

# PROJECT GREEN TABLE



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BACKGROUND AND METHODOLOGY

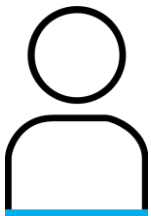
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CONSUMERS AND SCP

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KEY TAKEAWAYS

# BACKGROUND



The World Wide Fund for Nature - Philippines is a non-government environment conservation organization whose aim is to stop and reverse the fast degradation of the Philippine environment to build a future where Filipinos live in harmony with nature.



One of the projects under the WWF is The Sustainable Diner, a pioneer project which aims to help reduce carbon emissions and food waste in the food service industry of three key cities (Quezon City, Tagaytay City, Cebu City) through sustainable consumption and production (SCP).



This project involves the following sectors: government, business and consumers who has a direct impact and/or involvement in this project.

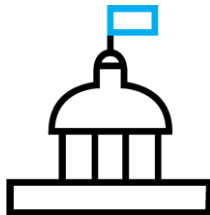
# OBJECTIVES OF THE STUDY



To help in the strategy development and campaign conceptualization of the SCP. Program aims to help as well, in the delivery of the following objectives per sector.

## GOVERNMENT

Potential **integration of SCP into Philippine policies and strategies** relevant to the food service industry via insights from the government sector



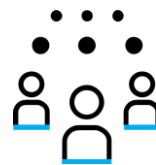
## FOOD SERVICE

- Identify current **trends in dining and diets that have resonance** with SCP that the project may use for its messaging;
- **Determine awareness of SCP, current practices**, integration of SCP in business operations and decisions and level of importance of positive environmental impact on business;
- Identify **how to reach and approach the business establishments** in order to garner support for the cause.



## CONSUMERS

- Identify current **trends in dining and diets that have resonance** with SCP that the project may use for its messaging;
- **Determine awareness of SCP, current practices**, integration of SCP and importance to consumers of a more environmentally conscious food service establishments;
- Identify **how to reach and approach consumers** in order to garner support for the cause.

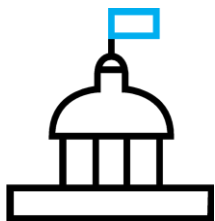


# PHASE 1: STAKEHOLDER DISCUSSIONS

- • • **Focus Group Discussion (FGDs)** - a gathering of 6-8 participants to gauge their understanding of SCP and their views on the concept. This method allows them to bounce ideas off each other for more dynamic understanding of the market.

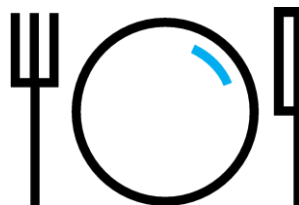


**Conducted during the WWF Launch/ Inception Workshop last September 26, 2017.**



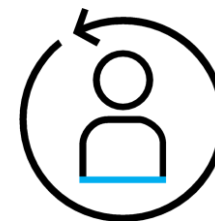
## Government Sector

Four (4) Groups divided to:  
 (1) National & (3) LGUs from various areas  
 (Tagaytay City, Quezon City, Cebu City)



## Food Service Sector

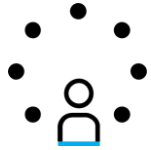
Three (3) Groups divided to:  
 (1) Top Management;  
 (1) Middle Management;  
 (1) Rank and File from various restaurants from 3  
 key cities (Tagaytay City, Quezon City, Cebu City)



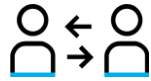
## Consumer/Dining Public

Two (2) Groups composed of food  
 bloggers/columnists, food related  
 websites/app representatives, HRM/Culinary  
 Arts representatives.

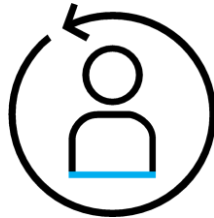
## PHASE 2: RESTAURANTS AND DINERS IN QC, LAGUNA & CEBU



**Focus Group Discussion (FGDs)** - a gathering of 6-8 participants to gauge their understanding of SCP and their views on the concept. This method allows them to bounce ideas off each other for more dynamic understanding of the market.

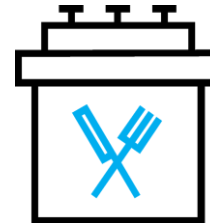


**In-depth Interviews (IDIs)** - interviews with restaurant owners with regard to their advocacies and practices pertaining to SCP and their willingness to support SCP.



### Consumer/Dining Public

Total of nine (9) FGDs. One group for older (46-60), middle-age (30-45), and younger (18-29) diners for Cebu, Laguna, and Quezon City.



### Select Restaurants

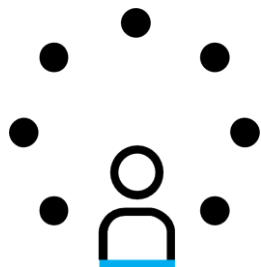
Total of (2) IDIs per city:

- Cebu: Zubuchon and Hikay
- Quezon City: Cravings and Manam
- Tagaytay: Bag of Beans and Nurture Wellness Spa

# PHASE 2: FOCUS GROUP PARTICIPANT PROFILE OF CONSUMERS/DINERS

These codes are helpful to highlight key themes/responses that are peculiar to a specific group, if any.

## Who are our informants?



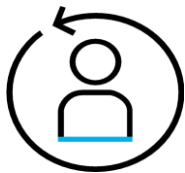
	Quezon City	Cebu City	Tagaytay City (Laguna residents)
Older Adults (46-60 Years Old)	QC, OA	CC,OA	LR, OA
Middle-Aged Adults (30-45 Years Old)	QC, MA	QC, MA	LR, MA
Younger Adults (18-29 Years Old)	QC, YA	QC, YA	LR, YA

### Criteria:

- Dining in the partner restaurant/s identified by WWF (at least 1x a month in past 3 months; restaurants must be mainstream/popular).
- Decision-maker or co-decision-maker for out of home consumption.
- Restaurants in the vicinity not the diner.
- At least 2 respondents have travelled to both Tagaytay and Cebu to eat out.

**Note:** The codes are helpful whenever there are key themes/responses that peculiar specific groups and will be highlighted in the discussions, if any.

## PHASE 3: DINERS IN QC, TAGAYTAY & CEBU



**Quantitative In-store Intercept** : The quantitative phase will allow us to quantify and validate sentiments of the diners from partner restaurants in QC, Tagaytay, and Cebu. **Field work was conducted March to May 2018**

### QUANTITATIVE METHODOLOGY AND RESEARCH DESIGN



#### Methodology

##### In-store intercept

Face to face computer-assisted personal interviews



#### Target Group

- 18-65 years old
- Male/Female
- Currently dining in the partner restaurant/s identified by WWF
- Decision maker or co-decision maker for out of home consumption



## PHASE 3: DINERS IN QC, TAGAYTAY & CEBU



Area Coverage



Sample Size

RESTAURANTS	SAMPLE
<b>QUEZON CITY</b>	<b>75</b>
Concha's Garden	20
Cravings	20
The Kanin Club	20
Serye	15
<b>TAGAYTAY CITY</b>	<b>75</b>
Taza Fresh Table	17
Nurture Wellness Village	17
Concha's Garden - Tagaytay City	17
Bells & Whistles	24

RESTAURANTS	SAMPLE
<b>CEBU CITY</b>	<b>75</b>
Anzani	19
Hikay	19
Circa 1900	19
Zubuchon	18
<b>TOTAL</b>	<b>225</b>

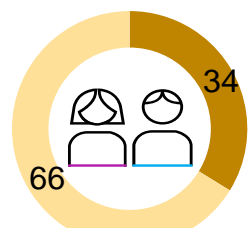
*\*Note: Profile of respondents are limited to the diners of partner restaurants*

**Design Rationale:** The study is limited to interviewing males and females who are 18 to 65 years old currently dining in WWF partner restaurants. They must be the primary or co-primary decision makers in choosing where to dine. This respondent qualification is chosen as WWF want to target the dining public. As a baseline study, level of awareness of SCP programs was determined from patrons of current partner restaurants. As such, diners of the restaurants rather than residents of the areas were interviewed.

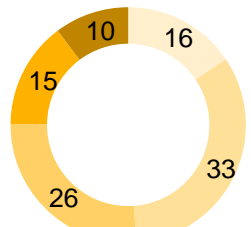
# CONSUMERS / DINING PUBLIC

# LADIES WHO LUNCH: PATRONS ARE MOSTLY MIDDLE-AGED FEMALE RESIDENTS

Who usually eat out once during weekends and twice during weekdays.

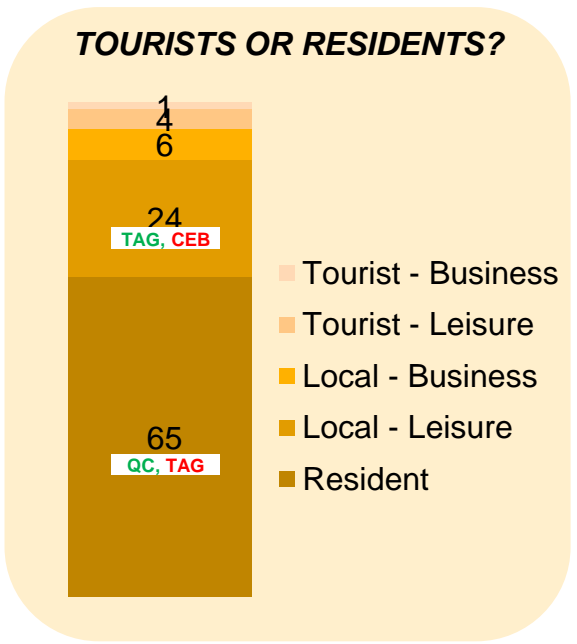


GENDER



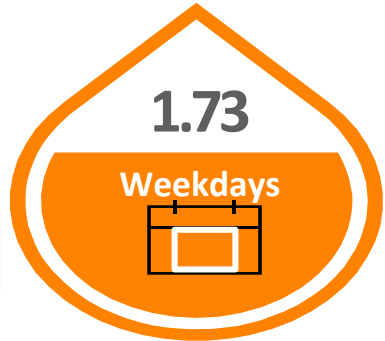
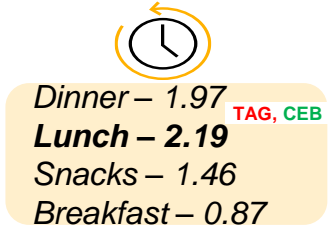
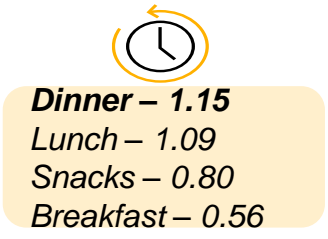
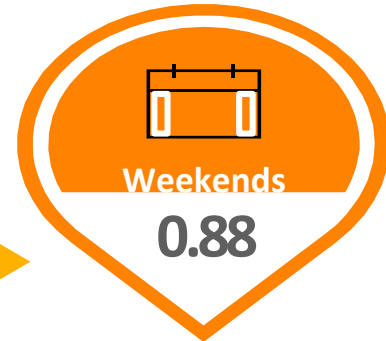
AGE

- 18-25 years old
- 26-35 years old
- 36-45 years old
- 46-55 years old



TOURISTS OR RESIDENTS?

## WHEN DO THEY GO OUT?\*



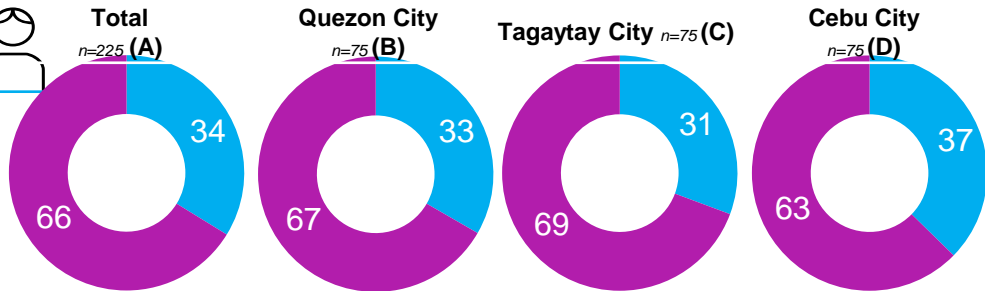
Base: Among all respondents (n=225)  
 Source: Q10a And which among this statement best describes your residential status at (MENTION ANSWER IN Q1 PLACE OF INTERVIEW?); Q11 On the average, how many times do you eat outside of your home during weekends/weekdays for breakfast? For lunch? For dinner? For snacks?  
 \*Note: Frequency here is regardless of food outlet.

XX – significantly higher vs. Total @ 95% CL  
 XX – significantly lower vs. Total @ 95% CL

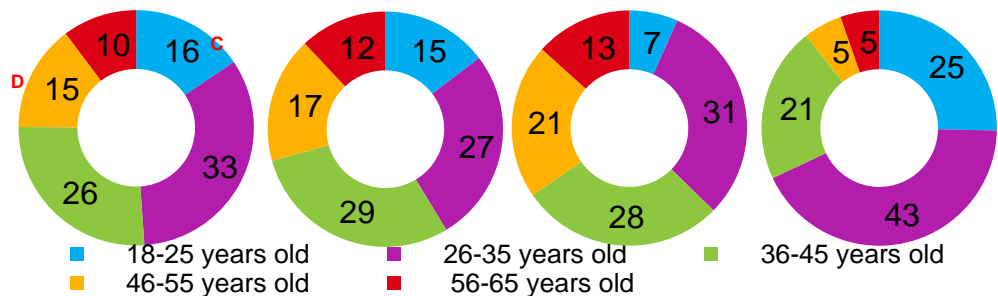
# QC & CEBU DRAWS IN RESIDENTS, WHILE TAGYTAY GETS A MIX OF RESIDENTS & TOURISTS

While leisure seekers go to Tagaytay and more tourists visit Cebu.

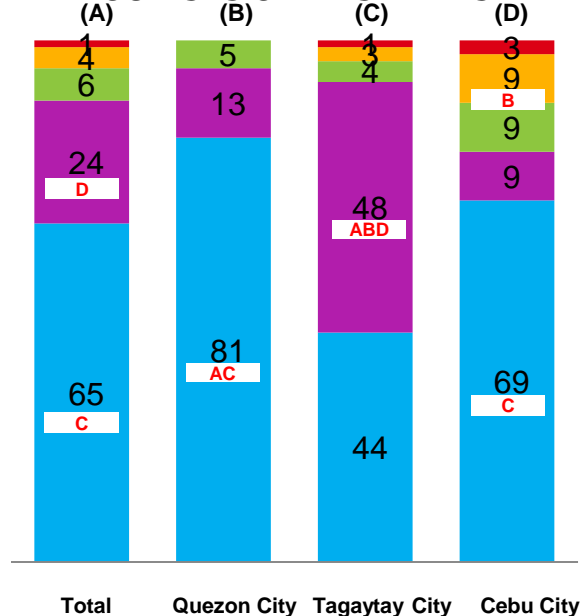
## GENDER



## AGE



## TOURISTS OR RESIDENTS?

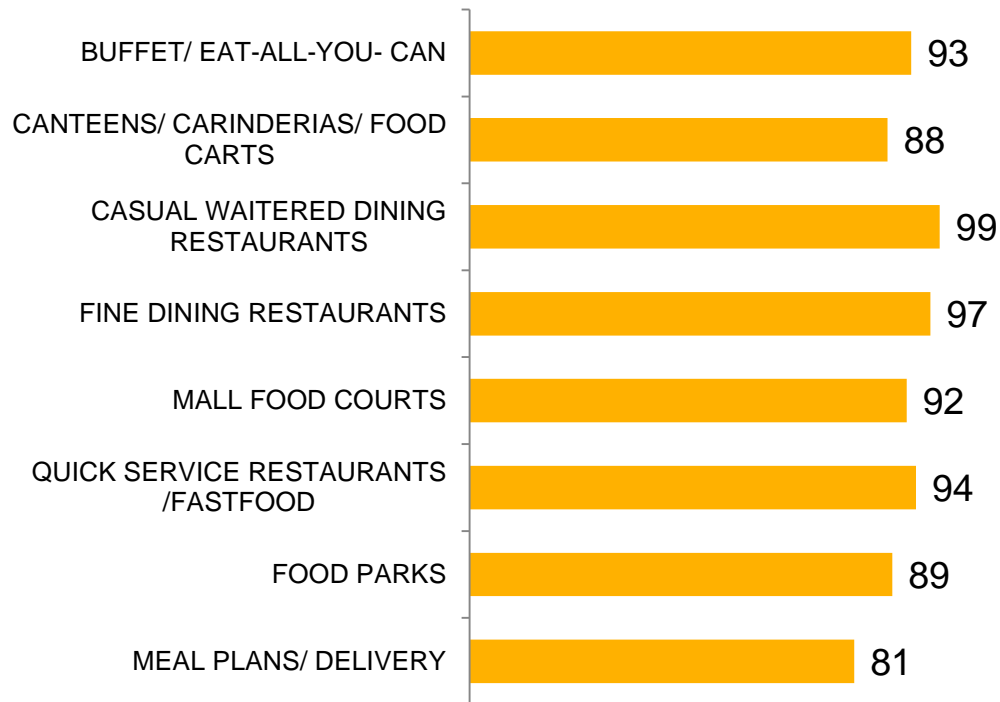


- Tourist - Business
- Local - Business
- Resident
- Tourist - Leisure
- Local - Leisure

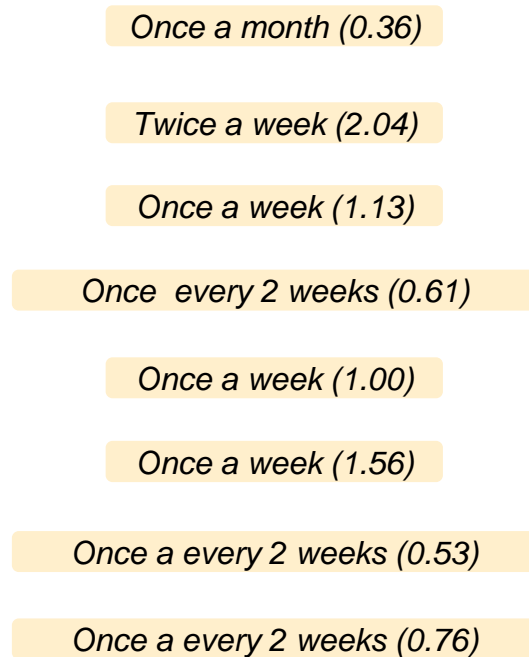
XX – significantly higher vs. parallel figure @ 95% CL  
 XX – significantly lower vs. parallel figure @ 95% CL

# DINING ESTABLISHMENTS FREQUENTED LIKELY A FUNCTION OF THE PROFILE OF DINERS

## WHERE DO THEY EAT OUT IN THE P3M?



## HOW FREQUENT DO THEY EAT?\*



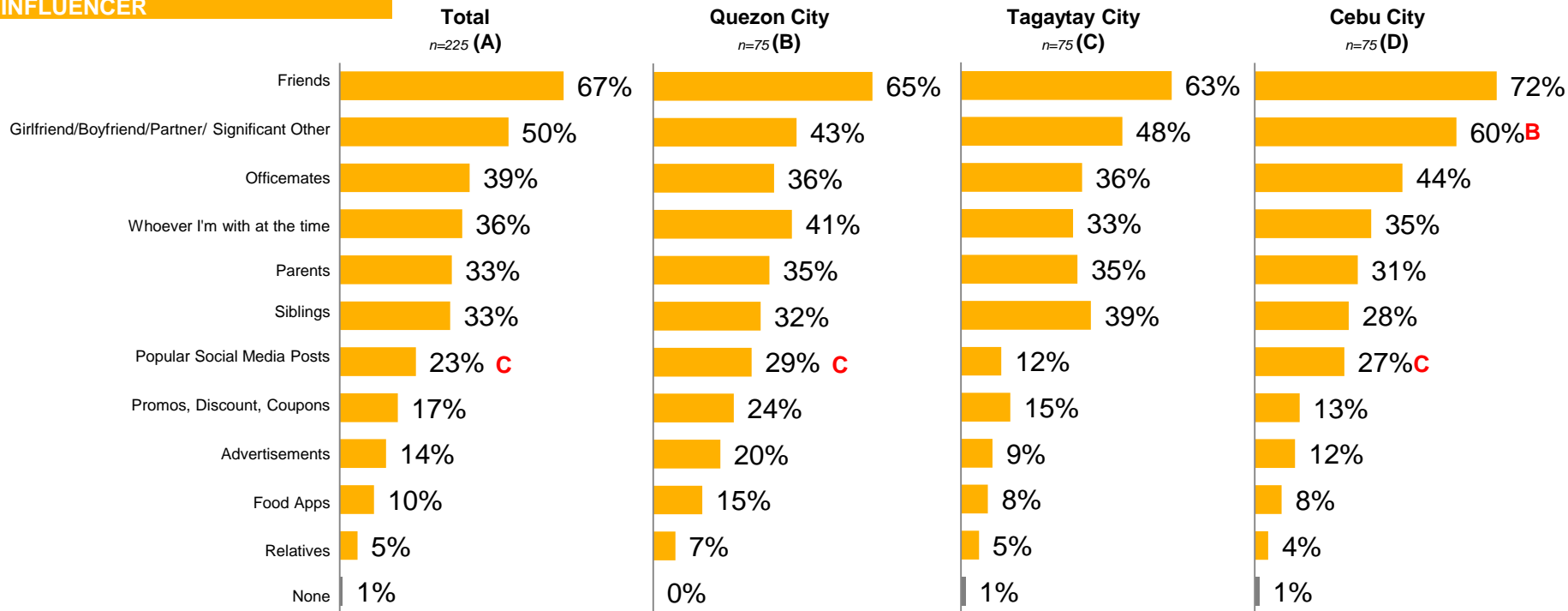
Base: Among all respondents (n=225)

Source: Q12 On the average, how often do you patronize the following food outlets in the past 3 months?

\*Note: Frequency here is per dining establishment

# FRIENDS, FAMILY MEMBERS, PARTNERS, COLLEAGUES, INFLUENCE SELECTION OF RESTAURANTS

## INFLUENCER



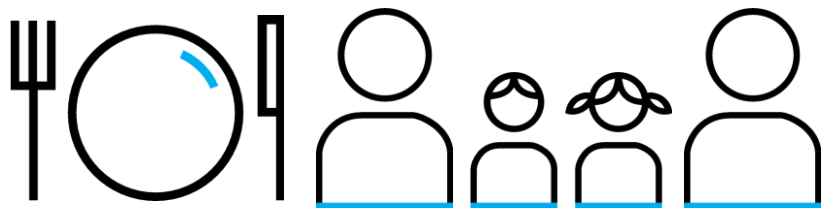
Source: Q15. Is there anyone who influences you where to dine when you eat outside of your home? Please select all that apply.

XX – significantly higher vs. parallel figure @ 95% CL  
 XX – significantly lower vs. parallel figure @ 95% CL

# EATING OUT IS ESSENTIAL TO CONNECTING TO FAMILY MEMBERS

The shared experience serve as “bonding moments” for family members regardless of geography.

## What does eating out mean for consumers?



### When do they eat out?

**Weekends especially Sundays are very important.** This is time for the family, usually after church.

**Occasions.** When someone celebrates a birthday, or a special event.

**Most especially payday weekends.** When there is spare money to spend.

**Meals during office breaks and client meetings.**

### Why eat out?

**Eating out is a way of connecting with family members (“family bonding”) and friends**

- To catch-up with family after a busy week of no contact.
- Token of gratitude for younger adults - a way to give back to their parents.
- To make children happy--in the case of parents with younger children.

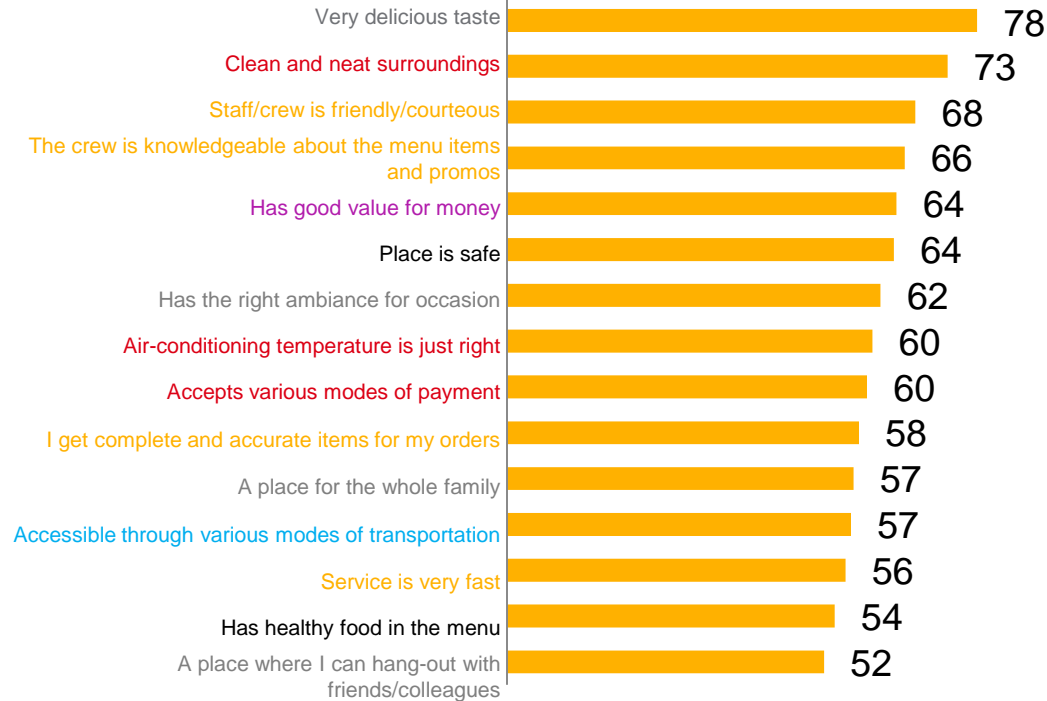
**For variety and escape from cooking at home.**

**To a treat to oneself to add excitement by trying new things.**

**Convenience** - Because they do not bring baon to work. While some do not have time to cook anymore.

# DINERS LOOKS FOR THE RIGHT BALANCE OF GOOD FOOD, AMBIANCE, SERVICE AND PRICE

## WHAT IS IMPORTANT WHEN LOOKING FOR A PLACE TO EAT?



LEGENDS:

PRODUCT  
PRICE  
ADS  
CUSTOMER SERVICE  
IMAGE  
FACILITIES  
LOCATION

■ SCP-related attributes

Base: All respondents (n=225)

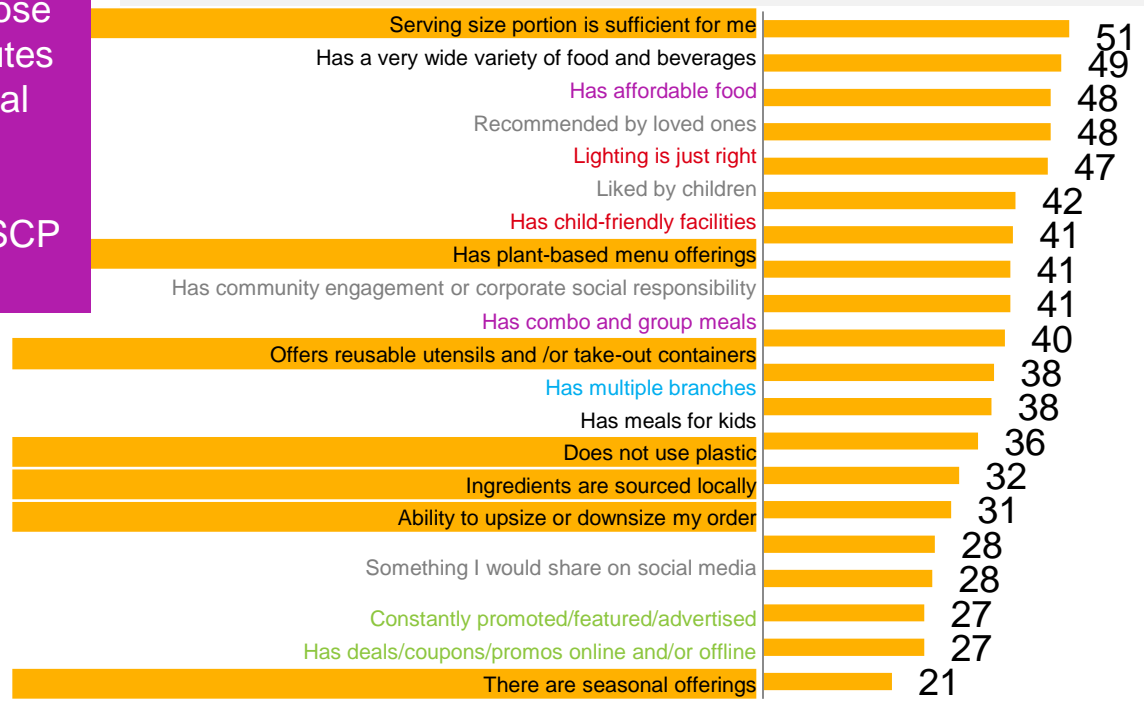
Source: Q14 These are some statements that others have said are important for selecting a type of food establishment to patronize. For each statement, please select how important it is for you, using a scale of 1 to 5, where 1 is Not Important At All and 5 is Definitely Important.



# BUT SCP NOT YET TOP CONSIDERATION WHEN CHOOSING FOOD OUTLETS

any merit to profile of those SCP attributes  
 ig test v total  
 g diff from SCP  
 total

## WHAT IS IMPORTANT WHEN LOOKING FOR A PLACE TO EAT?



- LEGENDS:
- PRODUCT
  - PRICE
  - ADS
  - CUSTOMER SERVICE
  - IMAGE
  - FACILITIES
  - LOCATION

SCP-related attributes

Base: All respondents (n=225)

Source: Q14 These are some statements that others have said are important for selecting a type of food establishment to patronize. For each statement, please select how important it is for you, using a scale of 1 to 5, where 1 is Not Important At All and 5 is Definitely Important.

# TASTE AND PRICE ARE IMPORTANT FACTORS IN RESTAURANT SELECTION

SCP practices are not drivers of consideration. Meanwhile the role of children matters especially for younger families.

## How do diners choose where to eat?

### INFLUENCERS

**Word of mouth and posts from friends from social media → trending places.**

**Instagrammability of food and/or venue seems to be the trend.**

**More information is sought from the internet via influencers, blogs, and social media posts.**

Spot.ph, Barat Queen, Tonipet, Drew Arellano to name a few.

### DECISION MAKERS

**Young children are crucial in the decision making process of restaurant selection.**

*"Alam namin yan [on organic choices in restaurants], kaso kasama namin ang mga anak namin, kaya, madalas sila ang namimimili."*

**It could also depend on who is paying or on the person who has a special request.**

### CRITERIA

**Taste and Price (value for money) are considered most important factors.**

**Ambiance is also important**--tied to the purpose of eating out as a form of relaxation.

**Health and SCP are not part of their consideration.**

*"Alam namin yan [on organic choices in restaurants], kaso kasama namin ang mga anak namin, kaya, madalas sila ang namimimili."*

*"Minsan lang naman ito [eating unhealthy]. May gamot naman."*

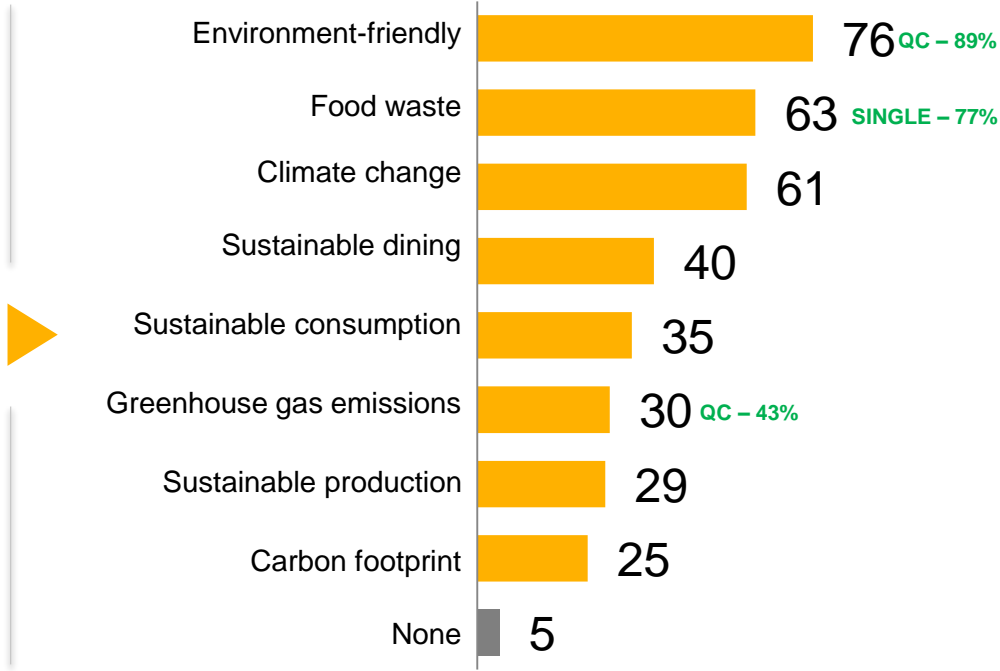
**Younger adults in Cebu and Laguna also noted impulse/cravings as a driver → younger and more mobile.**

# EVEN IF DINERS ARE WELL AWARE OF SCP-RELATED TERMS, SPECIFIC TERMS SUCH AS SUSTAINABLE DINING, CONSUMPTION & PRODUCTION STILL REQUIRES MORE AWARENESS

Specifically Cebu diners who need to catch up on SCP awareness

**95%**  
CEB  
Aware of any SCP-related words

**75%**  
Aware of the words food waste, sustainable dining or sustainable consumption



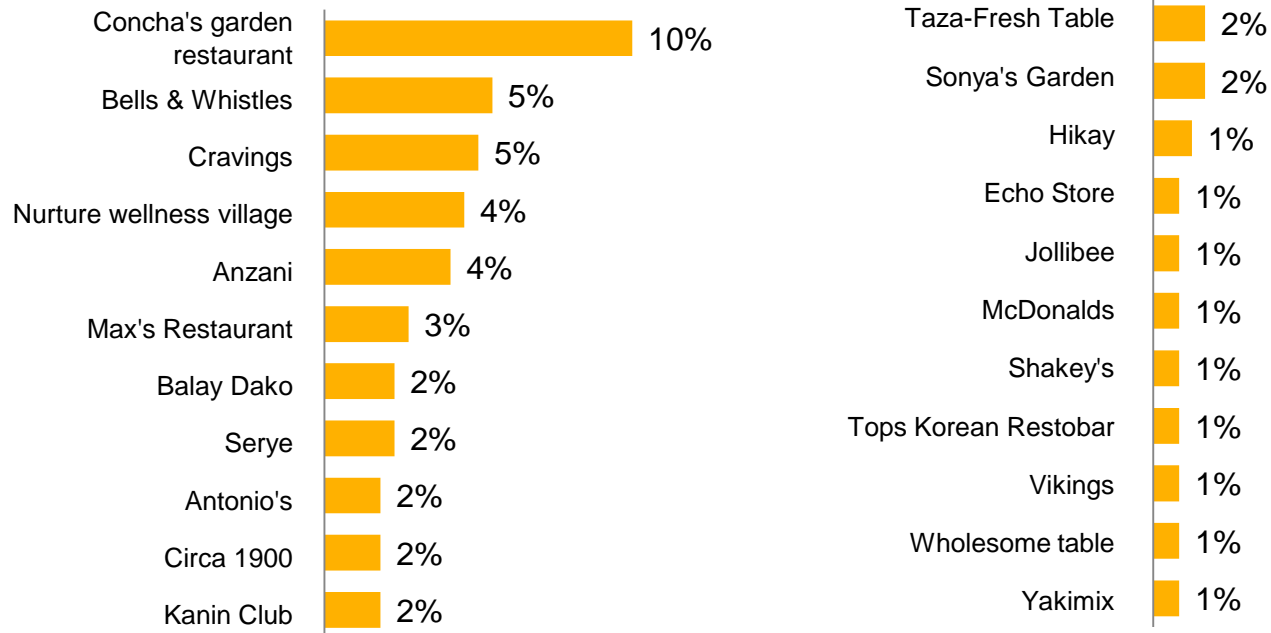
Base: Among all respondents (n=225)

Source: Q16 Which of the following words/phrases are you aware of? Please select all that apply.

XX - significantly higher vs. Total @ 95% CL  
 XX - significantly lower vs. Total @ 95% CL

# LIKEWISE AWARENESS FOR ESTABLISHMENTS PRACTICING SCP IS STILL VERY LIMITED

## RESTOS PRACTICING SCP

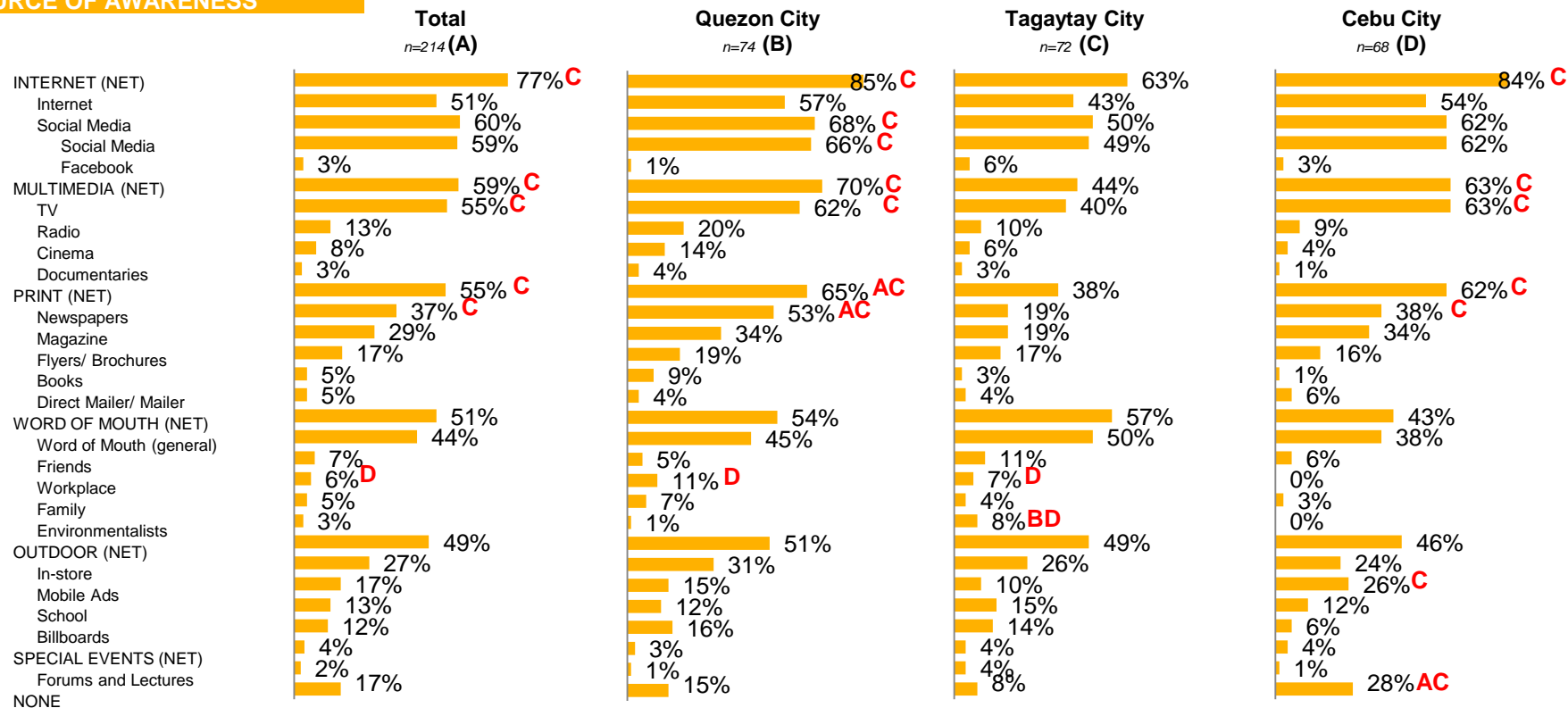


Base: Among all respondents (n=225)

Source: Q21. Can you tell me which ONE restaurant name comes to your mind that practices sustainable dining?

# SOCIAL MEDIA, INTERNET, TV TOPS SOURCES OF AWARENESS FOR SCP RELATED TERMS

## SOURCE OF AWARENESS



Base: Among all those who are aware (n=214). Note: Figures below 3% not shown.

Source: Q17. And, **where** have you seen or heard these words advertised? Please select all that apply and scroll to the right for more choices.

# ROOM TO GROW LEVEL OF SCP KNOWLEDGE & UNDERSTANDING

Top terms associated are terms they are more familiar with, necessary to increase depth in knowledge among sustainable dining, production and consumption practices.

	Sustainable Consumption	Sustainable Dining	Sustainable Production	Carbon Footprint	Food Waste	Environment Friendly	Green House Gas Emissions	Climate Change
<i>Base: Among aware of words</i>	78	90	66	57	141	172	67	138
Segregating waste properly	21%	26%	18%	42%	50%	47%	36%	56%
Ordering only what you can finish	56%	41%	35%	23%	43%	30%	18%	21%
Take-out of left over food when dining in restaurants	35%	37%	26%	21%	48%	30%	16%	18%
Opting to use paper bags instead of plastics	18%	23%	21%	42%	21%	41%	43%	46%
Eating plant-based dishes	29%	31%	24%	28%	13% TAG - 27%	21%	25%	17%
Checking of food labels that indicates eco-friendly practices	18%	29%	20%	35%	16%	31%	28%	30%
Buying food local farmers produce	38%	26%	50%	25%	13%	20%	19%	19%
Choosing dishes that are in season	32%	30%	35%	19%	18%	19%	12%	23%
Bringing your own reusable utensils	13%	17%	11%	33%	10%	30%	30%	23%
None	3%	2%	6%	9%	2%	3%	10%	4%

Base: Asked among all aware of words (n=214)

Source: Q19 Which of these attributes do you associate with or fits each words/phrases. You may choose 1 attribute, 2, all attributes, or no attributes at all

**Note: Read figures vertically.**

*First top practice attributed to the word/phrase*

*Second top practice attributed to the word/phrase*

# LOW ADVOCACY AND ENVIRONMENTAL AWARENESS AMONG DINERS

All groups consider family and health as important. However engagement with advocacies was not found in all groups except for Quezon City older adults (QC, OA)



## Value family and health.

Additional priority for younger audiences value career/money.



## Lead busy lives on weekdays.

With exception to older Quezon City Adults.



Weekends are for eating out with family.



## Not so much involved in advocacy work.

Exception would be older Quezon City Adults.



## Environmental awareness is not deeply entrenched.

Exception to older Quezon City Adults

What can we say about our diners?

## UNDERSTANDING OF INTERRELATEDNESS OF CONCEPTS IS LIMITED

Their current understanding of the concepts indicates that breadth and depth of knowledge they have on sustainability is limited.

### Do diners think that the concepts are interrelated?



Food Waste is the **only concept** strongly linked to sustainable consumption and production.

Concept is understood by **all age groups in Cebu, Laguna, and Quezon City.**



With exception to Laguna, climate change is correctly attributed to man's actions and they are able to connect it to bigger issues like ice-cap melting.

However, most groups **lack articulation of what causes it** (greenhouse emissions, carbon footprint). Although recognized to be man-made, only QC Older and Younger Adults (QC, OA; QC, YA) were able to articulate this properly.



There is **low understanding of the concept of carbon footprint** for most of the groups.

Only QC Younger adults (QC, YA) were able to articulate this. This was also explained clearly among the Younger Cebu (CC, YA) group albeit only by one person.



The level of understanding is also evident in discussions outside the concepts that we prompted.

Global warming is caused by damage to ozone layer. → Misconception from Laguna groups.

Plastic use is good as long as it is disposed properly. → **Plastic is still okay (CC, OA)**

Trash and plastic is mainly linked to be the cause of floods in their localities but **no mention of its effect on oceans and ecosystems. (Cebu Groups)**



## LIMITED UNDERSTANDING OF SCP → LIMITED UNDERSTANDING OF ITS CONNECTION TO DINING

Because of their limited understanding of SCP, this trickled down to how they see it in the context of food and dining. SCP is just understood in terms of supply and demand.

### Participants connect SCP to the more economic understanding of supply and demand.

Connected to local produce and supporting local farmers for sustained supply, not so much on carbon footprint. Associated with no waste and leftovers.

*"Kung alam ng resto ang number of customers per day, alam na ng resto kung gaano kalaki ang iproduce nila in a day. Para maging satisfied ang mga cutomers sa product nila."*

### Laguna participants showed the most diverging interpretations.

"Sustainable diner" means a restaurant being able to serve the same service and quality of food for an extended time.

[I do not practice sustainable consumption] *"Kasi mahilig kami... Malay mo hindi nagustuhan, hindi masarap para sa akin... kasi hindi ako nagaano sa isa lang eh."* ← She does not "sustain" patronizing just one restaurant.



What is their understanding of "sustainable dining lifestyle"?

### It is also understood as a lifestyle that has to be "maintained."

It has something to do with price in relation to income. *"Ako siguro I think it refers to value for money, eh. If you continue to increase 'yong price mo hindi na... consumers are going to stop coming kasi it's going to be too costly. You should be able to weigh things out to sustain ang dining lifestyle ng mga tao... So if it gets too expensive and then the income is not getting higher so you now have less dining lifestyle, frequency"*

*"Palagi kang may pambayad."*

Linked to their literal definition of sustainability, sustainable dining lifestyle also pertains to the longevity of a business and a business' success.

Educate the people to be able to bridge the link between SCP, and benefits to the environment.

## THEY ARE AWARE OF PRACTICES BUT SLIGHTLY MISS THE BIG PICTURE

While there is awareness of existing practice, most groups were not able to verbalize the bigger picture and showed a limited understanding of these practices in terms of the environment.

### SCP PRACTICES AWARE OF



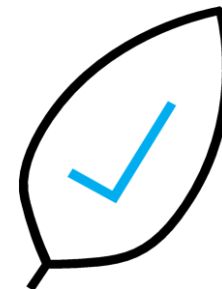
### MISSING LINK BETWEEN PRACTICE AND SUSTAINABILITY

Practices are understood for their individual benefits but are **not tied to the bigger concepts of sustainability and environment.**

Educate the people to be able to bridge the link between current practices, SCP, and benefits to the environment.

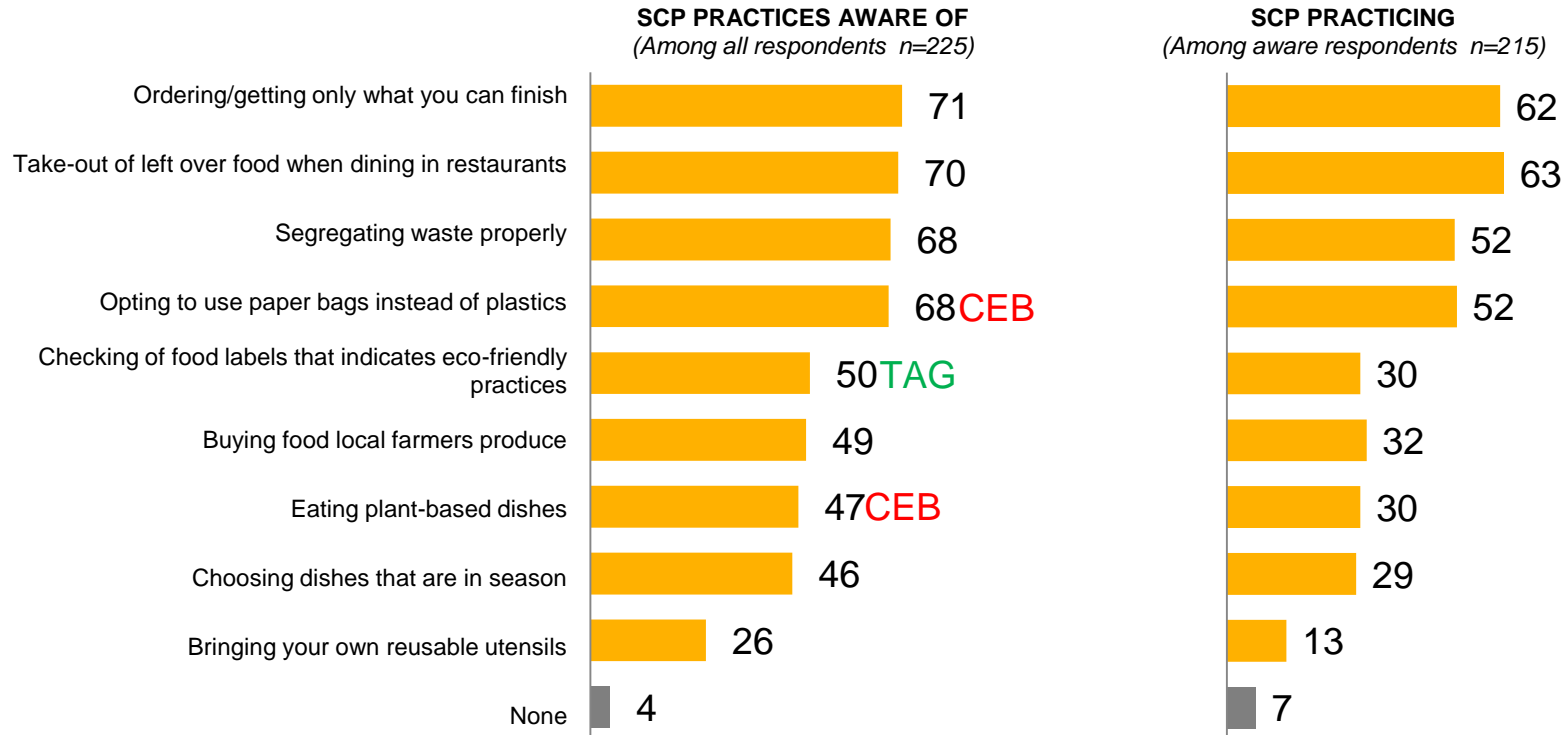


### PERCEIVED BENEFIT OF THESE PRACTICES



# ORDERING WHAT THEY CAN FINISH AND TAKING OUT LEFT OVER FOOD ARE TOP SCP PRACTICED

Segregation and using paper bags are the 3<sup>rd</sup> and 4<sup>th</sup> practiced SCP.

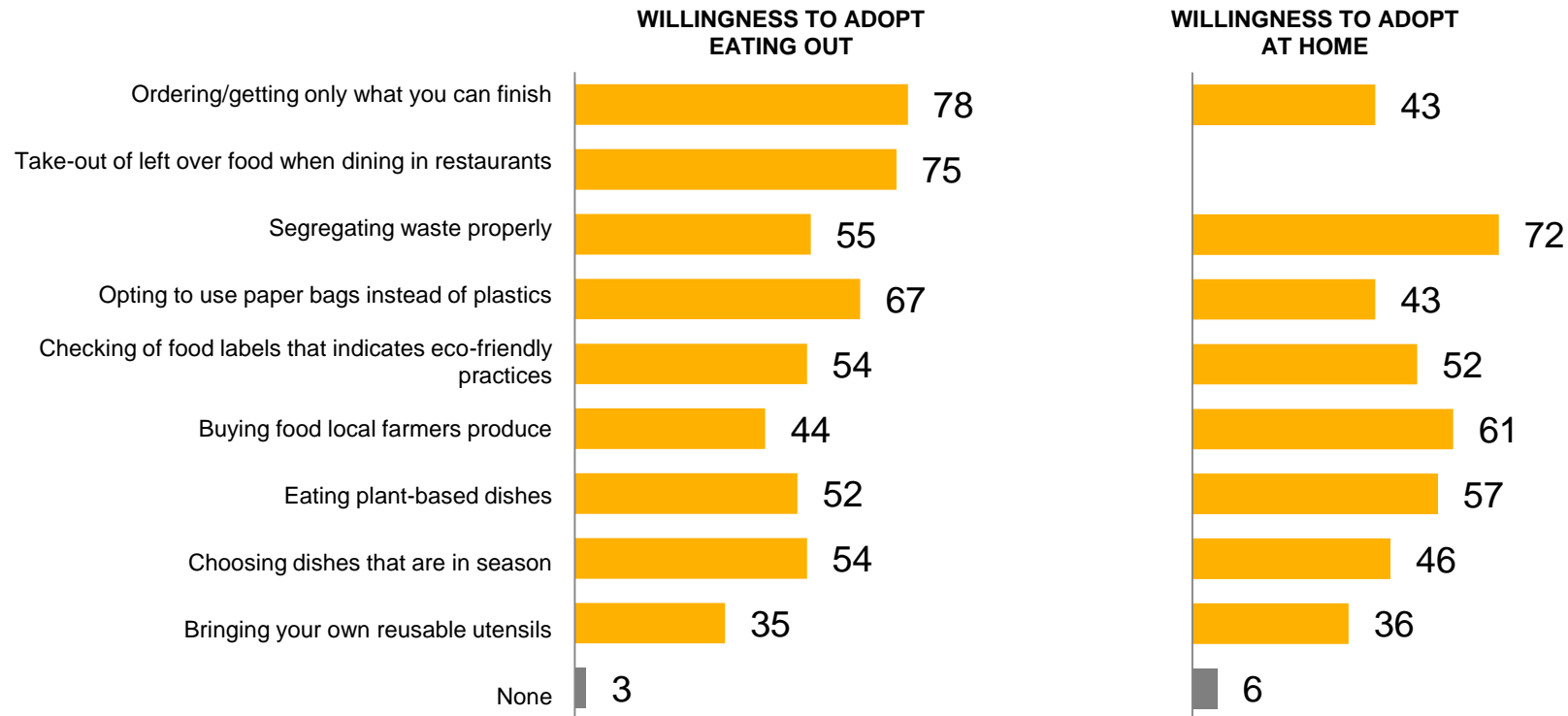


Base: Asked among all respondents (n=225)

Source: Q18 Which of these dining practices are you aware of? And which among these do you practice yourself?

**XX** – significantly higher vs. Total @ 95% CL  
**XX** – significantly lower vs. Total @ 95% CL

# SAME PRACTICES ARE TO BE ADOPTED WHEN EATING OUT, WHILE SEGREGATING WASTE IS TO BE PRACTICED AT HOME



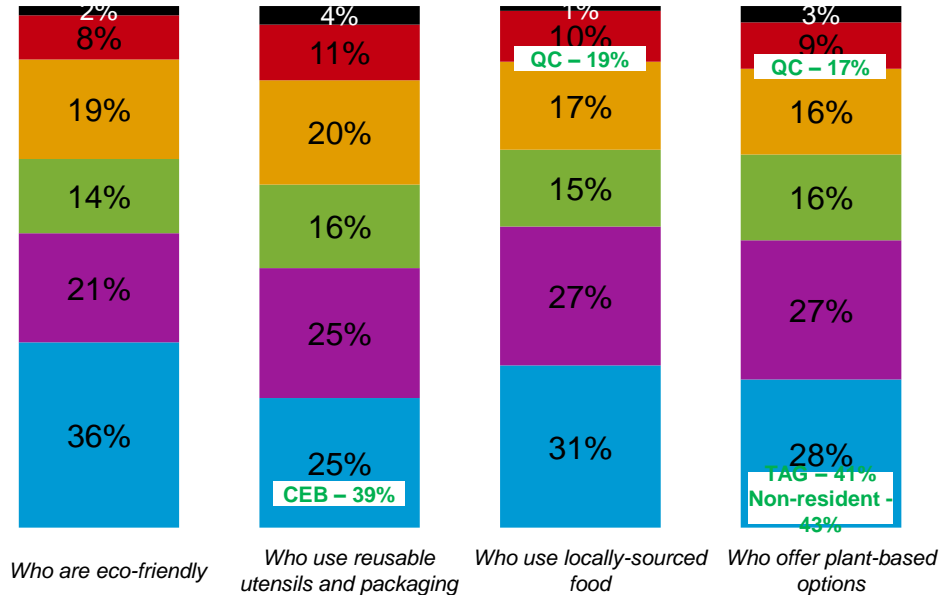
Base: Asked among all respondents (n=225)

Source: Q20 Which among these practices are you willing to adopt when dining out? ...when eating at home?

# WILLING TO PAY PREMIUM FOR RESTAURANTS PRACTICING SCP INDICATES OPPORTUNITY FOR DIFFERENTIATION

## WILLINGNESS TO PAY PRICE PREMIUM FOR RESTAURANTS

- I wouldn't buy it at all
- Only if it costs same as the cheapest restaurant
- Even if it costs A bit more than the cheapest restaurant
- Even if it costs A lot more than the cheapest restaurant
- Even if it costs more than for any other restaurant
- Whatever it costs

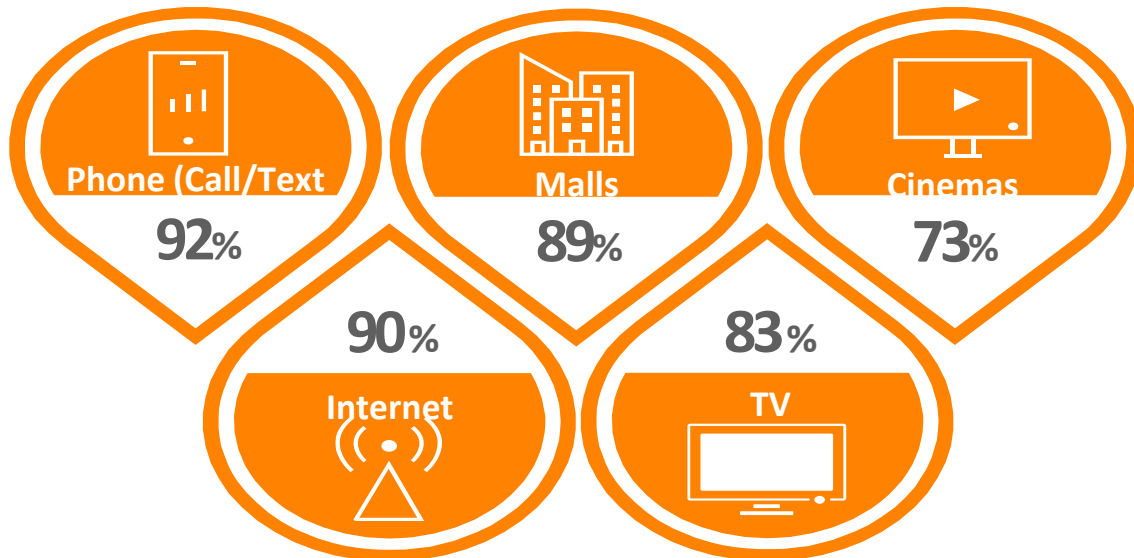


Base: Asked among all respondents (n=[225])

Source: Q22. Can you please indicate which of these statements best describes how much you would be willing to pay for a restaurant who practices sustainable dining?

# CONNECT THROUGH ENGAGEMENT ON DIGITAL CHANNELS, TV AND MALL EVENTS

## ACTIVITIES DURING WEEKDAYS/WEEKENDS



## INTERNET USAGE

### Social Media Accounts:

TAG

- Facebook – 92%
- Youtube – 61%
- Instagram – 58%
- Twitter – 27%
- LinkedIn – 15%



### Influencers on social media:

- Friends – 90%
- Family – 68%
- Bloggers – 6%
- Celebrities – 6%



Base: Asked among all respondents (n=225)

Source: Q23 Which of these do you usually do at least once a month during weekdays/weekends?

Q25a Which of the following social networking sites are you currently using? Please select all that apply. (Asked among those who use internet n=202)

Q26 Who are the influencers you follow on social media? (Asked among those who use internet n=202)

# RECAP OF FINDINGS



## FINDINGS

Diners look for a balance of good food, service, ambiance and price. 95% of them are aware on SCP-related terms. However, SCP is not a top consideration when eating out.

Top SCP practiced and willing to adopt are likely practices that have long been inculcated to them, which is likely learned during younger years

Necessary to increase awareness, understanding & impact of SCP terms and practices

Top activities they do on weekends and weekdays are:

- Using the Internet
- Going to the malls
- Watching TV and cinemas

## RECOMMENDATIONS

Prioritize creating awareness and a more in depth understanding of SCP and it's impact to the environment

Consider lobbying for SCP to be part of the school curriculum, in order to instill the importance of taking care of the environment as part of a child's growing up years

Employ high engagement platforms such as segment features, vlogs, blogs to create a sticky, interesting and relatable campaign

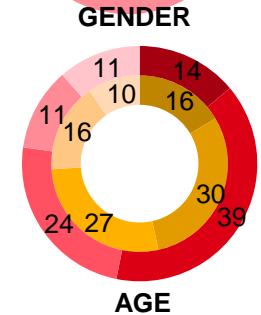
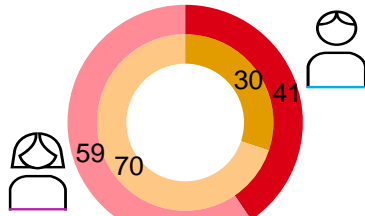
Laymanize SCP terms so they can be easily understood and related to terms they're already familiar with

Continue partnership with celebrity chefs to bring awareness to diners about SCP and how they can adopt it at home

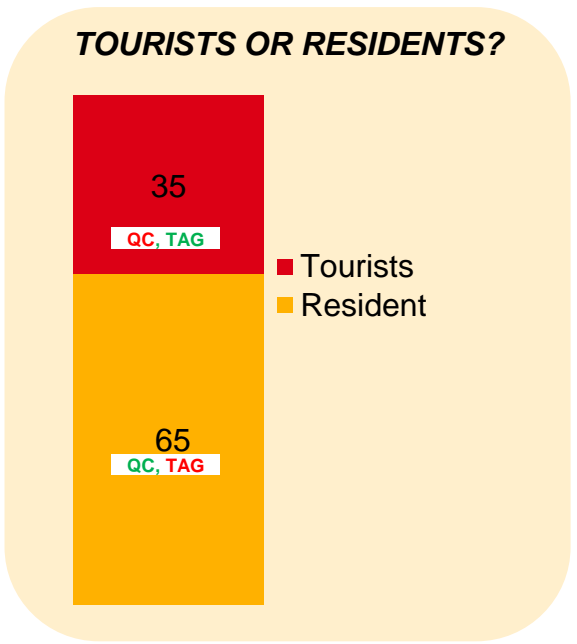
# RESIDENTS VS. TOURISTS



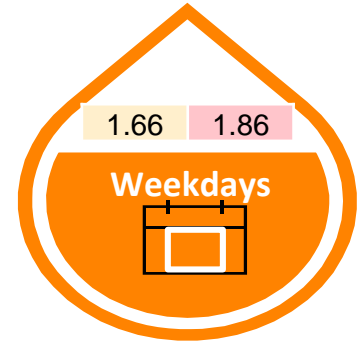
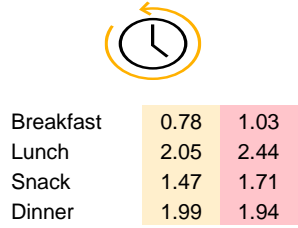
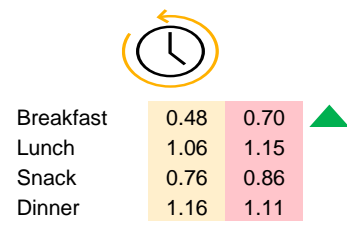
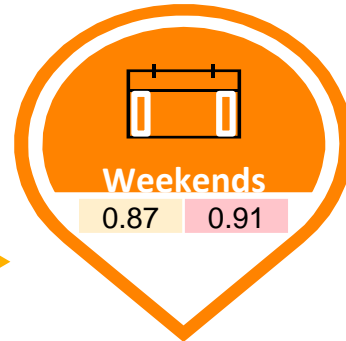
# DINERS IN QC MAINLY RESIDENTS; MORE TOURISTS DINE IN TAGAYTAY; AND A MIX OF BOTH IN CEBU



- 18-25 years old
- 26-35 years old
- 36-45 years old
- 46-55 years old



## WHEN DO THEY GO OUT?\*

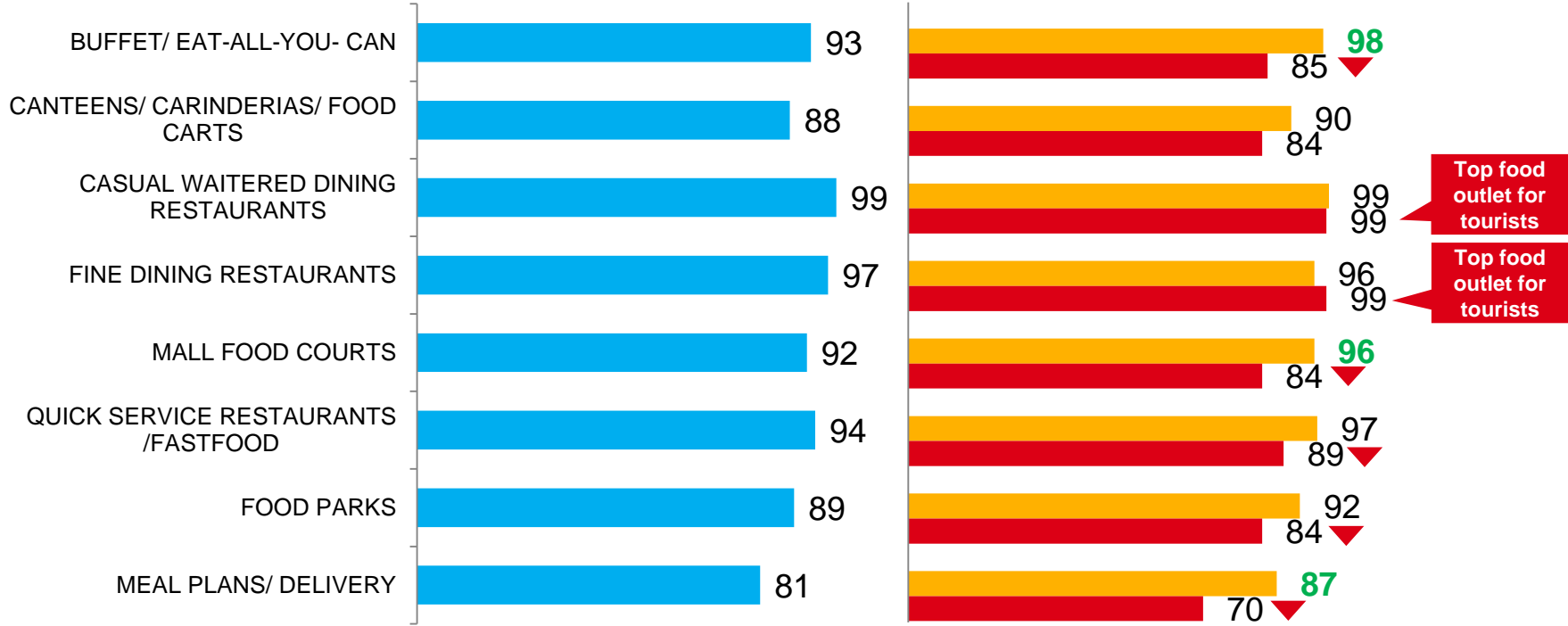


Base: Among all respondents (n=225), Residents (n=146), Tourists (n=79)  
 Source: IQ19a. And which among this statement best describes your residential status at (MENTION ANSWER IN Q1 PLACE OF INTERVIEW)? (Q11)  
 On the average, how many times do you eat outside of your home during weekends/weekdays for breakfast? For lunch? For dinner? For snacks?  
 \*Note: Frequency here is regardless of food outlet. \*\*Note: Tourists are those who are not from the place of interview

■ \*\*Tourists  
■ Residents  
▲ Sig higher vs. Resident  
▼ Sig lower vs. Resident  
XX – significantly higher vs. Total @ 95% CL  
XX – significantly lower vs. Total @ 95% CL

# TOURISTS TEND TO SPLURGE MORE WHEN EATING OUT DUE TO “VACATION MENTALITY”

## WHERE DO THEY EAT OUT IN THE P3M?

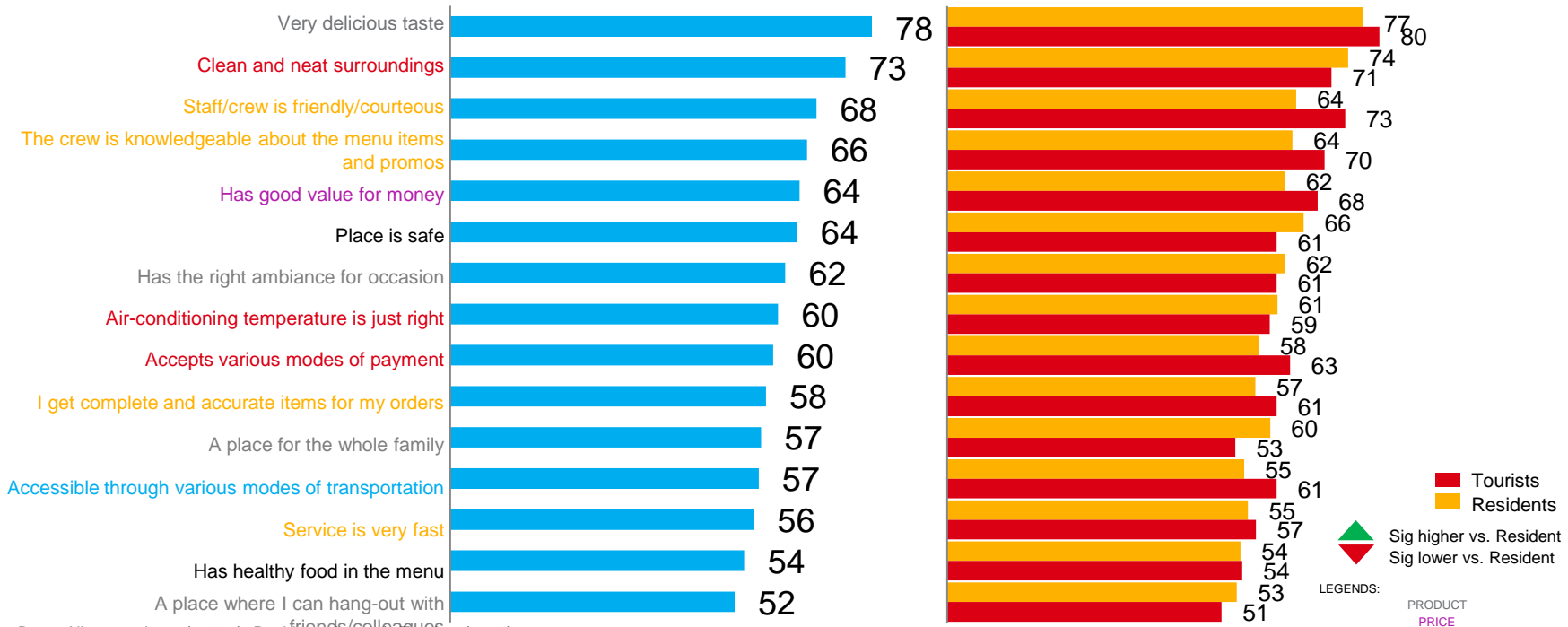


Base: Among all respondents (n=225); Residents (n=146), Tourists (n=79)  
 Source: Q12 On the average, how often do you patronize the following food outlets in the past 3 months?  
 \*Note: Frequency here is per dining establishment

■ Tourists     ▲ Sig higher vs. Resident  
■ Residents     ▼ Sig lower vs. Resident  
XX – significantly higher vs. Total @ 95% CL  
XX – significantly lower vs. Total @ 95% CL

# PERHAPS DUE TO VACATION/ SPLURGE MENTALITY, TOURISTS TEND TO HAVE HIGHER STANDARDS FOR DINING OUT

## WHAT IS IMPORTANT WHEN LOOKING FOR A PLACE TO EAT?



Base: All respondents (n=225); Residents (n=146); Tourists (n=79)

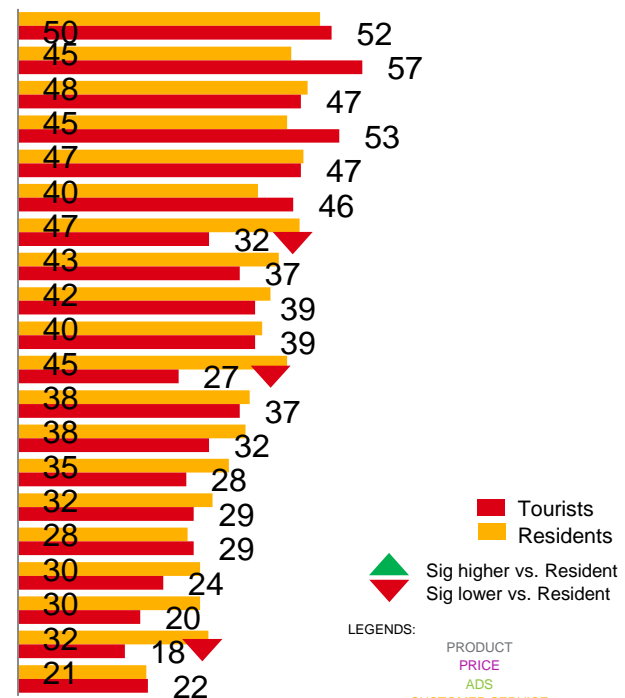
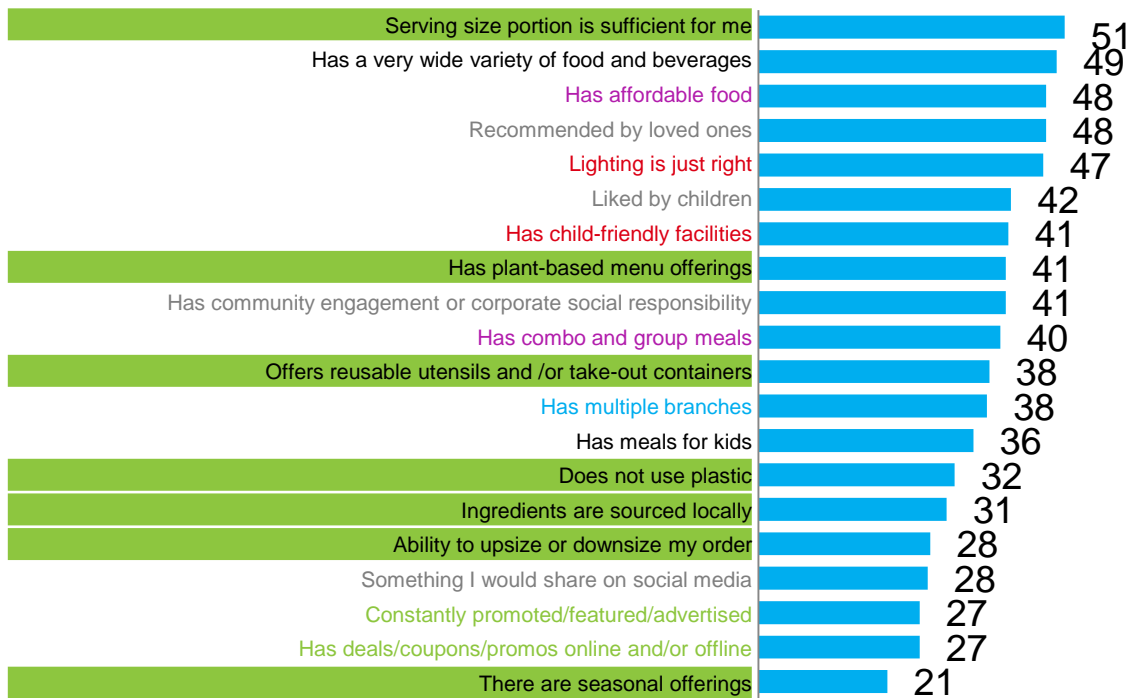
Source: Q14 These are some statements that others have said are important for selecting a type of food establishment to patronize. For each statement, please select how important it is for you using a scale of 1 to 5, where 1 is Not Important At All and 5 is Definitely Important. Note: TB scores

LEGENDS:

- Tourists
- Residents
- ▲ Sig higher vs. Resident
- ▼ Sig lower vs. Resident
- PRODUCT
- PRICE
- ADS
- IMAGE
- FACILITIES
- LOCATION

# SCP PRACTICES NOT A TOP PRIORITY FOR TOURISTS EITHER, ESPECIALLY USING REUSABLE UTENSILS

## WHAT IS IMPORTANT WHEN LOOKING FOR A PLACE TO EAT?

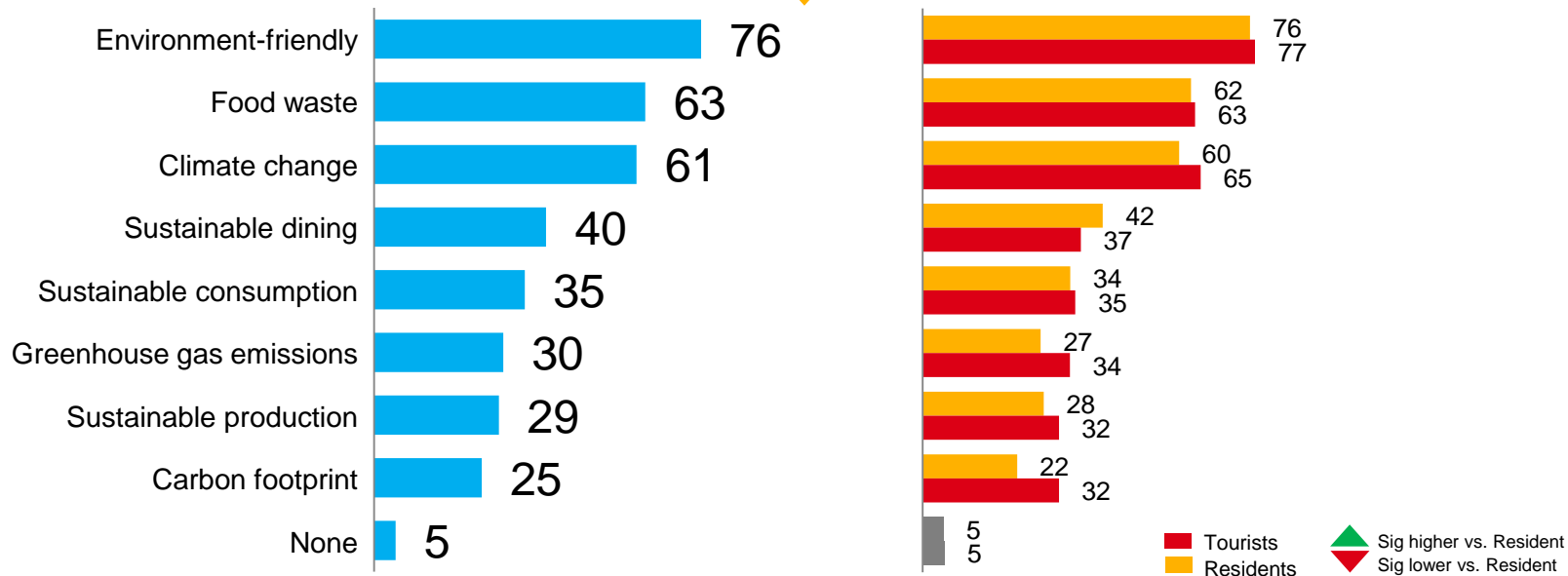


Base: All respondents (n=225) ; Residents (n=146), Tourists (n=79)

Source: Q14 These are some statements that others have said are important for selecting a type of food establishment to patronize. For each statement, please select how important it is for you, using a scale of 1 to 5, where 1 is Not Important At All and 5 is Definitely Important. Note: TB scores

# NEED TO INCREASE AWARENESS OF SCP TECHNICAL TERMS ACROSS ALL

**95%**  
**CEB**  
*Aware of any SCP-related words*



Base: Among all respondents (n=225) ; Residents (n=146), Tourists (n=79)  
 Source: Q16 Which of the following words/phrases are you aware of? Please select all that apply.

■ Tourists  
■ Residents  
▲ Sig higher vs. Resident  
▼ Sig lower vs. Resident  
XX – significantly higher vs. Total @ 95% CL  
XX – significantly lower vs. Total @ 95% CL

# ROOM TO GROW LEVEL OF SCP KNOWLEDGE & UNDERSTANDING

	Sustainable Consumption	Sustainable Dining	Sustainable Production	Carbon Footprint	Food Waste	Environment Friendly	Green House Gas Emissions	Climate Change
<i>Base: Among aware of words</i>	78	90	66	57	141	172	67	138
Segregating waste properly	21%	26%	18%	42%	50%	47%	36%	56%
Ordering only what you can finish	56%	41%	35%	23%	43%	30%	18%	21%
Take-out of left over food when dining in restaurants	35%	37%	26%	21%	48%	30%	16%	18%
Opting to use paper bags instead of plastics	18%	23%	21%	42%	21%	41%	43%	46%
Eating plant-based dishes	29%	31%	24%	28%	13% TAG - 27%	21%	25%	17%
Checking of food labels that indicates eco-friendly practices	18%	29%	20%	35%	16%	31%	28%	30%
Buying food local farmers produce	38%	26%	50%	25%	13%	20%	19%	19%
Choosing dishes that are in season	32%	30%	35%	19%	18%	19%	12%	23%
Bringing your own reusable utensils	13%	17%	11%	33%	10%	30%	30%	23%
None	3%	2%	6%	9%	2%	3%	10%	4%

Top terms associated are terms they are more familiar with, necessary to increase depth in the knowledge among

Base: Asked among all aware of words (N=244)  
 Second top practice attributed to the word/phrase among sustainable dining, production and consumption practices. You may choose 1 attribute, 2, all attributes, or no attributes at all

Note: Read figures vertically.

First top practice attributed to

Second top practice attributed to the word/phrase

# RESIDENTS' ASSOCIATION OF SCP-RELATED TERMS NO DIFFERENT VS. TOTAL

	Sustainable Consumption	Sustainable Dining	Sustainable Production	Carbon Footprint	Food Waste	Environment Friendly	Green House Gas Emissions	Climate Change
<i>Base: Among aware of words</i>	50	61	41	32	91	111	40	87
Segregating waste properly	22%	28%	24%	56%	49%	44%	35%	54%
Ordering only what you can finish	54%	43%	37%	28%	42%	28%	18%	23%
Take-out of left over food when dining in restaurants	36%	38%	29%	31%	49%	33%	18%	20%
Opting to use paper bags instead of plastics	18%	18%	27%	44%	24%	37%	38%	48%
Eating plant-based dishes	32%	34%	29%	28%	12%	22%	25%	17%
Checking of food labels that indicates eco-friendly practices	22%	30%	22%	41%	19%	35%	33%	33%
Buying food local farmers produce	38%	23%	49%	31%	13%	18%	20%	18%
Choosing dishes that are in season	30%	31%	39%	28%	21%	23%	18%	26%
Bringing your own reusable utensils	6%	11%	12%	28%	8%	30%	30%	24%
None	0%	2%	0%	0%	1%	2%	8%	1%

 Sig higher vs. Tourist

*First top practice attributed to the word/phrase*

*Second top practice attributed to the word/phrase*

XX – significantly higher vs. Total @ 95% CL  
XX – significantly lower vs. Total @ 95% CL

Base: Asked among all aware of words (n=214)

Source: Q19 Which of these attributes do you associate with or fits each words/phrases. You may choose 1 attribute, 2, all attributes, or no attributes at all  
Note: Read figures vertically.

# THE SAME CAN BE SAID FOR TOURISTS' KNOWLEDGE ON SCP

	Sustainable Consumption	Sustainable Dining	Sustainable Production	Carbon Footprint	Food Waste	Environment Friendly	Green House Gas Emissions	Climate Change
<i>Base: Among aware of words</i>	*28	*29	*25	*25	50	61	*27	51
Segregating waste properly	18%	21%	8%	24%	50%	52%	37%	59%
Ordering only what you can finish	61%	38%	32%	16%	46%	34%	19%	18%
Take-out of left over food when dining in restaurants	32%	34%	20%	8%	44%	25%	15%	16%
Opting to use paper bags instead of plastics	18%	34%	12%	40%	14%	49%	52%	43%
Eating plant-based dishes	25%	24%	16%	28%	16%	20%	26%	16%
Checking of food labels that indicates eco-friendly practices	11%	28%	16%	28%	12%	25%	22%	25%
Buying food local farmers produce	39%	31%	52%	16%	14%	23%	19%	20%
Choosing dishes that are in season	36%	28%	28%	8%	14%	11%	4%	18%
Bringing your own reusable utensils	25% ▲	28%	8%	40%	14%	30%	30%	22%
None	7%	3%	16%	20%	4%	5%	15%	8%

▲ Sig higher vs. Resident

*First top practice attributed to the word/phrase*

*Second top practice attributed to the word/phrase*

XX – significantly higher vs. Total @ 95% CL  
 XX – significantly lower vs. Total @ 95% CL

Base: Asked among all aware of words (n=214)

Source: Q19 Which of these attributes do you associate with or fits each words/phrases.

You may choose 1 attribute, 2, all attributes, or no attributes at all

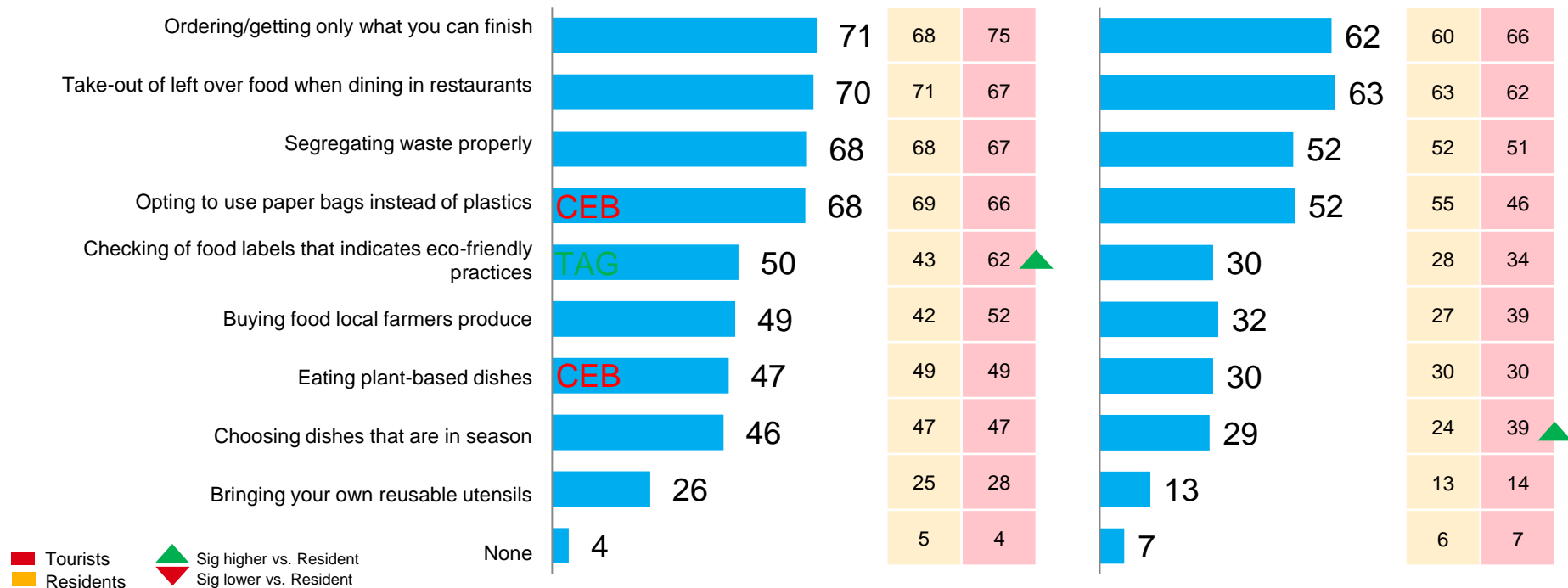
Note: Read figures vertically; \*Note: Read with caution, low base.



# TOURISTS MORE WILLING TO TRY DISHES THAT ARE IN SEASON, MAY BE LINKED TO BEING ON VACATION MODE WHERE THEY'RE MORE WILLING TO TRY NEW THINGS

SCP PRACTICES AWARE OF  
(Among all respondents n=225)

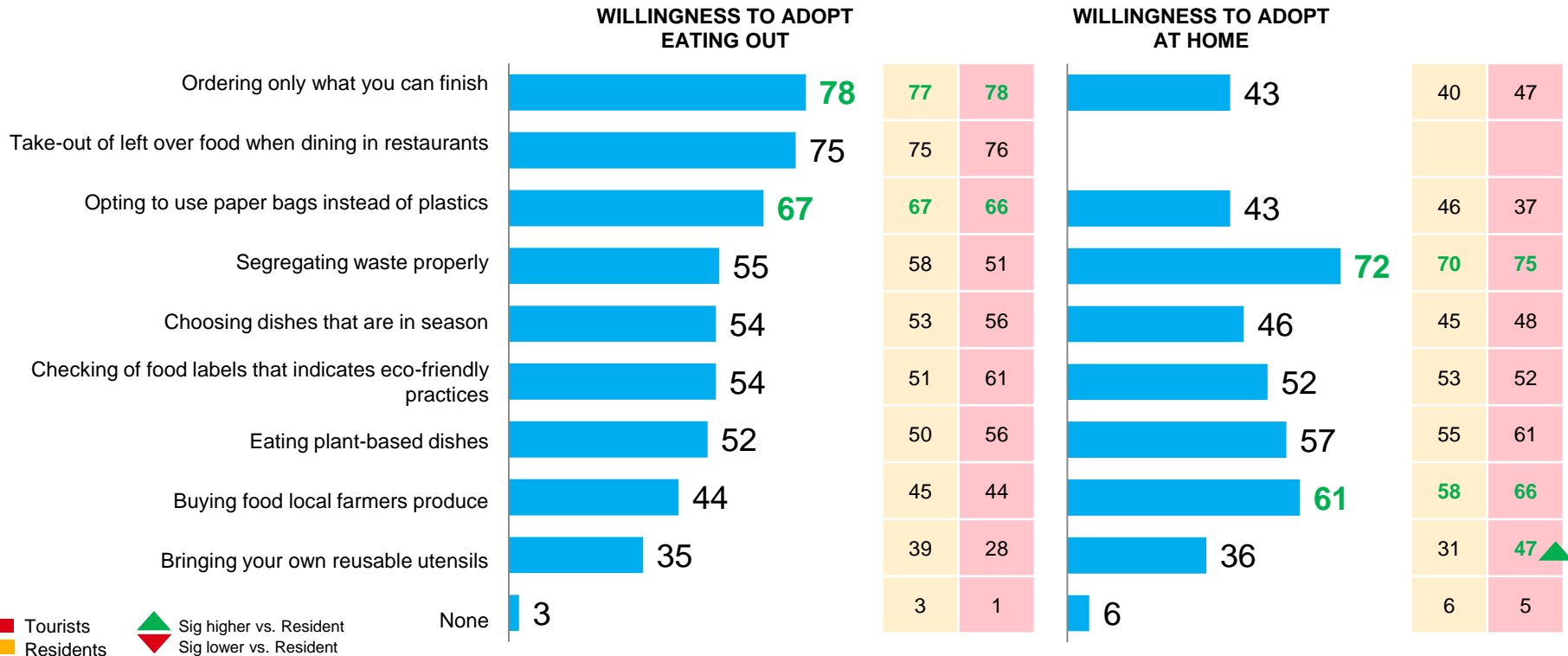
SCP PRACTICING  
(Among aware respondents n=215)



Base: Asked among all respondents (n=225); Residents (n=146), Tourists (n=79)  
 Source: Q18 Which of these dining practices are you aware of? And which among these do you practice yourself?

XX – significantly higher vs. Total @ 95% CL  
 XX – significantly lower vs. Total @ 95% CL

# SEGREGATION AND BUYING LOCAL PRODUCE WILLING TO ADOPT AT HOME; ORDERING THE RIGHT AMOUNT AND TAKE-OUT OF LEFT OVER FOOD WILLING TO ADOPT DURING DINING OUT



Base: Asked among all respondents (n=225) ; Residents (n=146), Tourists (n=79)  
 Source: Q20 Which among these practices are you willing to adopt when dining out? ...when eating at home?

XX – significantly higher vs. parallel figure (i.e. dining out or at-home) @ 95% CL  
XX – significantly lower vs. parallel figure (i.e. dining out or at-home) @ 95% CL

# TOURISTS MORE WILLING TO PAY PREMIUM FOR PLANT-BASED OPTIONS, PERHAPS DUE TO VACATION/ SPLURGE MENTALITY

## WILLINGNESS TO PAY PRICE PREMIUM FOR RESTAURANTS

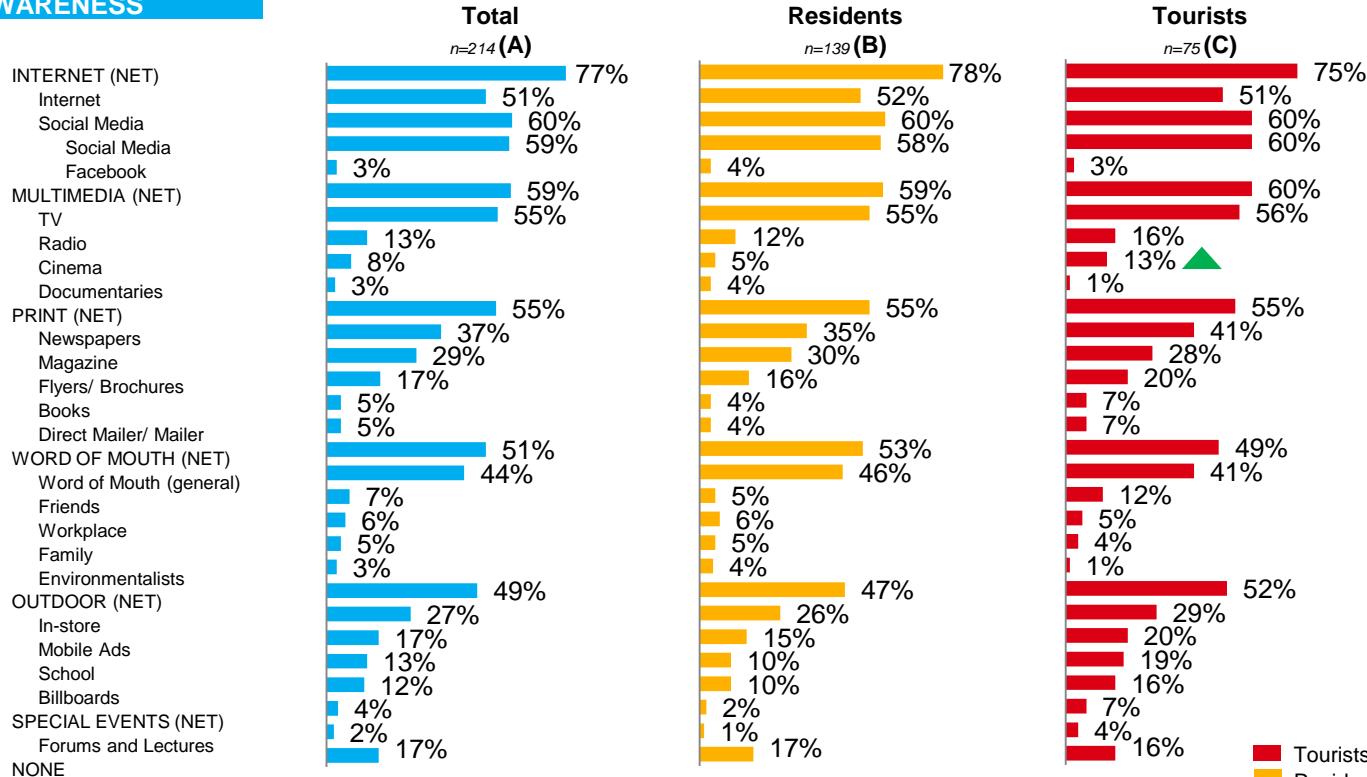


Base: Asked among all respondents (n=225)  
 Source: Q22. Can you please indicate which of these statements best describes how much you would be willing to pay for a restaurant who practices sustainable dining?

■ Tourists     ▲ Sig higher vs. Resident  
■ Residents     ▼ Sig lower vs. Resident  
XX – significantly higher vs. Total @ 95% CL  
XX – significantly lower vs. Total @ 95% CL

# SOCIAL MEDIA, INTERNET, TV TOPS SOURCES OF AWARENESS FOR SCP RELATED TERMS BOTH FOR RESIDENTS AND TOURISTS

## SOURCE OF AWARENESS



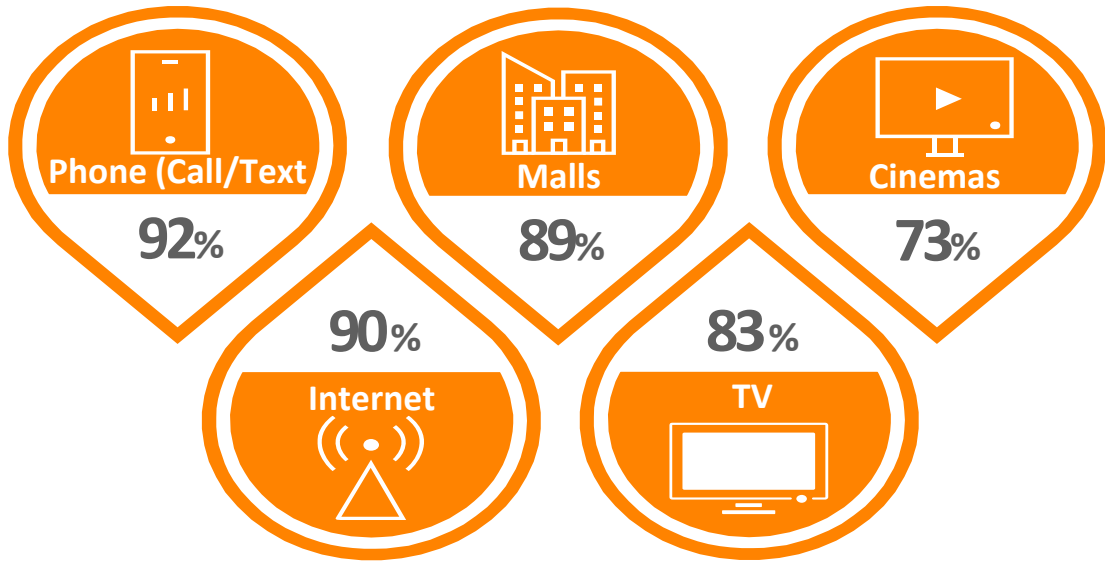
Base: Among all those who are aware (n=214). Note: Figures below 3% not shown.

Source: Q17. And, **where** have you seen or heard these words advertised? Please select all that apply and scroll to the right for more choices.

■ Tourists  
■ Residents  
▲ Sig higher vs. Resident  
▼ Sig lower vs. Resident  
XX – significantly higher vs. Total @ 95% CL  
XX – significantly lower vs. Total @ 95% CL

# CONNECT THROUGH ENGAGEMENT ON DIGITAL CHANNELS, TV AND MALL EVENTS

## ACTIVITIES DURING WEEKDAYS/WEEKENDS



## INTERNET USAGE

### Social Media Accounts:

	Total	R	T
Facebook	92%	92%	90%
Youtube	61%	52%	77%
Instagram	58%	56%	62%
Twitter	27%	27%	28%
LinkedIn	15%	14%	17%



### Influencers on social media:

- Friends – 90%
- Family – 68%
- Bloggers – 6%
- Celebrities – 6%



Base: Asked among all respondents (n=225)  
 Source: Q23 Which of these do you usually do at least once a month during weekdays/weekends?  
 Q25a Which of the following social networking sites are you currently using? Please select all that apply. (Asked among those who use internet n=202)  
 Q26 Who are the influencers you follow on social media? (Asked among those who use internet n=202)

■ Tourists     ▲ Sig higher vs. Resident  
■ Residents     ▼ Sig lower vs. Resident  
XX – significantly higher vs. Total @ 95% CL  
XX – significantly lower vs. Total @ 95% CL



## FINDINGS

- ❑ Tourists on vacation mode have the tendency to be more adventurous in trying out plant based and seasonal dishes. But this is likely not linked to SCP, rather more because they're on vacation where they have the tendency to be more adventurous and more willing to splurge in general. Still, this is an opportunity to educate and raise awareness about SCP.

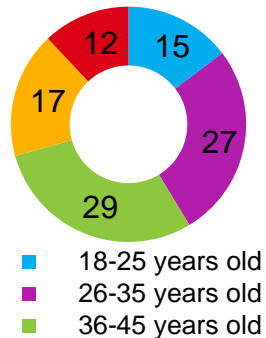
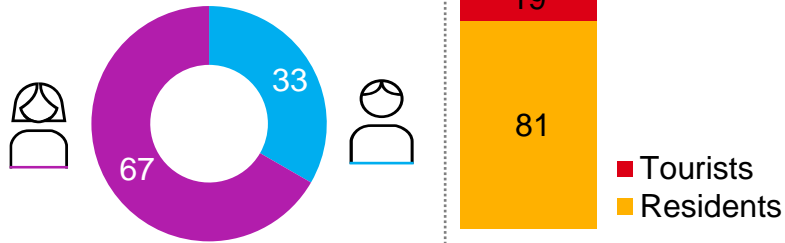
# IDENTIFYING OPPORTUNITIES PER AREA

# QUEZON CITY

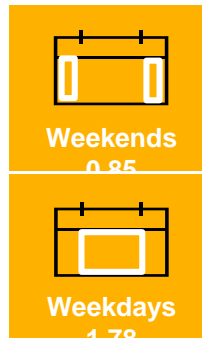


# MORE RESIDENTS THAN TOURISTS IN QC

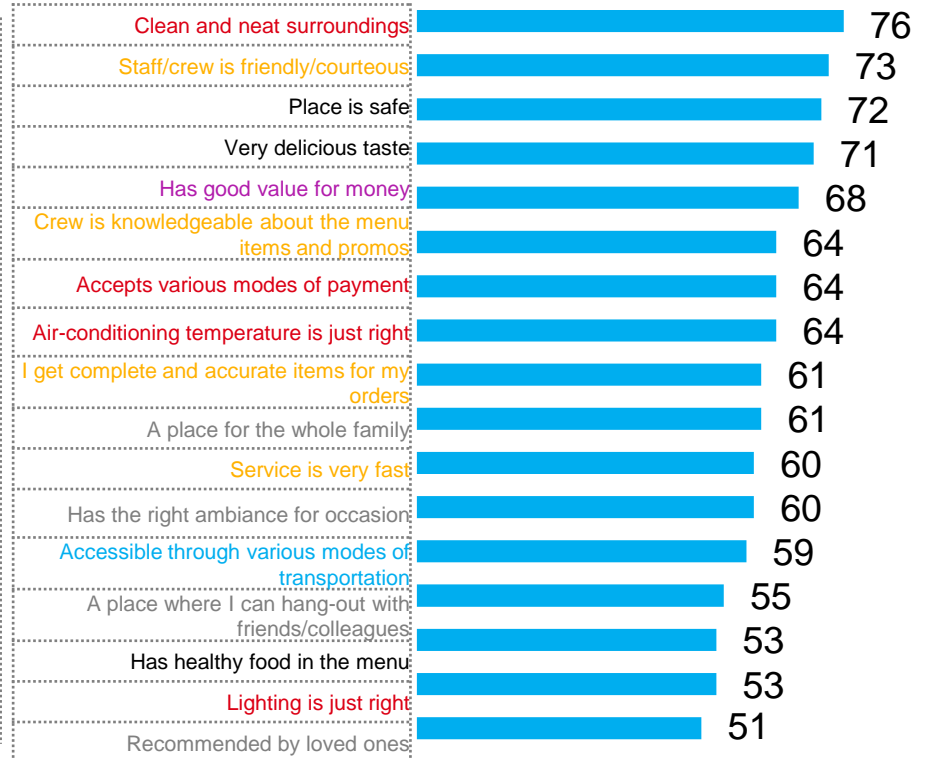
## PROFILE OF QC DINERS



- 18-25 years old
- 26-35 years old
- 36-45 years old



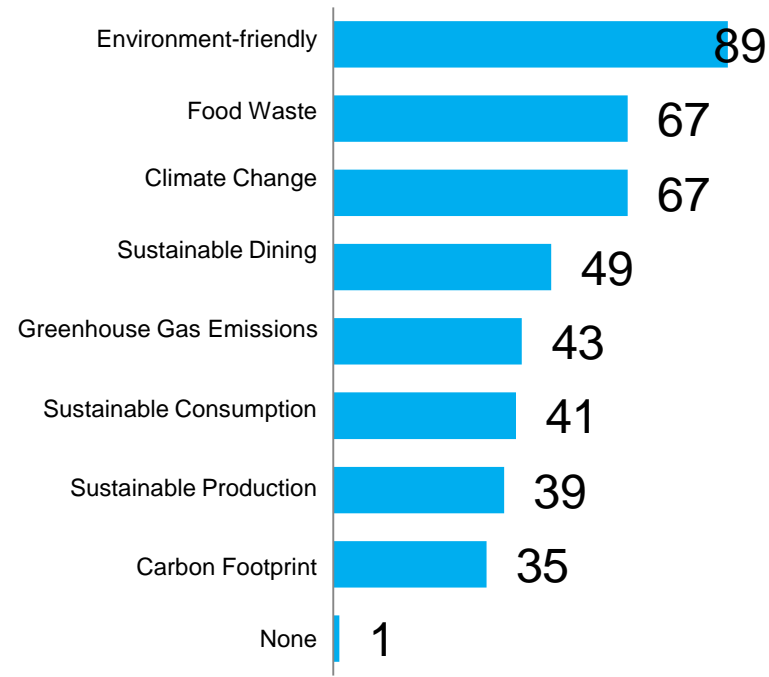
## CONSIDERATIONS WHEN DINING OUT



XX – significantly higher vs. parallel figure @ 95% CL  
 XX – significantly lower vs. parallel figure @ 95% CL

# DINERS IN QC SHOW HIGHER AWARENESS OF SCP TERMS COMPARED TO THE OTHER CITIES

**99%** *Aware of any SCP-related words*



Base: Among QC respondents (n=75)  
Source: Q16 Which of the following words/phrases are you aware of? Please select all that apply.

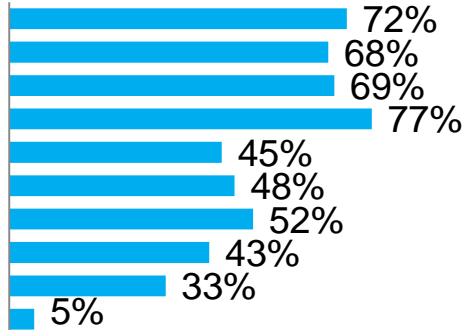
XX – significantly higher vs. Total @ 95% CL  
XX – significantly lower vs. Total @ 95% CL

# EDUCATION STILL REQUIRED TO BOOST AWARENESS ON SCP PRACTICES, BUT WILLINGNESS TO ADOPT IS PRESENT

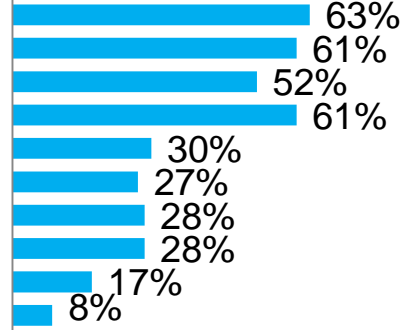
## SCP PRACTICES

- Ordering/getting only what you can finish
- Take-out of left over food
- Segregating waste properly
- Opting to use paper bags instead of plastics
- Checking of food labels
- Buying food local farmers produce
- Eating plant-based dishes
- Choosing dishes that are in season
- Bringing your own reusable utensils
- None

## AWARE



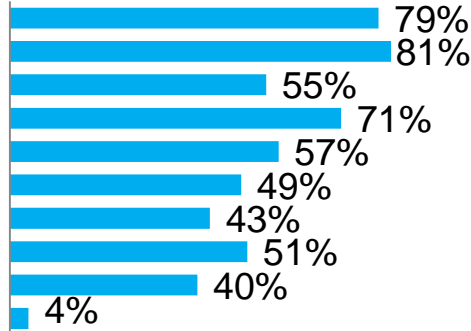
## PRACTICES



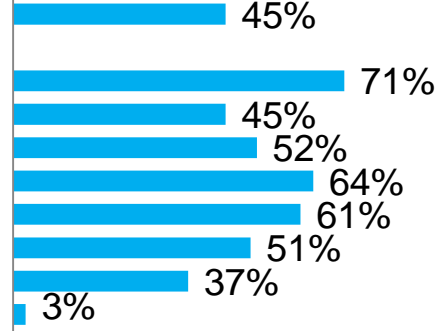
## PRACTICES WILLING TO ADOPT

- Ordering/getting only what you can finish
- Take-out of left over food
- Segregating waste properly
- Opting to use paper bags instead of plastics
- Checking of food labels
- Buying food local farmers produce
- Eating plant-based dishes
- Choosing dishes that are in season
- Bringing your own reusable utensils
- None

## DINING OUT

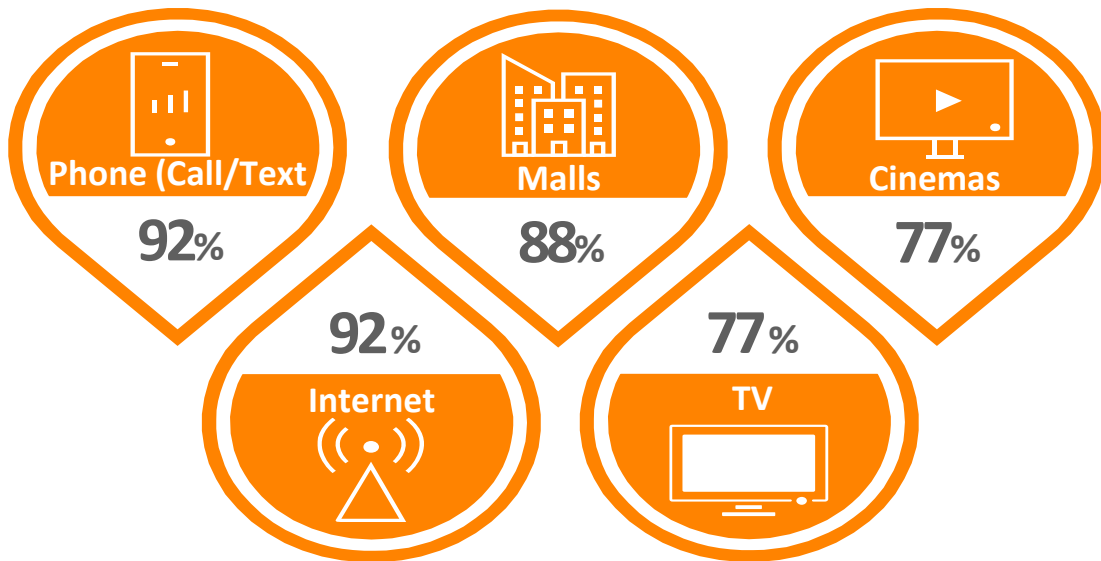


## AT-HOME



# SIMILAR MEDIA ACROSS AREAS

## ACTIVITIES DURING WEEKDAYS/WEEKENDS



Click to edit text

## INTERNET USAGE

### Social Media Accounts:

	Total
Facebook	91%
Youtube	52%
Instagram	51%
Twitter	26%
LinkedIn	20%



### Influencers on social media:

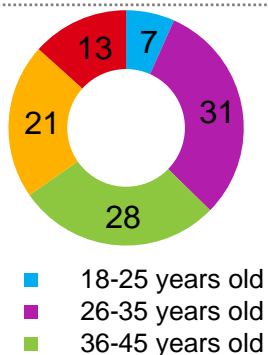
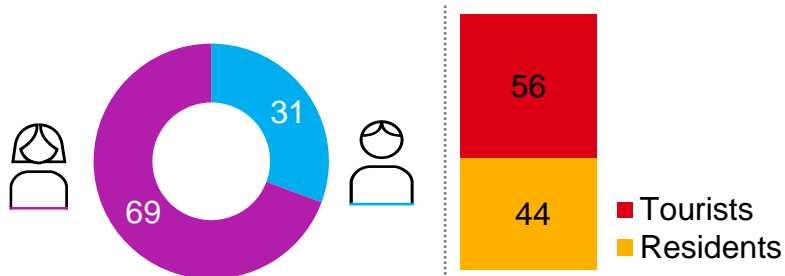
Friends	– 91%
Family	– 67%
Bloggers	– 7%
Celebrities	– 3%



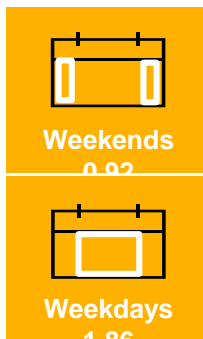
# TAGAYTAY CITY

# MORE TOURISTS IN TAGAYTAY CITY

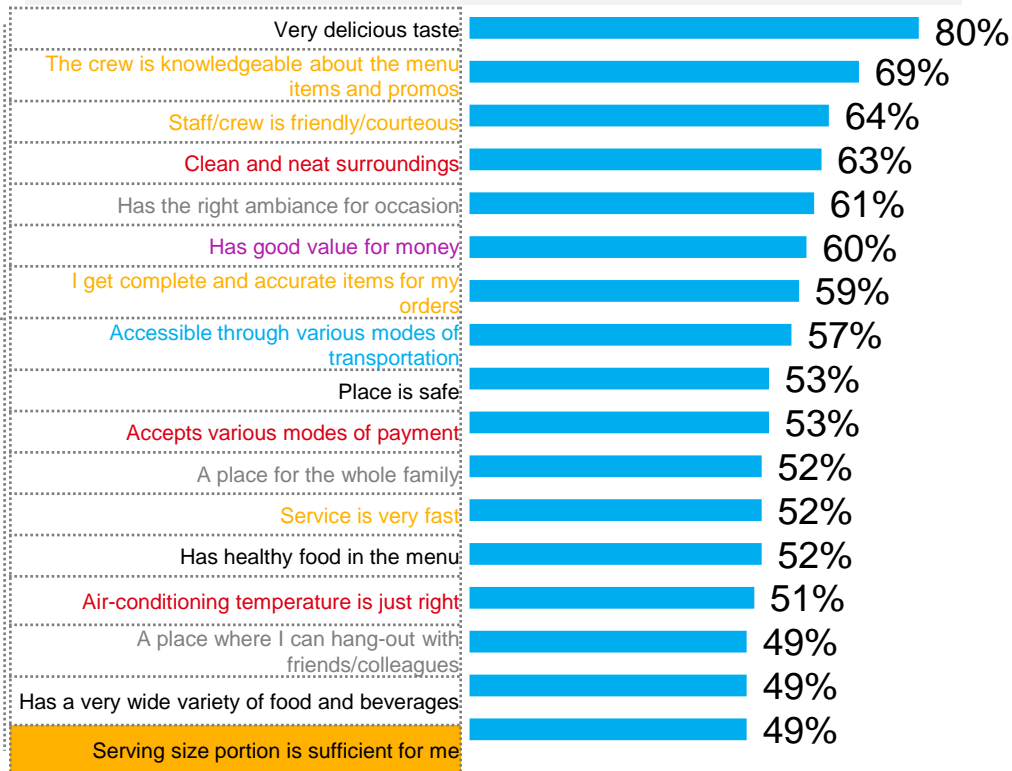
## PROFILE OF QC DINERS



- 18-25 years old
- 26-35 years old
- 36-45 years old



## CONSIDERATIONS WHEN DINING OUT

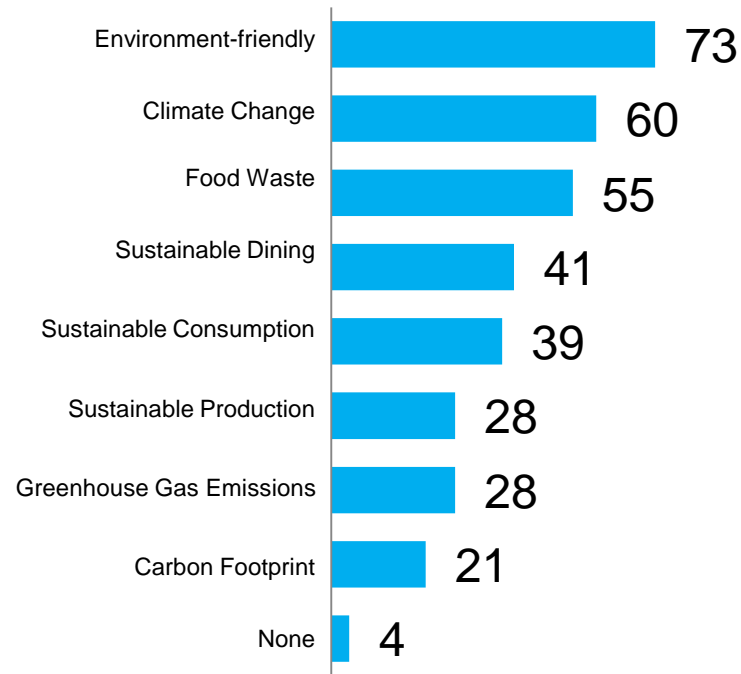


XX – significantly higher vs. parallel figure @ 95% CL  
 XX – significantly lower vs. parallel figure @ 95% CL

# NEED TO INCREASE DEPTH OF AWARENESS AMONG TAGAYTAY DINERS

96%

*Aware of any SCP-related words*

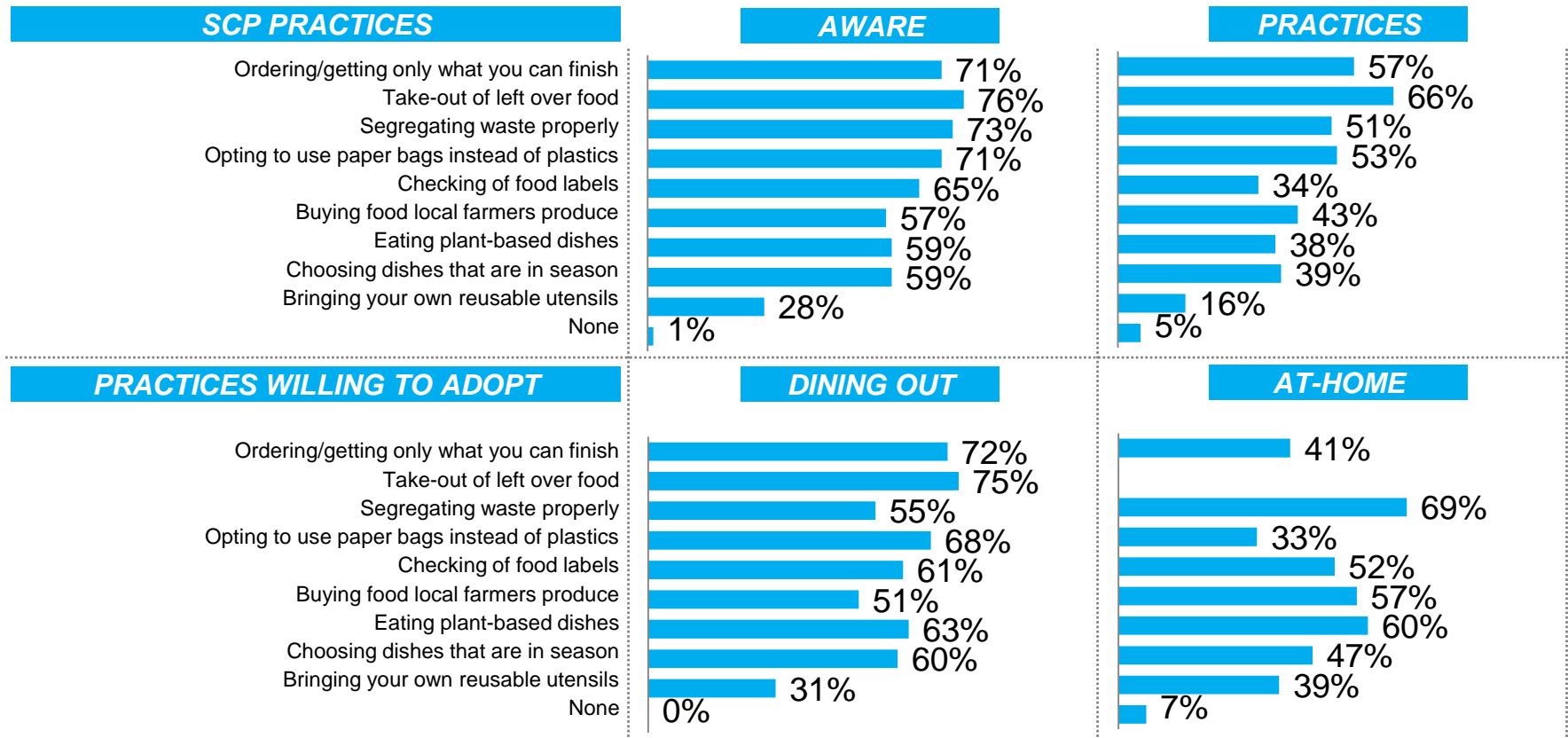


Base: Among Tagaytay respondents (n=75)

Source: Q16 Which of the following words/phrases are you aware of? Please select all that apply.

XX – significantly higher vs. Total @ 95% CL  
XX – significantly lower vs. Total @ 95% CL

# DINERS IN TAGAYTAY SHOW HIGH AWARENESS OF NEW SCP PRACTICES, BUT STILL HAS TO IMPROVE CONVERSION INTO PRACTICE



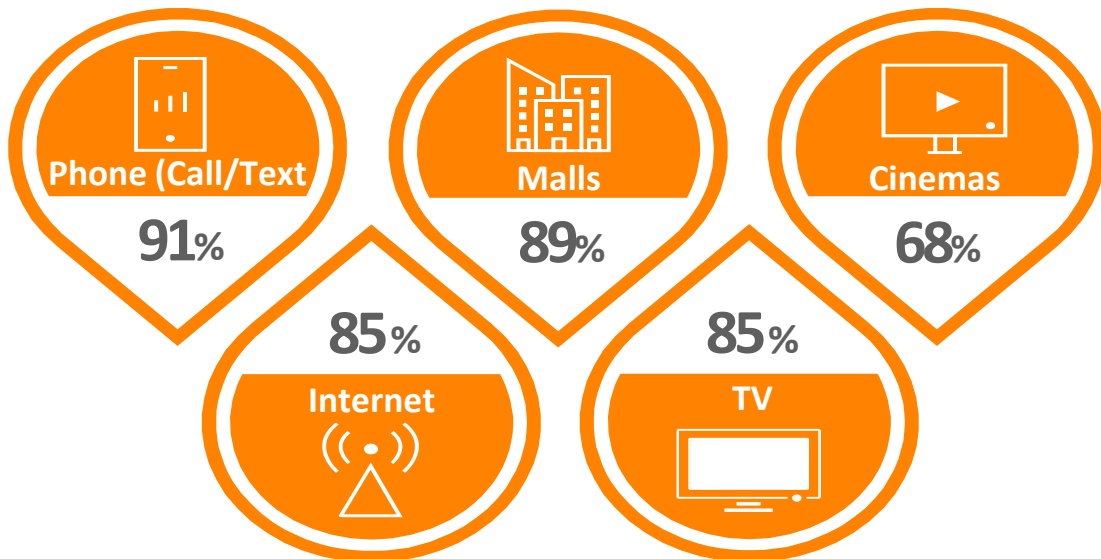
Base: Among Tagaytay respondents (n=75)

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# COMMUNICATION CAN BE DONE VIA MALLS, TV, AND INTERNET

## ACTIVITIES DURING WEEKDAYS/WEEKENDS



## INTERNET USAGE

### Social Media Accounts:

	Total
Facebook	100%
Youtube	65%
Instagram	56%
Twitter	32%
LinkedIn	14%



### Influencers on social media:

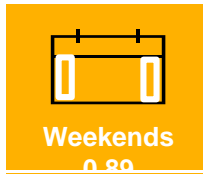
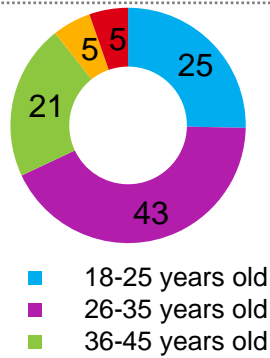
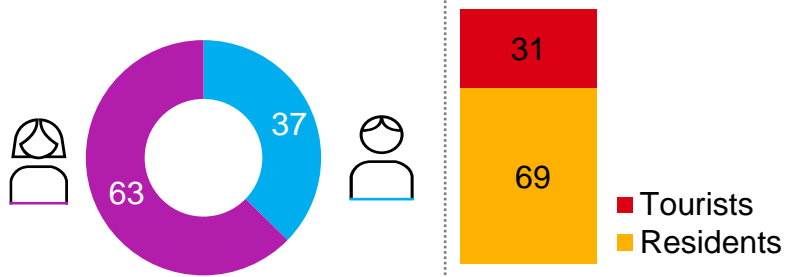
- Friends – 90%
- Family – 81%
- Bloggers – 5%
- Celebrities – 8%



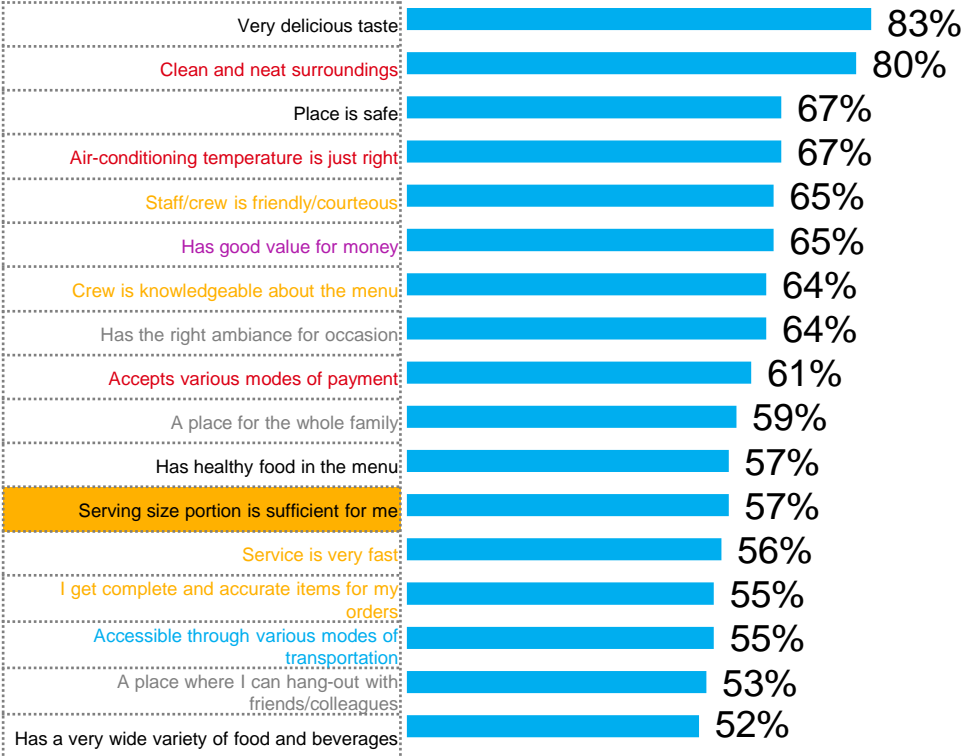
# CEBU CITY

# CEBU DINERS CONSIDERS SERVING SIZE IN CHOOSING RESTAURANTS

## PROFILE OF QC DINERS

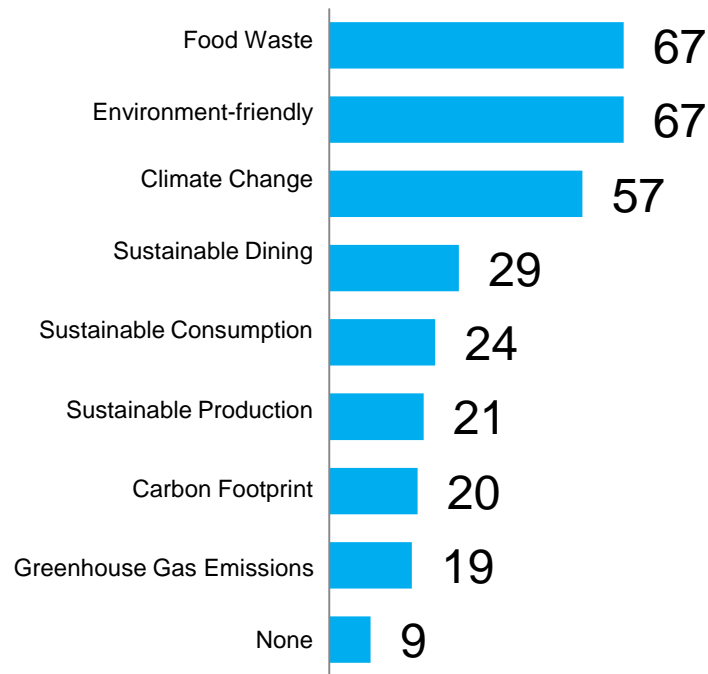
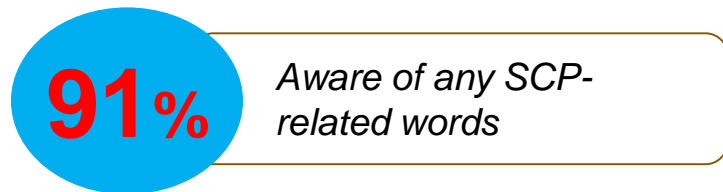


## CONSIDERATIONS WHEN DINING OUT



XX – significantly higher vs. parallel figure @ 95% CL  
 XX – significantly lower vs. parallel figure @ 95% CL

# HOWEVER, THEY NEED TO CATCH UP ON SCP AWARENESS



Base: Among Tagaytay respondents (n=75)

Source: Q16 Which of the following words/phrases are you aware of? Please select all that apply.

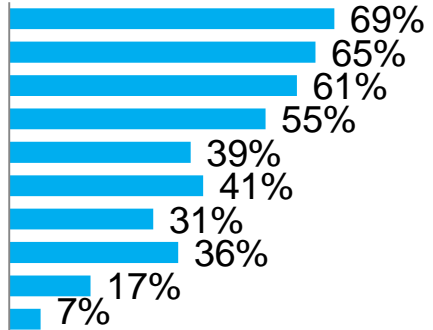
XX – significantly higher vs. Total @ 95% CL  
 XX – significantly lower vs. Total @ 95% CL

# WHICH LIKELIESTH TRANSLATES INTO PRACTICES AWARE OF AND CURRENTLY DOING

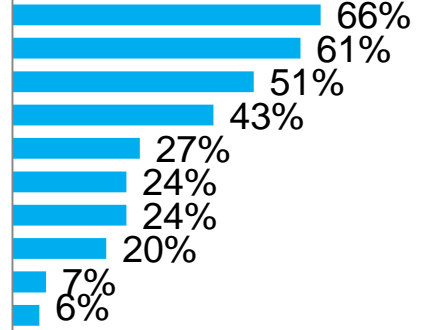
## SCP PRACTICES

- Ordering/getting only what you can finish
- Take-out of left over food
- Segregating waste properly
- Opting to use paper bags instead of plastics
- Checking of food labels
- Buying food local farmers produce
- Eating plant-based dishes
- Choosing dishes that are in season
- Bringing your own reusable utensils
- None

## AWARE



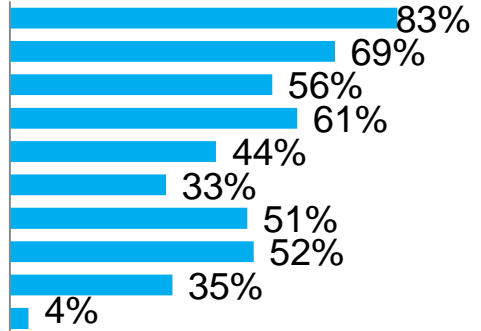
## PRACTICES



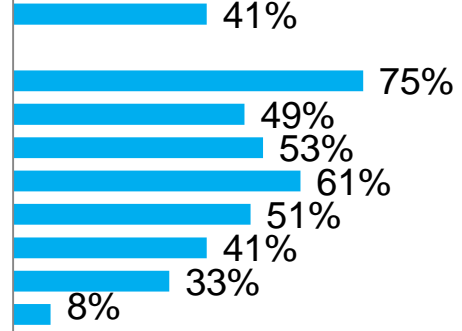
## PRACTICES WILLING TO ADOPT

- Ordering/getting only what you can finish
- Take-out of left over food
- Segregating waste properly
- Opting to use paper bags instead of plastics
- Checking of food labels
- Buying food local farmers produce
- Eating plant-based dishes
- Choosing dishes that are in season
- Bringing your own reusable utensils
- None

## DINING OUT

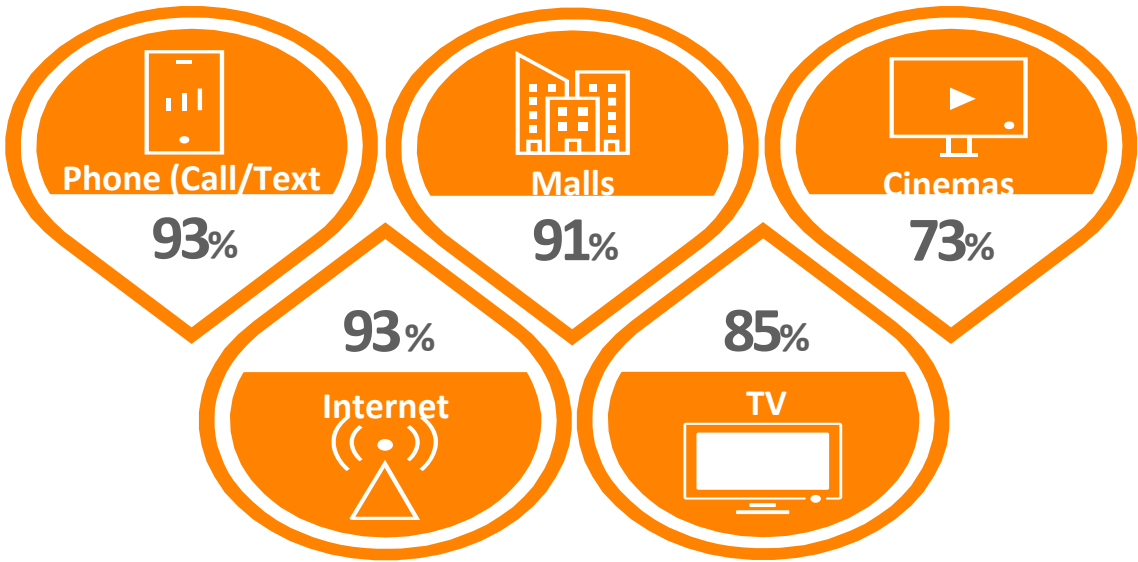


## AT-HOME



# PENETRATE MALLS, COMMUNICATE VIA INTERNET AND TV TO CONNECT WITH CEBU DINERS

## ACTIVITIES DURING WEEKDAYS/WEEKENDS



## INTERNET USAGE

### Social Media Accounts:

	Total
Facebook	84%
Youtube	66%
Instagram	67%
Twitter	24%
LinkedIn	10%



### Influencers on social media:

- Friends – 89%
- Family – 59%
- Bloggers – 6%
- Celebrities – 7%





## FINDINGS

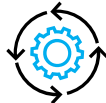
- ❑ Quezon city diners highest in awareness of SCP terms but needs more work on acquiring practices.
- ❑ Tagaytay diners highest in awareness of SCP practices, but needs to improve conversion to practice.
- ❑ Cebu Diners needs to catch up on SCP in general. Start with the basics by introducing terms and practices. Maximize their higher willingness to adopt SCP practices at-home and out-of-home.

# EDUCATION IS KEY TO PROMOTING SCP – RIGHT MESSAGE, RIGHT CHANNEL



Prioritize awareness and understanding of SCP

**Awareness & understanding is the first step** for people to adopt SCP



Show them the big picture, link to familiar concepts

Make people understand the link between known practices, SCP, and environment.



Appeal to heart & mind to change behavior

**Harp on** elements such as **health, family, friend and future to make SCP concept resonate with** and **appeal** to diners.



Tap multiple partners, & channels to reach wider audience

Partner with **government, restaurants, academe, media** and tap high engagement platforms.





# SUSTAINABLE DINING

PROJECT GREEN TABLE



# CONTENTS

<b>BACKGROUND &amp; OBJECTIVES OF THE STUDY</b>	3
What is the Sustainable Diner Project?	
<b>RESEARCH METHODOLOGY AND DESIGN</b>	4
Qualitative and Quantitative Design	
<b>RESULTS: CONSUMER / DINING PUBLIC</b>	6
<b>KEY TAKEAWAYS</b>	13
Summary and Recommendations	

# “SUSTAINABLE DINING PROJECT”

The World Wide Fund for Nature - Philippines is a non-government environment conservation organization whose aim is to stop and reverse the fast degradation of the Philippine environment to build a future where Filipinos live in harmony with nature.

One of the projects under the WWF is The Sustainable Diner: A Key Ingredient For Sustainable Tourism, a pioneer project which aims to help reduce carbon emissions and food waste in the food service industry of three key cities (Quezon City, Tagaytay City, Cebu City) through sustainable consumption and production (SCP). This project involves the following sectors: government, business and consumers who has a direct impact and/or involvement in this project.

To help in the strategy development and campaign conceptualization of the SCP. Program aims to help as well, in the delivery of the following objectives per sector:

- *Government*:: Potential integration of SCP into Philippine policies and strategies relevant to the food service industry via insights from the government sector
- *Food Service*: Identify current trends in dining and diets that have resonance with SCP that the project may use for its messaging. Determine awareness of SCP, current practices, integration of SCP in business operations and decisions and level of importance of positive environmental impact on business. Identify how to reach and approach the business establishments in order to garner support for the cause.
- *Consumer*: Identify current trends in dining and diets that have resonance with SCP that the project may use for its messaging. Determine awareness of SCP, current practices, integration of SCP and importance to consumers of a more environmentally conscious food service establishments. Identify how to reach and approach consumers in order to garner support for the cause.





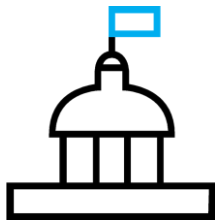
# RESEARCH METHODOLOGY

## QUALITATIVE PHASE

### PHASE 1: STAKEHOLDER DISCUSSIONS

Conducted during the WWF Launch/ Inception Workshop last September 26, 2017.

**Focus Group Discussion (FGDs)** - a gathering of 6-8 participants to gauge their understanding of SCP and their views on the concept. This method allows them to bounce ideas off each other for more dynamic understanding of the market.



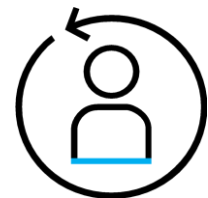
#### Government Sector

Four (4) Groups divided to:  
 (1) National & (3) LGUs from various areas (Tagaytay City, Quezon City, Cebu City)



#### Food Service Sector

Three (3) Groups divided to:  
 (1) Top Management;  
 (1) Middle Management;  
 (1) Rank and File from various restaurants from 3 key cities (Tagaytay City, Quezon City, Cebu City)



#### Consumer/Dining Public

Two (2) Groups composed of food bloggers/columnists, food related websites/app representatives, HRM/Culinary Arts representatives.

### PHASE 2: RESTAURANTS AND DINERS IN QC, LAGUNA & CEBU

**Focus Group Discussion (FGDs)** - a gathering of 6-8 participants to gauge their understanding of SCP and their views on the concept. This method allows them to bounce ideas off each other for more dynamic understanding of the market.

**In-depth Interviews (IDIs)** - interviews with restaurant owners with regard to their advocacies and practices pertaining to SCP and their willingness to support SCP.



#### Consumer/Dining Public

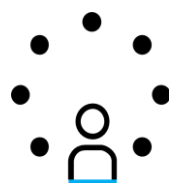
Total of nine (9) FGDs. One group for older (46-60), middle-age (30-45), and younger (18-29) diners for Cebu, Laguna, and Quezon City.



#### Select Restaurants

Total of (2) IDIs per city:

- Cebu: Zubuchon and Hikay
- Quezon City: Cravings and Manam
- Tagaytay: Bag of Beans and Nurture Wellness Spa



#### Who are our informants?

##### Criteria:

- Dining in the partner restaurant/s identified by WWF (at least 1x a month in past 3 months; restaurants must be mainstream/popular).
- Decision-maker or co-decision-maker for out of home consumption.
- Restaurants in the vicinity not the diner.
- At least 2 respondents have travelled to both Tagaytay and Cebu to eat out.

	Quezon City	Cebu City	Tagaytay City (Laguna residents)
Older Adults (46-60 Years Old)	QC, OA	CC,OA	LR, OA
Middle-Aged Adults (30-45 Years Old)	QC, MA	QC, MA	LR, MA
Younger Adults (18-29 Years Old)	QC, YA	QC, YA	LR, YA

*\*These codes are helpful to highlight key themes/responses that are peculiar to a specific group, if any.*

# RESEARCH METHODOLOGY

## QUANTITATIVE PHASE

### PHASE 3: DINERS IN QC, TAGAYTAY & CEBU

Field work was conducted March to May 2018

**Quantitative In-store Intercept** : The quantitative phase will allow us to quantify and validate sentiments of the diners from partner restaurants in QC, Tagaytay, and Cebu.

#### METHODOLOGY



- **In-store intercept:** Face to face computer-assisted personal interviews



- **Criteria:**
  - 18-65 years old
  - Male/Female
  - Currently dining in the partner restaurant/s identified by WWF
  - Decision maker or co-decision maker for out of home consumption



RESTAURANTS	SAMPLE
<b>QUEZON CITY</b>	<b>75</b>
Concha's Garden	20
Cravings	20
The Kanin Club	20
Serye	15
<b>TAGAYTAY CITY</b>	<b>75</b>
Taza Fresh Table	17
Nurture Wellness Village	17
Concha's Garden - Tagaytay City	17
Bells & Whistles	24
<b>CEBU CITY</b>	<b>75</b>
Anzani	19
Hikay	19
Circa 1900	19
Zubuchon	18
<b>TOTAL</b>	<b>225</b>

*\*\*Note: Profile of respondents are limited to the diners of partner restaurants*



# CONSUMERS / DINING PUBLIC

# LADIES WHO LUNCH: PATRONS ARE MOSTLY MIDDLE-AGED FEMALE RESIDENTS

WHO USUALLY EAT OUT ONCE DURING WEEKENDS AND TWICE DURING WEEKDAYS.

The respondent profile of the study is composed of 66% females and 34% males (see Figure 1). Age ranges from 18 years old to 65 years old, where most them are 26-45 years old (see Figure 2). As we can see across areas, 1/3 of the diners come from the 26-35 age group (see Figure 3).

They tend to eat out once during weekends and twice during weekdays. Most diners, 65% of them, are residents who live within the area, while 24% are local tourists who dine for leisure. There's an influx of residents in Quezon City and Cebu City restaurants, while Tagaytay City get a mix of residents and tourists. (see Figure 4).

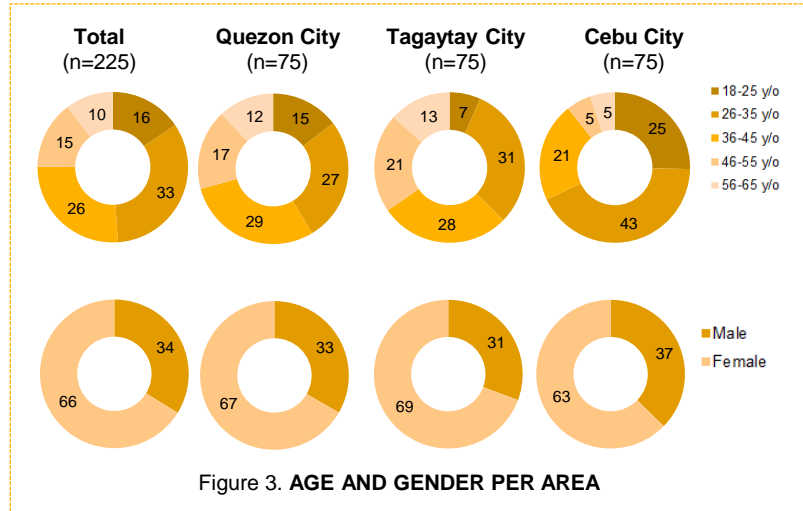


Figure 3. AGE AND GENDER PER AREA

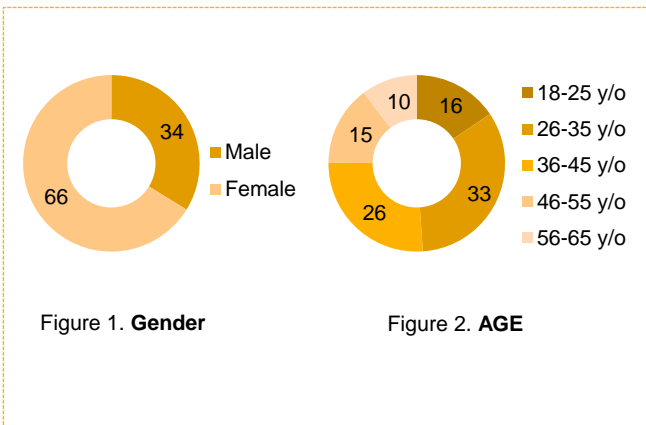


Figure 1. Gender

Figure 2. AGE

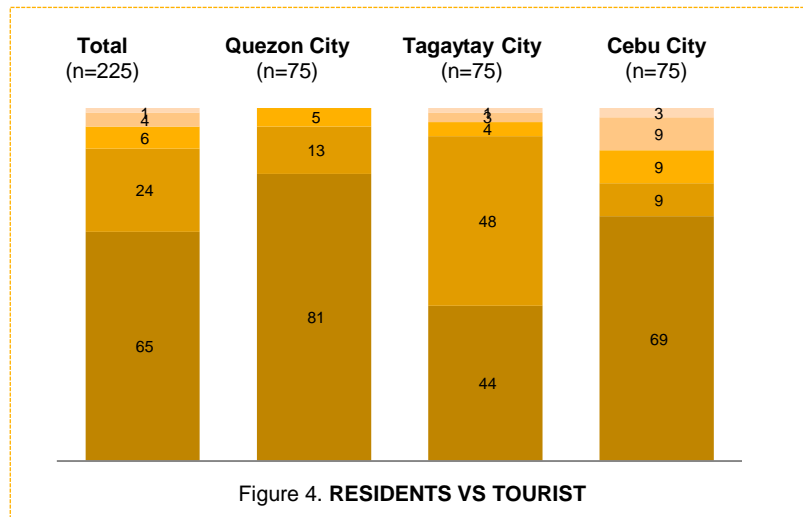


Figure 4. RESIDENTS VS TOURIST

**Notes:**

Base: Among all respondents (n=225)

Source: Q10a And which among this statement best describes your residential status at (MENTION ANSWER IN Q1 PLACE OF INTERVIEW)?; Q11 On the average, how many times do you eat outside of your home during weekends/weekdays for breakfast? For lunch? For dinner? For snacks?



# DINING OUT EQUATES TO CONNECTING TO FAMILY & FRIENDS

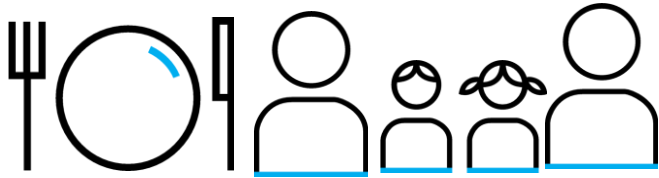
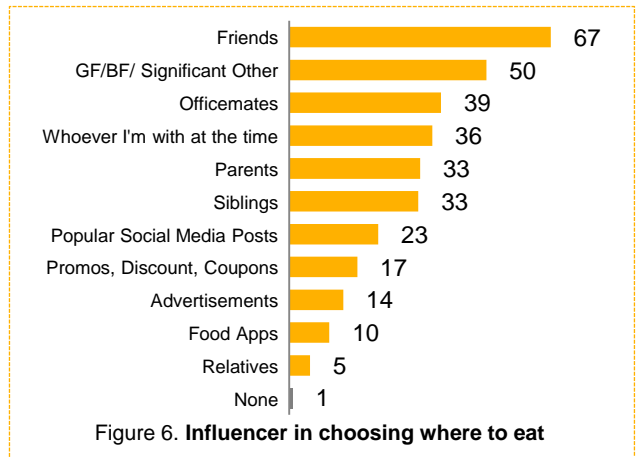
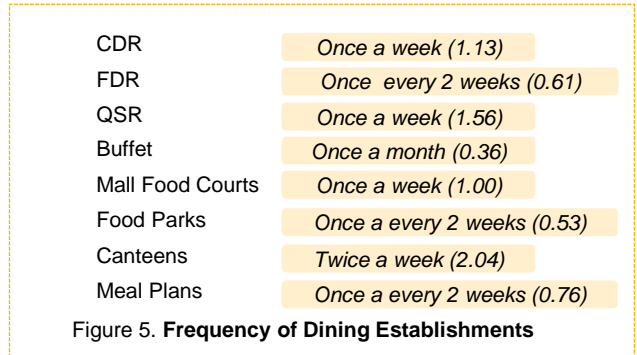
## DINING ESTABLISHMENTS FREQUENTED LIKELY A FUNCTION OF THE PROFILE OF DINERS

Dining establishments frequented are as follows:

- Casual-waitered dining restaurants – 99%
- Fine-dining restaurants – 97%
- Quick-service restaurants – 94%
- Buffet or eat-all-you can restaurants – 93%
- Mall food courts – 92%
- Food parks – 89%
- Canteen/ *carinderias*/ food carts – 88%
- Meal plans/ deliver – 81%

They go to canteens twice a weeks; they also dine in QSRs, CDRs, and mall food courts once a week; once every 2 weeks they dine in FDRs, food parks, and avail of meal plans; while buffets are enjoyed once a month (see Figure 5). Note that the profile of patrons from the participating may have an influence on the eating patterns found above.

Filipinos being very sociable, dining out is seen as an essential activity to connect to family members and friends. The shared experience serve as “bonding moments” for family members and friends regardless of geography. It is with this reason that friends, family members, partners, and colleagues influence diners in their selection of restaurants.



### When do they eat out?

**Weekends especially Sundays are very important.** This is time for the family, usually after church.

**Occasions.** When someone celebrates a birthday, or a special event.

**Most especially payday weekends.** When there is spare money to spend.

**Meals during office breaks and client meetings.**

### Why eat out?

**Eating out is a way of connecting with family members (“family bonding”) and friends**

- To catch-up with family after a busy week of no contact.
- Token of gratitude for younger adults - a way to give back to their parents.
- To make children happy--in the case of parents with younger children.

**For variety and escape from cooking at home.**

**To a treat to oneself to add excitement by trying new things.**

**Convenience** - Because they do not bring baon to work. While some do not have time to cook anymore.

*\*Qualitative insight*

Notes:

Base: Among all respondents (n=225)

Source: Source: Q15. Is there anyone who influences you where to dine when you eat outside of your home? Please select all that apply.

# SCP NOT YET A DRIVER OF RESTAURANT CHOICE

Diners look for the right balance of good food, ambiance, service and price when choosing a restaurant. When looking for a place to eat, the top things diners consider are taste, cleanliness and neat surroundings, courteous and knowledgeable staff/crew, and has good value for money (see Figure 7).

SCP practices among restaurant choices are unfortunately not yet at the top of the consideration list when choosing a restaurant. This implies that much is still needed to be done to change the consumers' dining habits in order for SCP to be part of their consideration set. This means the task at hand beyond awareness requires change in mindset and change in habits as well.

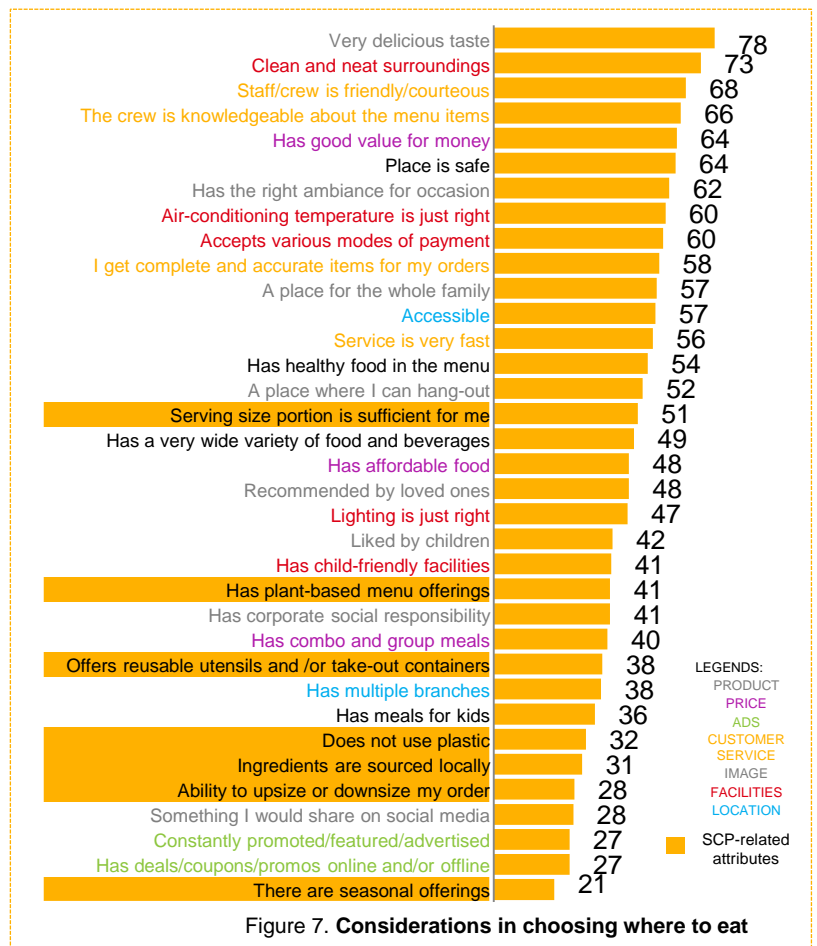


Figure 7. Considerations in choosing where to eat

## How do diners choose where to eat?

### INFLUENCERS

Word of mouth and posts from friends from social media → trending places.

Instagrammability of food and/or venue seems to be the trend.

More information is sought from the internet via influencers, blogs, and social media posts. Spot.ph, Barat Queen, Tonipet, Drew Arellano to name a few.

### DECISION MAKERS

Young children are crucial in the decision making process of restaurant selection.

*"Alam namin yan [on organic choices in restaurants], kaso kasama namin ang mga anak namin, kaya, madalas sila ang namimimili."*

It could also depend on who is paying or on the person who has a special request.

### CRITERIA

Taste and Price (value for money) are considered most important factors.

Ambiance is also important--tied to the purpose of eating out as a form of relaxation.

Health and SCP are not part of their consideration.

Younger adults in Cebu and Laguna also noted impulse/cravings as a driver → younger and more mobile.

Qualitative insight

Base: Among all respondents (n=225); Q14 These are some statements that others have said are important for selecting a type of food establishment to patronize. For each statement, please select how important it is for you, using a scale of 1 to 5, where 1 is Not Important At All and 5 is Definitely Important. Note: TB scores

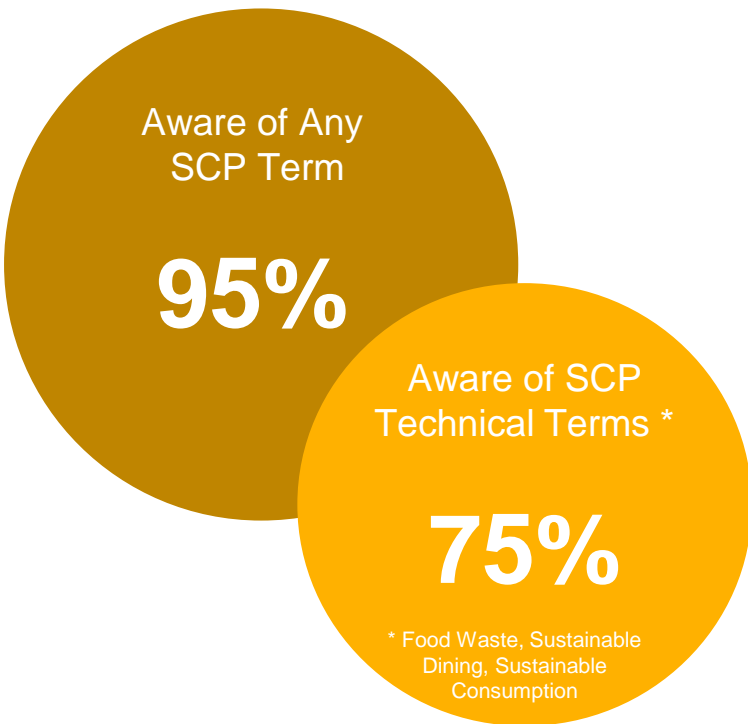
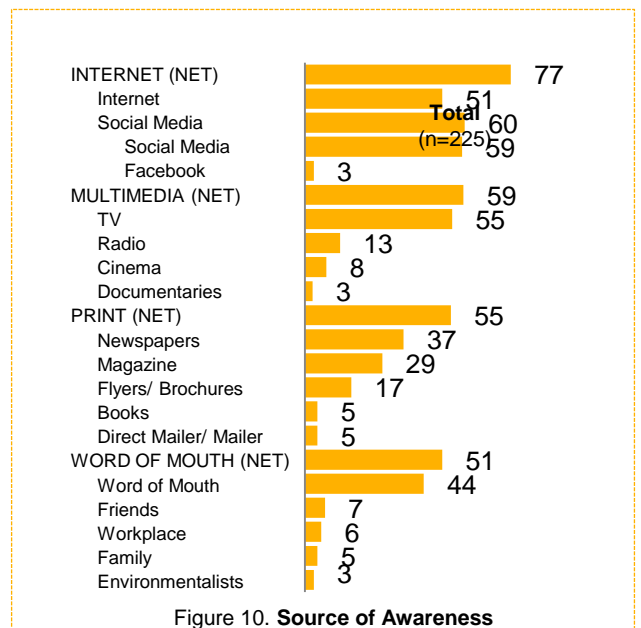
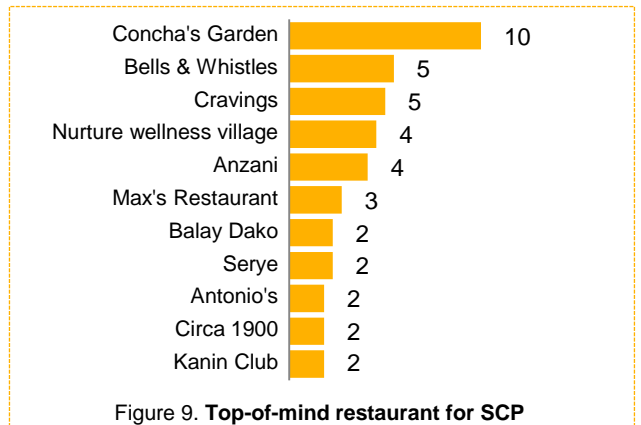
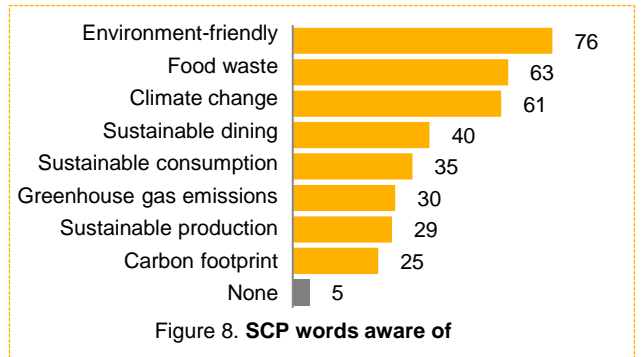
# SCP TECHNICAL TERMS NEEDS MORE AWARENESS

## SUSTAINABLE DINING, CONSUMPTION AND FOOD WASTE GARNERS 75% AWARENESS AMONG DINERS

Almost all diners are aware of SCP-related terms registering at 95% awareness. Top words aware of are environment-friendly, food waste, and climate change, which are terms that are commonly used even in schools and in households. SCP technical terms such as sustainable dining, consumption and production need more awareness as less than half of the diners are aware of these terms. Cebu City trails behind in terms of awareness of any SCP-related terms at 91%, which suggests the need to further intensify campaigns in the city.

When diners are probed as to which restaurants they're aware of that are practicing SCP, the restaurants that comes to mind are only limited to a few, with Concha's being the top recalled restaurant that practices SCP.

Current top touch points for SCP awareness are internet, social media and TV. However, since SCP is not a behavior acquired without a mindset change, it is imperative to also focus on the way the message is crafted. Communication campaigns must not only focus on increasing awareness but impacting a change in behavior and mindset.



**Notes:**

Base: Among all respondents (n=225)

Source: Q21. Can you tell me which ONE restaurant name comes to your mind that practices sustainable dining?; Q17. And, **where** have you seen or heard these words advertised? Please select all that apply and scroll to the right for more choices.

# UNDERSTANDING OF INTERRELATEDNESS OF CONCEPT IS LIMITED

CURRENT UNDERSTANDING OF THE CONCEPTS INDICATES THAT BREADTH AND DEPTH OF SCP KNOWLEDGE IS LIMITED.

**Figure 11. SCP Association**

	Sustainable Consumption	Sustainable Dining	Sustainable Production	Carbon Footprint	Food Waste	Environment Friendly	Green House Gas Emissions	Climate Change
<i>Base: Among aware of words</i>	78	90	66	57	141	172	67	138
Segregating waste properly	21%	26%	18%	42%	50%	47%	36%	56%
Ordering only what you can finish	56%	41%	35%	23%	43%	30%	18%	21%
Take-out of left over food when dining in restaurants	35%	37%	26%	21%	48%	30%	16%	18%
Opting to use paper bags instead of plastics	18%	23%	21%	42%	21%	41%	43%	46%
Eating plant-based dishes	29%	31%	24%	28%	13%	21%	25%	17%
Checking of food labels that indicates eco-friendly practices	18%	29%	20%	35%	16%	31%	28%	30%
Buying food local farmers produce	38%	26%	50%	25%	13%	20%	19%	19%
Choosing dishes that are in season	32%	30%	35%	19%	18%	19%	12%	23%
Bringing your own reusable utensils	13%	17%	11%	33%	10%	30%	30%	23%
None	3%	2%	6%	9%	2%	3%	10%	4%

First top practice attributed    Second top practice attributed

To further comprehend the level of understanding the diners have of SCP, an evaluation of association of terms and practices was put into place to see which practices are associated with the terms diners are aware of. Terms are generally seen to be identified with practices diners are more familiar with such as segregating waste, finishing what you ordered, use of paper bags. New practices such as- eating plant based dishes, checking food labels, buying local produce, choosing dishes in season and bringing reusable utensils are less associated with the terms they are aware of. This suggests the depth of understanding is still shallow and more educational campaigns needs to be rolled out to increase the level of awareness.

The qualitative focus group discussions further reveals that there’s a missing link between the benefits of the practices and the overall big picture of sustainability. Practices are understood for their individual benefits but they are not tied to the bigger concepts of sustainability and environment. They are aware of the practices but slightly miss the big picture, where there is awareness of existing practice. Most groups were not able to verbalize the bigger picture and showed a limited understanding of these practices in terms of the environment. There is a need then to educate the people to be able to bridge the link between current practices, SCP, and benefits to the environment.

When probed if SCP concepts are interrelated, qualitative results show that food waste is the only concept strongly linked to sustainable consumption and production. Concept is understood by all in groups in Cebu, Laguna and Quezon City. And when delving to specific concepts, with exception of Laguna, climate change for example is correctly attributed to man’s actions and respondents were able to connect it to bigger issues like ice-cap melting. However, most groups lack articulation of what causes it (greenhouse emissions, carbon footprint).

WWF may opt to leverage on familiar terms and practices to introduce and tie together the new terms and practices. This will allow consumers to understand that all these practices are part of the big picture contributing to sustainability.

**Notes:**  
 Base: Asked among all aware of words (n=214)  
 Source: Q19 Which of these attributes do you associate with or fits each words/phrases. You may choose 1 attribute, 2, all attributes, or no attributes at all  
**Note: Read figures vertically.**

# NEW SCP PRACTICES REQUIRES MORE AWARENESS

## IMPERATIVE TO CLOSE GAP BETWEEN AWARENESS AND APPLICATION OF SCP PRACTICE

Ordering what you can finish, taking out left over food, segregating waste properly and opting to use paper bags are top practices aware of and likewise claimed as the ones being practiced. Other new SCP related practices are trailing behind, which implies more awareness and educational campaigns need to be done to bring it up to par with other practices.

Top practices are observed to be the practices that have been widely publicized and have been taught at home and in schools. This suggests that there may be merit to form partnerships with schools and to educate children about sustainable practices early on.

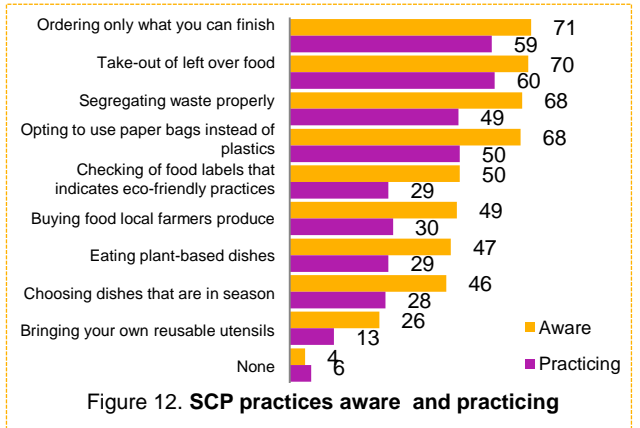


Figure 12. SCP practices aware and practicing

Furthermore a gap between awareness and application of practice is observed. This suggests that awareness does not necessarily translate to practice

Willingness to adopt at home or in restaurants is present among diners though. Top practices willing to be adopted are the same practices that they are aware of – ordering only what you can finish, take-out of left over food, and option to use paper bags. Willingness to adopt new SCP practices signal openness and acceptance towards SCP.

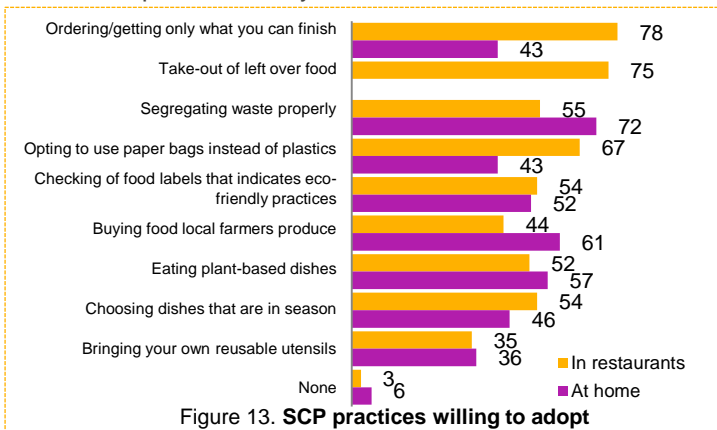


Figure 13. SCP practices willing to adopt

Majority of diners show willingness to spend more for restaurants practicing SCP – those who are eco-friendly, those who use reusable utensils and packaging, those who use locally sourced food and those who offer plant based options. While diners state they are willing to pay more for those practicing SCP, this suggests that the restaurants may offer differentiation in the eyes of the diner, but may not necessarily change their restaurant consideration. Partnerships with restaurants can still be used as an avenue to educate diners on SCP though.

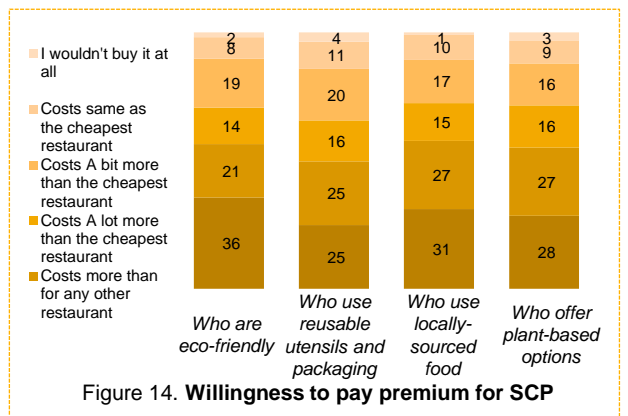
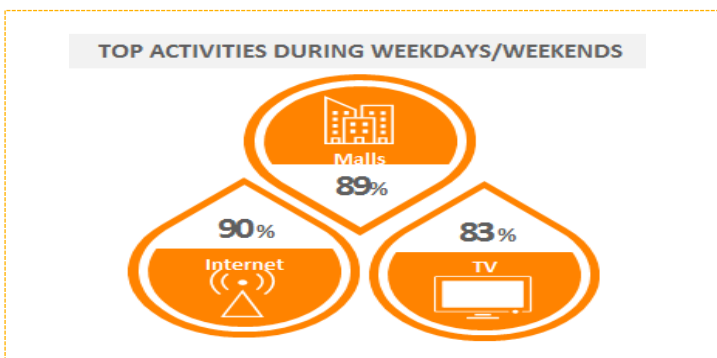


Figure 14. Willingness to pay premium for SCP

In line with the top sources of awareness, top activities for diners remain to be internet usage, watching TV and going to the malls. WWF may utilize these high engagement channels to drive awareness, understanding and encourage adoption of SCP practices.



**Notes:**

Base: Asked among all respondents (n=225)

Source: Q18 Which of these dining practices are you aware of? And which among these do you practice yourself?

Q20 Which among these practices are you willing to adopt when dining out? ...when eating at home?

Source: Q22. Can you please indicate which of these statements best describes how much you would be willing to pay for a restaurant who practices sustainable dining?



# KEY TAKEAWAYS

EDUCATION IS KEY TO PROMOTING SCP –  
RIGHT MESSAGE, RIGHT CHANNEL

1

## PRIORITIZE AWARENESS AND UNDERSTANDING OF SCP

Awareness & understanding is the first step for people to adopt SCP. Prioritize creating awareness and a more in depth understanding of SCP and it's impact to the environment

2

## SHOW THE BIG PICTURE, LINK PRACTICES TO FAMILIAR CONCEPTS

Make people understand the link between known practices, SCP, and environment. Consider lobbying for SCP to be part of the school curriculum, in order to instill the importance of taking care of the environment as part of a child's growing up years

3

## APPEAL TO HEART & MIND TO CHANGE BEHAVIOR

Harp on elements such as health, family, friend and future to make SCP concept resonate with and appeal to diners. Employ high engagement platforms such as segment features, vlogs, blogs to create a sticky, interesting and relatable campaign

4

## TAP MULTIPLE PARTNERS, & CHANNELS TO REACH WIDER AUDIENCE

Partner with government, restaurants, academe, media and tap high engagement platforms. Laymanize SCP terms so they can be easily understood and related to terms they're already familiar with. Continue partnership with celebrity chefs to bring awareness to diners about SCP and how they can adopt it at home