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VG12078 Project Harvest
Vegetable consumption in restaurants.

20th January 2014

Prepared for the Australian vegetable industry
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Background and Methodology.

Research Objectives.

The overarching objective of this quantitative study was to explore consumers' perceptions of vegetable availability in the Australian restaurant sector.

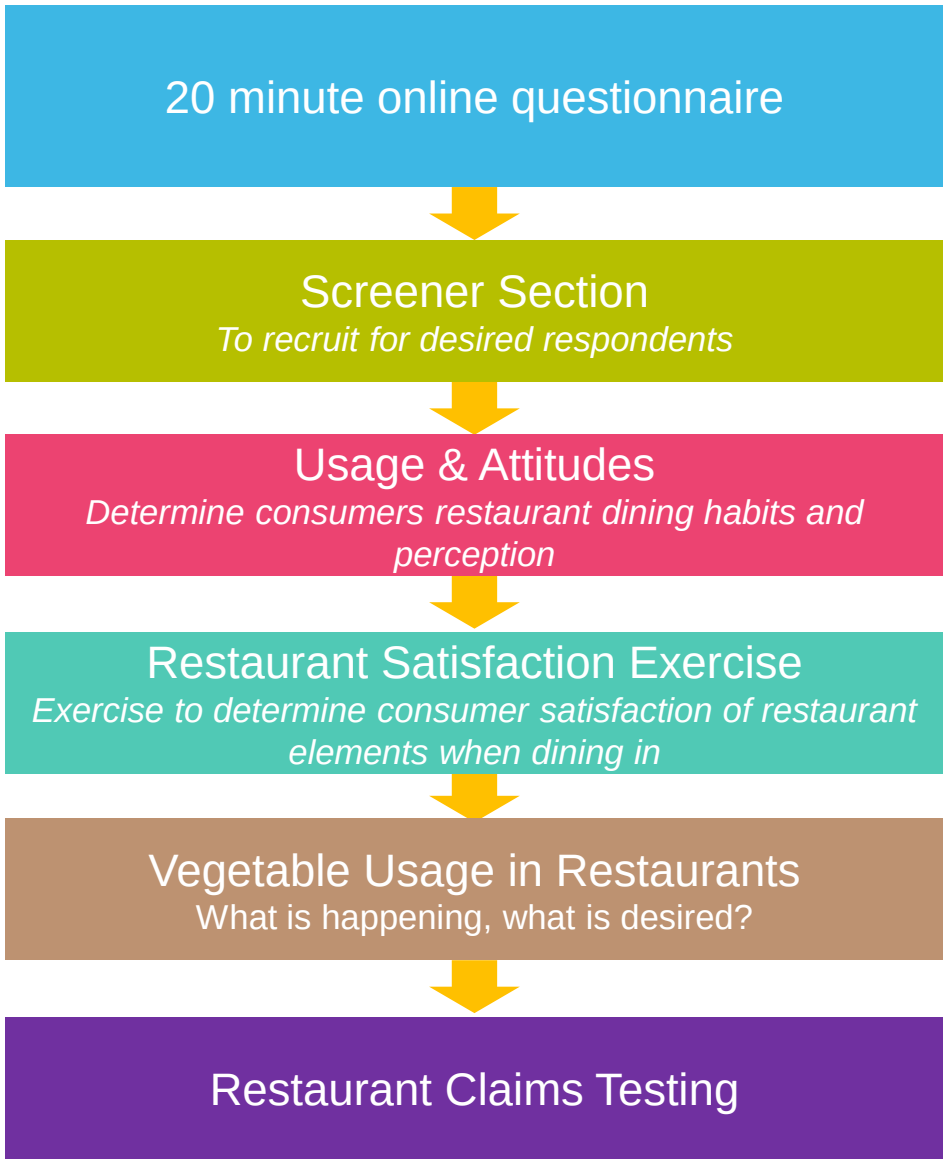
Specific Research Objectives

1. Is there wide enough variety of vegetables available on restaurant menus?
2. Should vegetables be more centre-plate in restaurants & how do consumers currently rate their presentation?
3. Are portion sizes of vegetables sufficient in restaurants?
4. Which vegetables in particular would consumers like to see more of in restaurants?
5. Would consumers buy more for vegetables at a restaurant if they used specific claims around; *Hydroponically grown, organic, produced in Australia & fresh.*
6. Do consumers copy recipes with vegetables from dishes in restaurants?

With these findings, the industry aims to encourage greater use of vegetables in restaurants and help educate growers (and all other stakeholders) what opportunities exist in strengthening the quality and volume sold of vegetable produce to restaurants.

Methodology

- 20 Minute online questionnaire.
- Questionnaire recruited from the 16th to the 20th of December 2013.
- See right for the overall flow of the questionnaire and the topics that were explored.



Sample Specifications

Recruitment specifications aimed to be representative of the general population in Australia.

Respondents were:

- Ages 18 and over
- Must have dined in at a restaurant at least once a fortnight^

In addition, there were quotas on dietary requirements and ethnicity.

^Those who dined exclusively at fast food restaurants were screened from the questionnaire.

Total Sample N=1025		
Gender		
	Target	Achieved
Male	National Rep	48%
Female	National Rep	52%
Age		
18-24	National Rep	7%
25-34	National Rep	19%
35-44	National Rep	15%
45-54	National Rep	18%
55-64	National Rep	20%
65+	National Rep	21%
Life-stage		
Single Income, No Kids	Natural Fall Out	22%
Double Income, No Kids	Natural Fall Out	18%
Young Families	Natural Fall Out	12%
Established Families	Natural Fall Out	17%
Empty Nesters	Natural Fall Out	29%
Location		
Metro	Min 20%	27%
Regional	Max 80%	73%
Dietary Requirements		
Vegetarians	Min 3%	4%
Other Requirements	Min 25%	33%
No dietary requirements	Min 25%	63%

** Note: Sample was ethnically representative*

Summary & Key Recommendations

Executive Summary:

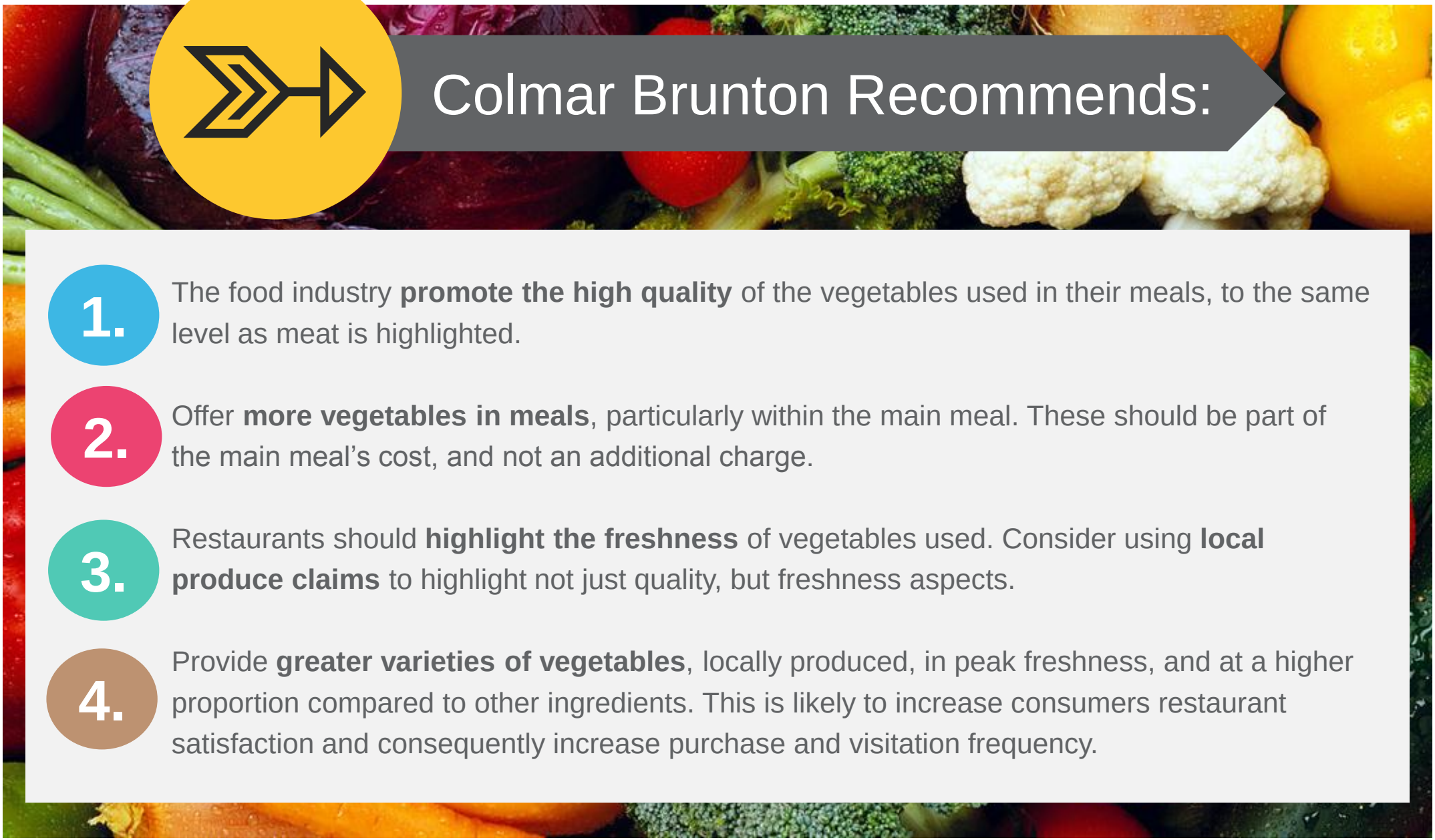
For consumers, the **quality of vegetables was just as important as the quality of the meat**: Respondents' satisfaction with restaurants overall, was equally driven by the quality of both meat and vegetables.

- Satisfaction was also strongly impacted by the vegetable to meat ratio in the meals, with main meals being the most important.
  - Consumers **wanted slightly more vegetables than other ingredients** in their restaurant meals.

- The majority of respondents in this study wanted **vegetables to be more prominent in their restaurant meals**.
  - To do this they would like to see slightly **more vegetables used in their meals** (entrees, lunches, dinners and snacks) relative to other ingredients being used.
  - A larger **variety of vegetables** will further assist in the satisfaction of restaurant experiences.

- **Asian cuisine** (especially Chinese & Thai) was the strongest performing cuisine in the Australian restaurant market (this was consistent across all ethnic groups).
  - Asian Cuisine provided the most variety in meals overall (and vegetables used) and had garnered the most interest from respondents in regard to the types of meals that are copied for cooking at home (e.g. stir fry's and Asian meals).

- Of the claims explored for restaurants, **communicating that all vegetable produce used are fresh and local** was the most effective claim to drive trial and repeat purchase.



Colmar Brunton Recommends:

1. The food industry **promote the high quality** of the vegetables used in their meals, to the same level as meat is highlighted.

2. Offer **more vegetables in meals**, particularly within the main meal. These should be part of the main meal's cost, and not an additional charge.

3. Restaurants should **highlight the freshness** of vegetables used. Consider using **local produce claims** to highlight not just quality, but freshness aspects.

4. Provide **greater varieties of vegetables**, locally produced, in peak freshness, and at a higher proportion compared to other ingredients. This is likely to increase consumers restaurant satisfaction and consequently increase purchase and visitation frequency.

A Plan of Action…

1. The Australian Vegetable Industry needs to identify key personnel and connections who can directly influence food service markets. Communication strategies should be targeted to these people.

2. A communication/sales plan needs to be developed that highlights the bottom line ($) impact greater inclusion of fresh, local, high quality vegetables may have on the food service industry i.e. greater inclusion = greater customer satisfaction = greater return business.

3. Within communication to the food service industry, it should be made clear that the quality of vegetables is just as important as the quality of meat. Supply the industry with clear descriptions of each vegetable to enhance their knowledge of what is a high vs. low quality product so they can in turn highlight this in their consumer offering.

4. The Australian Vegetable Industry should supply the food service sector ready prepared statements/claims they can use indicating provenance of each vegetable supplied and it's freshness (from harvest to plate timings).

5. A consumer campaign should also be mounted, with the basic premise of "Demand more from your restaurant". Consumers indicate they want more fresh, local, high quality vegetables. The more vocal consumers are in communicating this, the greater the chance of compliance from the food service sector.

Detailed Report.

The Australian Restaurant Environment:

- Overall, the average respondent **dined out at an eatery 6 times a month**. Those that live in metro areas dined out significantly more than respondents in regional locations (6.2 to 4.7 times a month, respectively).

- Cafés, food courts and sandwich/wrap bars were the most frequented eateries for meals that were mostly/all vegetables. The most frequented restaurants for all types of meals were cafés (50%), fast food restaurants (47%) and pubs/RSL's (38%).

- **Chinese, followed by Thai and Modern Australian cuisine** were the most frequent cuisines consumed at restaurants when eating meals that were mostly/all vegetables. For all types of meals consumed at restaurants, the most frequent cuisines consumed were Chinese (57%), Modern Australian (50%) and Italian (47%).

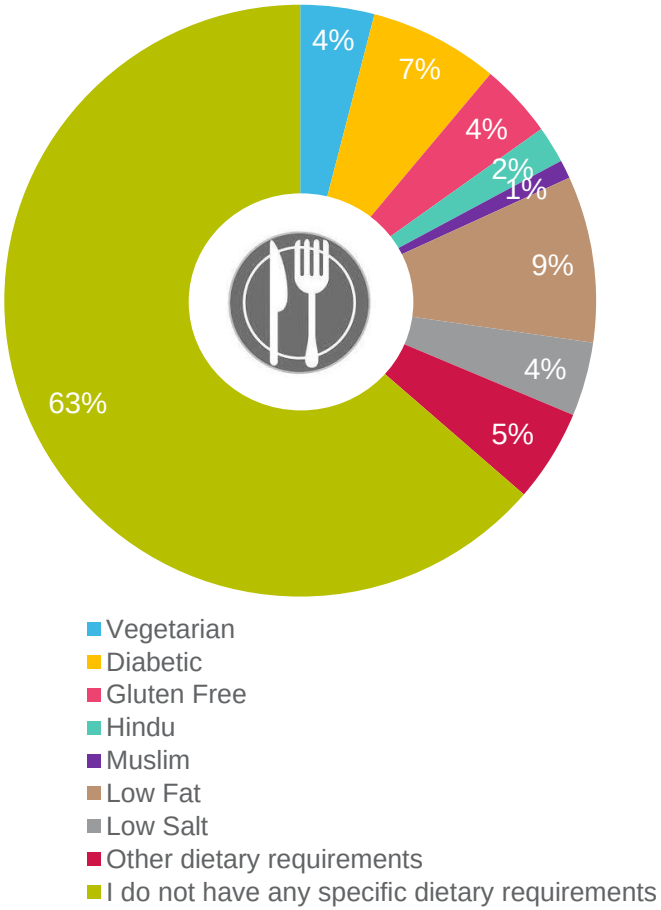
- In comparison, at home the most frequently cooked dishes containing vegetables were Traditional/Modern Australian and Chinese cuisine *(source: VG12078 Harvest*).

Dietary Requirements & Ethnicity

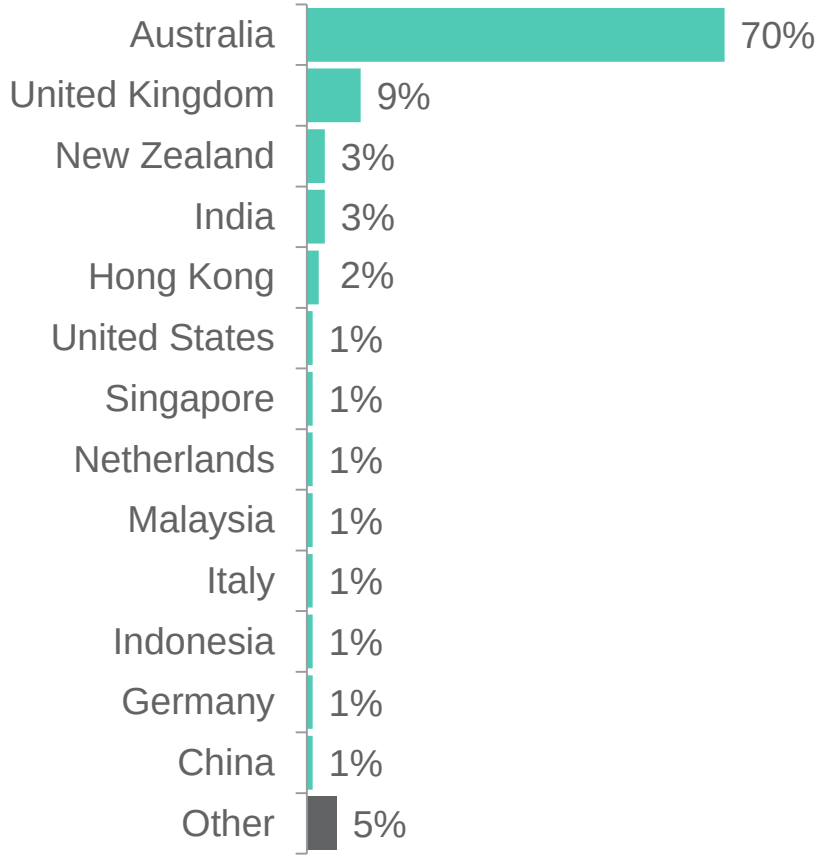
Demographics

- The majority of respondents did not have any specific dietary requirements. Of those that did, low fat and diabetic were the main reported requirements.
- Ethnicity was primarily Australian, followed by UK and New Zealand.

Dietary Requirements



Ethnicity of Respondents



S6. Do you have any DIETARY REQUIREMENTS in your everyday consumption of food?
S4a. In which country were you born?
Total Respondents N=1025

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Frequency of Dining Out

Mean Per Month

- On average, respondents dined out on six occasions per month. Those that live in metro areas dined out significantly more than those in regional locations.
- Younger respondents (25-34yo) were significantly more likely to eat out compared with older consumers (45+ yo).

5.8 Dining Occasions per month

6.0 Dining Occasions per month

5.5 Dining Occasions per month

Total	Gender		Age						Location		Household					Diet		
	A. Male	B. Female	A. 18-24	B. 25-34	C. 35-44	D. 45-54	E. 55-64	F. 65+	A. REGIONAL	B. METRO	A. SINKS	B. DINKS	C. Young Families	D. Established Families	E. Empty Nesters	A. Vegetarian	B. Other Requirements	C. No dietary requirements
N=1025	N=495	N=530	N=73	N=191	N=153	N=185	N=208	N=215	N=275	N=750	N=229	N=189	N=127	N=179	N=301	N=40	N=335	N=650
5.8	6.0	5.5	6.0	7.8 DEF	6.5 EF	5.2	5.0	4.6	4.7	6.2 A	6.8 E	6.4 E	5.9	5.6	4.7	6.0	5.9	5.7

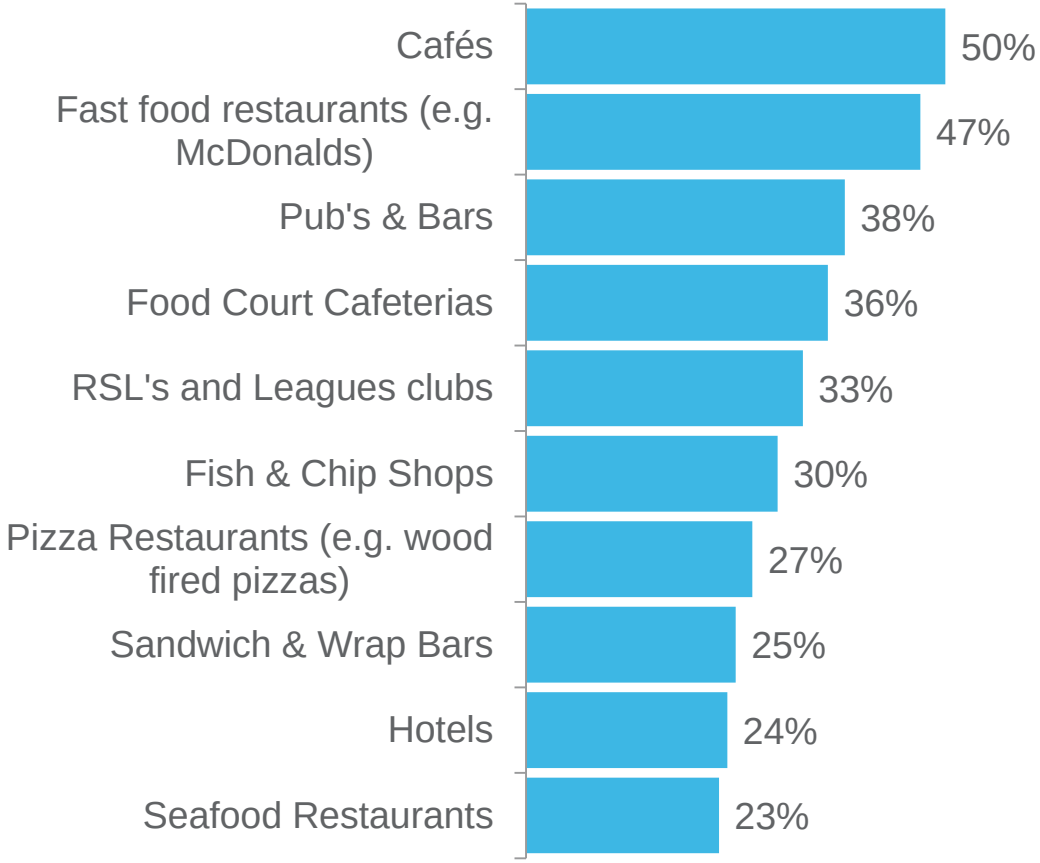
S9a. How often do you dine out at restaurants for main meals (e.g. lunch and dinner)?Total Respondents N=1025
Significant higher differences @ 95%CI indicated by capital letter

Types of Restaurants Frequented & Cuisines Consumed

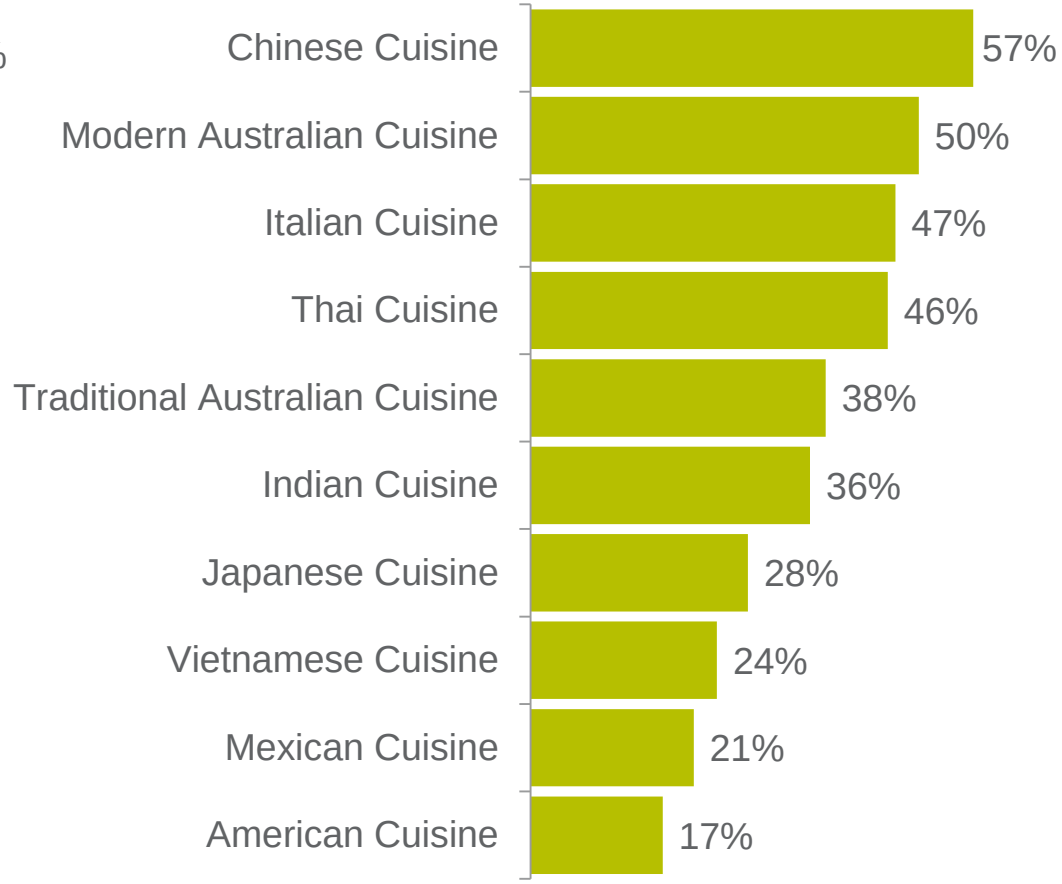
Last 3 Months

- Half of the respondents had dined at a café over the past three months. Other popular eateries were fast food restaurants, pubs & bars and food courts.
- Asian cuisine was the most frequently consumed cuisine over the last three months, specifically Chinese and Thai. Modern Australian and Italian eateries were also popular. This was consistent across all ethnic groups in the study.

Top 10 Restaurants



Top 10 Cuisines

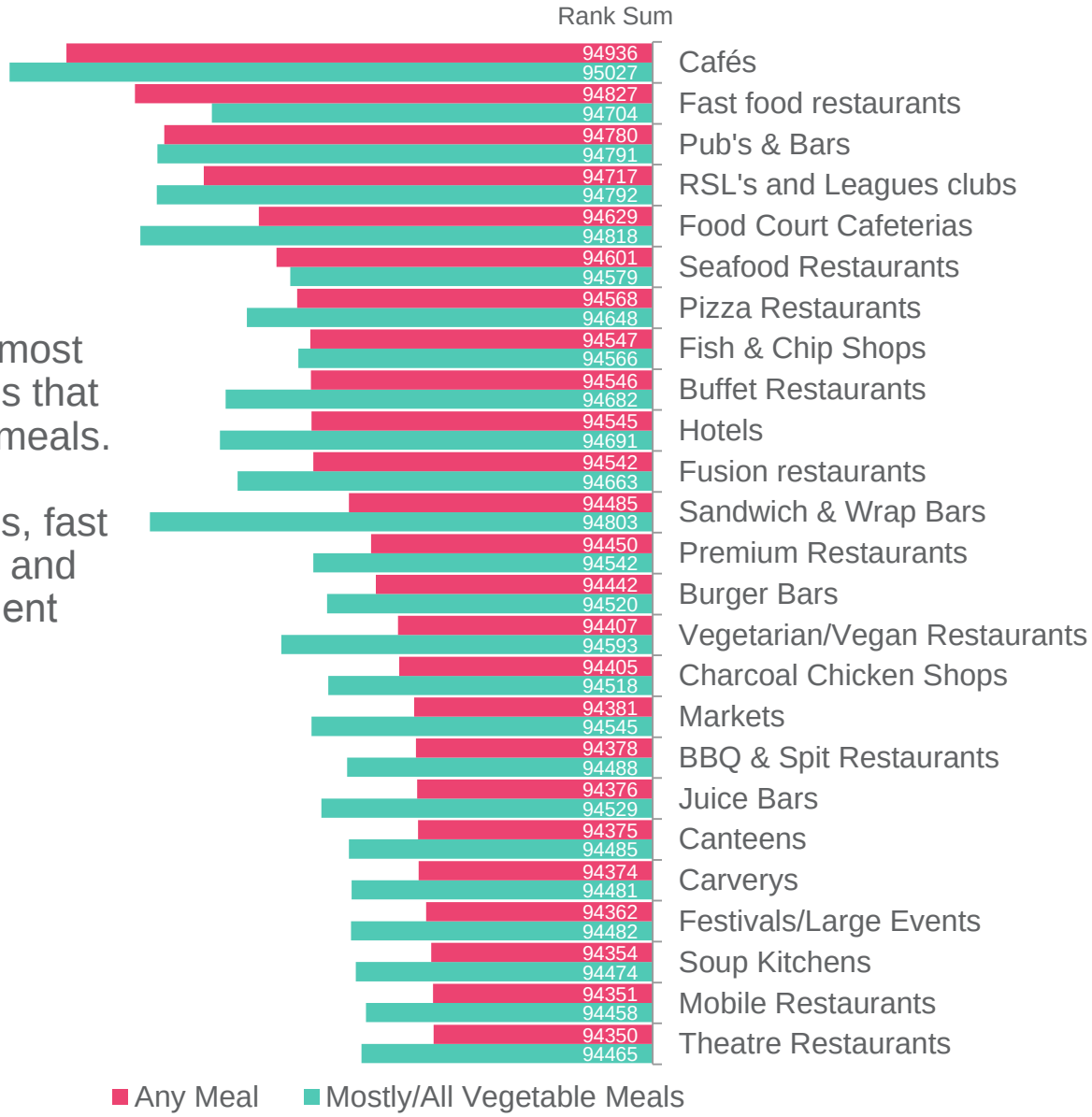


S9. What types of RESTAURANTS below do you FREQUENTLY DINE IN at for your main meals (e.g. for lunch and dinner at least once in the last 3 months)?
S10. What types of cuisine below do you frequently consume at the restaurants that you dine in at for your main meals (e.g. for lunch and dinner at least once in the last 3 months)?
Total Respondents N=1025
Note: Respondents who only dined at fast food restaurants or food courts did not continue the study.

Top Restaurant Types Frequented

For All Meals & Meals That Are Mostly/All Vegetables

- Cafés, food courts and sandwich/wrap bars were most frequented for eating meals that were mostly/all vegetable meals.
- For all types of meals cafés, fast food restaurants and pubs and RSL's were the most frequent restaurants dined at by respondents.



Rank

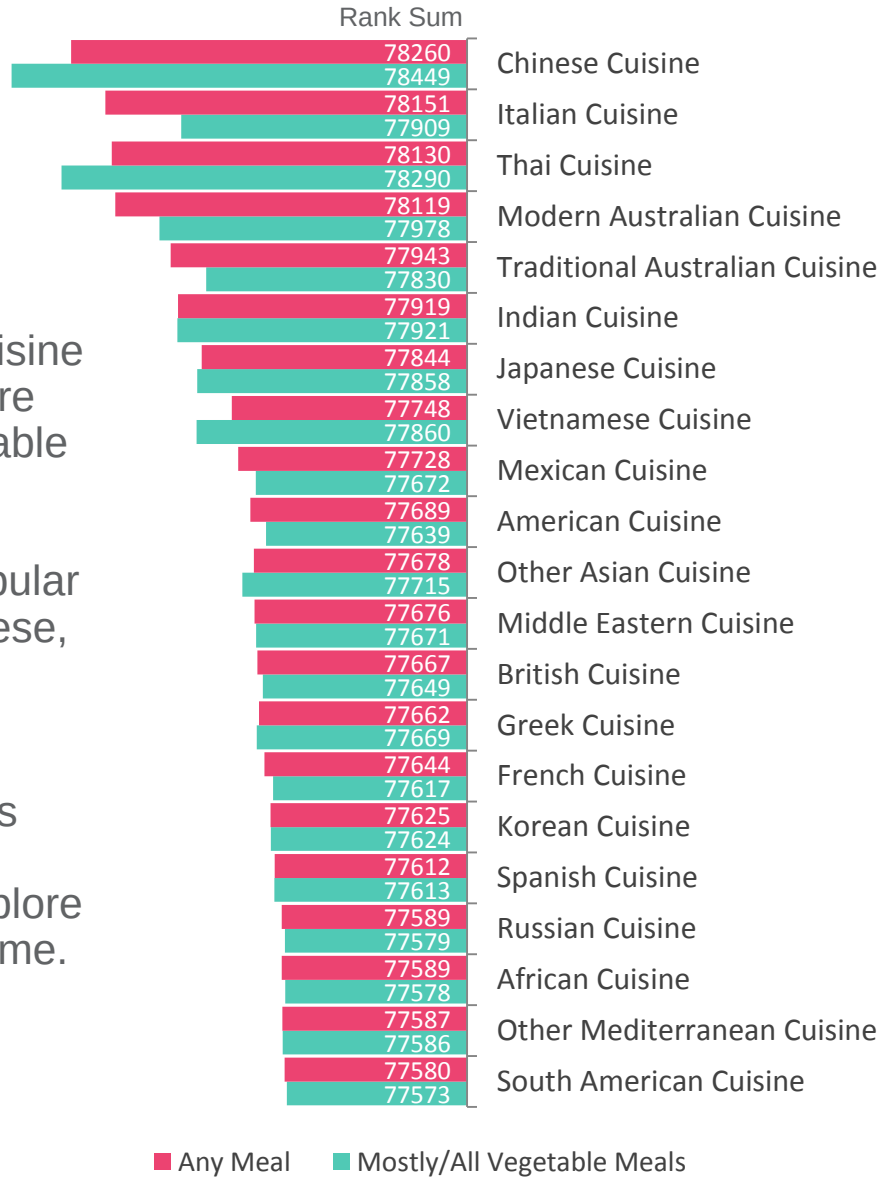
Any Meal	Mostly/All Vegetable Meals
1st	1st
2nd	6th
3rd	5th
4th	4th
5th	2nd
6th	12th
7th	10th
8th	13th
9th	8th
10th	7th
11th	9th
12th	3rd
13th	15th
14th	17th
15th	11th
16th	18th
17th	14th
18th	19th
19th	16th
20th	20th
21st	22nd
22nd	21st
23rd	23rd
24th	25th
25th	24th

Q4. What are the TOP 3 RESTAURANTS that you frequent most often for the following types of meals;
Any type of meal / Meals that are mostly or all vegetables
Scores shown are reversed rank sum scores (the higher the score the more frequent it is used in restaurant meals). Total Respondents N=1025

Top Cuisines Consumed at Restaurants

Any Type of Meal Vs. Meals That Are Mostly/All Vegetables

- Chinese, Thai and Modern Australian cuisine were the most common restaurants where respondents consumed mostly/all vegetable meals.
- Considering all meal types, the most popular cuisines eaten at restaurants were Chinese, Italian and Thai.
- At home* respondents are most likely to cook Traditional/Modern Australian meals and Chinese dishes. This suggests that consumers dine out at restaurants to explore new cuisines that they do not cook at home.



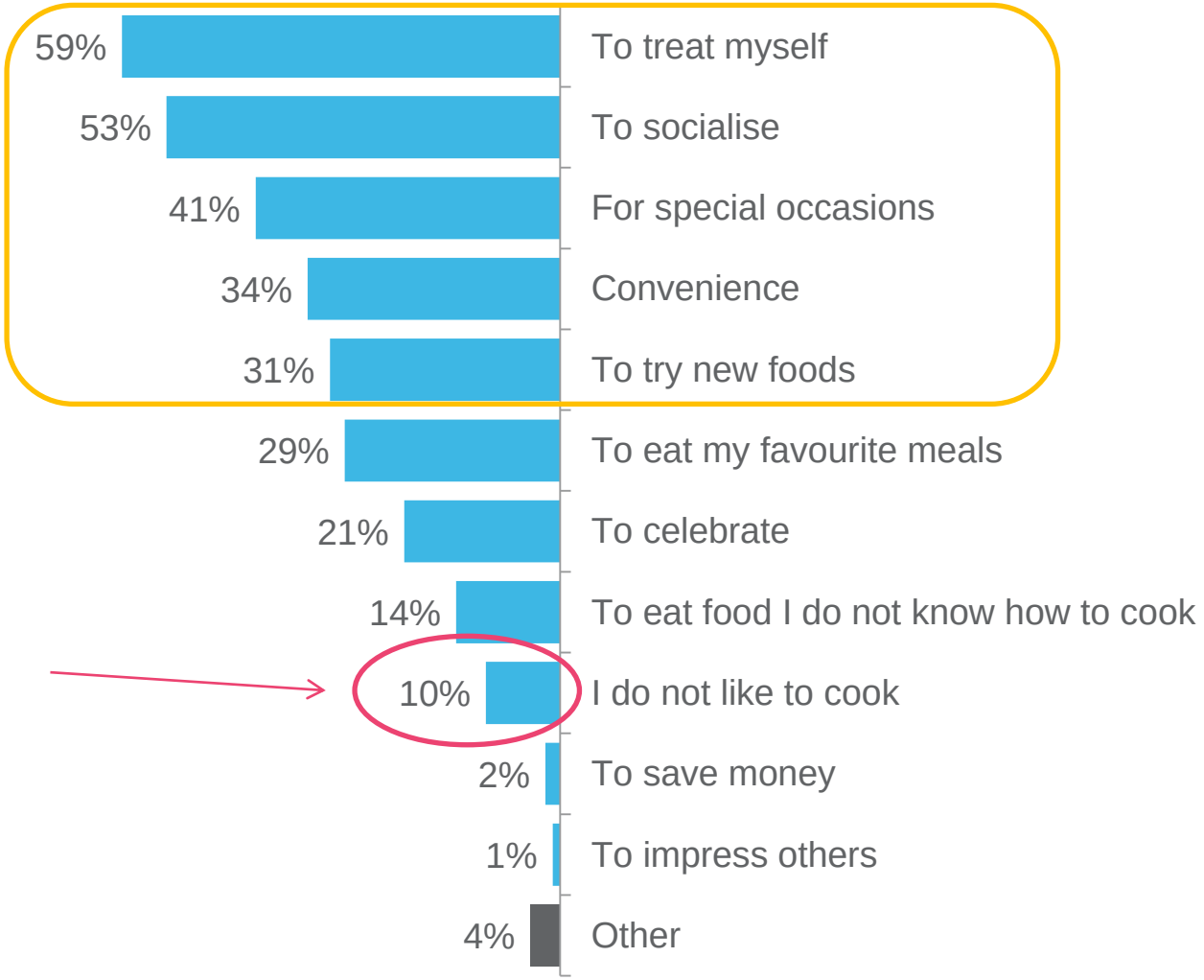
Rank

Any Meal	Mostly/All Vegetable Meals
1st	1st
2nd	5th
3rd	2nd
4th	3rd
5th	8th
6th	4th
7th	7th
8th	6th
9th	10th
10th	14th
11th	9th
12th	11th
13th	13th
14th	12th
15th	16th
16th	15th
17th	17th
18th	20th
19th	19th
20th	18th
21st	21st

Q5. What are the TOP 3 CUISINES that you dine in for, for the following types of meals;
Scores shown are reversed rank sum scores (the higher the score the more frequent it is used in restaurant meals). Total Respondents N=1025
* At home, as determined by Harvest monthly tracker

Reasons to Dine Out at Restaurants

- Consumers consider dining at restaurants as a treat to themselves, which is the primary motivation to eat out.
- Respondents also eat out for social reasons and when celebrating special occasions.
- One tenth of respondents choose to dine at eateries because they do not like to cook. These people may be more likely than ‘special occasion diners’ to rely on restaurants to provide balanced meals.



Total Respondents N=1025
Q8b. Why do you dine out at restaurants for meals?

Restaurant Satisfaction Model.
Explained

Satisfaction models are utilised to determine which of a series of possible elements may drive satisfaction for consumers.

In the present study, this model was used to understand what is driving consumers satisfaction with their restaurant dining experience.

The modelling works by first asking consumers their level of satisfaction of a large array of elements such as, how satisfied are they with the quality of the vegetables they are served within restaurants.

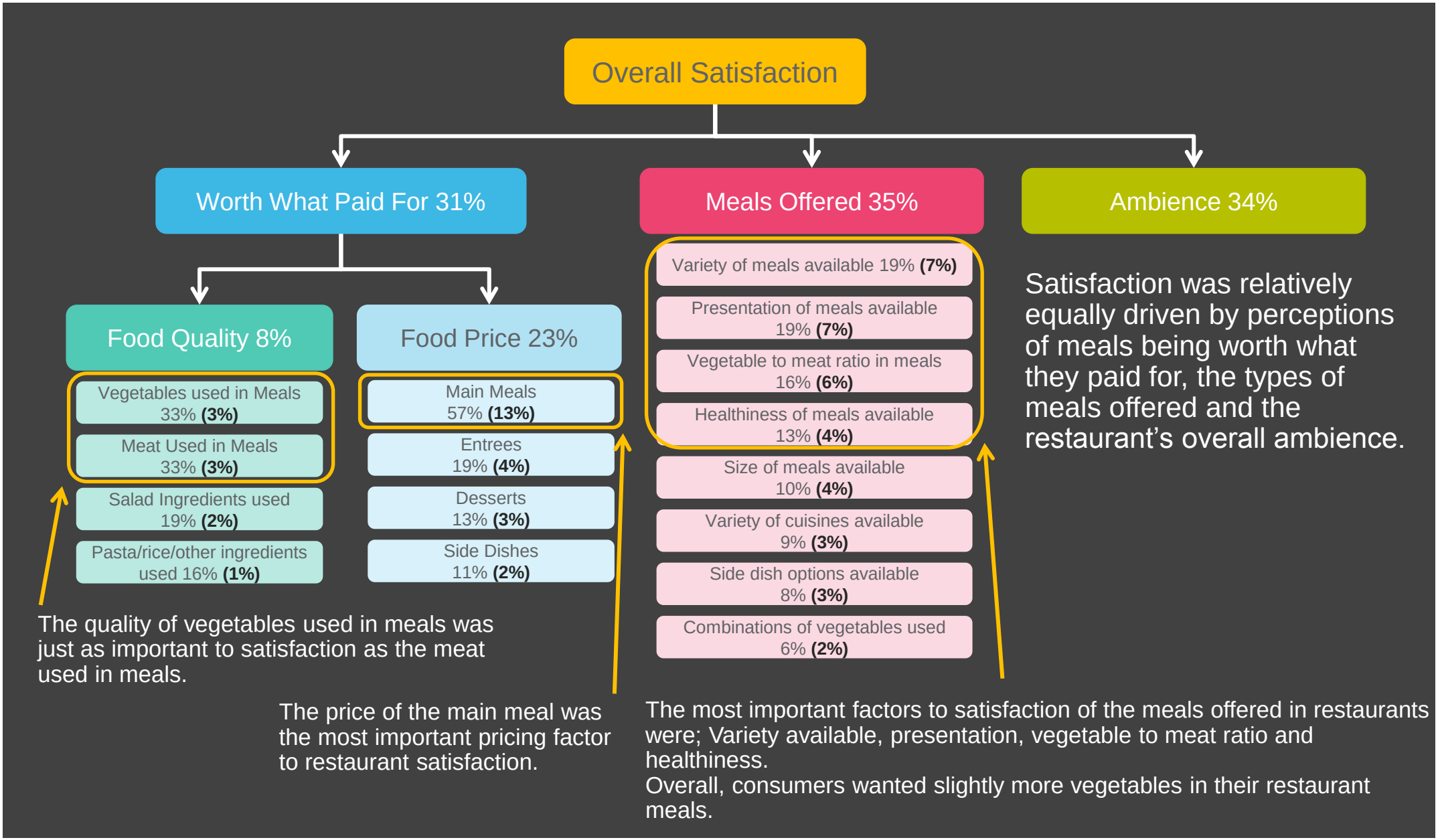
Elements explored include aspects of food quality, price of the meals, the types of meals offered and the overall ambience.

A statistical procedure (regression analysis) is then utilised to determine the impact of each of these elements on a consumers overall satisfaction with their complete experience.

Finally, the relative importance of each is determined allowing us to explore items of interest such as the comparative importance of the quality of meat versus quality of vegetables offered.

See the following slides for what drives satisfaction within Australian restaurants.

Restaurant Satisfaction Model



78% of the satisfaction model above explains consumer satisfaction when dining in at restaurants in Australia.
%'s in grey represent proportion element explains satisfaction of that particular grouping (e.g. food quality)
%'s in black represent proportion element explains satisfaction overall (whole model)
Total Respondents N=1025

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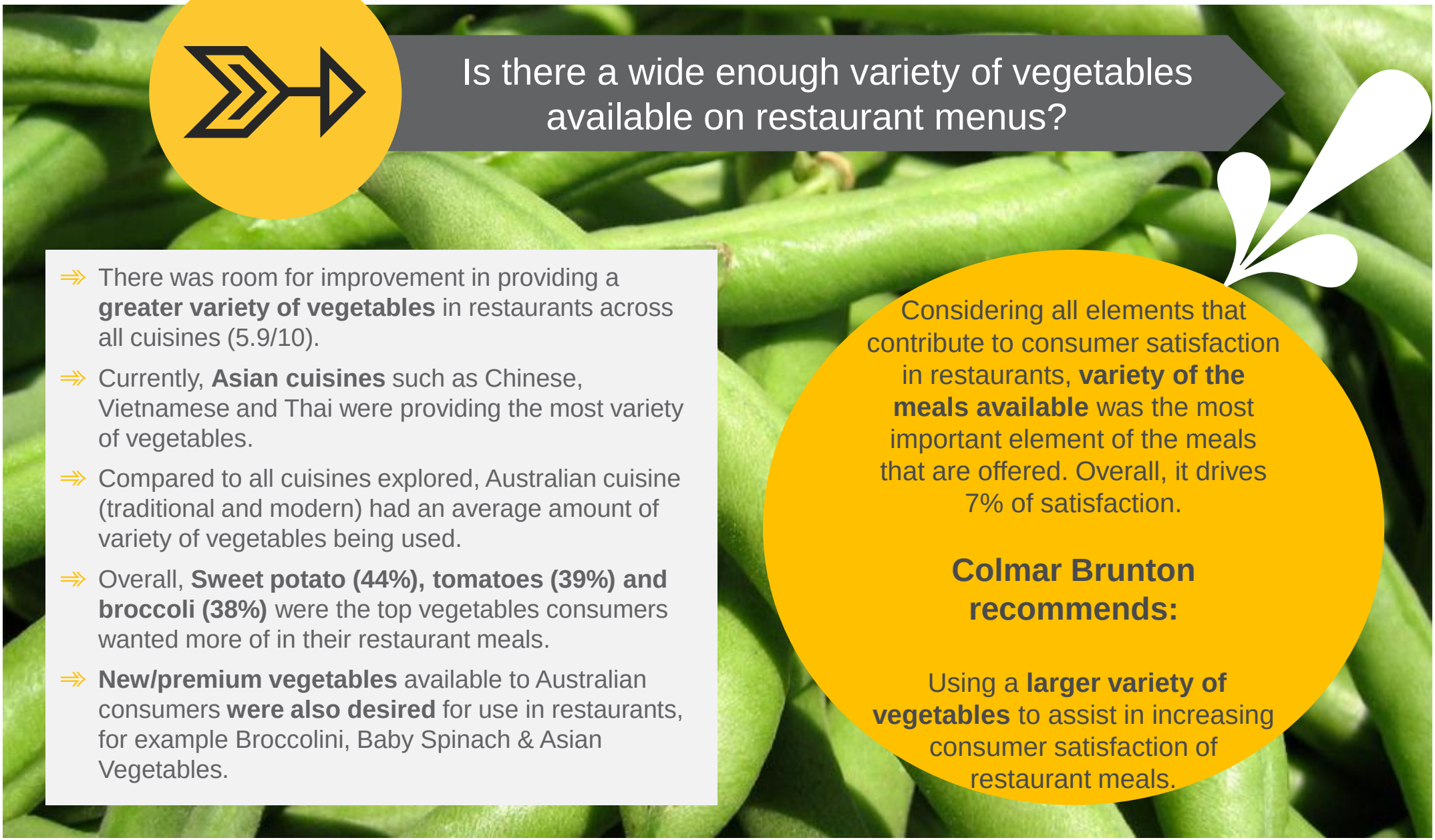
Is there a wide enough variety of vegetables available on restaurant menus?



- There was room for improvement in providing a **greater variety of vegetables** in restaurants across all cuisines (5.9/10).
- Currently, **Asian cuisines** such as Chinese, Vietnamese and Thai were providing the most variety of vegetables.
- Compared to all cuisines explored, Australian cuisine (traditional and modern) had an average amount of variety of vegetables being used.
- Overall, **Sweet potato (44%), tomatoes (39%) and broccoli (38%)** were the top vegetables consumers wanted more of in their restaurant meals.
- **New/premium vegetables** available to Australian consumers **were also desired** for use in restaurants, for example Broccolini, Baby Spinach & Asian Vegetables.

Considering all elements that contribute to consumer satisfaction in restaurants, **variety of the meals available** was the most important element of the meals that are offered. Overall, it drives 7% of satisfaction.

Colmar Brunton recommends:

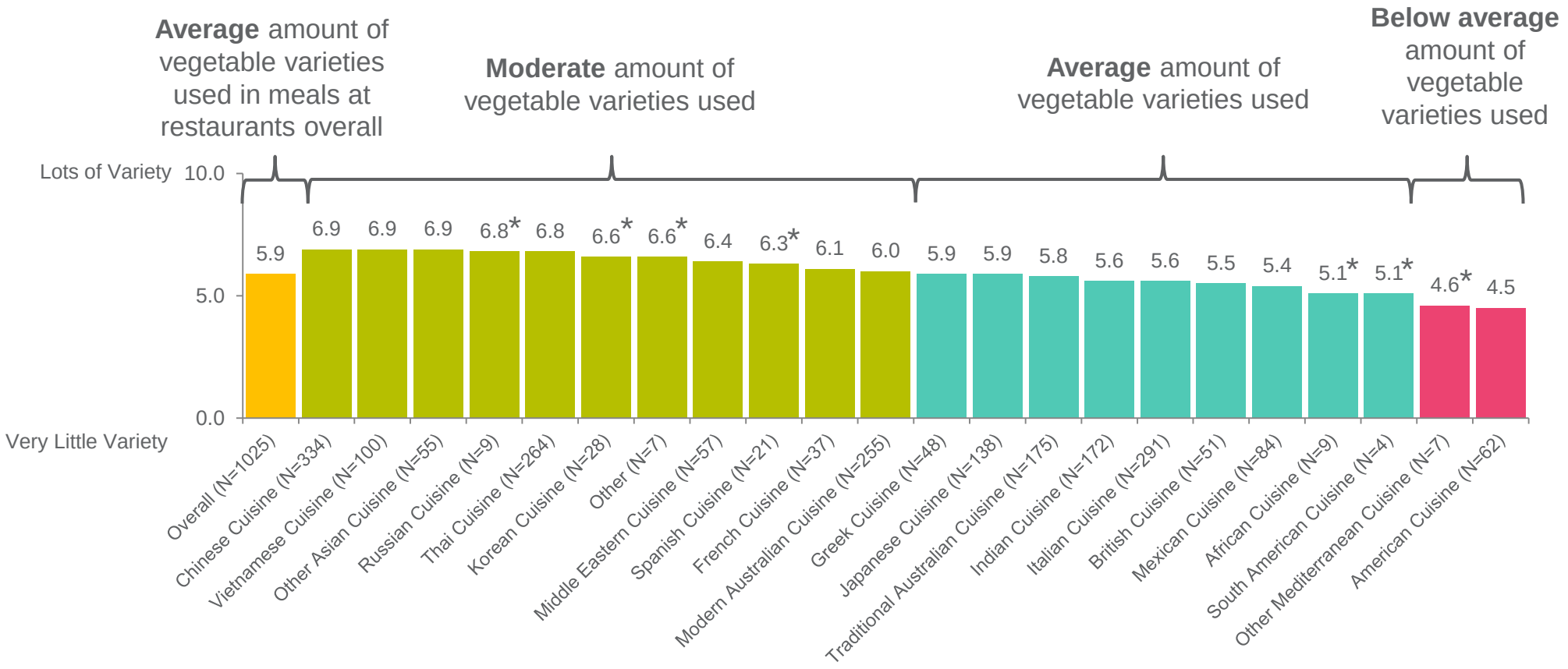
Using a **larger variety of vegetables** to assist in increasing consumer satisfaction of restaurant meals.

Variety of Vegetables Used In Restaurants

There was room for improvement by providing greater variety of vegetables in restaurants across all cuisines.

Respondents stated that there was an average number of vegetables being used in restaurant meals overall, with a mean of 5.9/10.

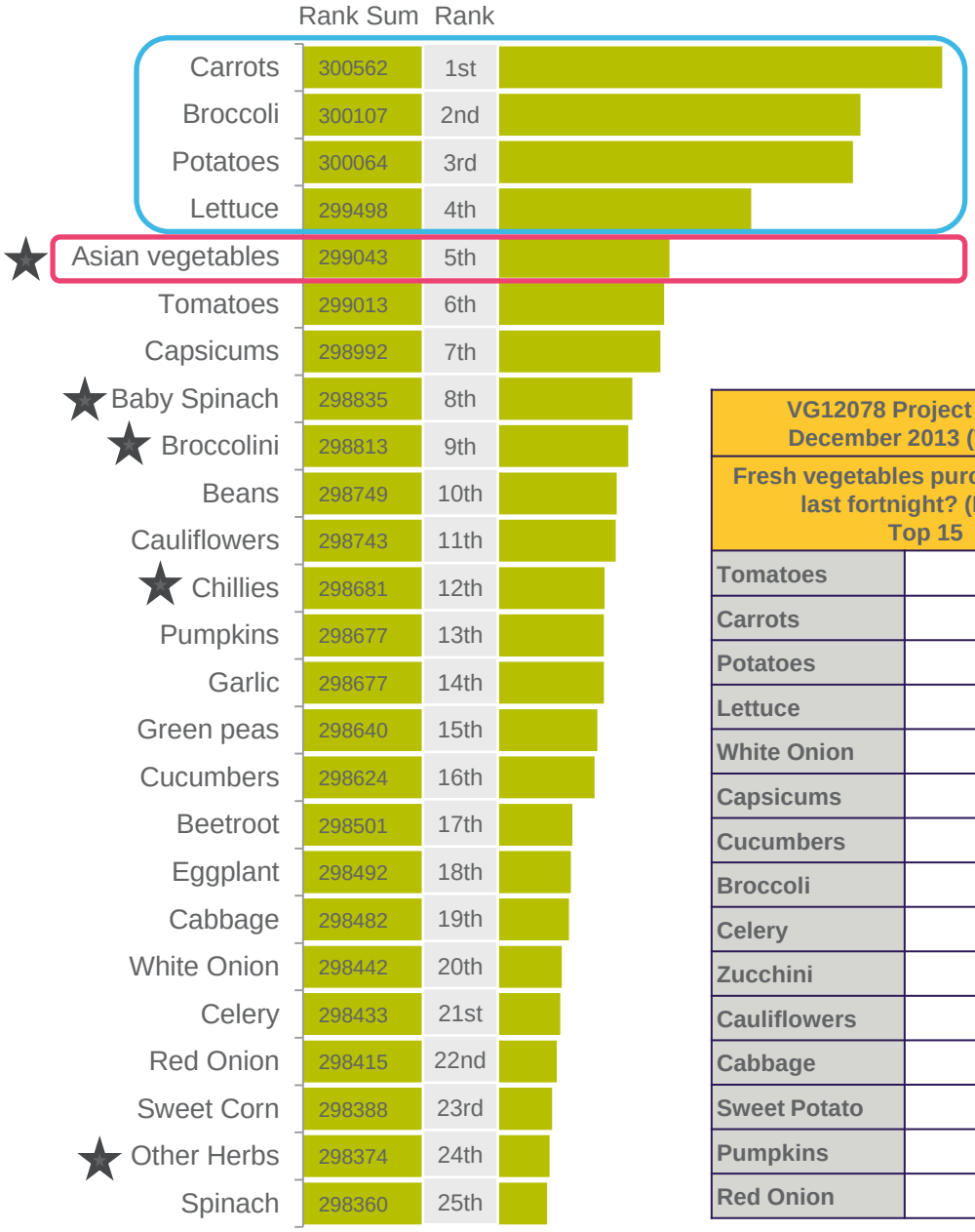
Asian cuisines such as Chinese, Vietnamese and Thai were the cuisines that respondents stated had the highest levels of variety. Those cuisines that had the least amount of stated vegetable variety in restaurants were American and British cuisine.



Q13. Overall, what do you think of the VARIETY of the vegetables used at the restaurants that you dine in at?
Q13a. How varied would you consider the vegetables used for the restaurant types shown below?
Total Respondents N=1025 (* indicates caution low base size N<30)

Top Vegetables Consumed at Restaurants

Top 25 Vegetables – Total Sample



Base vegetables most commonly used in restaurant meals.

Asian vegetables used often as many respondents go to restaurants for Asian cuisine (for example, 57% of sample had eaten at Chinese cuisine restaurants in last 3 months).

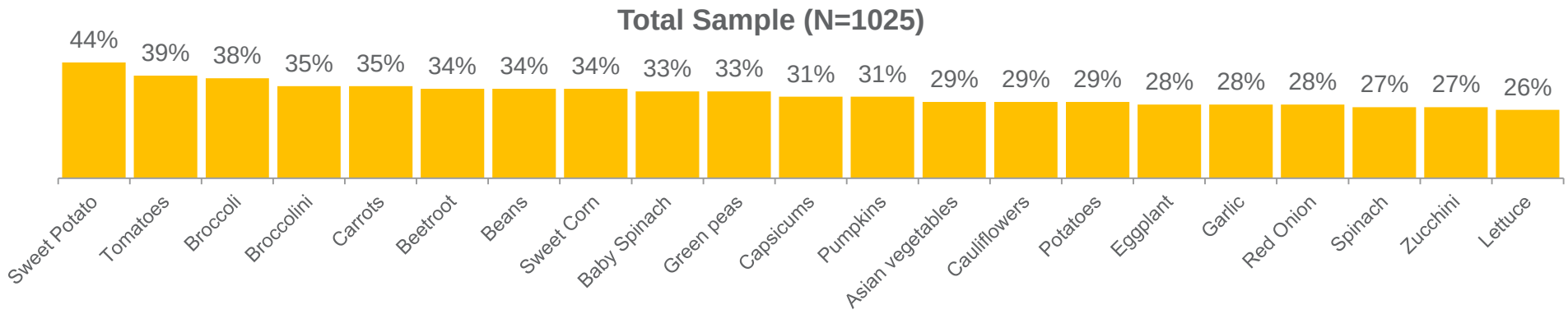
VG12078 Project Harvest December 2013 (Wave 7)	
Fresh vegetables purchased in the last fortnight? (N=536) Top 15	
Tomatoes	91%
Carrots	89%
Potatoes	77%
Lettuce	77%
White Onion	76%
Capsicums	76%
Cucumbers	75%
Broccoli	73%
Celery	72%
Zucchini	65%
Cauliflowers	61%
Cabbage	60%
Sweet Potato	60%
Pumpkins	59%
Red Onion	58%

- There were some differences between the vegetables that were being used in restaurants compared to what consumers purchase for use at home.
- Although some vegetables remained common for both (e.g. base vegetables such as carrots, tomatoes and broccoli), premium/newer vegetables such as broccolini, baby spinach, chillies and other herbs were more commonly consumed when dining out than are being purchased for use at home (see ★). This may be due to availability and level of confidence in their preparation.

Q2. Can you please rank the TOP 5 vegetables that you consume MOST FREQUENTLY when dining out at restaurants?
Scores shown are revered rank sum scores (the higher the score more frequent it is use in restaurant meals.
Total Respondents N=1025

Vegetables to Use More in Restaurants

Top 20



	Total N=1025	Gender		Age						Location	
		Male N=495	Female N=530	18-24 N=73	25-34 N=191	35-44 N=153	45-54 N=185	55-64 N=208	65+ N=215	REGIONAL N=275	METRO N=750
Sweet Potato	44%	38%	50%	45%	36%	38%	46%	50%	47%	46%	43%
Tomatoes	39%	41%	37%	30%	34%	36%	37%	39%	49%	38%	39%
Broccoli	38%	35%	41%	40%	36%	35%	42%	34%	43%	38%	38%
Broccolini	35%	32%	38%	26%	38%	31%	35%	38%	35%	33%	36%
Carrots	35%	35%	34%	40%	29%	34%	34%	33%	41%	31%	36%
Beetroot	34%	31%	37%	23%	30%	29%	36%	37%	40%	36%	33%
Beans (i.e. French & Runner)	34%	34%	34%	19%	21%	29%	35%	39%	48%	36%	33%
Sweet Corn	34%	34%	33%	36%	38%	35%	32%	30%	33%	36%	33%
Baby Spinach	33%	30%	35%	27%	28%	34%	39%	30%	34%	32%	33%
Green peas	33%	36%	30%	23%	30%	26%	30%	35%	45%	36%	32%
Capsicums	31%	29%	33%	26%	31%	31%	34%	30%	32%	32%	31%
Pumpkins	31%	25%	36%	37%	27%	30%	31%	31%	33%	31%	31%
Asian vegetables	29%	27%	30%	25%	21%	28%	31%	29%	35%	33%	27%
Cauliflowers	29%	27%	31%	22%	24%	20%	26%	31%	42%	33%	27%
Potatoes	29%	29%	28%	30%	25%	24%	30%	28%	36%	29%	29%
Eggplant	28%	25%	31%	22%	31%	31%	32%	27%	24%	24%	30%
Garlic	28%	26%	29%	25%	23%	33%	30%	23%	32%	31%	27%
Red Onion	28%	29%	28%	16%	26%	24%	30%	28%	37%	30%	28%
Spinach	27%	26%	28%	23%	23%	27%	28%	28%	30%	24%	28%
Zucchini	27%	21%	32%	19%	29%	27%	33%	25%	25%	31%	26%
Lettuce	26%	28%	25%	23%	20%	29%	26%	22%	36%	28%	26%

Overall, sweet potato, tomatoes and broccoli were the top vegetables consumers wanted more of in their restaurant meals.

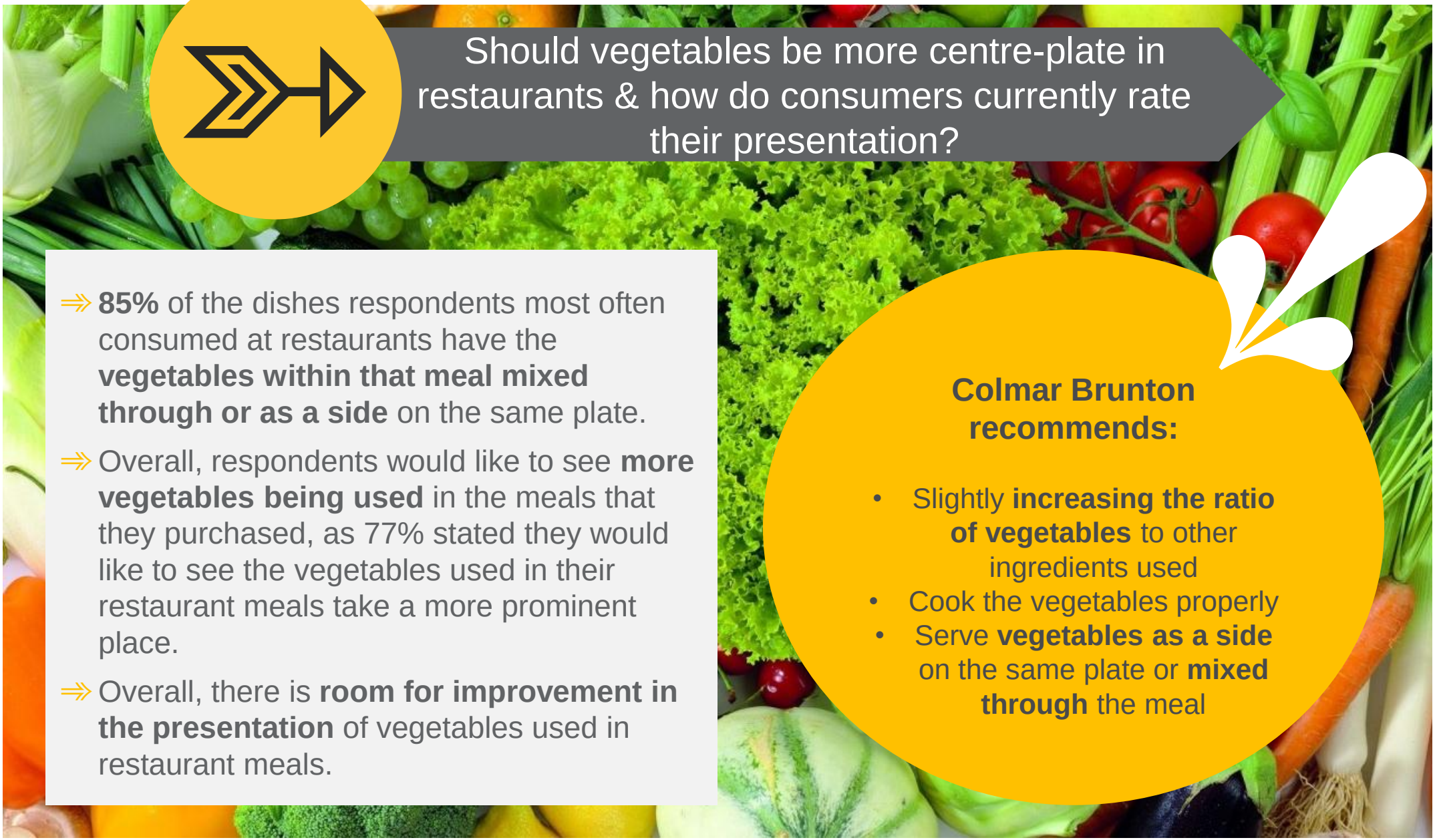
New/premium or less common vegetables available to Australian consumers are also desired for use in restaurants, for example;

- Broccolini
- Baby Spinach
- Asian Vegetables
- Beans (i.e. French & Runner)
- Eggplant

It is evident that the desired vegetables to be used in restaurants were strongly influenced by Asian cuisine as many of the top cuisines frequented were from this region and the top dishes they purchased were of Asian origin.

Q14. What specific vegetables would you like to see be used more in the restaurants that you dine in at?
Colour shades in above table represent high (green) to low (red) proportions
Total Respondents N=1025

Should vegetables be more centre-plate in restaurants & how do consumers currently rate their presentation?



- **85%** of the dishes respondents most often consumed at restaurants have the **vegetables within that meal mixed through or as a side** on the same plate.
- Overall, respondents would like to see **more vegetables being used** in the meals that they purchased, as 77% stated they would like to see the vegetables used in their restaurant meals take a more prominent place.
- Overall, there is **room for improvement in the presentation** of vegetables used in restaurant meals.

Colmar Brunton recommends:

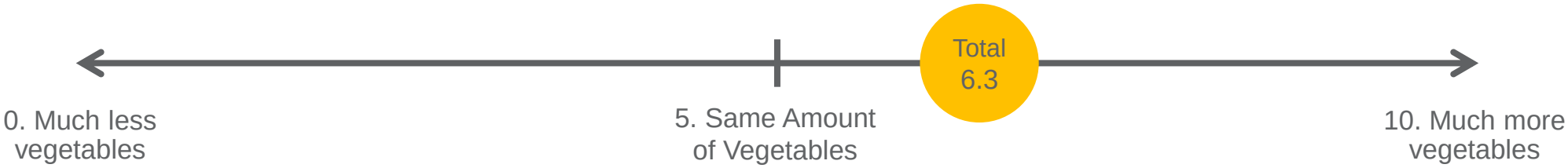
- Slightly **increasing the ratio of vegetables** to other ingredients used
- Cook the vegetables properly
- Serve **vegetables as a side** on the same plate or **mixed through** the meal

More or Less Vegetables?

For Main Meal Purchased

Overall, respondents wanted more vegetables in the main dishes that they purchased.

Females wanted significantly more vegetables added to their main meals than males, as did 25-64 year olds compared with 65+ years old.



Total N=1025	Gender		Age						Location	
	a. Male N=495	b. Female N=530	a. 18-24 N=73	b. 25-34 N=191	c. 35-44 N=153	d. 45-54 N=185	e. 55-64 N=208	f. 65+ N=215	a. Regional N=275	b. Metro N=750
6.3	6.1	6.5 a	6.2	6.6 f	6.5 f	6.5 f	6.2	5.9	6.2	6.3

Q5c. MORE OR LESS VEGETABLES MOST FREQUENT DISH
Q5c. would you like to see MORE or LESS VEGETABLES in this meal in the future?
Letter indicates significantly higher difference between scores @ 95% CI
Total Respondents N=1025

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Most Common Dishes Purchased at Restaurants

Top 30 Meals at Restaurants	
1st	Steak
2nd	Stir-fry
3rd	Pasta
4th	Fish
5th	Chicken
6th	Chicken parmigiana
7th	Seafood
8th	Salad
9th	Chinese cuisine
10th	Schnitzel
11th	Vegetable dishes
12th	Roast
13th	Pizza
14th	Sushi
15th	Curries
16th	Grilled fish
17th	Steak & vegetables
18th	Steak & salad
19th	Fish & chips
20th	Chicken schnitzel
21st	Pad thai
22nd	Salmon
23rd	Chicken schnitzel
24th	Fish & salad
25th	Veal
26th	Parmigiana
27th	Rice dishes
28th	Thai stir-fry
29th	Thai cuisine
30th	Fried rice

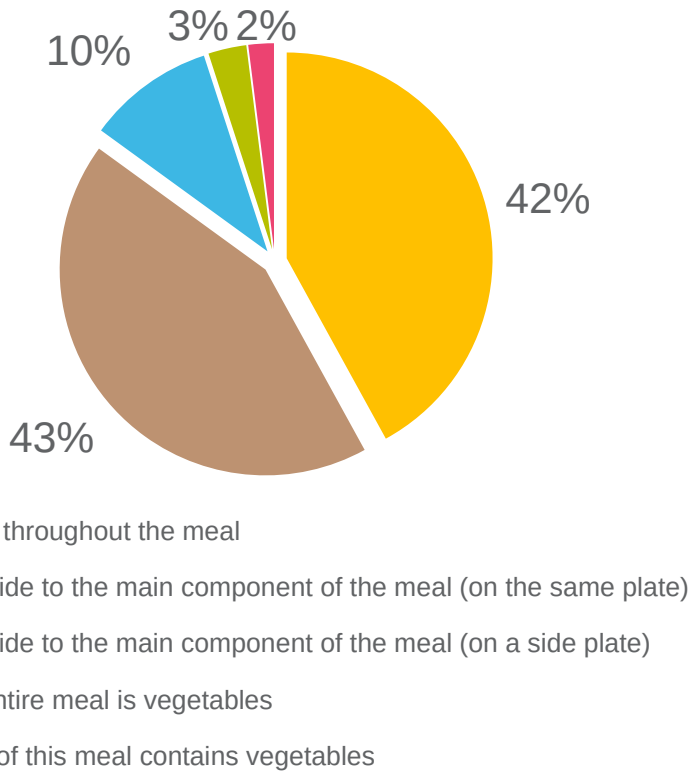
Of the top 30 most common dishes consumed at restaurants by respondents, 27% were Asian cuisine.

The top dishes mentioned were meat based (steak and chicken) meals, stir-fry meals and pasta.

Q5a. MOST COMMON DISH PURCHASED AT RESTAURANTS
Q5a. What is the most common dish that you order and consume when dining out at restaurants?
Total Respondents N=1025 (gen) - Generic/unspecified
The above image indicates through the size of the words shown how frequently the words were used in the respondents verbatims relative to all other words used by all respondents

How Vegetables are Typically Served

For Most Frequent Dish Purchased



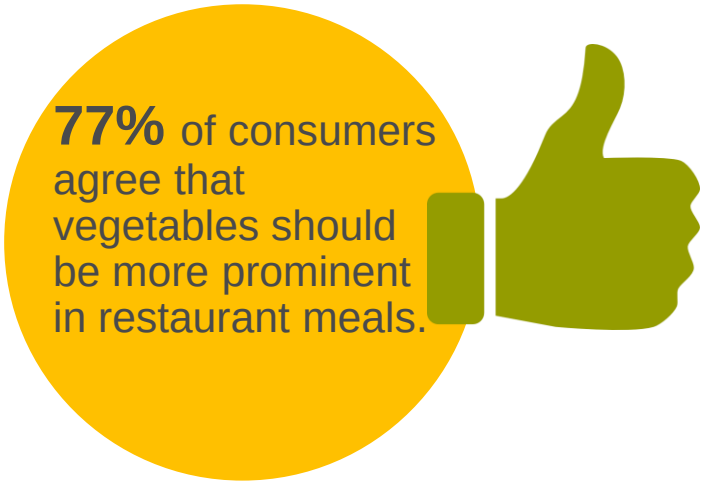
85% of the most frequent dishes consumed at restaurants had vegetables either mixed throughout the meals or as a side on the same plate.

This was consistent for all demographics.

	Total	Gender		Age						Location	
		Male	Female	18-24	25-34	35-44	45-54	55-64	65+	REGIONAL	METRO
	N=1025	N=495	N=530	N=73	N=191	N=153	N=185	N=208	N=215	N=275	N=750
Mixed throughout the meal	42%	39%	46%	56%	54%	45%	47%	33%	30%	38%	44%
As a side to the main component of the meal (on the **same** plate)	43%	46%	41%	32%	36%	34%	43%	52%	53%	49%	41%
As a side to the main component of the meal (on a **side** plate)	10%	12%	8%	8%	9%	12%	6%	10%	13%	8%	10%
The entire meal is vegetables	3%	3%	3%	0%	1%	7%	3%	3%	2%	3%	3%
None of this meal contains vegetables	2%	1%	2%	4%	1%	2%	2%	2%	1%	1%	2%

Q5b. How are the vegetables served for your most frequent dish?
Colour shades in above table represent high (green) to low (red) proportions
Total Respondents N=1025

Prominence of Vegetables in Restaurant Meals



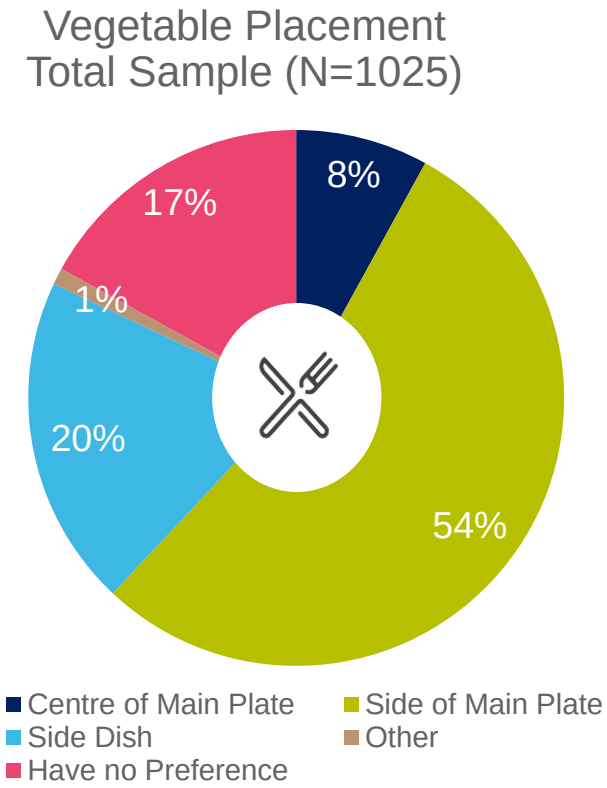
The majority of respondents across all demographics wanted to see vegetables used more prominently in the restaurant meals that they purchased.

	Total	Gender		Age						Location	
		Male	Female	18-24	25-34	35-44	45-54	55-64	65+	REGIONAL	METRO
	N=1025	N=495	N=530	N=73	N=191	N=153	N=185	N=208	N=215	N=275	N=750
Agree	43%	35%	51%	52%	41%	43%	48%	45%	37%	45%	43%
Somewhat agree	34%	36%	32%	33%	42%	28%	32%	30%	37%	32%	35%
Neither agree or disagree	18%	22%	14%	11%	13%	22%	19%	19%	20%	19%	17%
Somewhat disagree	3%	4%	2%	4%	3%	7%	1%	1%	5%	3%	3%
Disagree	1%	2%	1%	0%	1%	1%	0%	4%	1%	1%	1%

Min N=1025
Q8. To what extent do you agree or disagree that vegetables should take a more prominent place in restaurant meals in the future?
Colour shades in above table represent high (green) to low (red) proportions

Overall Preference of Vegetables Being Served in Restaurant Meals

The majority of consumers (74%) preferred vegetables to be served on the side of the main dish (either on the same plate or on a side dish).



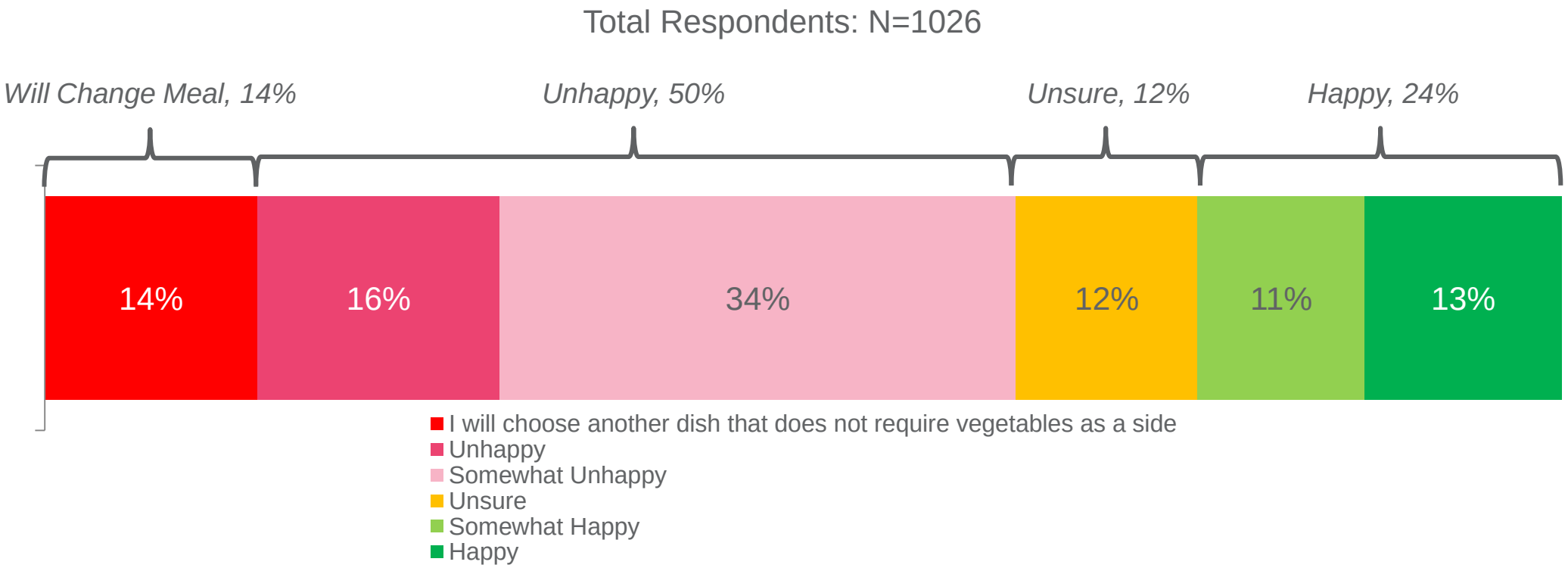
	Total	Gender		Age						Location	
		Male	Female	18-24	25-34	35-44	45-54	55-64	65+	REGIONAL	METRO
	N=1025	N=495	N=530	N=73	N=191	N=153	N=185	N=208	N=215	N=275	N=750
On the side of the main plate	54%	53%	56%	71%	61%	48%	54%	53%	50%	54%	55%
As a side dish	20%	22%	17%	14%	14%	21%	19%	22%	24%	20%	20%
I have no preference in how vegetables are served for my meals	17%	16%	18%	10%	12%	19%	19%	18%	18%	18%	16%
In the centre of the main plate	8%	9%	7%	4%	13%	11%	7%	6%	6%	6%	9%
Other (please specify)	1%	0%	2%	1%	0%	1%	1%	0%	2%	2%	1%

Min N=1025
Q8a. How would you prefer to have vegetables served for your restaurant meals?
Colour shades in above table represent high (green) to low (red) proportions

Charging for Additional Vegetables to Meals

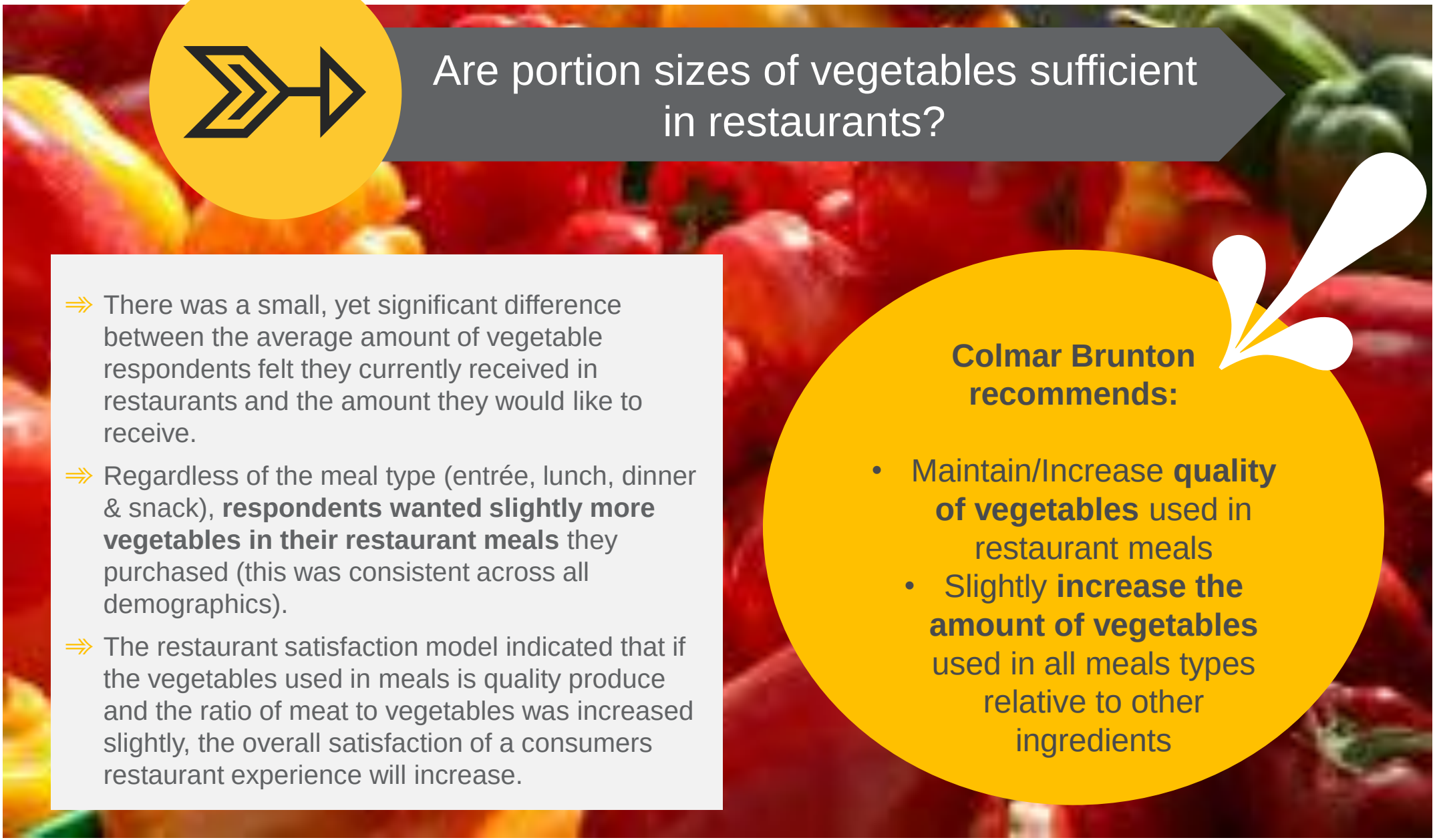
Respondents stated that they do not like restaurants charging for vegetables as an optional extra and would prefer them added as a part of the main meal. This was consistent across all demographics.

54% of respondents would either change their meal choice or be unhappy with the meal if a restaurant charged separately for vegetables. Only 24% of respondents were happy for this activity to occur in restaurants. This is most likely due to respondents being dissatisfied with additional costs being added to their restaurant meals.



Q19PR. In some restaurants it is common to pay for the main dish (e.g. a steak) and then be charged for vegetables at an additional cost (e.g. side dish). In this type of scenario what would be your typical behaviour/attitude?
Total Respondents N=1025

Are portion sizes of vegetables sufficient in restaurants?



- There was a small, yet significant difference between the average amount of vegetable respondents felt they currently received in restaurants and the amount they would like to receive.
- Regardless of the meal type (entrée, lunch, dinner & snack), **respondents wanted slightly more vegetables in their restaurant meals** they purchased (this was consistent across all demographics).
- The restaurant satisfaction model indicated that if the vegetables used in meals is quality produce and the ratio of meat to vegetables was increased slightly, the overall satisfaction of a consumers restaurant experience will increase.

Colmar Brunton recommends:

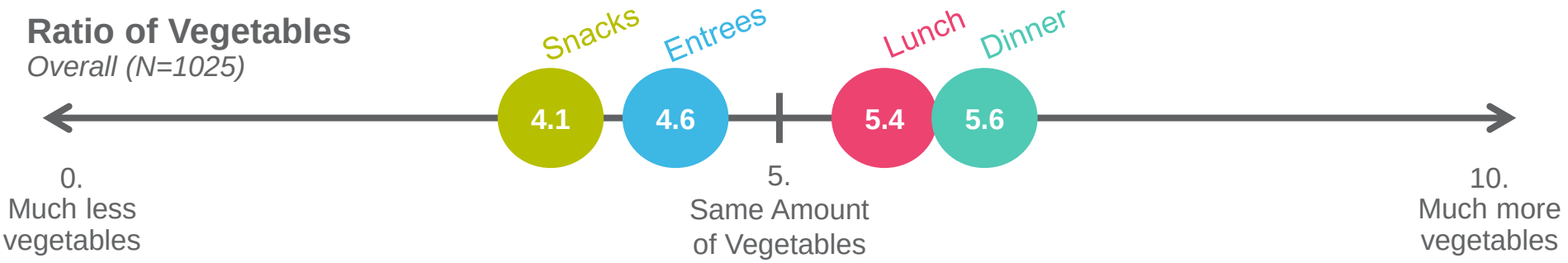
- Maintain/Increase **quality of vegetables** used in restaurant meals
- Slightly **increase the amount of vegetables** used in all meals types relative to other ingredients

Ratio of Vegetables & Ideal Amount Used In Restaurants

- Snacks and entrées had **slightly less** vegetables in comparison to other ingredients used in restaurant meals.
- Lunch and dinner restaurant meals had **slightly more** vegetables compared to other ingredients.
- Regardless of the meal type, all respondents wanted **slightly more** vegetables being used in restaurant meals that they purchased (this was consistent across all demographics).
  - This was particularly true for the main meal, which was also key to driving restaurant satisfaction overall.

Net Increase Vegetable Amount Actual to Ideal Ratio	
Snacks	+0.3
Entrees	+0.3
Lunch	+0.3
Dinner	+0.5

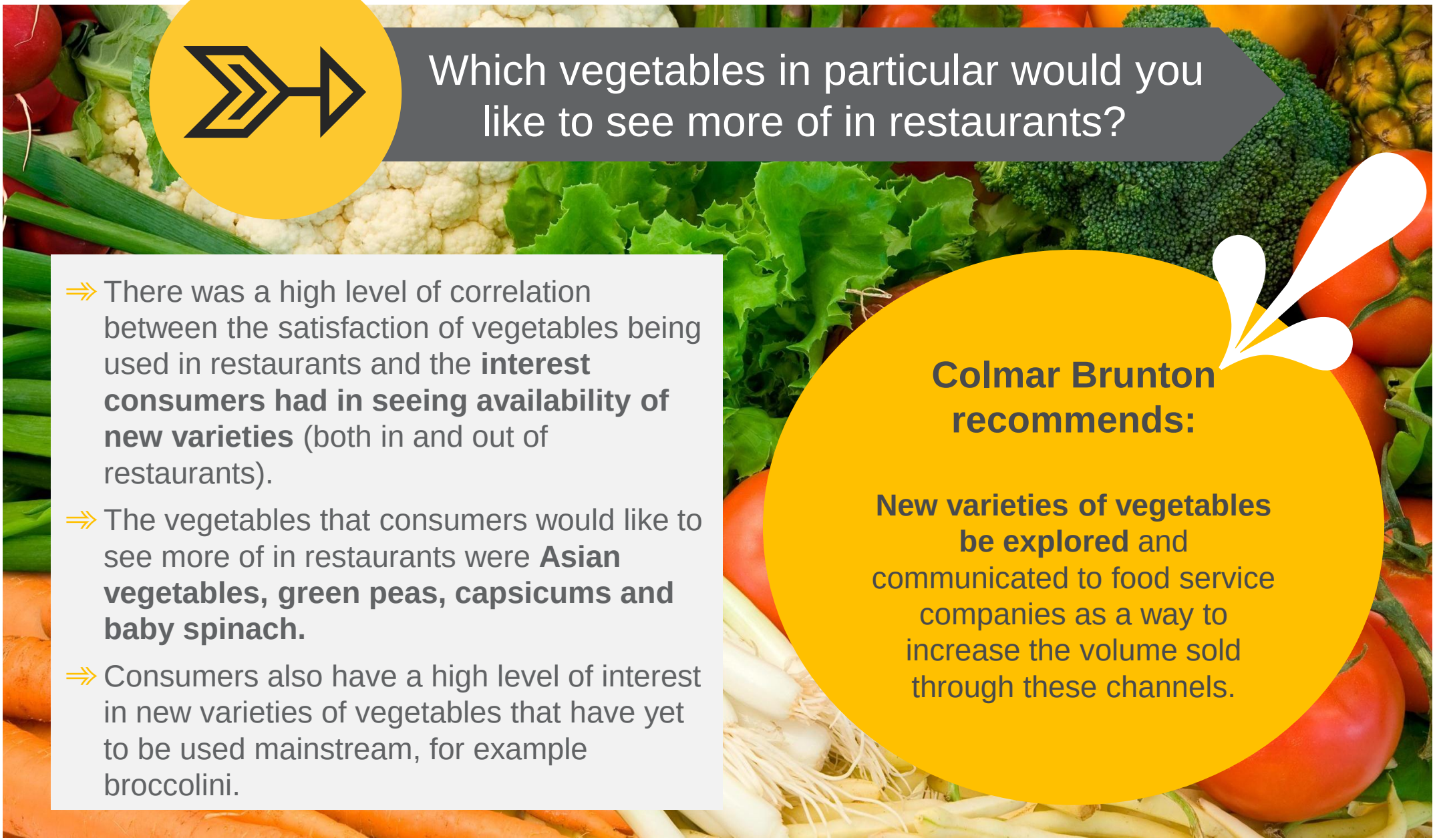
Ratio of Vegetables
Overall (N=1025)



Decrease/Increase Vegetables
Overall (N=1025)

Min N=851
Q6.What ratio do you think the meals typically (including side dishes you typically purchase) are for vegetables to other ingredients?
Q7. How would you change the ratios of vegetables in your meals (including side dishes you typically purchase) at restaurants to better suit you?

Which vegetables in particular would you like to see more of in restaurants?



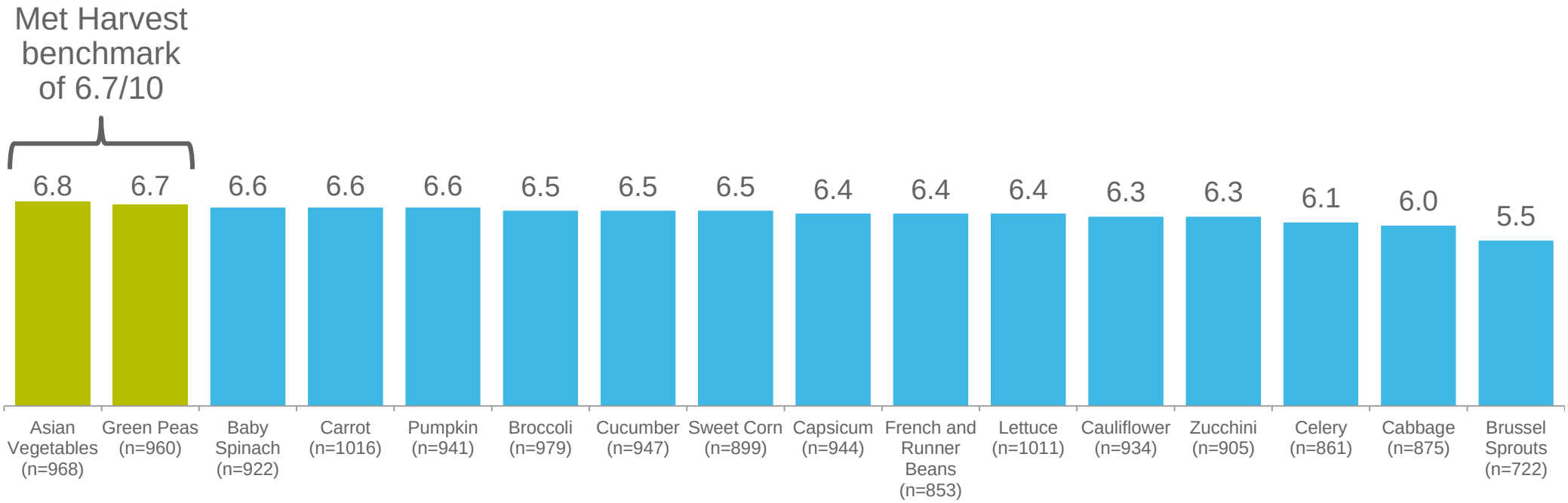
- There was a high level of correlation between the satisfaction of vegetables being used in restaurants and the **interest consumers had in seeing availability of new varieties** (both in and out of restaurants).
- The vegetables that consumers would like to see more of in restaurants were **Asian vegetables, green peas, capsicums and baby spinach.**
- Consumers also have a high level of interest in new varieties of vegetables that have yet to be used mainstream, for example broccolini.

Colmar Brunton recommends:

New varieties of vegetables be explored and communicated to food service companies as a way to increase the volume sold through these channels.

Satisfaction of Key Vegetables in Restaurants

- Satisfaction of vegetables used in restaurant meals was relatively good, with a range of 1.3 for all 16 commodities tracked (current commodities also tracked in Project Harvest, VG12078).
- However, compared to the Harvest monthly tracker, overall satisfaction mean of 6.7/10 (as of December 2013), only Asian Vegetables and Green Peas were meeting this benchmark.
- Satisfaction may be increased by improving the cooking of vegetables, which was the key reason for vegetable dissatisfaction (see next slide).



Q12a-p. How **SATISFIED** are you with each of the following vegetables when they are used in the meals that you have consumed at restaurants?
Total Respondents N=1025
Means are out of 10 (from 1, not at all satisfied to 10 extremely satisfied)

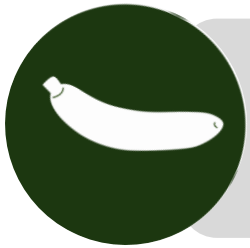
Dissatisfaction with Vegetables

Overall, vegetables not being cooked properly was the main reason for dissatisfaction.

29% Brussels Sprout Dissatisfaction.
Main Reason: I do not like the taste (40%).

21% Cabbage Dissatisfaction.
Main Reason: They are often not cooked properly (32%).

19% Celery Dissatisfaction.
Main Reason: I do not like the taste (27%).



17% Zucchini Dissatisfaction.
Main Reason: They are often not cooked properly (36%).

17% Lettuce Dissatisfaction.
Main Reason: Too much of this vegetable is served (30%).

17% Cauliflower Dissatisfaction.
Main Reason: They are often not cooked properly (54%).

17% Beans Dissatisfaction.
Main Reason: They are often not cooked properly (48%).

13% Broccoli Dissatisfaction.
Main Reason: They are often not cooked properly (50%).

13% Sweet Corn Dissatisfaction.
Main Reason: They are often not cooked properly (33%).

13 % Cucumber Dissatisfaction.
Main Reason: Do not like the taste (25%).

13 % Capsicum Dissatisfaction.
Main Reason: I do not like the taste (31%).

12% Pumpkin Dissatisfaction.
Main Reason: They are often not cooked properly (26%).

12% Baby Spinach Dissatisfaction.
Main Reason: I do not like the taste (22%).

11% Asian Vegetable Dissatisfaction.
Main Reason: They are often not cooked properly (34%).

11% Green Peas Dissatisfaction.
Main Reason: Often not fresh when cooked (31%).

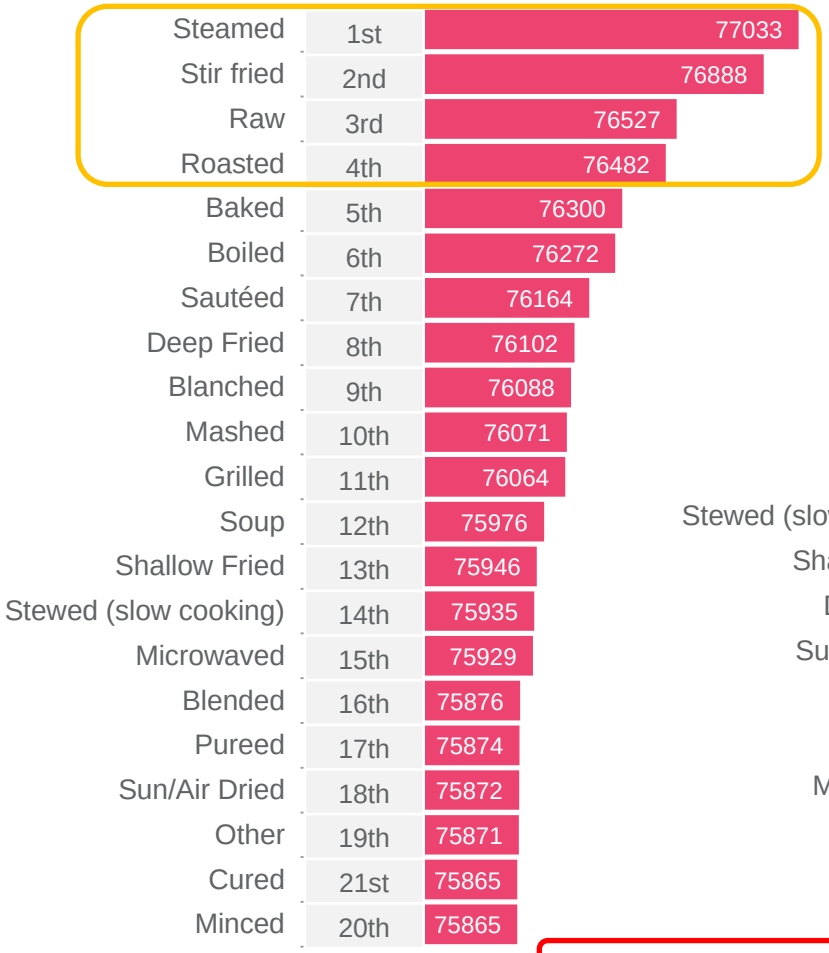
10% Carrot Dissatisfaction.
Main Reason: They are often not cooked properly (46%).

Respondents who scored below 5 on a vegetable for Q12a-p, completed this question. Min N=102
Q12z. Below are the vegetables you stated you were dis-satisfied with when they are used in meals you have tried at restaurants.

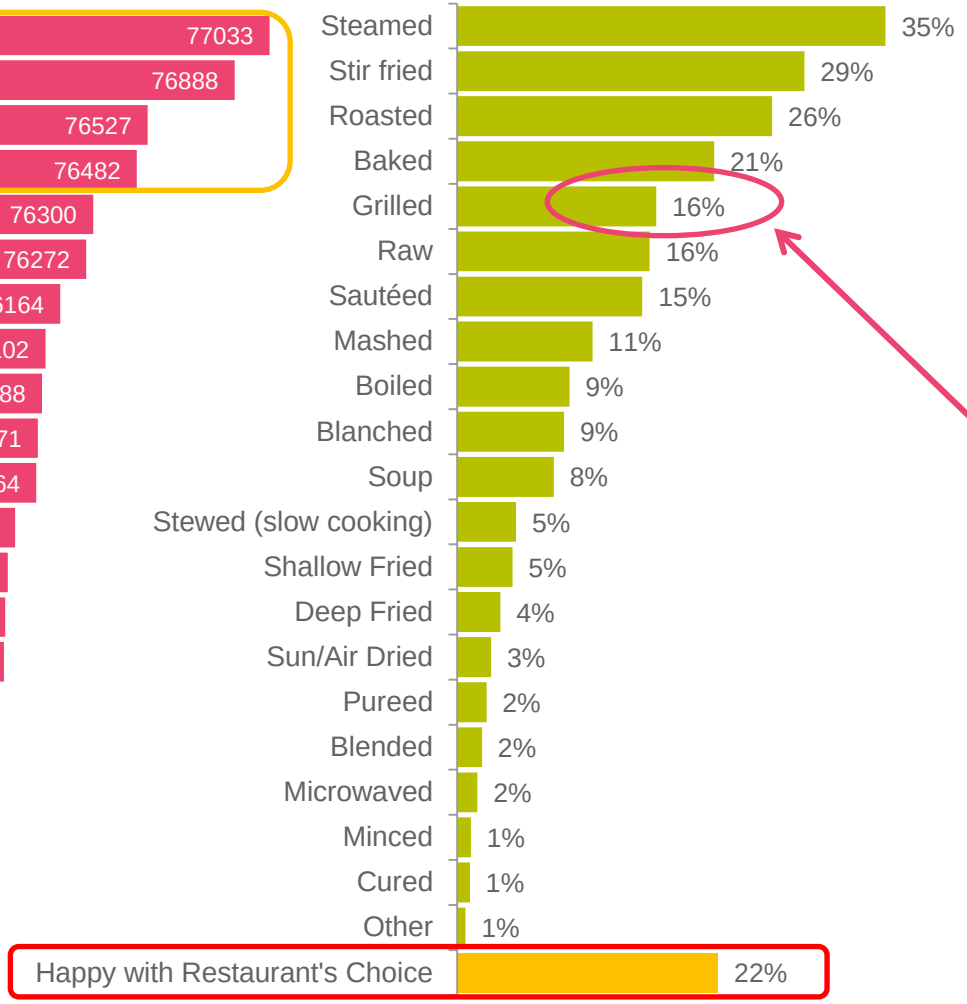
How Vegetables are Cooked at Restaurants

Actual & Preferred.

Most Common Vegetable Cooking Methods (Ranking Top 3) N=1025



Preferred Cooking Method in Restaurants N=1025



The most common formats of vegetables in restaurants were steaming, stir frying, serving raw and baking/roasting.

The preferred methods of cooking vegetables in restaurants were consistent with current restaurant cooking methods being applied.

Respondents however, would like to see more *grilled* vegetables in restaurants.

Overall, restaurant cooking methods were also consistent with the way consumers have indicated they cook their vegetables at home. *(source: Project Harvest VG12078)*.

Q3. Can you please rank the top 3 ways in which vegetables that you consume at restaurants are typically cooked?
Q3PR. How would you prefer to have vegetables cooked for your restaurant meals?
Scores shown are reversed rank sum scores (the higher the score the more frequent it is used in restaurant meals). Total Respondents N=1025

Interest in New Varieties
Project Harvest (VG12078)

- There was consistency between the vegetables that consumers were satisfied with in restaurants and the interest consumers have in new varieties of these vegetables overall.
- Consumers wanted to see more varieties of Asian vegetables being used in restaurants, as well as green peas, capsicums and baby spinach.
- They also wanted to see these available outside of restaurants for use at home.

How interested or disinterested are you in new varieties of …….?
Source: VG12078 Project Harvest Waves 3-7 September to December 2013
Min N=317 per commodity

Would you dine more at a restaurant if they used claims (for vegetables)?

- Overall, respondents had a reasonable **perception of freshness** for vegetables used in restaurants **(6.4/10).** However, there is room to improve this perception for all consumer demographics.
- Of the claims tested, communicating that all **vegetables used in a restaurant are fresh was the most appealing claim (7.8/10)**.
- This claim was closely followed by communicating that all vegetables used were grown in Australia (7.4/10).
- The organic and hydroponic claims explored were less likely to entice consumers to dine at a restaurant more often.

Colmar Brunton recommends:

Advise restaurants that **freshness is the core claim** to communicate to consumers and will help drive trial and repeat business.

Freshness of Vegetables Used in Restaurants

- There is room for improvement in the perceptions of vegetable freshness used in restaurants overall, especially with younger age groups.
- All demographics explored had moderate perceptions freshness of vegetables used in restaurants.
  - As quality of vegetables was a strong driver of perceived value for money, freshness of vegetables should be promoted with-in the restaurant industry.
- Older respondents aged 55+ had a significantly higher perception of restaurant vegetables compared with younger respondents aged 18-24.

6.4/10 Overall Freshness.

Consumers indicated that vegetables used in restaurant meals were reasonably fresh.

Total	Gender		Age						Location	
	A. Male	B. Female	A. 18-24	B. 25-34	C. 35-44	D. 45-54	E. 55-64	F. 65+	A. REGIONAL	B. METRO
N=1025	N=495	N=530	N=73	N=191	N=153	N=185	N=208	N=215	N=275	N=750
6.4	6.3	6.4	5.8	6.2	6.3	6.4	6.5 A	6.6 A	6.4	6.3

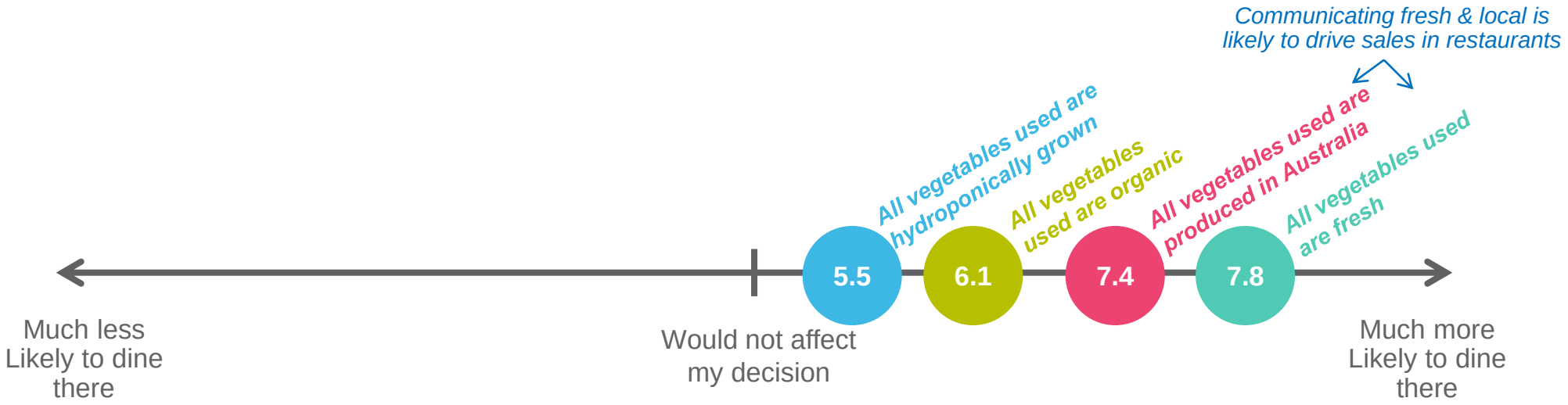
Perception of vegetable freshness in restaurants increased with age groups.

Q11. Overall, how **FRESH** do you find the vegetables that are being used in the restaurant meals are? N=1025
Total Respondents N=1025 (means are out of 10) Anchors used were 0 – Not at all Fresh to 10 – Extremely fresh
Capital letter indicates significant higher differences between means @ 95% CI

Vegetable Claims to be Used in Restaurants

Of the claims explored, communicating that all vegetables used in restaurants are fresh was the most effective in enticing respondents to dine there. This was consistent across all demographics.

The second most effective claim tested was communicating that all vegetables used in the restaurant were produced in Australia. This particularly resonated with older respondents aged 45+, compared to younger age groups.



Claims Tested	Total (N=1025)	Gender		Age						Location	
		A. Male (N=495)	B. Female (N=530)	A. 18-24 (N=73)	B. 25-34 (N=191)	C. 35-44 (N=153)	D. 45-54 (N=185)	E. 55-64 (N=208)	F. 65+ (N=215)	A. REGIONAL (N=275)	B. METRO (N=750)
All vegetables used are fresh	7.8	7.6	7.9 A	7.9 B	7.3	7.8 B	8 B	7.7	7.9 B	7.8	7.7
All vegetables used are produced in Australia	7.4	7.2	7.6 A	7	6.9	7.3	7.8 A, B	7.6 B	7.6 B	7.6	7.3
All vegetables used are organic	6.1	5.9	6.4 A	6.6 F	6.4 F	6.4 F	6.3 F	6.1 F	5.4	5.8	6.2 A
All vegetables used are hydroponically grown	5.5	5.4	5.5	5.3	5.5	5.6	5.8 F	5.4	5.2	5.3	5.5

Q18a-e. How much would each of the following statements below influence your decision to dine in at a restaurant if each of these claims were made?
Total Respondents N=1025
Significant higher differences @ 95%CI indicated by capital letter

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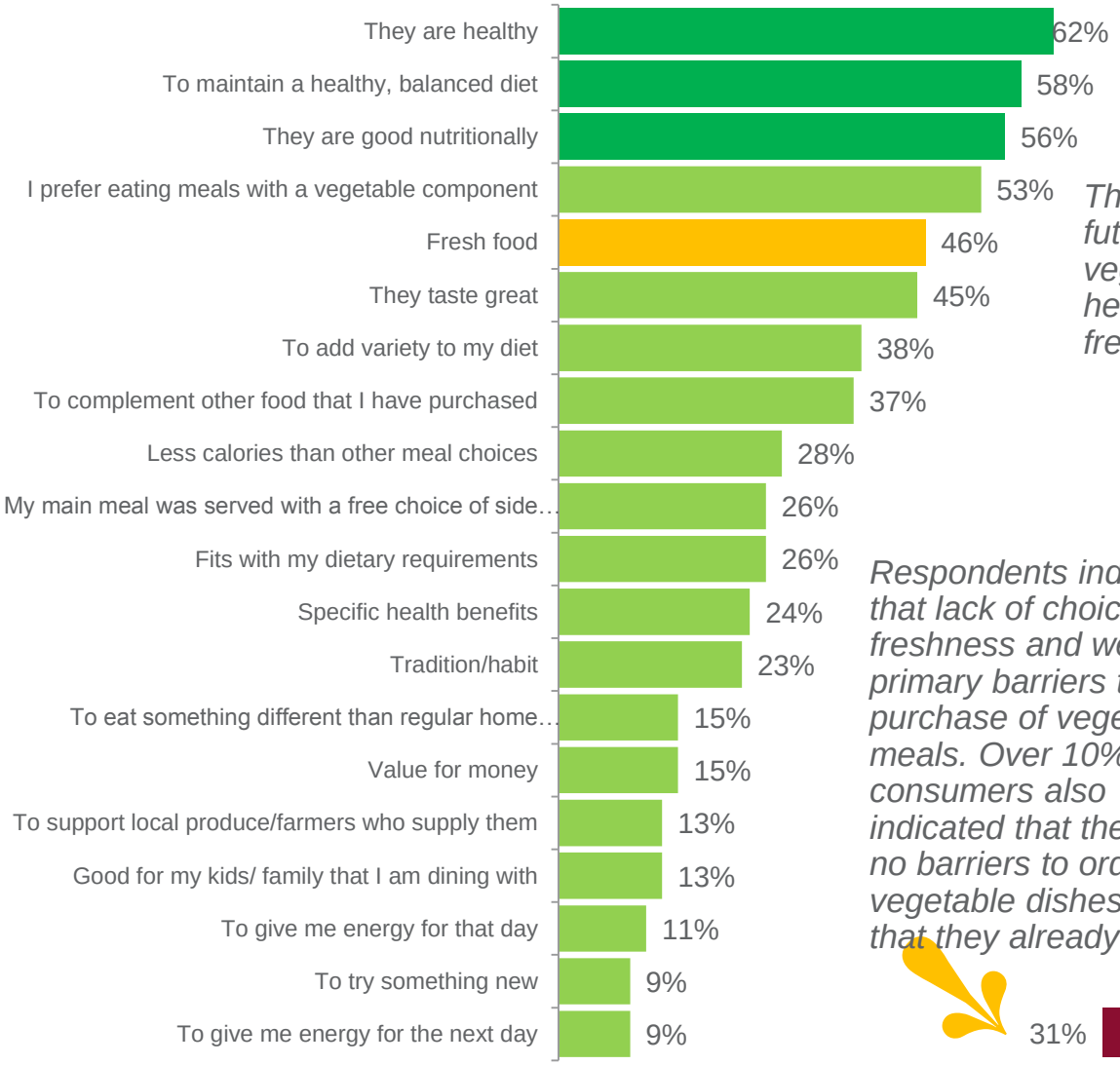
Triggers and Barriers to Purchasing Meals at Restaurants (that contain vegetables)

Freshness is a key trigger (and barrier if not met) to the purchase of meals at restaurants that contain vegetables.

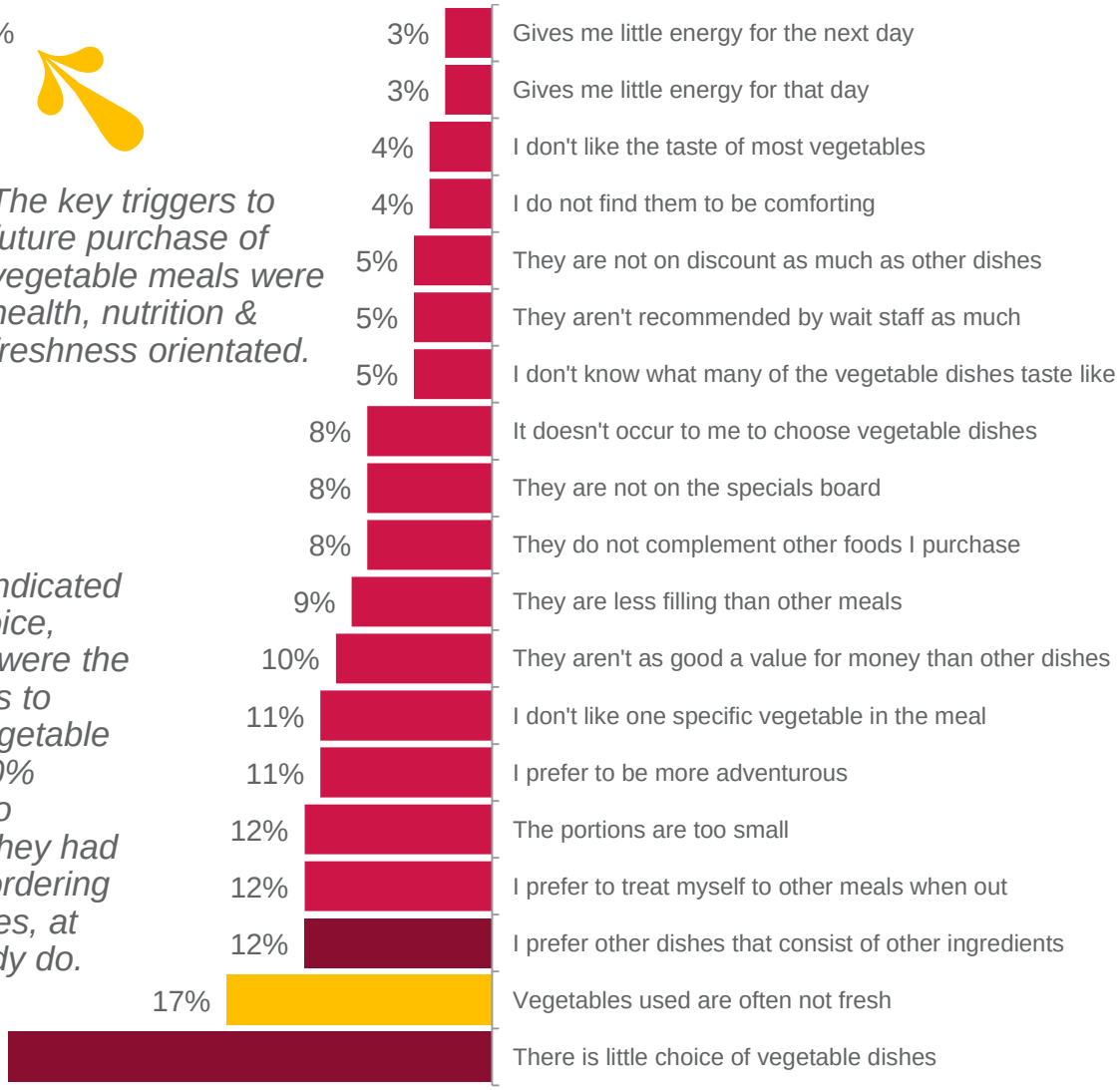
Triggers



The key triggers to future purchase of vegetable meals were health, nutrition & freshness orientated.

Respondents indicated that lack of choice, freshness and were the primary barriers to purchase of vegetable meals. Over 10% consumers also indicated that they had no barriers to ordering vegetable dishes, at that they already do.

Barriers



Min N=1025
Q9. What makes you purchase meals that contain vegetables when dining in at restaurants?
Q10. What prevents you from purchasing meals that contain vegetables when dining in at restaurants?

Copying Recipes From Restaurants

What Meals Are Copied?

- Overall 16% of respondents copied recipes from restaurants to cook at home. Females were more likely to do this than males and those aged 18-54 were more likely to do this compared to those aged 55+.
- The most copied meals from restaurants were stir fry's, Asian cuisine dishes and pasta recipes.

	Total (N=1025)	Gender		Age						Location	
		A. Male (N=495)	B. Female (N=530)	A. 18-24 (N=73)	B. 25-34 (N=191)	C. 35-44 (N=153)	D. 45-54 (N=185)	E. 55-64 (N=208)	F. 65+ (N=215)	A. REGIONAL (N=275)	B. METRO (N=750)
Yes	**16%**	11%	21% A	19% E, F	21% E, F	21% E, F	18% E, F	11%	11%	16%	16%
No	**84%**	89%	79%	81%	79%	79%	82%	89%	89%	84%	84%

Top 20 Recipes Copied (N=164)
Stir Fry (gen)
Chinese (gen)
Pasta (gen)
Asian meals (gen)
Curries (gen)
Salads (gen)
French meals (gen)
Roasts (gen)
Thai Curries (gen)
Thai Green Curry
Fennel Salad
Fried Rice
Honey Mustard Chicken Salad
Italian meals (gen)
Laksa
Nasi Goreng
Tacos
Thai meals (gen)
Vegetable Noodles
Vegetable Soups

Q17. Do you copy the INGREDIENTS USED (e.g. recipe or meal description) from RESTAURANT MEALS that you have tried and liked in order to cook them at home?
Total Respondents N=1025
The above image indicates through the size of the words shown how frequently the words were used in the respondents verbatims relative to all other words used by all respondents

Appendix.

Types of Restaurants Frequented
Last 3 Months (Splits)

	Total	Gender		Age						Location		Dietary Requirements		
		Male	Female	18-24	25-34	35-44	45-54	55-64	65+	REGIONAL	METRO	Vegetarians	Other Requirements	No dietary requirements
	N=1025	N=495	N=530	N=73	N=191	N=153	N=185	N=208	N=215	N=275	N=750	N=40	N=335	N=650
Cafés	50%	43%	57%	56%	53%	55%	55%	48%	41%	45%	52%	50%	49%	51%
Fast food restaurants (e.g. McDonalds)	47%	43%	51%	68%	64%	58%	51%	32%	27%	44%	48%	33%	45%	49%
Pub's & Bars	38%	36%	41%	37%	47%	32%	49%	40%	25%	44%	37%	25%	36%	41%
Food Court Cafeterias	36%	32%	39%	47%	46%	35%	36%	30%	28%	30%	38%	40%	33%	36%
RSL's and Leagues clubs	33%	36%	30%	14%	25%	19%	33%	38%	52%	43%	29%	30%	28%	36%
Fish & Chip Shops	30%	29%	31%	40%	35%	39%	36%	23%	20%	31%	30%	18%	27%	33%
Pizza Restaurants (e.g. wood fired pizzas)	27%	28%	27%	40%	48%	35%	29%	16%	9%	20%	30%	33%	27%	27%
Sandwich & Wrap Bars	25%	21%	28%	40%	33%	29%	26%	18%	15%	23%	26%	25%	26%	24%
Hotels	24%	28%	21%	8%	24%	14%	24%	32%	31%	29%	23%	20%	25%	24%
Seafood Restaurants	23%	27%	19%	16%	20%	24%	19%	29%	24%	22%	23%	15%	25%	22%
Sushi Restaurants	23%	22%	24%	49%	34%	29%	25%	14%	7%	13%	27%	20%	21%	24%
Buffet Restaurants	20%	21%	19%	16%	24%	21%	21%	18%	18%	16%	21%	25%	20%	19%
Fusion restaurants (e.g. cuisine from multiple countries)	18%	17%	18%	18%	25%	22%	15%	17%	11%	13%	19%	15%	15%	19%
Burger Bars (e.g. Grilled, Schnitz)	17%	15%	18%	40%	40%	18%	14%	5%	2%	7%	20%	25%	13%	18%
Charcoal Chicken Shops	12%	12%	13%	23%	20%	20%	10%	7%	4%	6%	15%	3%	12%	13%
Markets	11%	9%	13%	12%	19%	12%	14%	6%	5%	8%	12%	13%	9%	12%
Other Restaurants	11%	11%	10%	5%	3%	8%	10%	13%	20%	9%	11%	3%	9%	12%
Premium (e.g. Award winning - Michelin star) Restaurants	10%	13%	8%	4%	15%	16%	7%	10%	7%	7%	11%	8%	8%	11%
Juice Bars	9%	9%	9%	22%	20%	13%	5%	4%	2%	6%	11%	20%	10%	8%
Tapas Restaurants	9%	9%	8%	11%	19%	12%	6%	4%	4%	8%	9%	15%	7%	9%
Vegetarian/Vegan Restaurants	8%	8%	8%	10%	17%	12%	4%	3%	4%	4%	9%	60%	8%	4%
Teppanyaki Restaurants	7%	8%	5%	8%	10%	8%	7%	6%	1%	3%	8%	5%	8%	6%
Festivals/Large Events	6%	6%	6%	3%	16%	8%	3%	4%	0%	5%	6%	8%	7%	5%
BBQ & Spit Restaurants	6%	8%	5%	11%	15%	10%	4%	2%	2%	3%	8%	3%	7%	6%
Carverys	6%	6%	5%	0%	6%	3%	5%	8%	7%	4%	6%	3%	7%	5%
Canteens	5%	5%	4%	15%	10%	6%	4%	0%	0%	3%	5%	5%	4%	5%
Soup Kitchens	3%	2%	3%	3%	5%	3%	4%	1%	0%	2%	3%	5%	4%	2%
Mobile Restaurants (e.g. Taco Truck)	3%	2%	3%	10%	6%	2%	1%	1%	0%	2%	3%	5%	2%	2%
Theatre Restaurants (e.g. Draculas)	2%	2%	2%	1%	8%	2%	2%	1%	0%	2%	2%	3%	3%	2%

S9. What types of RESTAURANTS below do you FREQUENTLY DINE IN at for your main meals (e.g. for lunch and dinner at least once in the last 3 months)?
S10. What types of cuisine below do you frequently consume at the restaurants that you dine in at for your main meals (e.g. for lunch and dinner at least once in the last 3 months)?
Total Respondents N=1025

Types of Cuisines Consumed
Last 3 Months (Splits)

	Total	Gender		Age						Location		Dietary Requirements		
		Male	Female	18-24	25-34	35-44	45-54	55-64	65+	REGIONAL	METRO	Vegetarians	Other Requirements	No dietary requirements
	N=1025	N=495	N=530	N=73	N=191	N=153	N=185	N=208	N=215	N=275	N=750	N=40	N=335	N=650
Chinese Cuisine	57%	61%	54%	59%	59%	58%	61%	57%	53%	55%	58%	33%	54%	60%
Modern Australian Cuisine	50%	47%	53%	49%	48%	50%	54%	50%	49%	47%	51%	25%	47%	53%
Italian Cuisine	47%	48%	46%	56%	49%	50%	48%	44%	42%	40%	49%	50%	42%	49%
Thai Cuisine	46%	49%	44%	40%	56%	54%	48%	41%	38%	39%	49%	58%	41%	48%
Traditional Australian Cuisine	38%	39%	36%	25%	27%	33%	39%	44%	47%	42%	36%	10%	38%	39%
Indian Cuisine	36%	37%	36%	34%	46%	42%	38%	32%	27%	32%	38%	58%	38%	35%
Japanese Cuisine	28%	27%	28%	52%	39%	39%	26%	17%	13%	18%	31%	18%	27%	28%
Vietnamese Cuisine	24%	27%	21%	19%	28%	25%	28%	25%	16%	12%	28%	20%	20%	26%
Mexican Cuisine	21%	19%	22%	25%	31%	27%	23%	17%	8%	14%	23%	23%	20%	21%
American Cuisine	17%	16%	19%	38%	31%	25%	17%	5%	5%	12%	19%	8%	16%	19%
Greek Cuisine	16%	17%	15%	22%	17%	16%	20%	12%	13%	13%	17%	13%	16%	16%
Middle Eastern Cuisine	16%	16%	16%	16%	25%	20%	15%	10%	12%	12%	17%	15%	16%	16%
British Cuisine	15%	16%	14%	14%	16%	15%	14%	13%	18%	17%	14%	10%	14%	16%
Other Asian Cuisine	14%	16%	13%	11%	10%	15%	20%	14%	13%	13%	15%	20%	15%	14%
French Cuisine	13%	15%	10%	12%	16%	14%	7%	11%	15%	12%	13%	8%	10%	14%
Korean Cuisine	9%	10%	8%	18%	16%	14%	10%	3%	1%	4%	11%	3%	7%	10%
Spanish Cuisine	9%	10%	8%	10%	17%	12%	8%	5%	4%	6%	10%	10%	8%	9%
African Cuisine	3%	4%	3%	4%	9%	3%	3%	1%	1%	3%	3%	0%	4%	3%
Russian Cuisine	3%	4%	2%	1%	9%	3%	2%	1%	0%	1%	3%	0%	4%	2%
South American Cuisine	3%	3%	3%	1%	7%	4%	4%	1%	1%	1%	4%	0%	4%	3%
Other Mediterranean Cuisine (e.g. Macedonian, Maltese, Croatian)	3%	4%	1%	0%	1%	5%	2%	3%	4%	1%	3%	5%	2%	2%
Other Cuisines	2%	2%	2%	0%	1%	1%	2%	2%	4%	2%	2%	3%	3%	1%

S9. What types of RESTAURANTS below do you FREQUENTLY DINE IN at for your main meals (e.g. for lunch and dinner at least once in the last 3 months)?
S10. What types of cuisine below do you frequently consume at the restaurants that you dine in at for your main meals (e.g. for lunch and dinner at least once in the last 3 months)?
Total Respondents N=1025

Reason to Dine Out

Splits

	Total	Gender		Age						Location	
		A. Male	B. Female	A. 18-24	B. 25-34	C. 35-44	D. 45-54	E. 55-64	F. 65+	A. REGIONAL	B. METRO
	N=1025	N=495	N=530	N=73	N=191	N=153	N=185	N=208	N=215	N=275	N=750
To treat myself	59%	57%	61%	58%	59%	58%	64% (F)	63% (F)	52%	64%	57%
To socialise	53%	50%	57% (A)	53%	45%	41%	56% (B,C)	58% (B,C)	64% (B,C)	56%	53%
For special occasions	41%	39%	43%	37%	37%	41%	43%	44%	43%	46%	39%
Convenience	34%	36%	33%	37%	29%	40% (B)	31%	33%	39% (B)	31%	36%
To try new foods	31%	35% (B)	27%	29%	43% (A,D,E,F)	35% (E,F)	30%	24%	26%	24%	33% (B)
To eat my favourite meals	29%	31%	28%	32%	31%	24%	31%	31%	28%	29%	29%
To celebrate	21%	19%	23%	19%	20%	26%	18%	23%	21%	25%	20%
To eat food I do not know how to cook	14%	15%	12%	15%	21% (D,E,F)	14%	11%	10%	12%	11%	15%
I do not like to cook	10%	10%	11%	14%	12%	14%	10%	9%	7%	8%	11%
Other	4%	3%	4%	3%	1%	4% (B)	4% (B)	5% (B)	6% (B)	5%	3%
To save money	2%	3%	1%	1%	2%	3%	2%	2%	1%	1%	2%
To impress others	1%	1%	0%	3%	2%	0%	1%	0%	0%	0%	1%

N=1025
Q8b. Why do you dine out at restaurants for meals?
Capital Letter indicates significant difference between splits at 95% CI

Top Vegetables Consumed at Restaurants

Remaining 27 Vegetables – Total Sample

	Rank Sum	Rank
Zucchini	298357	26th
Sweet Potato	298352	27th
Brussel Sprouts	298350	28th
Chives	298340	29th
Parsley	298338	30th
Hard Squash	298322	31st
Other vegetables (mostly mushroom and asparagus)	298314	32nd
Fennel	298307	33rd
Endive	298299	34th
Silverbeet	298297	35th
Chicory	298297	36th
Leeks	298294	37th
Parsnips	298291	38th
Raddichio (e.g. Tevisio)	298290	39th
Artichoke	298288	40th
Sprouts	298284	41st
Witlof	298281	42nd
Jicama	298281	43rd
Kohlrabi	298280	44th
Rhubarb	298277	45th
Rambutan	298277	46th
Taro	298276	47th
Swedes	298276	48th
Radish	298276	49th
Celeriac	298276	50th
Turnips	298275	51st
Triticale	298275	52nd

- Little difference in ranking scores of remaining 27 vegetable commodities.

Q2. Can you please rank the TOP 5 vegetables that you consume MOST FREQUENTLY when dining out at restaurants?
Scores shown are revered rank sum scores (the higher the score more frequent it is use in restaurant meals.
Total Respondents N=1025

Vegetables to Use More in Restaurants

All Vegetables (just data)

	Total N=1025	Gender		Age						Location	
		Male N=495	Female N=530	18-24 N=73	25-34 N=191	35-44 N=153	45-54 N=185	55-64 N=208	65+ N=215	REGIONAL N=275	METRO N=750
Sweet Potato	44%	38%	50%	45%	36%	38%	46%	50%	47%	46%	43%
Tomatoes	39%	41%	37%	30%	34%	36%	37%	39%	49%	38%	39%
Broccoli	38%	35%	41%	40%	36%	35%	42%	34%	43%	38%	38%
Broccolini	35%	32%	38%	26%	38%	31%	35%	38%	35%	33%	36%
Carrots	35%	35%	34%	40%	29%	34%	34%	33%	41%	31%	36%
Beetroot	34%	31%	37%	23%	30%	29%	36%	37%	40%	36%	33%
Beans (i.e. French & Runner)	34%	34%	34%	19%	21%	29%	35%	39%	48%	36%	33%
Sweet Corn	34%	34%	33%	36%	38%	35%	32%	30%	33%	36%	33%
Baby Spinach	33%	30%	35%	27%	28%	34%	39%	30%	34%	32%	33%
Green peas	33%	36%	30%	23%	30%	26%	30%	35%	45%	36%	32%
Capsicums	31%	29%	33%	26%	31%	31%	34%	30%	32%	32%	31%
Pumpkins	31%	25%	36%	37%	27%	30%	31%	31%	33%	31%	31%
Asian vegetables	29%	27%	30%	25%	21%	28%	31%	29%	35%	33%	27%
Cauliflowers	29%	27%	31%	22%	24%	20%	26%	31%	42%	33%	27%
Potatoes	29%	29%	28%	30%	25%	24%	30%	28%	36%	29%	29%
Eggplant	28%	25%	31%	22%	31%	31%	32%	27%	24%	24%	30%
Garlic	28%	26%	29%	25%	23%	33%	30%	23%	32%	31%	27%
Red Onion	28%	29%	28%	16%	26%	24%	30%	28%	37%	30%	28%
Spinach	27%	26%	28%	23%	23%	27%	28%	28%	30%	24%	28%
Zucchini	27%	21%	32%	19%	29%	27%	33%	25%	25%	31%	26%
Lettuce	26%	28%	25%	23%	20%	29%	26%	22%	36%	28%	26%
Other Herbs	25%	23%	28%	18%	21%	25%	34%	25%	24%	29%	24%
Leeks	24%	20%	28%	21%	16%	22%	26%	30%	26%	23%	24%
Cabbage	22%	22%	21%	18%	20%	16%	22%	21%	29%	24%	21%
Chives	22%	18%	25%	21%	18%	22%	26%	21%	22%	23%	21%
Cucumbers	22%	18%	27%	16%	21%	24%	25%	19%	26%	20%	23%
Silverbeet	21%	21%	22%	11%	16%	20%	19%	23%	30%	22%	21%
Sprouts	20%	17%	22%	14%	21%	16%	24%	21%	18%	18%	20%
White Onion	20%	22%	19%	15%	17%	20%	25%	15%	27%	22%	20%
Chillies	19%	22%	16%	23%	20%	20%	19%	18%	16%	17%	20%
Brussel Sprouts	18%	21%	16%	12%	13%	17%	15%	22%	25%	21%	17%
Celery	18%	17%	19%	16%	13%	22%	18%	14%	25%	16%	19%
Parsley	18%	18%	18%	11%	14%	20%	19%	17%	24%	20%	17%
Parsnips	18%	17%	19%	10%	13%	14%	15%	23%	27%	22%	17%
Hard Squash	17%	13%	20%	7%	13%	18%	19%	20%	17%	16%	17%
Fennel	16%	15%	17%	8%	12%	18%	21%	17%	16%	14%	17%
Radish	16%	17%	15%	10%	16%	18%	17%	16%	15%	17%	15%
Artichoke	15%	13%	17%	12%	14%	18%	15%	16%	13%	13%	15%
Raddichio (e.g. Tevisio)	13%	11%	15%	7%	16%	16%	14%	13%	12%	12%	14%
Rhubarb	12%	9%	15%	7%	10%	10%	10%	13%	19%	14%	12%
Swedes	10%	9%	11%	5%	10%	10%	7%	10%	13%	9%	10%
Endive	9%	5%	12%	7%	7%	11%	10%	6%	11%	10%	8%
Taro	9%	6%	11%	14%	12%	7%	8%	8%	7%	8%	9%
Rambutan	8%	7%	9%	7%	7%	11%	7%	7%	9%	9%	8%
Turnips	8%	8%	8%	5%	13%	9%	8%	5%	8%	7%	9%
Witlof	8%	6%	10%	4%	4%	12%	8%	10%	10%	7%	9%
Celeriac	7%	4%	10%	5%	7%	7%	8%	9%	7%	5%	8%
Chicory	6%	4%	8%	8%	7%	8%	8%	3%	6%	6%	6%
Kohlrabi	6%	4%	8%	7%	6%	5%	8%	6%	7%	6%	6%
Jicama	4%	2%	5%	5%	6%	7%	1%	2%	3%	3%	4%
Triticale	2%	1%	4%	5%	3%	5%	1%	0%	1%	3%	2%

Q14. What specific vegetables would you like to see be used more in the restaurants that you dine in at?
Colour shades in above table represent high (green) to low (red) proportions
Total Respondents N=1025

Ratio of Vegetables & Ideal Amount Used In Restaurants (Splits)

- Across all demographics explored, respondents want slightly more more vegetables added to their meal types. These increases were significant across all meal types for females, and metro living respondents.

		Gender		Age						Location	
	Total	Male	Female	18-24	25-34	35-44	45-54	55-64	65+	REGIONAL	METRO
	N=851	N=422	N=429	N=60	N=180	N=132	N=150	N=167	N=157	N=222	N=629
Actual Amount of Vegetables (0. Much less vegetables; 5. Same Amount of Vegetables; 10. Much more vegetables)											
Entrees	**4.6**	4.7	4.5	4.7	5.1	5	4.8	4.1	4	4.3	4.7
Lunch	**5.4**	5.4	5.4	4.8	5.5	5.5	5.4	5.3	5.5	5.4	5.4
Dinner	**5.6**	5.7	5.5	4.9	5.7	5.4	5.7	5.6	5.7	5.7	5.5
Snacks	**4.1**	4.2	4.1	3.9	4.6	4.6	4	3.7	3.8	3.8	4.2
Ideal Amount of Vegetables (0. Decrease Vegetables; 5. Keep the Same; 10. Increase Vegetables)											
Entrees	**4.9***	4.9	5*	4.6	5.5*	5.6*	5.1	4.7*	4.1	4.7	5*
Lunch	**5.7***	5.5	5.9*	5.8*	6*	5.8	5.8*	5.7*	5.4	5.8*	5.7*
Dinner	**6.1***	5.9	6.3*	6.3*	6	6.3*	6.4*	5.8	5.9	6.1*	6.1*
Snacks	**4.4***	4.4	4.5*	5*	5.2*	4.8	4.5	4.1	3.6	4.2	4.5*
Net increase											
Entrees	**+0.3**	+0.2	+0.5	+-0.1	+0.4	+0.6	+0.3	+0.6	+0.1	+0.4	+0.3
Lunch	**+0.3**	+0.1	+0.5	+1	+0.5	+0.3	+0.4	+0.4	+-0.1	+0.4	+0.3
Dinner	**+0.5**	+0.2	+0.8	+1.4	+0.3	+0.9	+0.7	+0.2	+0.2	+0.4	+0.6
Snacks	**+0.3**	+0.2	+0.4	+1.1	+0.6	+0.2	+0.5	+0.4	+-0.2	+0.4	+0.3

Min N=851
Q6.What ratio do you think the meals typically (including side dishes you typically purchase) are for vegetables to other ingredients?
Q7. How would you change the ratios of vegetables in your meals (including side dishes you typically purchase) at restaurants to better suit you?
* Indicates Significantly higher difference in mean scores from ideal amount of vegetables to actual amount (@ 95%CI).

Satisfaction Model Means

Satisfaction Model Means

	Total	Gender		Age						Location	
		A. Male	B. Female	A. 18-24	B. 25-34	C. 35-44	D. 45-54	E. 55-64	F. 65+	A. REGIONAL	B. METRO
	N=1025	N=495	N=530	N=73	N=191	N=153	N=185	N=208	N=215	N=275	N=750
Overall Satisfaction	**6.9**	6.8	6.9	6.7	6.6	6.6	6.8	7 (A B C D)	7.4	7	6.9
Worth What Paid For	**6.5**	6.4	6.5	6.2	6.2	6.2	6.4	6.5 (A B C D)	7	6.5	6.4
Food Quality	**7.3**	7.2	7.3	7	7.1	7.1	7.3	7.4 (B C)	7.6	7.4	7.2
Vegetables Used in meals	**6.5**	6.5	6.6	5.9	6.7	6.4	6.5	6.5 (A)	6.7	6.5	6.5
Meat used in meals	**6.7**	6.8	6.6	6.4	6.3	6.7	6.7 (B)	7.1 (B)	7 (B)	7	6.7
Salad ingredients used in meals	**6.4**	6.3	6.5	6	6.4	6.3	6.3	6.3	6.7	6.4	6.4
Pasta/Rice or other similar ingredients used in meals	**6.5**	6.5	6.6	6.7	6.6	6.6	6.4	6.5	6.5	6.5	6.6
Price	**6.3**	6.3	6.4	5.9	6.1	6.1	6.1	6.4 (A B C D)	6.8 (B)	6.6	6.2
Price Entrees	**5.6**	5.5	5.7	5.3	5.7	5.6	5.6	5.6	5.8	5.8	5.6
Price Main meals	**6.5**	6.5	6.5	6.2	6.3	6.3	6.3	6.6 (A B C D)	7 (B)	6.7	6.4
Price Side dishes	**5.4**	5.3	5.4	5.2	5.5	5.4	5.3	5.3	5.5	5.5	5.3
Price Desserts	**5.6**	5.5	5.6	5.7	5.8	5.5	5.4	5.6	5.5	5.7	5.5
Meals Offered	**6.8**	6.8	6.8	6.3	6.6	6.6	6.8	6.9 (A B C D)	7.3	6.8	6.8
Side dish options available	**5.8**	5.9	5.8	5.6	5.8	5.9	5.8	5.8	5.9	5.8	5.9
Types of vegetables used in meals	**6.1**	6.2	6.1	5.7	6	6	5.9	6.2 (A)	6.5	6.1	6.1
Combinations of vegetables used in meals	**6.1**	6.2	6.1	5.6	6.1	6.1	6	6.2 (A)	6.4	6.1	6.2
Vegetable to meat ratio in meals	**6.1 (B)**	6.2	6	5.9	5.9	5.8	6	6.2 (B C)	6.6	6.2	6.1
Presentation of vegetables in meals	**6.2**	6.3	6.2	5.9	5.9	6.1	6.1	6.4 (B)	6.6	6.2	6.2
Variety of meals available	**6.7**	6.7	6.7	6.5	6.4	6.5	6.6	6.8 (A B C D)	7.2	6.7	6.7
Variety of cuisines available	**6.5**	6.5	6.5	6.5	6.2	6.2	6.4 (B C)	6.8 (B C D)	7	6.5	6.6
Size of meals available	**6.7**	6.7	6.8	6.5	6.4	6.4	6.7	6.8 (A B C D)	7.3 (B)	7	6.6
Healthiness of meals available	**6.2**	6.3	6.1	5.8	5.8	5.8	6.1	6.4 (A B C D)	6.7	6.2	6.1
Presentation of meals available (general)	**6.7**	6.7	6.8	6.4	6.5	6.6	6.6	6.9 (A B)	7.1	6.7	6.7
Ambience	**6.7**	**6.6**	**6.7**	**6.4**	**6.5**	**6.6**	**6.6**	**6.7 (B)**	**7**	**6.8**	**6.6**

Means out of 10 (0= Not at all satisfied, 10= Extremely satisfied)
Total Respondents N=1025
How satisfied are you with …… in the restaurants that you frequent?
Capital letter indicates significantly higher difference at 95% CI.

Thanks.

colmar brunton.