experiences the last time they ate out in Wales; 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 in Wales; why; and what might be done about it.

Guide to the slides

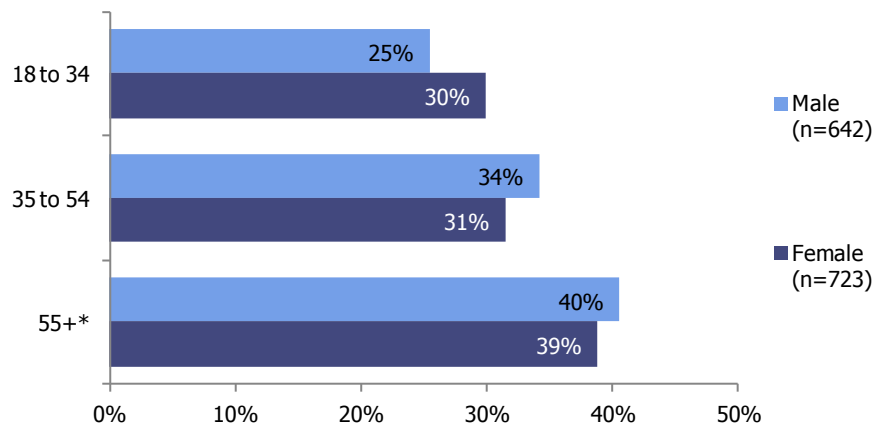
- **Slides 5, 6 and 7** present characteristics of the survey respondents who had eaten out in Wales and of the occasion to which their answers referred;
 - **Slides 8 to 14** focus on 'meal leavers' – who they are, what food they left, and why;
 - **Slides 15 to 21** present findings on the attitudes 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 of those eating out in Wales (1,366) was weighted to make it representative of the Welsh population.
- The effective base tells us the impact of the weights on our sample. The effective base for this sample is 1,093.
- The weighting efficiency is the ratio of the effective base to the sample. The weighting efficiency for this sample is 80%.
- The range of weighting factors on this sample was 0.27 to 3.9.
- 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 Welsh population eating out (1,366) a response at 50% has a margin of error of $\pm 2.65\%$ while a response at 10% has a margin of error of $\pm 1.59\%$ for a 95% confidence level.
 - When looking at a proportion of the Welsh meal leavers sample (354) a response at 50% has a margin of error of $\pm 5.21\%$ while a response at 10% has a margin of error of $\pm 3.13\%$ for a 95% confidence level.
 - When looking at a proportion of the Welsh non-meal leavers sample (1,012) a response at 50% has a margin of error of $\pm 3.08\%$ while a response at 10% has a margin of error of $\pm 1.85\%$ for a 95% confidence level.

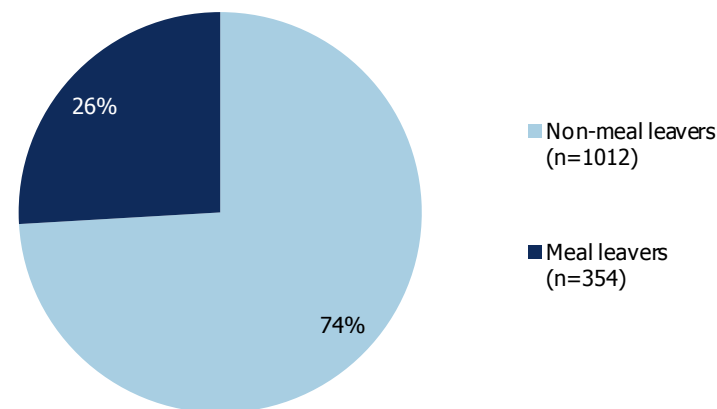
Who eats out in Wales?

Age and gender profile



Base: All respondents (1,366)

Proportion of meal leavers in Wales

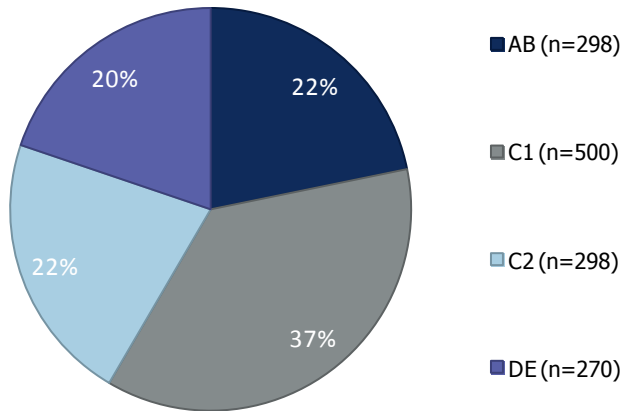


Base: All respondents (1,366)

- Of those who ate out in Wales, slightly more were women (53%) compared to men (47%);
- 26% of those living in Wales and who ate out were meal leavers.

Who eats out in Wales?

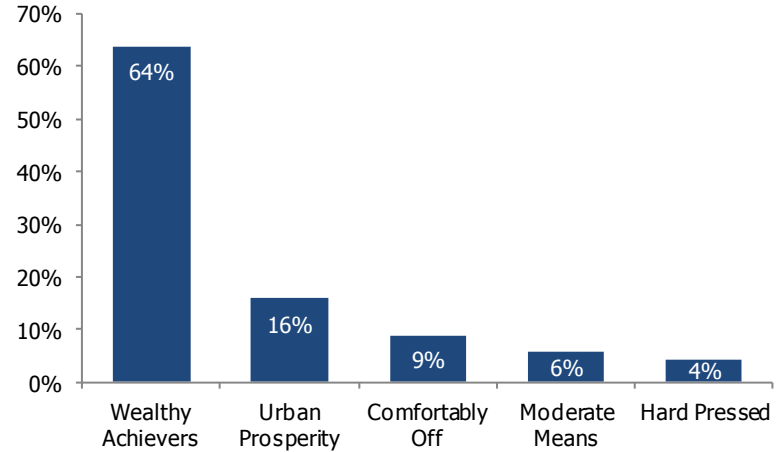
Social grade



Base: All respondents (1,366)

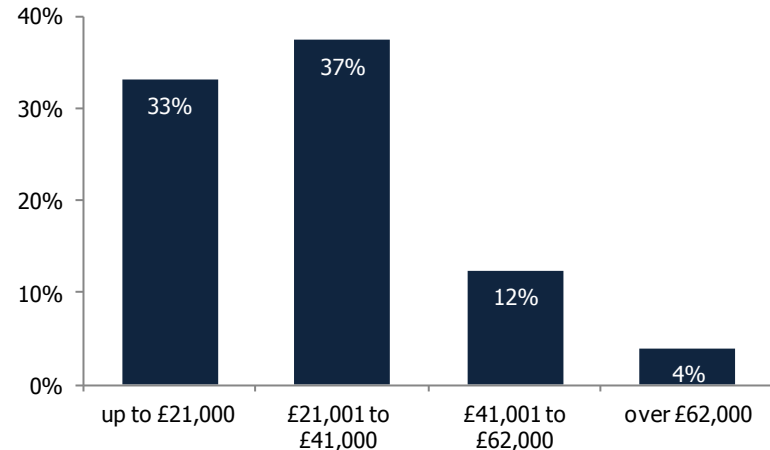
- 59% of Welsh people eating out belong to higher social grades (AB and C1);
- This is echoed by the Acorn classification which tells us that Welsh eating out tend to be wealthy: 64% are 'Wealthy Achievers'.

Acorn classification



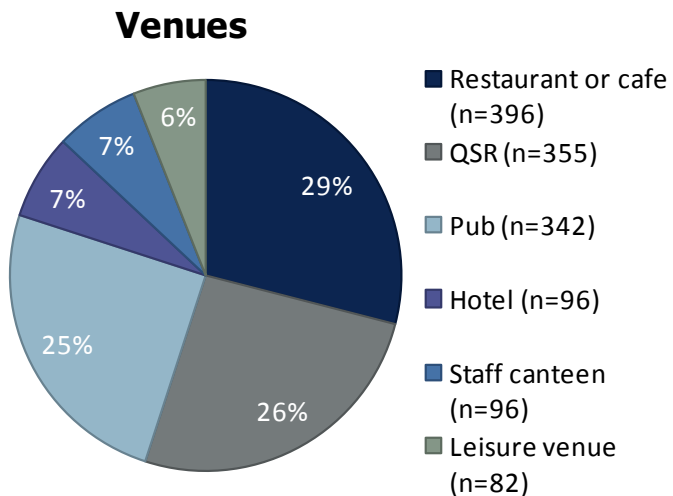
Base: All respondents (1,366)

Household income



Base: All respondents (1,366)

Eating out experience



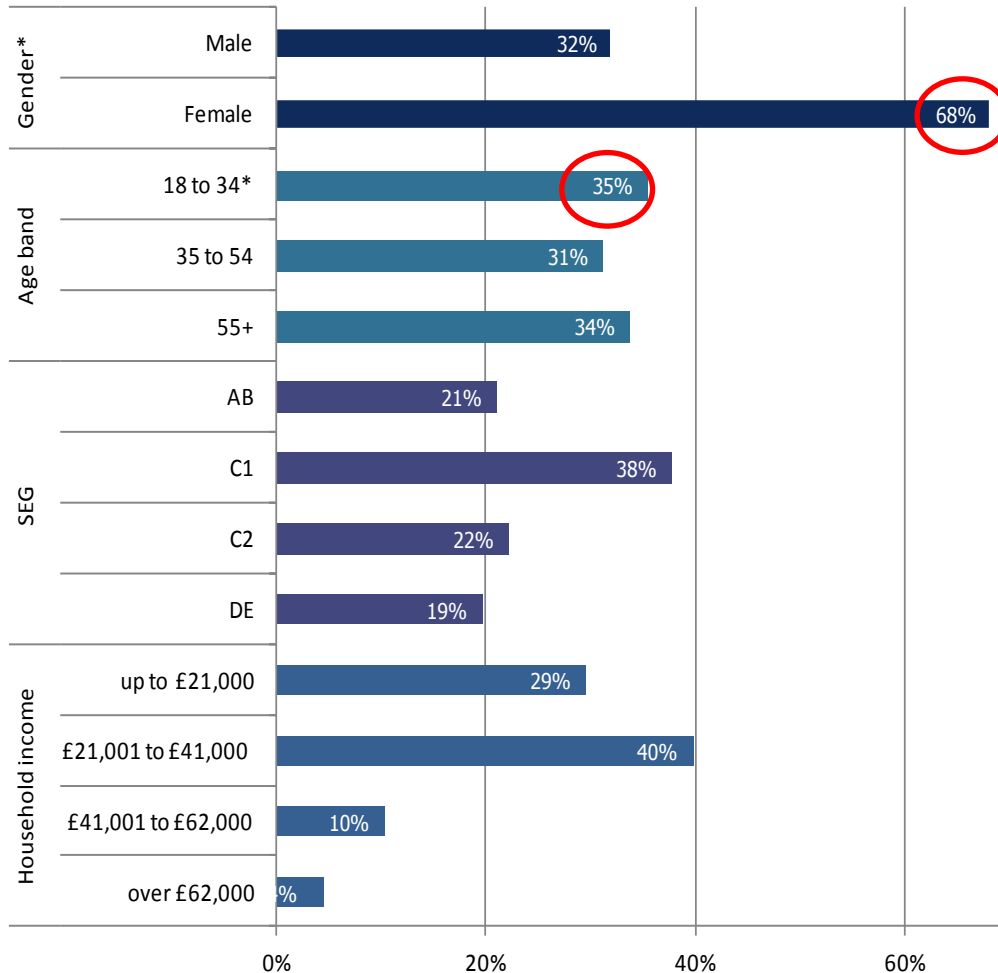
Base: All respondents (1,366)

Welsh people who ate out tended to go to a casual dining restaurant or a QSR, for a lunch or an evening meal, in an outlet they already know. They also tended to be quite familiar with the menu.

Base: 1,366 (All respondents)	Frequency	%
QE. Date of eating out occasion		
In the last week	504	37%
In the last 2 weeks	351	26%
Between 2 weeks and a month ago	263	19%
Between 1 to 2 months ago	159	12%
QF. Description of the venue		
Casual dining restaurant	710	52%
Fast food outlet	306	22%
Cafe	237	17%
Q1. Type of meal		
Lunch	643	47%
Evening meal	465	34%
Other daytime meal or snack	155	11%
Q7. Have they eaten there before?		
Yes - this restaurant/outlet	926	68%
Yes - another one in the same chain	169	12%
No	250	18%
Q8. Familiarity with the menu		
Very	373	27%
Quite	623	46%
Not very	208	15%
Not at all	158	12%

Percentages less than 10% of the total base (1,366) are not displayed

Profile of people who leave food (Wales)

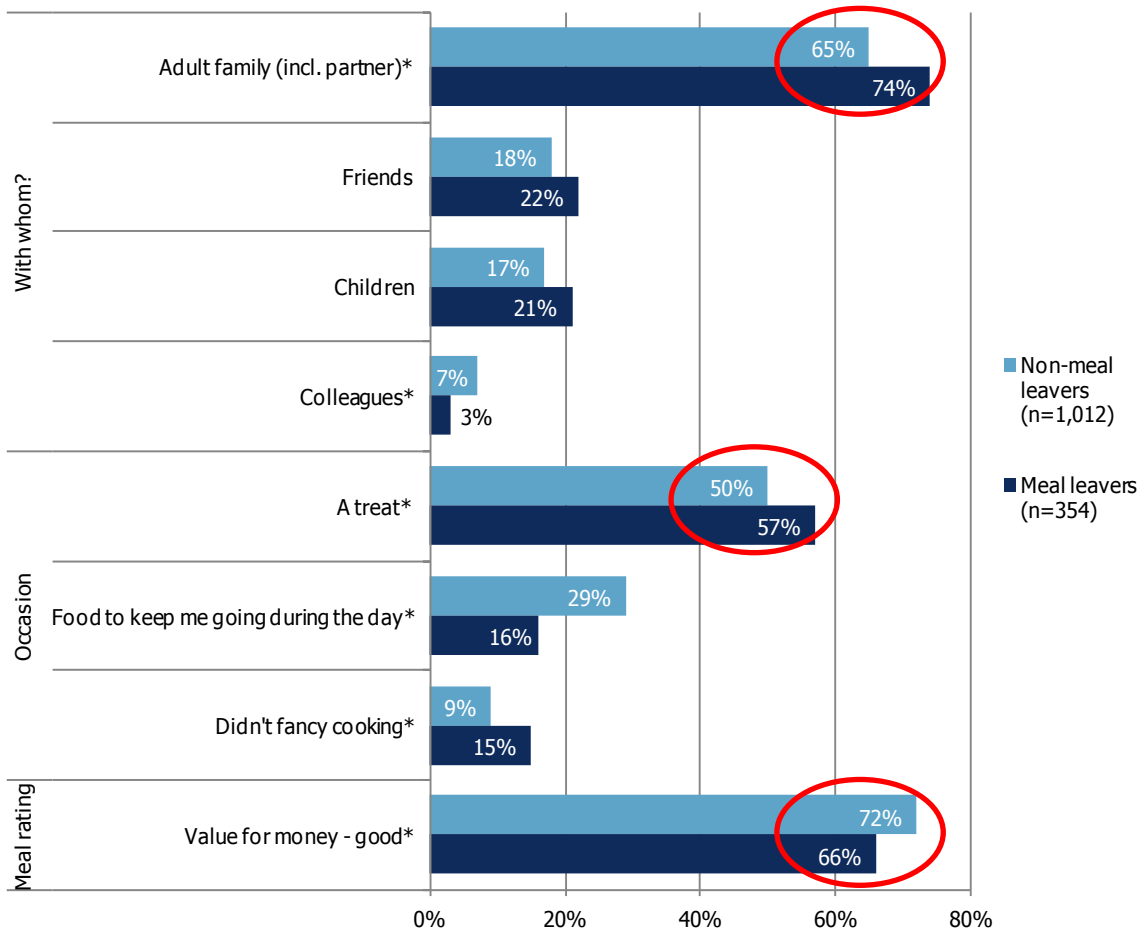


Base: All meal leavers (n= 354)

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

- Except for age and gender, the profile of meal leavers is similar to the profile of all of those eating out in Wales;
- Just over two thirds (68%) of meal leavers in Wales are women;
- Young Welsh people (18-34 years old) are more likely to be meal leavers than others.

Profile of people who leave food (Wales)



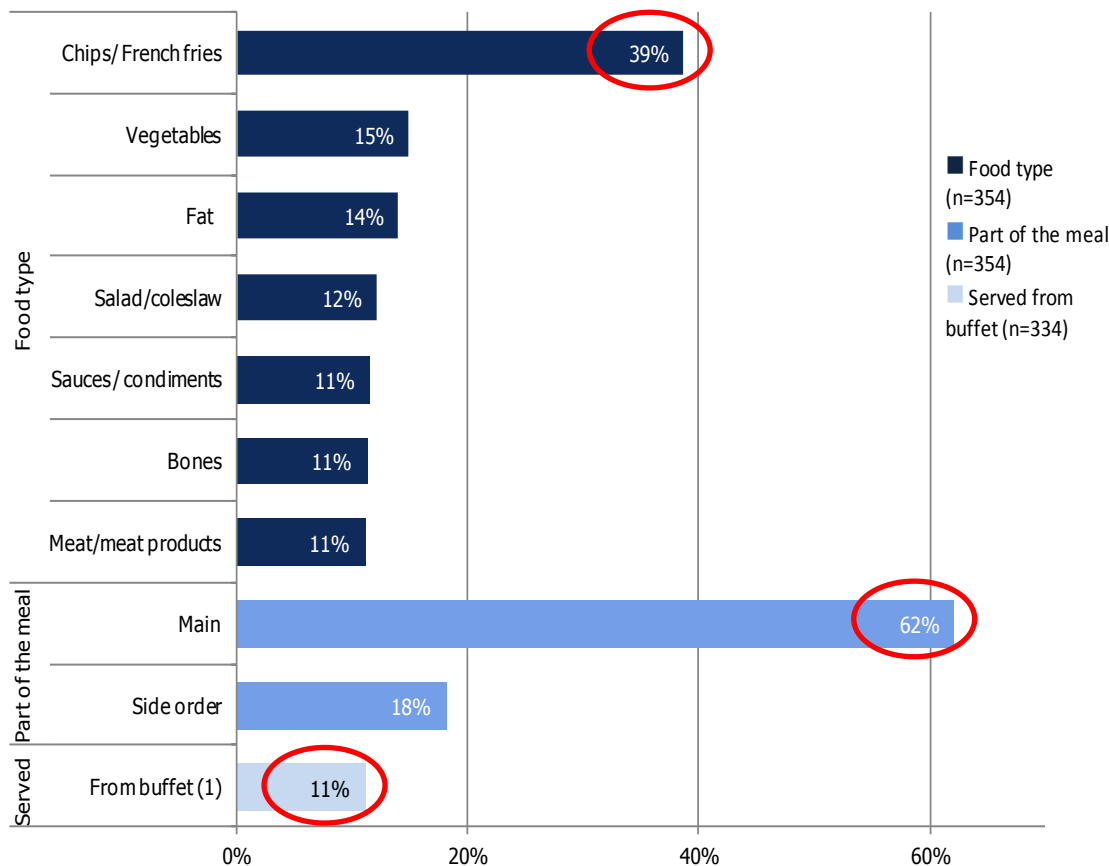
This chart breaks down both meal leavers and non-meal leavers in the sample by details of the eating out occasion:

- Diners in Wales were more likely to waste food if they were eating in a family group (74% meal-leavers v 65% non-leavers) or if their eating occasion was a treat (57% v 50%);
- Meal leavers were slightly less likely to consider that their meal was good value for money than non-meal leavers.

This graph only displays a selection of answers and excludes percentages <10% of the total base (1,366) unless there is a significant difference in between meal leavers and non-meal leavers

Food left in Wales

% of meal leavers who left:

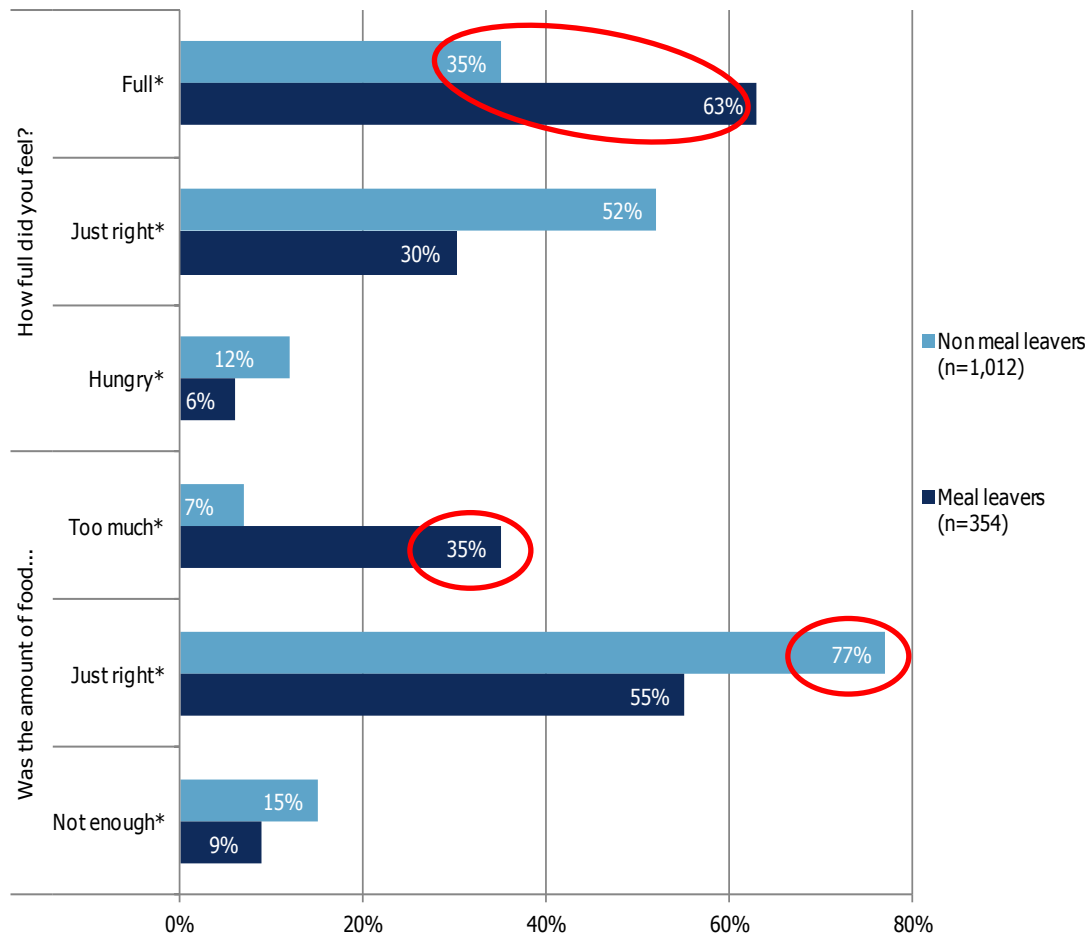


- Chips were the most frequently left food, with 39% of meal leavers admitting to leaving them on their plate;
- Food from the main part of the meal is more likely to be wasted than that from any other course. 62% of meal leavers left food from their main;
- 11% of meal leavers reported that the food they wasted was served from a buffet.

Percentages less than 10% are not displayed

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

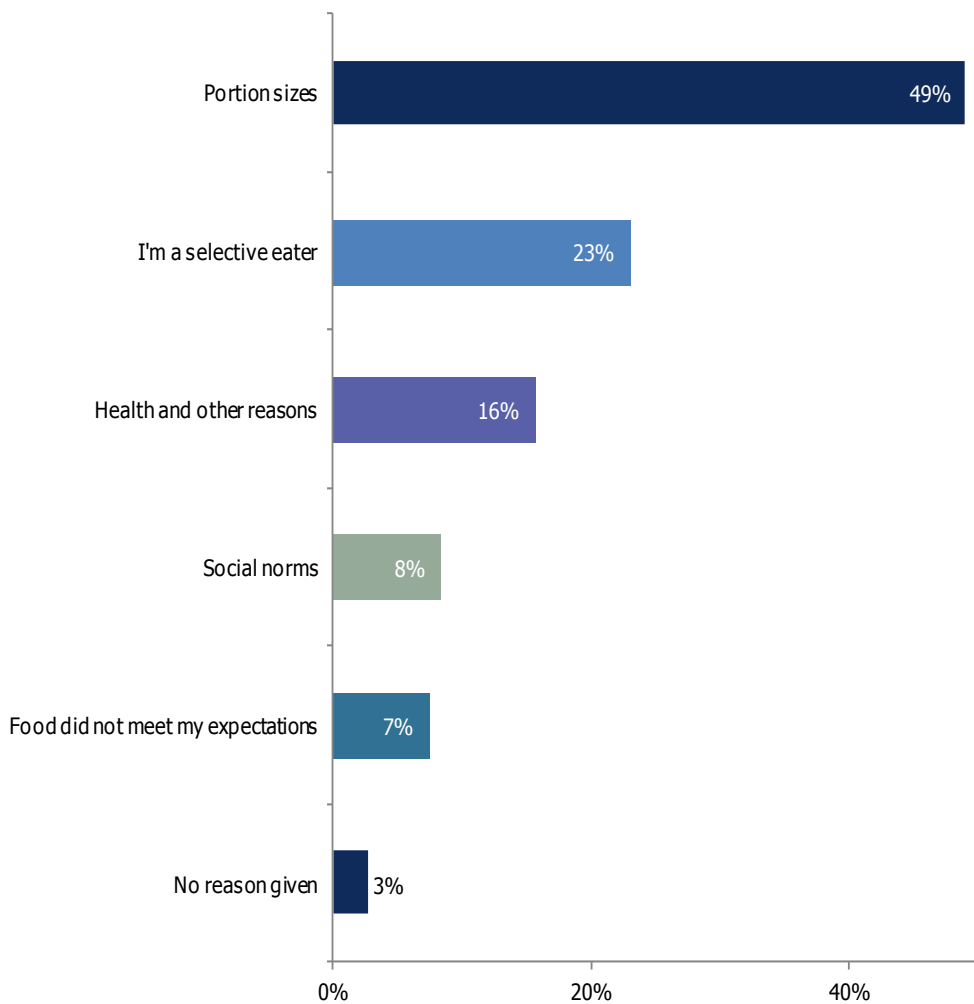
How full are you after a meal out in Wales?



➤ Meal leavers are more likely (63%) to feel full than non-meal leavers (35%);

➤ Over a third (35%) of meal leavers stated that they had too much food; whilst three quarters (77%) of non-leavers reported that the amount of food they had was just right.

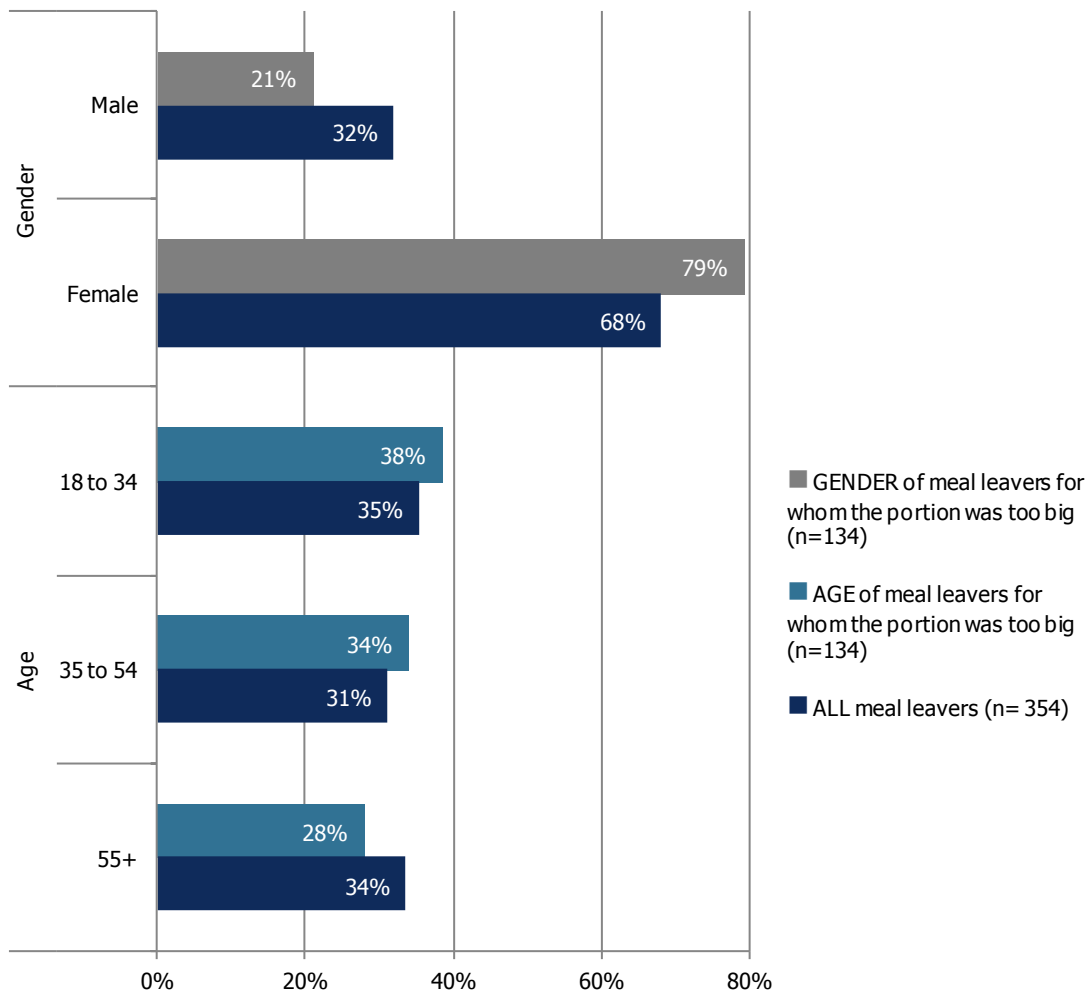
Reasons given for leaving food



Base: All meal leavers (n= 354)

Base: 354 (All meal leavers) Q32 multicode		%
Portion sizes		49%
The portion was too big		37%
I ordered too much/served myself too much		10%
Food proportions wrong		1%
Full (unspecified)		1%
I'm a selective eater		23%
I am a fussy eater		9%
I left things I didn't like		11%
I didn't like the taste		5%
Social norms		8%
It's normal to leave a bit of food		5%
I didn't want to appear greedy		3%
Other people left their food		-
Food did not meet my expectations		7%
The food was/went cold		2%
The food wasn't what I expected		1%
Food was poor quality		3%
Food was badly cooked		2%
Health and other reasons		16%
I'm watching my weight		7%
Inedible		6%
Didn't have enough time		2%
Health reasons (non-weight)		-

Who finds the portions too big?



This chart breaks down those who found the portion too big by socio-demographics:

- Women accounted for 68% of meal leavers in Wales; but 79% of those meal leavers who found the portions too big, indicating that the size of portions is a bigger issue for women than men;
- There were limited differences among age groups in terms of the likelihood of portion size being an issue

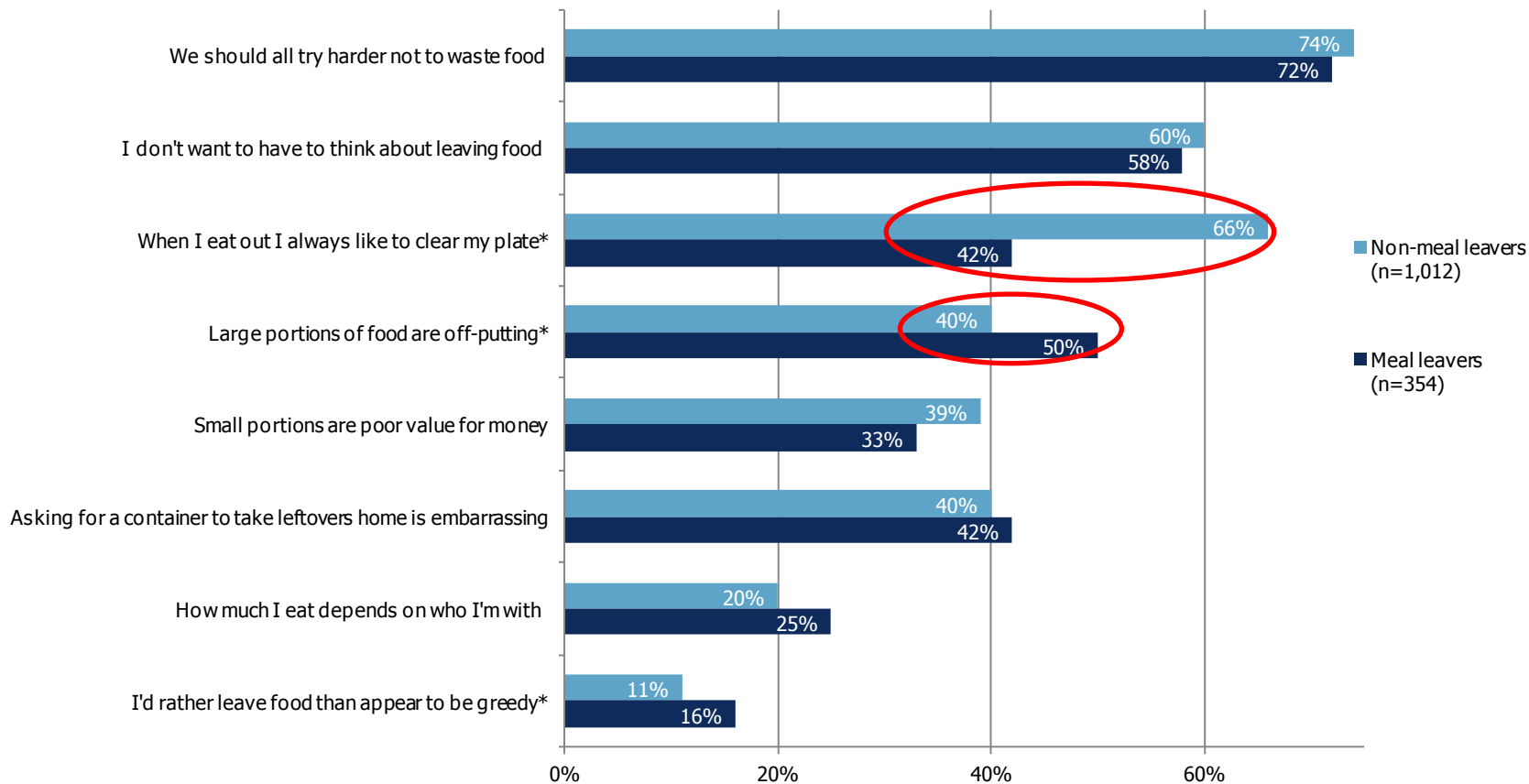
NB: Sample of those who found the portions too big includes a small number of individuals who wasted drinks rather than food

How are portion sizes experienced?

Base: 1,366 (All respondents) % of respondents who have done/agree with the following:	Total	Meal leavers (n=354)	Non-meal leavers (n=1,012)
Q42. General behaviours			
Ever asked for advice on portion size	28%	31%	27%
Ever asked for a smaller portion*	30%	40%	27%
Ever asked to have a starter as a main meal	45%	45%	45%
Q12. When ordered- this occasion:			
Knew what size the portion was going to be	70%	65%	71%
There was a choice of portion size	34%	29%	36%
Asked for information on portion size	3%	4%	3%
Q14. Staff behaviours-this occasion:			
Suggested specials	14%	16%	13%
Asked if you wanted sides or extras*	43%	48%	41%
Offered any advice on portion size	4%	4%	4%
Q19. The amount of food served was:			
Too much*	15%	35%	7%
Just right*	72%	55%	77%
Not enough*	13%	9%	15%
Q22. At the end of the meal, you felt:			
Full*	43%	35%	63%
Just right*	47%	52%	30%
Hungry*	10%	12%	6%

Attitudes towards leaving food when eating out

% of respondents who agree with the following statements:



(1) 31% of non-meal leavers strongly agree against 25% of meal leavers and this difference is significant
 (2) 47% of non-meal leavers disagree (net) against 40% of meal leavers and this difference is significant
 (3) 3% of non-meal leavers disagree against 6% of meal leavers and this difference is significant

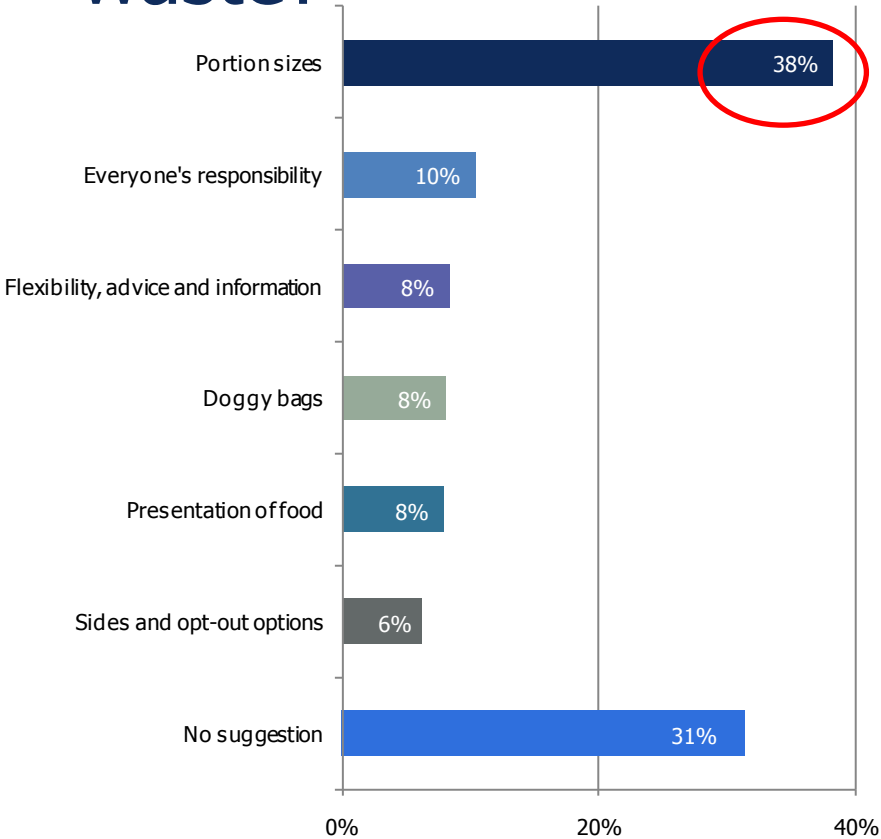
Attitudes towards leaving food in general

Base: 1,366 (All respondents)	Total	Meal leavers (n= 354)	Non-meal leavers (n=1,012)
Q36. Often leave food:			
At home			
Eat a meal cooked at home (1)	19%	23%	18%
Eat a take-away meal at home*	10%	20%	6%
Out of home			
Served at your table*	6%	13%	3%
From a counter/self-service*	4%	10%	2%
Q37. 'Bothered' if leaving food:			
At home			
Eat a meal cooked at home (2)	28%	30%	27%
Eat a take-away meal at home (2)	26%	26%	27%
Out of home			
Served at your table (2)	31%	31%	31%
From a counter/self-service (2)	27%	26%	27%

Concern about food waste

Q38. Top 5 reasons for being bothered % of those who said they were bothered	Total (n=784)	Meal leavers (n=210)	Non-meal leavers (n=574)
It's a waste of good food	75%	70%	77%
It's a waste of money*	74%	66%	77%
It makes me feel guilty	23%	24%	22%
It's bad for the environment	20%	24%	19%
It shows I haven't appreciated the food	13%	12%	14%
Q39. Top 5 reasons for not being bothered	Total	Meal	Non-meal
I'd rather leave food than eat too much*	37%	46%	33%
I've paid for it so it's up to me if I want to leave some food	31%	25%	34%
Don't consider it a problem*	25%	19%	28%
It's not something I think about*	24%	15%	29%
If I don't like it I can't do anything about it	22%	20%	23%

What can be done to help reduce plate waste?

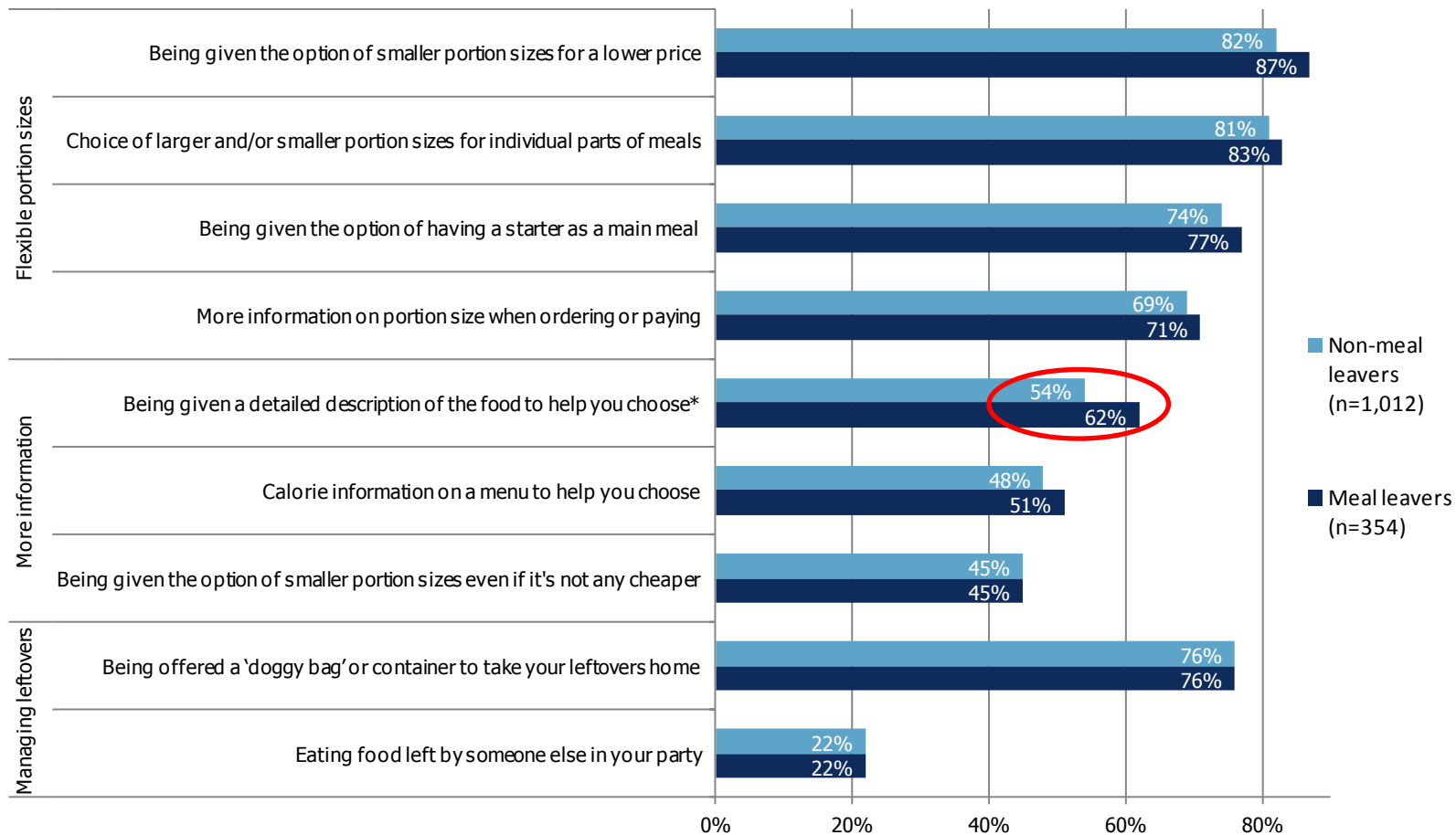


Base: All respondents (n= 1,366)

Base: 1,366 (All respondents) Q40 spontaneous response	Total	Meal leavers (n=354)	Non-meal leavers (n=1,012)
Portion sizes	38%	46%	35%
Offer a choice of portion sizes	17%	19%	17%
Smaller portions	15%	20%	13%
Vendor to correct portion sizing	4%	3%	4%
Everyone's responsibility	10%	13%	9%
It is down to choices individual diners make	4%	5%	4%
Order less or don't overload plate	4%	7%	3%
Have a big appetite/be hungry before going out	2%	1%	2%
Flexibility, advice and information	8%	9%	8%
Advice about/description of portion sizes	6%	6%	6%
Presentation of food	8%	11%	7%
Change quality / presentation of the food	5%	6%	4%
Meals served from common dishes at the table	2%	1%	2%
Doggy bags	8%	7%	9%
Make doggy bags available	4%	3%	5%
Actively offer or automatically give doggy bags	4%	4%	4%
Sides and opt-out options	6%	9%	5%
Offer sides (e.g. veg, salad, chips) as optional	3%	4%	2%
Option to opt out of items/more choice of accompaniments	2%	3%	2%
No suggestion	31%	19%	36%
No response/none/nothing	8%	5%	9%
Don't know	8%	5%	9%
Never/don't waste food	7%	3%	8%
Rarely waste food	4%	2%	5%
Other	3%	3%	3%

Proposed options

% of respondents in favour of the following:



What do customers ask for when eating out?

Base: 1,366 (All respondents) Q42 single code % of respondents who said 'Yes' when asked 'Have you ever done any of the following?'	Total	Meal leavers (n=354)	Non-meal leavers (n=1,012)
Information Asked for a detailed description of the food	27%	28%	27%
Portions Asked for advice on portion size when ordering	28%	31%	27%
Asked for a smaller portion*	30%	40%	27%
Meal options Asked to have a starter as a main meal	45%	45%	45%
Asked not to have part of the meal *	59%	66%	57%
Doggy bags Asked for a doggy bag/ container to take food home	53%	57%	52%

Behaviours and attitudes towards doggy bags

Base: 1,366 (All respondents)	Total	Meal leavers (n=354)	Non-meal leavers (n=1,012)
Q40. Spontaneous mention of doggy bags as an option to help you waste less food	8%	7%	9%
Q41. In favour of being offered a doggy bag	76%	76%	76%
Q42. Ever asked for a doggy bag to take food home	48%	45%	49%
Q44. Are embarrassed to ask for a doggy bag*	40%	42%	40%

Key points

- Over a quarter (26%) of those living in Wales and eating out were meal leavers.
- Just over two thirds (68%) of meal leavers in Wales were women.
- Nearly two in five (39%) of those who left food in Wales left chips. Other commonly left foods were vegetables, fat and salad/coleslaw.
- 43% of customers eating out in Wales felt full at the end of their meal, 47% felt just right.
- 15% felt they had too much food. Amongst meal leavers this figure was 35%.
- Around half (49%) of those who wasted food blamed the waste on portioning.
- Those who felt the portion was too big were overwhelmingly female (79%).
- While 66% of non-meal leavers stated that they always liked to clear their plate when eating out, only 42% of those who left this food agreed with the same statement.
- Half of meal leavers and 40% of non-meal leavers stated that they found large portions of food off-putting.
- Customers in Wales were bothered by food waste (59%) and felt that it was a waste of good food (75%) and a waste of money (74%).
- 38% of customers spontaneously mentioned portion sizes as a way to reduce plate waste in Wales. When asked directly, 83% were in favour of being given the option of smaller portions for a lower price.
- 76% of customers in Wales were in favour of being offered a doggy bag to take home any food that they could not eat, however 40% were embarrassed by the prospect of asking for a doggy bag, suggesting that doggy bags need to be actively offered, rather than simply made available.