From Plate to Profit

How Portion Customization Elevates Dining and Reduces Waste

A ReFED report produced in collaboration with Datassential

ReFED | DATASSENTIAL

About This Study

In today's foodservice landscape, portion customization is more than just what ends up on the plate—it also shapes how consumers perceive value, satisfaction, health, and waste. This study from ReFED and Datassential examines the evolving role of portion customization in restaurant experiences and expectations. We explore how well restaurant portions align with diners' actual wants in a single sitting, the strategies eaters use to manage oversized meals, potential interest in flexible and customizable options, and the complex relationship between portions and perceived value.

CONTRIBUTING ORGANIZATIONS

ReFED

ReFED is the leading nonprofit working to solve food waste. We're an engine for change known for our deep subject matter expertise, broad convening power, and collaborations across supply chains and sectors, and we serve as a driver and connector for the movement and a central resource on the topic.

DATASSENTIAL

Datassential is the leading global food and beverage intelligence platform providing guidance on trends, competitive benchmarking, and sales intelligence. Through AI-powered solutions, an intuitive UI, and proprietary data, the food and beverage ecosystem relies on Datassential to more effectively develop, market, and sell their products.

Dana Gunders

President
ReFED

Deemed "the woman who helped start the waste-free movement" by Consumer Reports, Dana Gunders is a national expert who has dedicated her career to helping industry, policymakers, and consumers activate solutions to reduce food waste. Her landmark 2012 report "Wasted: How America is Losing Up to 40% of Its Food from Farm to Fork to Landfill" sparked a national dialogue about the consequences of food waste, and since then, she has continued to bring the issue to a wider audience through testimony before Congress, her Waste-Free Kitchen Handbook, speaking at the TED Dilemma Series, and appearing in media such as The New York Times, The Wall Street Journal, Bloomberg, Time, Fox News, Teen Vogue, PBS "Newshour," and hundreds of other outlets. Before joining ReFED in 2019, she served as a founding board member for the organization.

Sara Burnett

Executive Director
ReFED

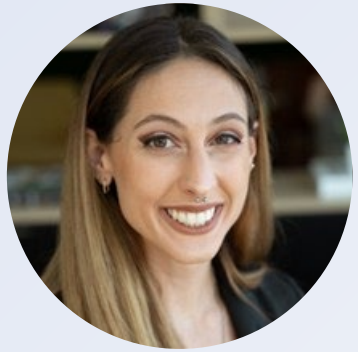
As ReFED's Executive Director, Sara Burnett provides organizational leadership with direct oversight of ReFED's programs, operations, and administration, and contributes to the organization's overall strategic vision. Before ReFED, she served as Founder and Principal Consultant of Burnett Strategy and Communications, where she helped purpose-driven organizations grow their businesses while driving positive impact. Prior to this, Sara served as Vice President of Food Beliefs, Sustainability, and Public Relations at Panera Bread and Panera Brands for 18 years, where she pioneered the company's Clean Food Commitment and led both Panera Bread's Day-End Dough-Nation program as well as the Panera Bread Foundation.
Sara began her career as a food scientist and supply chain expert leading programs in ingredient quality, food safety, climate strategy, and animal welfare. She was a Pathfinder Environmental Fellow at Washington University in St. Louis, where she received a bachelor's degree in biology and psychology. She holds an MBA from Webster University in St. Louis.

Huy Do

Trendologist, Research & Insights Manager

Datassential

Huy Do is a Trendologist and Research & Insights Manager at Datassential, where he helps the food and beverage industry make sense of what's next. With more than seven years of experience spanning consumer research, hospitality, and cultural analysis, Huy blends data with storytelling to uncover how economic, technological, and cultural forces shape the way America eats and drinks. At Datassential, he leads the development of forward-looking reports and webinars exploring everything from restaurant innovation and sustainability to the rise of AI technology. A frequent speaker and media contributor, Huy is known for translating complex research into engaging insights that feed both curiosity and creativity. He holds a B.S. in Communication from Northwestern University and an M.A. in Digital Communication & Media Studies from DePaul University.



Madelin Ghomshe

Project Manager

Datassential

Madelin Ghomshe is a Project Manager on Datassential's Custom Solutions team, where she leads custom research engagements and co-manages the company's Omnibus product. With 8+ years in market research, she's known for her endless curiosity, rigorous survey design, meticulous execution, and a deep affinity for data that turns business objectives into practical, client-ready insights. Madelin holds a B.S. in Marketing from Florida State University. As a former bodybuilder and certified yoga teacher, she brings a unique perspective to her work in the food industry.

Why This Research Matters...

In the U.S., 31% of food is never eaten, and restaurants and other foodservice operations are responsible for more than 17% of that total. Wasted food means wasted dollars, so it's critical that businesses understand why food is going uneaten and develop strategies to address it.

An analysis by ReFED shows that the vast majority of restaurant and foodservice food waste—nearly 70%—comes from what's left behind by customers. What's more, food waste from households—which includes food not eaten from takeout/delivery orders and restaurant leftovers—is the largest portion of the total.

Reducing the amount of food that goes to waste is one of the top solutions for addressing climate change and minimizing use of our natural resources. It can also support communities, customers, and employees who are facing hunger.

Who This Research Is For...

Restaurant and foodservice business owners and operators. By providing customers with more options for portion customization, businesses can drive incremental sales and stand out from competitors. ReFED's modeling estimates that offering different portion sizes at restaurants has the potential to reduce 2.35 million tons of food waste annually while saving the foodservice sector $547M. Adding in other portion options (mix & match combos, no sides options, etc.) would reduce more waste and create an even greater financial benefit.

This new research demonstrates that customers are open to flexible portion options and that there is a clear business benefit for owners and operators who make this accommodation.

About This Study

Methodology

The data populating this report was collected from an **online survey conducted in August 2025** through Datassential's Omnibus platform, with **1,509 American consumers representative of the general population, ages 18 and above**.

Respondent Profile

GENDER	Male	50%
	Female	50%
GENERATION	Gen Z	17%
	Millennial	32%
	Gen X	26%
	Boomer+	26%
INCOME	<$25K	17%
	$25K - $49K	17%
	$50K - $74K	17%
	$75K - $99K	14%
	$100K - $149K	19%
	$150K +	15%
RACE	White	72%
	Black	13%
	Asian	5%
	Other	10%
HISPANIC	Yes	16%
	No	84%
REGION	West	24%
	Midwest	22%
	South	39%
	Northeast	17%
FOODIE	Foodie	41%
	Non-Foodie	59%
GLP-1	GLP-1 User	8%
	GLP-1 Non-User	92%

Key Takeaways:

1. **Dining out is an integral component of most Americans' lives, but the experience is seldom perfect, especially in the context of portion sizes**. In the past month alone, nearly half of consumers were surprised by how large a restaurant meal was, a third ate past the point of fullness to avoid waste, and 30% wished a restaurant meal they purchased had been smaller. Aware that portions often exceed what they can comfortably eat, many diners have had to adopt workarounds to navigate this mismatch. For example, in the past month, nearly 40% intentionally over-ordered to take food home, over a third shared a regular menu item to avoid too much food, and a similar share skipped ordering something entirely (whether an entrée, side, or dessert) they didn't think they could finish. About 30% even asked for parts of a meal to be left off. **GLP-1 users, who dine out even more frequently than the average consumer, are especially likely to use all of these tactics — and to feel frustrated by the lack of right-sized options.**

2. **Plate waste and leftover behavior signal a meaningful opportunity to reduce food waste — both environmental and economic.** In the past month alone, over a quarter of consumers left uneaten food behind at a restaurant. In general, across all dining segments, but particularly at full-service venues, more than two in five admit to leaving food uneaten at least "some of the time." Even more striking, 25% of consumers say they leave food behind always or most of the time — deceptively small percentages that translate into significant volumes of waste industry-wide. **Younger consumers and GLP-1 users are even more likely than the average diner to say they left food on the plate.** And while taking leftovers home is more common (with six in ten doing so at least once last month), that still leaves four in ten consumers who haven't taken leftovers home at all in recent weeks. These findings highlight an urgent need for portion solutions that reduce waste at the source, not just after the fact.

Key Takeaways:

3. **While most consumers say restaurant portions generally match their appetite, many still encounter significant mismatches, most often in the form of too much food.** On average, full-service venues are more often perceived as serving too much food compared to limited-service counterparts, and this observation is especially salient in the minds of women, Gen Z, Boomers, and GLP-1 users. And when evaluating across dishes, pasta entrées (like spaghetti and lasagna) as well as other full-service entrées like pizza, meat, and seafood are most often seen as imperfectly portioned, with many diners finding them either too large or too small. Fast food staples as well as other handhelds (e.g. sandwiches, burgers, tacos, etc.) perform better but are not immune, as roughly a quarter of consumers in general believe even these formats could be more appropriately sized.

4. **Balancing portion size and value is a strategic opportunity for operators — not just a tradeoff.** While larger portions have long been tied to perceived value, today's consumers are also highly motivated to reduce waste and eat in line with their appetite. Three in four say smaller portions must come with lower prices, but nearly half are willing to pay a little more for the right-sized meal that better suits their needs. GLP-1 users are even more likely to feel this way: they're 13% more likely than non-users to pay more for a right-sized portion and more likely to say they value a lower bill over maximizing food. In 2025, portion perceptions are shaped not just by economics, but by a growing desire for customization, control, and intentionality. Portion innovation must therefore be paired with transparent pricing strategies that emphasize control and personalization, ensuring diners feel empowered by their choices rather than shortchanged.

Key Takeaways:

5. **Visual cues can help close the gap between expectations and reality.** When portion sizes are misjudged, it's often because consumers had no clear visual reference. And with 70% of consumers saying portion sizes are hard to judge without visuals, it's clear that elements like photos, displays, or sample plates play an outsized role in setting expectations. Roughly two-thirds of consumers say they sometimes wish they could see what a dish looks like before ordering — not just for presentation, but to understand the quantity. Nearly half of all diners (and a majority of GLP-1 users) say they would avoid ordering an item if a visual cue made it look too large. These simple design elements can help diners better match their appetite to their order, reduce waste, and feel more confident in their choices. For operators, transparency through visuals is a simple but powerful way to build trust and improve the overall dining experience.

6. **Overall, consumers are largely supportive of portion innovation: 59% say they would be more likely to visit restaurants that offer flexible, customizable, or innovative portion size options.** GLP-1 users are even more enthusiastic, with 73% saying this would influence their restaurant choice. Support for flexible or alternative portion sizes also spans across all foodservice segments. Younger diners, foodies, and higher-income consumers drive this demand, but the ideal format depend heavily on venue. For example, structured sizing (small/medium/large) is perceived as most appropriate for fast casual restaurants, while ideas like split portions for two or taster flights feel more natural in full service. Overall, portion flexibility isn't just about offering smaller or larger quantities of food, but also about providing diners the right options in the right context.

Key Takeaways:

7. **GLP-1 users may be a small and growing subgroup, but highly engaged audience in foodservice.** At present, 8% of respondents in this survey currently take GLP-1 medications, with another 17% interested in trying them in the future, whether for weight management or existing conditions. But for these consumers, dining out isn't just a treat — it's a regular part of life. **Nearly all GLP-1 users purchase restaurant food monthly, and over three-quarters do so weekly, significantly more often than non-users**. This is partly due to demographic factors: GLP-1 users are more likely to be higher-income and urban-based, giving them greater access to restaurants, delivery services, and the disposable income to support frequent dining. Despite their appetite changes and dietary adjustments, GLP-1 users are more likely to dine out daily or several times per week, making them a disproportionately important segment for restaurants to understand and serve.

8. **Among all generations, Gen Z stands out as the most portion-conscious, consistently showing greater concern about receiving too much food when dining out.** They're significantly more likely than older consumers to say that restaurant portions, especially at quick-service restaurants, are too large for a single sitting, and they're also more likely to report adjusting their orders to avoid waste. In the past month alone, Gen Z consumers were more likely to share entrées, skip ordering sides or desserts, or request items be left off their meals to better match their appetite. **Notably, this generation also shows stronger alignment with the idea of paying a little more for right-sized portions, valuing control and personalization over quantity.** As this cohort continues to shape the future of dining, their preferences signal growing demand for flexibility, customization, and conscious consumption.

SECTION 01

The Opportunity

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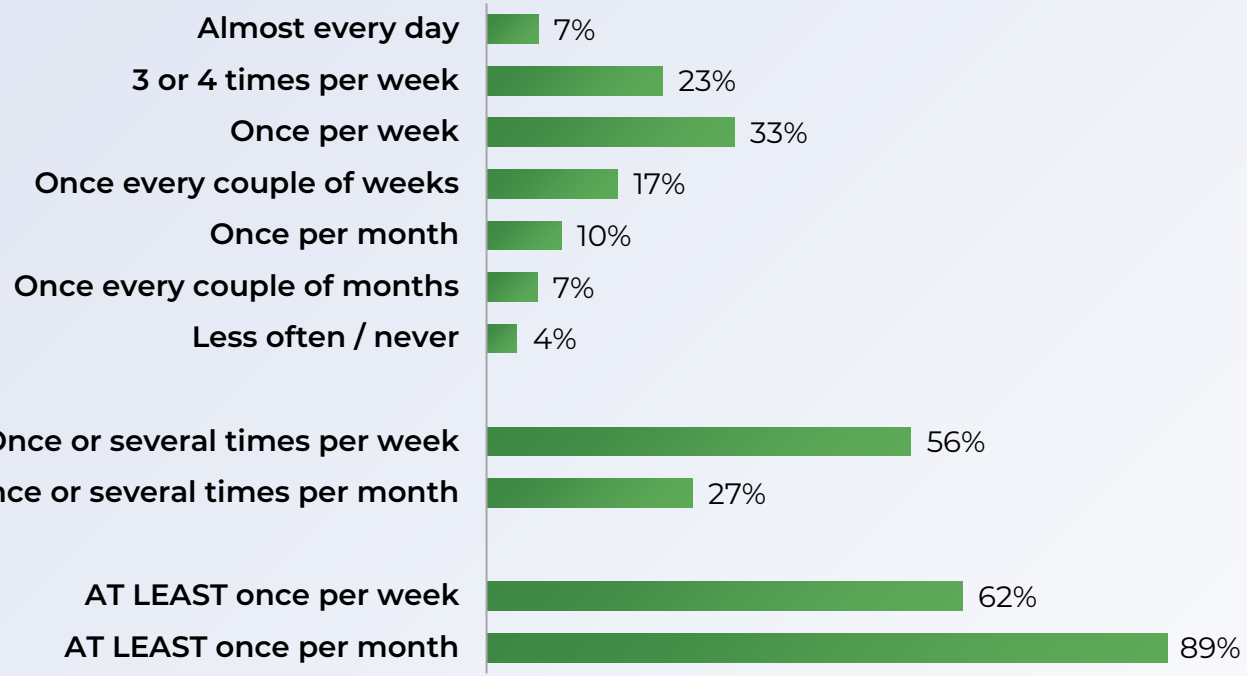
At present, 90% of American consumers say they purchase food away from home at least once a month, and nearly two-thirds do so weekly or more often.

Men report dining out more often than women, with men skewing toward daily or weekly visits, while women more often fall into bi-weekly, monthly, or less frequent patterns. Meanwhile, Gen Z and Millennials are significantly more likely to purchase food away from home – and to do so more frequently – than Gen X and Boomers.

HOW OFTEN DO CONSUMERS TYPICALLY...
Purchase From Foodservice Venues?



C1a: How often do you get food or drinks from restaurants or other foodservice venues (whether dining in, taking out, or getting delivery)?

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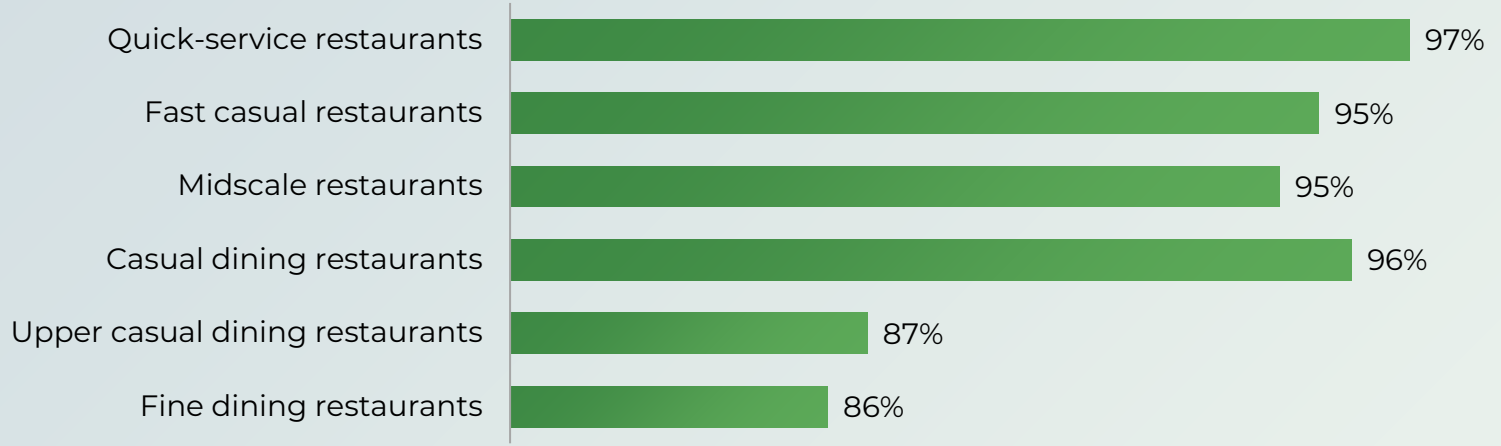
Most consumers visit a wide range of restaurant types, with over 85% reporting they've dined across every major segment, from fast food to fine dining.

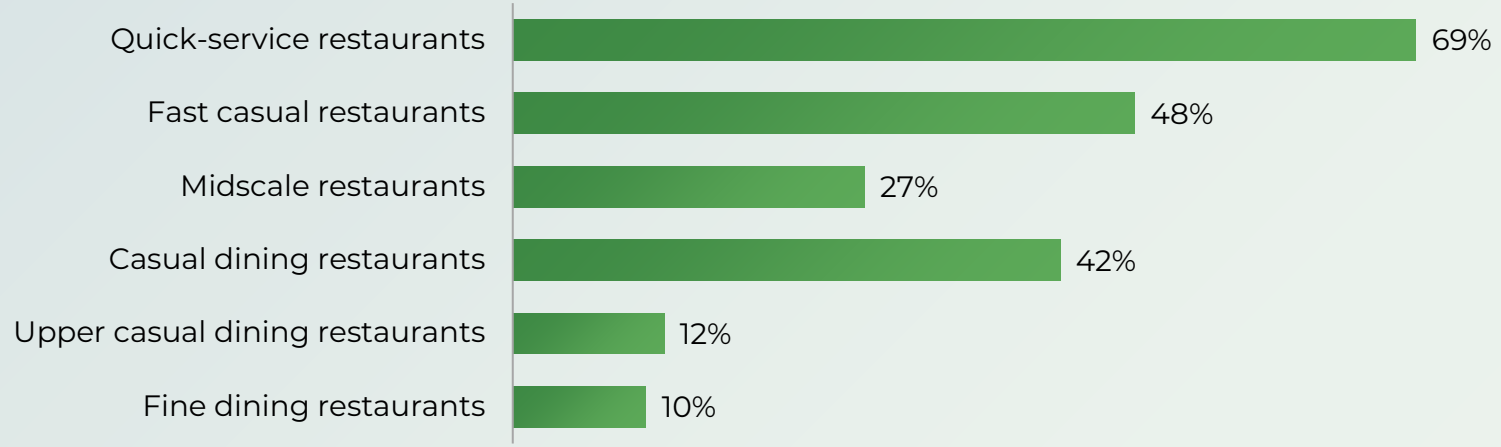
Frequency, however, varies. In the past month, nearly 70% of consumers say they visited a quick-service restaurant, roughly half purchased from a fast casual restaurant, and just over 40% visited casual dining establishment. Visitation drops off sharply for midscale, upper casual, and fine dining concepts.

Men are more likely than women to visit limited-service restaurants, while Millennials and Gen X lead the way in visitation across all segments — especially full-service — outpacing both Gen Z and Boomers.

DO CONSUMERS VISIT THE FOLLOWING TYPES OF RESTAURANTS?



THOSE WHO VISITED THESE VENUES IN THE PAST MONTH



C3b: How often do you leave food on your plate after dining at the following types of restaurants?
A4a: Have you VISITED IN-PERSON any of the following venues for a meal within the LAST MONTH?
(from Datassential's monthly Table Stakes tracker)

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However, while most consumers are enthusiastic about visiting and purchasing from foodservice, their restaurant experiences are not immune to friction – especially around portion sizes.

In the past month, nearly half of consumers say they were – at least once – surprised by portion size of a meal they purchased. One in three overate due to oversized portions, and nearly 30% wished at least one restaurant meal they ordered had been smaller. Gen Z and Millennials are significantly more likely than older eaters to report having experienced these scenarios.

IN THE PAST MONTH...

"I ordered a meal at a restaurant and was surprised by how large the portion was."

46%

Significantly more likely among **Gen Z** (56%) and **Millennials** (47%)

"I ate past the point of being comfortably full because the portion was so large (and I didn't want to waste food)."

33%

Significantly more likely among **Men** (36%), **Gen Z** (49%) and **Millennials** (41%)

"I ordered food at a restaurant and wanted a smaller portion than what I got."

29%

Significantly more likely among **Men** (32%), **Gen Z** (42%) and **Millennials** (36%)

C2: Have you experienced any of the following scenarios in the past month?

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SECTION 02

Consumer Portion Perceptions & Waste Reduction Behaviors

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Aware that restaurant portions are often large, many consumers have developed strategies to avoid overeating or wasting food. But these coping behaviors can come at a cost to operators.

In the past month, nearly 40% intentionally over-ordered to take food home later, over a third shared a regular item to avoid excess, and a similar share skipped ordering an entrée, side, or dessert they couldn't finish. Nearly 30% also asked to have part of a meal left off entirely (e.g., bread, sides, toppings).These behaviors signal rising demand for portion control — but also highlight lost revenue when diners downsize, share, or forgo purchases.

IN THE PAST MONTH...

"I purposely ordered more food than I could eat so I'd have leftovers for later."

38%

Significantly more likely among **Gen Z** (50%) and **Millennials** (45%)

"I shared a regular menu item with someone else to avoid ordering too much food."

35%

Significantly more likely among **Gen Z** (45%) and **Millennials** (40%)

"I chose to skip ordering an item (entrée, side, dessert, etc.) because I knew I wouldn't be able to eat it all."

34%

Significantly more likely among **Gen Z** (47%) and **Millennials** (37%)

"I asked a server or restaurant to leave off something from a meal (e.g. side, bread, etc.) because I knew I wouldn't eat it."

29%

Significantly more likely among **Gen Z** (40%) and **Millennials** (33%)

Q: Have you experienced any of the following scenarios in the past month?

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KEY STATISTIC

How Often Do Consumers Leave Food Behind?

Consumers are routinely leaving food uneaten at restaurants across all segment, highlighting a persistent issue with portion sizing.

In the past month, more than a quarter of consumers left food uneaten at a restaurant — a behavior led by Gen Z, followed by Millennials and Gen X. When asked how often this happens by restaurant type, a majority admit to leaving food behind at least rarely across all major segments. Plate waste is slightly less common at QSRs (where 67% say they've left food uneaten) and fast casual restaurants (71%), but still widespread. Across full-service segments, roughly three-quarters of consumers say they leave food behind, even if it's only on a rare occasion.

IN THE PAST MONTH...

27%

OF CONSUMERS **DIDN'T FINISH THEIR MEAL AND LEFT FOOD ON THE TABLE** AT LEAST ONCE

HOW MANY CONSUMERS TYPICALLY LEAVE FOOD BEHIND AT...

C2: Have you experienced any of the following scenarios in the past month?
C3b: How often do you leave food on your plate after dining at the following types of restaurants?

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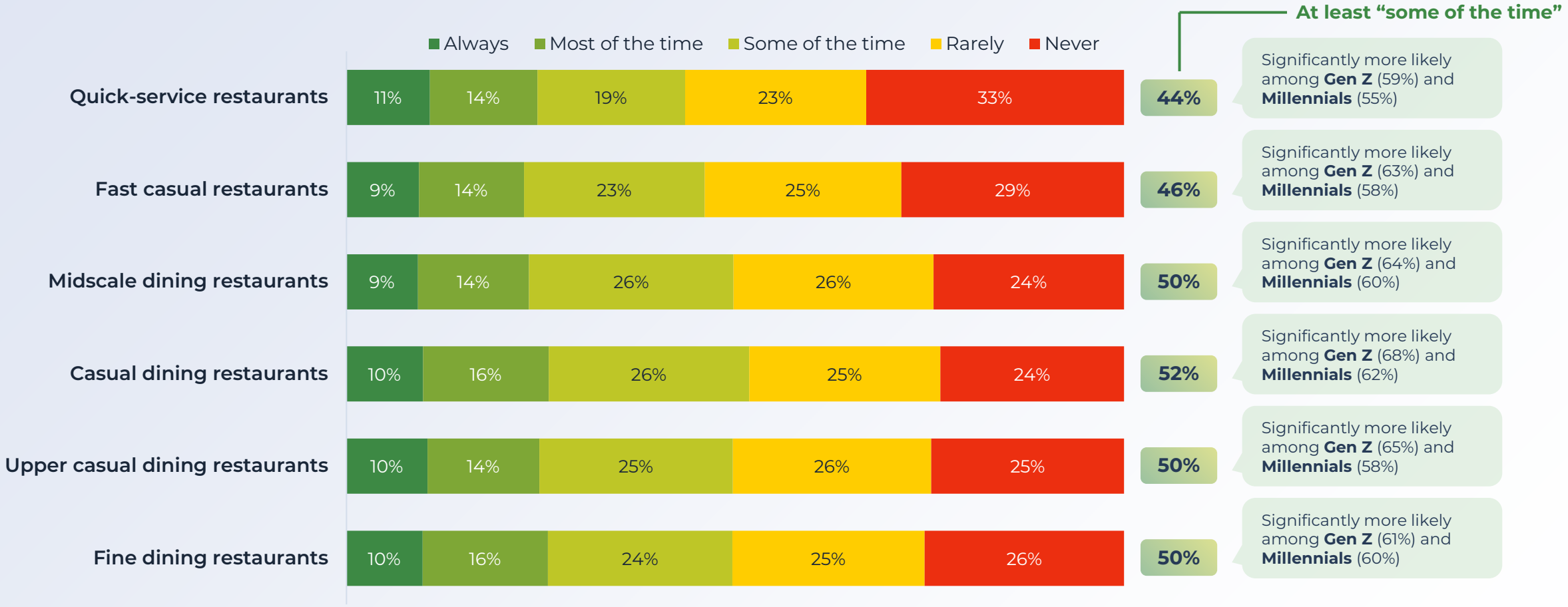
Plate waste remains a significant issue — even when it doesn't happen every time.

In general, nearly half of consumers admit to leaving food behind at least "some of the time" across all restaurant segments, and roughly a quarter are in the habit of doing so very frequently — behavior that can add up to significant volumes of waste over time. Even when diners try to avoid waste (by taking home leftovers or adopting specific ordering strategies), there's a clear and persistent mismatch between portion sizes and actual appetites. This presents a challenge and opportunity for operators to design portions that satisfy without excess, helping reduce how often food is left uneaten at the table.



C3b: How often do you leave food on your plate after dining at the following types of restaurants?

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KEY STATISTIC

How Do Consumers Handle Leftovers?

Leftovers are common but not always eaten.

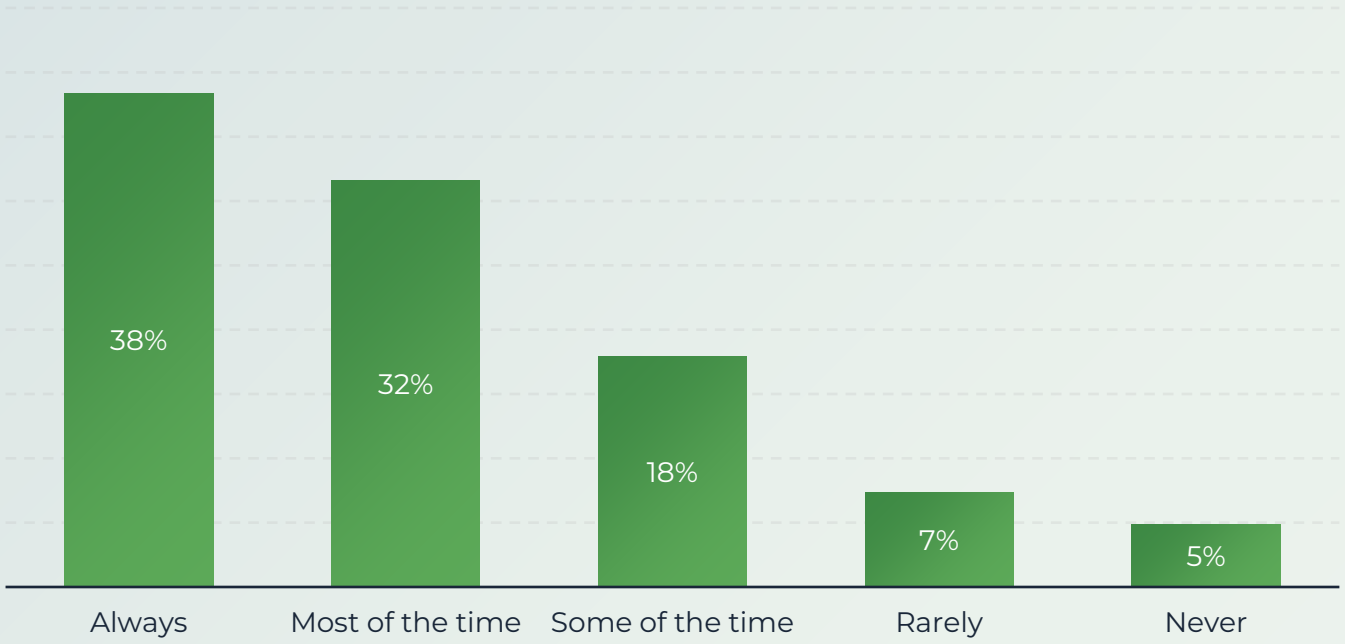
Leftovers are a regular part of dining out: 60% of consumers took food home from a restaurant at least once in the past month, while the remaining 40% did not — either because they always finished their meals or chose not to take anything home. But taking leftovers isn't the same as eating them. While over two-thirds say they "always" or "most of the time" finish their leftovers, the other 30% eat them only occasionally or not at all. Generationally, Boomers are the most diligent, with 42% saying they always eat their leftovers, while Gen Z is the least diligent, with 24% saying they only eat leftovers "some of the time," followed by Millennials (19%).

IN THE PAST MONTH...

60%

OF CONSUMERS **TOOK LEFTOVERS HOME FROM A RESTAURANT** AT LEAST ONCE

HOW OFTEN DO CONSUMERS EAT LEFTOVERS?



C2: Have you experienced any of the following scenarios in the past month? | **C3a:** How often do you eat your restaurant leftovers?

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61%

of consumers say they **feel guilty when they leave food uneaten at a restaurant and don't take leftovers home.**

C8: Please rate your level of agreement with the following statements. (top 2; 5 pt. scale)

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While a majority consumers do feel that restaurant portions generally match what they want to eat in a single sitting, there's significant room for improvement.

Compared to limited-service restaurants, full-service segments are much more likely to be seen as serving too much food. For example, nearly 30% of consumers say portions at casual dining spots are too large for one sitting, compared to just 14% for QSRs and 18% for fast casual. Generational and gender differences also stand out: Gen Z are more likely than older consumers to say that QSR portions are typically oversized, while Boomers and women are more likely to feel that way about fast casual portions. Across full-service restaurants, women, Gen Z, and Boomers are significantly more likely to flag oversized portions than men, Millennials, or Gen X.

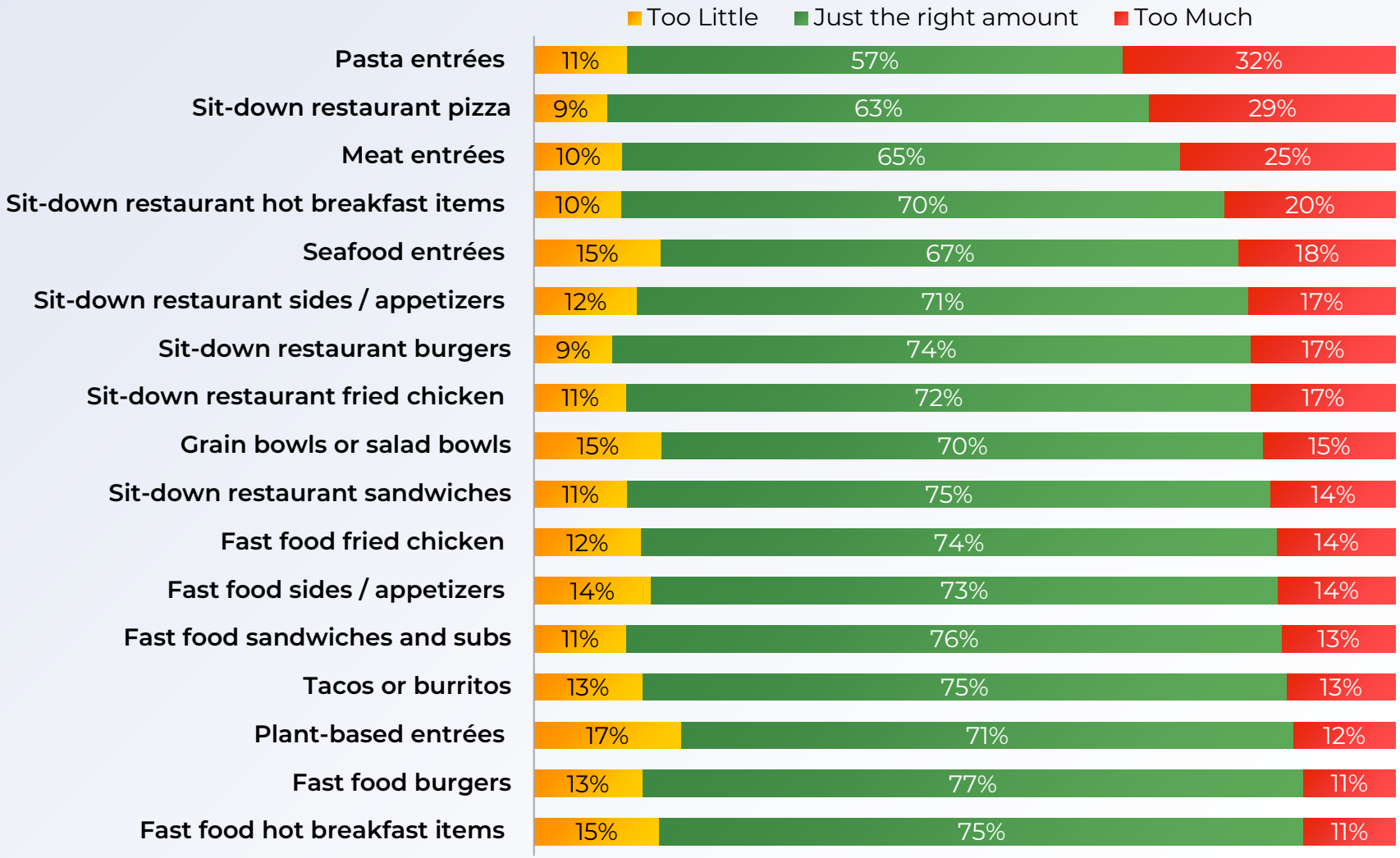
C4: When you eat at the following restaurants, how well do the portion sizes typically match what you want to eat in a single meal or sitting?

To get even more granular, we asked consumers to evaluate typical portion sizes for a variety of restaurant dishes. Here's what they thought:

The majority of consumers do find that the typical portion sizes for most restaurant dishes – whether that's a fast-food burger or a center-of-plate entrée at a sit-down restaurant – generally align with what they want in a single meal. That said, there remains room for improvement.

For example, over two-fifths say that pasta entrées (like spaghetti or lasagna) are either too big or too little for one sitting. Roughly a third of consumers find that typical sit-down restaurant entrées like pizzas or meat and seafood dishes, are imperfectly sized (either too big or too little). In contrast, fast-food staples or handhelds such as burgers, tacos, and sandwiches draw fewer complaints, though roughly a quarter of consumers still believe these portions could be better calibrated.

PORTION PERCEPTION ACROSS TYPES OF DISHES



C5: When you order the following foods, how well do the portion sizes typically match what you want to eat in a single meal or sitting?

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KEY STATISTICS

Which Types Of Restaurant Food Do Consumers Think Are Imperfectly Portioned?

Portion Sizes Are Typically Too Much

Pasta entrées (e.g., spaghetti, lasagna, etc.)	32%
Sit-down restaurant pizza	29%
Meat entrées (e.g., steak, ribs, pork chops, etc.)	25%
Sit-down restaurant hot breakfast items (e.g. egg platter, pancakes, waffles, etc.)	20%
Seafood entrées (e.g., shrimp, salmon, fish & chips, etc.)	18%
Sit-down restaurant sides / appetizers (e.g., fries, mashed potatoes, steamed vegetables, etc.)	17%
Sit-down restaurant burgers	17%
Sit-down restaurant fried chicken (e.g., tenders, nuggets, wings, bone-in, etc.)	17%
Grain bowls or salad bowls	15%
Sit-down restaurant sandwiches	14%

Portion Sizes Are Typically Too Little

Plant-based entrées (e.g., veggie burger, tofu bowl, etc.)	17%
Grain bowls or salad bowls	15%
Seafood entrées (e.g., shrimp, salmon, fish & chips, etc.)	15%
Fast food hot breakfast items (e.g., egg sandwiches, breakfast burritos, etc.)	15%
Fast food sides / appetizers (e.g., fries, tater tots, onion rings, etc.)	14%
Tacos or burritos	13%
Fast food burgers	13%
Fast food fried chicken (e.g., tenders, nuggets, wings, bone-in, etc.)	12%
Sit-down restaurant sides / appetizers (e.g., fries, mashed potatoes, steamed vegetables, etc.)	12%
Pasta entrées (e.g., spaghetti, lasagna, etc.)	11%

C5: When you order the following foods, how well do the portion sizes typically match what you want to eat in a single meal or sitting?

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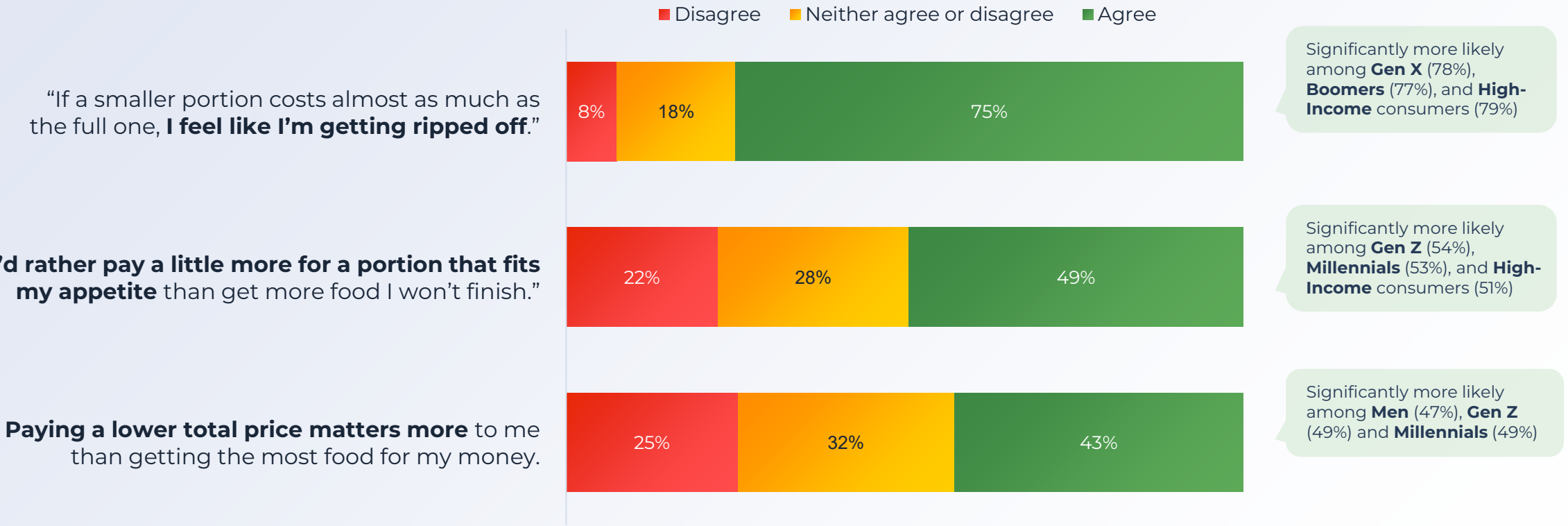
Portion sizing isn't just about how much food is on the plate – it's also tightly linked to pricing and perceived value.

Even as many consumers want to avoid waste and right-size their meals, they're still constantly staring down broader economic challenges and are thus equally focused on stretching their dining dollar. While large portions can often feel excessive, they can also signal "more for the money," which can make some consumers sensitive to the idea of downsizing. Thus, foodservice initiatives centered around reducing portion size must also be cognizant of consumers' need for value.

Case in point: three in four consumers agree that a smaller portion without a smaller price feels like a rip-off. Over 40% also agree that paying a lower total price matters more to them when dining out than getting the most food for their money. That said, nearly half say they are willing to pay a little more for a portion that better fits their appetite.



C8: Please rate your level of agreement with the following statements. (top 2 + bottom 2; 5 pt. scale)

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HYPOTHETICAL EXERCISE

Which Of Three Serving Sizes Are Consumers Most Likely To Choose?

In a hypothetical scenario, consumers were asked to pick between three portion sizes – small, medium, or large – for the same Chicken Alfredo dish at the same restaurant, with prices scaled to portion size. Here's where they landed:

- **The majority (56%) chose the medium option**, striking a balance between quantity and price. This was the top choice across all major demographics, though men, younger diners, Hispanic consumers, and foodies were especially likely to select it.
- The remainder were split almost evenly between small and large. **Men and Millennials gravitated more strongly toward the largest serving**, while **women and older generations (Gen X and Boomers) leaned more toward the smallest size**.

Small 8 oz. portion | $11.00

22%

WOULD CHOOSE THIS

Significantly More Likely Among

- **Women**: 31%
- **Gen X**: 24%
- **Boomers**: 39%
- **South**: 24%

Medium 12 oz. portion | $13.50

56%

WOULD CHOOSE THIS

Significantly More Likely Among

- **Men**: 60%
- **Gen Z**: 66%
- **Millennials**: 59%
- **Hispanic**: 65%
- **Foodies**: 59%

Large 16 oz. portion | $16.00

20%

WOULD CHOOSE THIS

Significantly More Likely Among

- **Men**: 25%
- **Millennials**: 28%
- **Foodies**: 26%

C7: Imagine you're ordering Chicken Alfredo Pasta from a restaurant. The dish comes in three options, each with a different size and price. Which Chicken Alfredo Pasta option would you most likely order?

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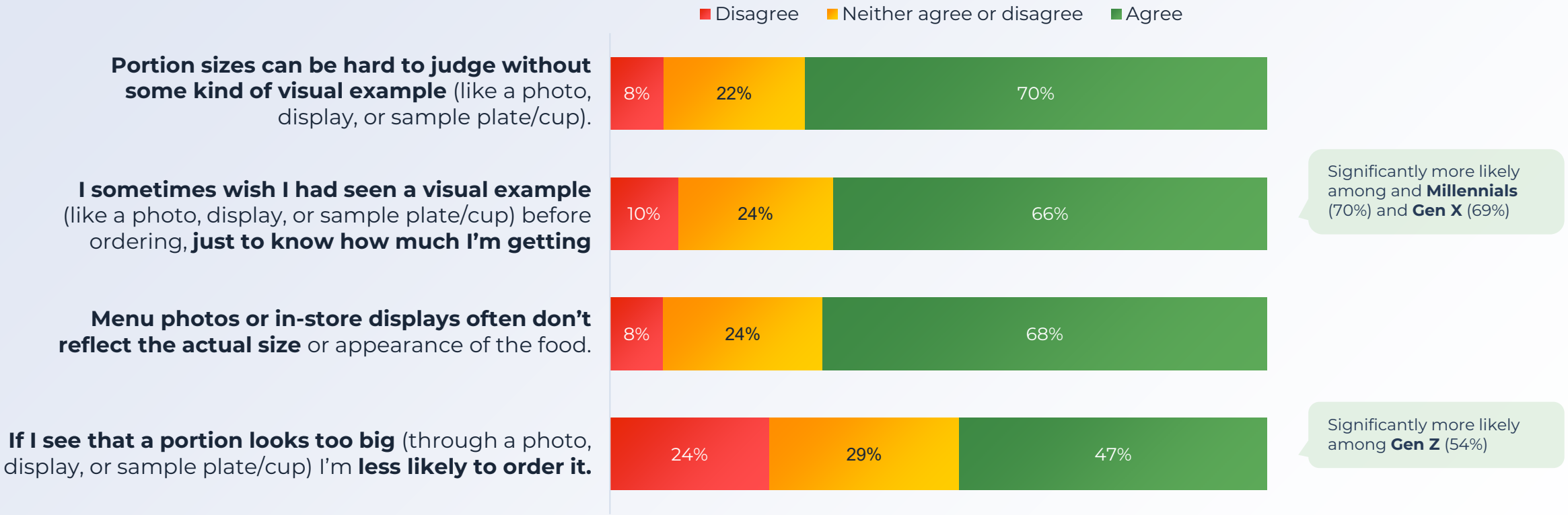
Visual cues also play a powerful role when it comes to portion perception.

Visual elements like photos, physical displays, or sample plates can help diners gauge how much food they're getting for the price they're paying. But most menus don't often provide these visual cues, or at least not for every dish or components, and as a result, 70% of consumers say portion sizes are hard to judge, and two-thirds say they sometimes wish they could see an image or a sample of a restaurant meal before ordering. Visual cues don't just set expectations; they can also prevent waste by helping consumers avoid making decisions they might regret. Nearly half of consumers (47%) say if a portion looks too big in a photo or display, they're less likely to order it. Gen Z, having grown up immersed in social media and visual-first experiences, are the most likely to agree with this sentiment.



C8: Please rate your level of agreement with the following statements. (top 2 + bottom 2; 5 pt. scale)

SECTION 03

Affinity for Customizable Portion Options

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59%

of consumers agree that **if a restaurant near them offered more flexible portion size options, they would be more likely to visit that restaurant.**

Significantly more likely among **Gen Z** (61%), **Millennials** (63%), **Gen X** (61%), and **High-Income consumers** (62%)

C8: Please rate your level of agreement with the following statements. (top 2; 5 pt. scale)

ReFED | DATASSENTIAL

WE ASKED CONSUMERS TO…

1. Evaluate The Following Portion Options
2. Select The Segments They'd Be Interested In Ordering Them From

IDEA	DESCRIPTION
Small, Regular, or Large Portions	Choose from three portion sizes for most dishes – small (cheaper), regular (standard), or large (slightly higher price).
Half Portions	Order a half-sized version of a regular entrée (like pasta, salad, or stir-fry) for half the price.
Mini / Snack-Sized Versions	Get small or bite-sized options (like sliders, mini breakfast wraps, or single tacos) at low prices.
Pick 2 / Mix & Match Combos	Build a meal by combining two smaller items (like soup + salad or half wrap + smoothie) at a bundled price.
Light or "Fit" Versions	A smaller, lighter version of a regular menu item — fewer calories, smaller portion, same flavor, at a slightly lower price.
Kids' Portions for Adults	Let adults order from the kids' menu – smaller size and lower cost, no age restrictions.
Taster Flights or Samplers	Try a few mini portions of different items (like small pastas, wings, or desserts) for one bundled price.
Protein-Only / No Sides Option	Skip the sides and just get the main protein of a dish (like grilled chicken, steak, or fish) for a lower price.
Entrées in Side Dish Size	Choose a downsized version of a full entrée (like a small mac & cheese or mini curry) for the price of a typical side dish.
Build-Your-Own Small Plate Combo	Create a custom meal by picking smaller servings of a protein and a few sides – priced based on what you select.
Split Portions for Two	Get one full dish split into two smaller servings – ideal for sharing or saving half for later, often with no extra charge.

C6: Thinking about the following types of portion size options, which restaurant type(s) would you be interested in ordering them from?

Flexible portion options are broadly appealing, but there's no singular, one-size-fits-all solution.

Nearly 60% of consumers say they'd be more likely to visit a restaurant offering flexible sizes, with strong interest in smaller, alternative, or build-your-own options. The most popular formats include structured sizing (small/regular/large), mix-and-match combos, and build-your-own meals – each providing a strong balance between flexibility, value, and personalization. However, not all formats are suited for every venue. For example, consumers are especially interested in flexible sizing options are fast casual and casual dining restaurants but are less keen on them at fine dining. Split portions and tasting flights, on the other hand, are viewed as better suited to full-service than limited-service restaurants.

ORDERING INTEREST ACROSS ALL FOODSERVICE SEGMENTS

C6: Thinking about the following types of portion size options, which restaurant type(s) would you be interested in ordering them from?

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DEMOGRAPHIC DETAIL

Consumer Interest in Alternative or Flexible Portion Size Options

In general, all demographic cohorts show high consumer interest in flexible portion options. Still, nuances emerge:

- **Generation:** On average, Gen Z and Millennials stand out as being most enthusiastic about all surveyed alternative portion sizes, showing consistently higher interest than older generations.
- **Gender**: Overall, both men and women show strong interest in flexible sizing across restaurant types, but women lean slightly more toward half portions and kids' portions for adults, while men favor protein-only options.
- **Foodies**: Self-identified foodies are far more open to every alternative portion concept than non-foodies, reflecting their open-minded and propensity for experimentation when it comes to food choices.
- **Income**: Medium- and high-income consumers are more likely than low-income diners to embrace flexible sizes, though patterns are less consistent than with age. For instance, higher-income consumers show stronger interest in structured sizing (small/medium/large), but the difference is only significant at fast casual and midscale venues.

statistically more likely statistically less likely

		GENDER		GENERATION			
	TOTAL	MALE	FEMALE	GEN Z	MILLEN.	GEN X	BOOMER
Small, Regular, or Large Portions	89%	89%	88%	95%	92%	85%	85%
Pick 2 / Mix & Match Combos	87%	87%	87%	92%	91%	85%	80%
Build-Your-Own Small Plate Combo	84%	84%	84%	92%	89%	83%	74%
Entrées in Side Dish Size	82%	81%	82%	92%	85%	80%	72%
Split Portions for Two	82%	82%	81%	93%	87%	76%	72%
Taster Flights or Samplers	80%	81%	80%	88%	88%	81%	66%
Half Portions	80%	78%	82%	92%	86%	76%	70%
Mini / Snack-Sized Versions	80%	78%	81%	91%	86%	78%	67%
Light or "Fit" Versions	78%	77%	79%	86%	84%	76%	66%
Kids' Portions for Adults	71%	68%	74%	87%	80%	67%	53%
Protein-Only / No Sides Option	69%	72%	65%	82%	82%	64%	49%

C6: Thinking about the following types of portion size options, which restaurant type(s) would you be interested in ordering them from?

SEGMENT PROFILE

Quick-Service Restaurants

QSR Patrons: General Habits

97%

OF CONSUMERS **GET FOOD FROM QUICK-SERVICE RESTAURANTS**

44%

OF QSR PATRONS **LEAVE FOOD UNEATEN AT LEAST SOME OF THE TIME**

Patrons Believe Typical Portions At QSRs Are...

14%

TOO MUCH FOR ONE SITTING

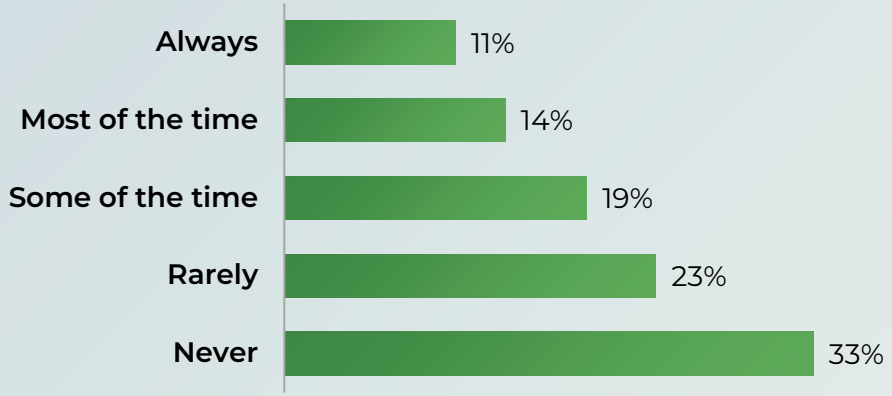
77%

THE RIGHT AMOUNT FOR ONE SITTING

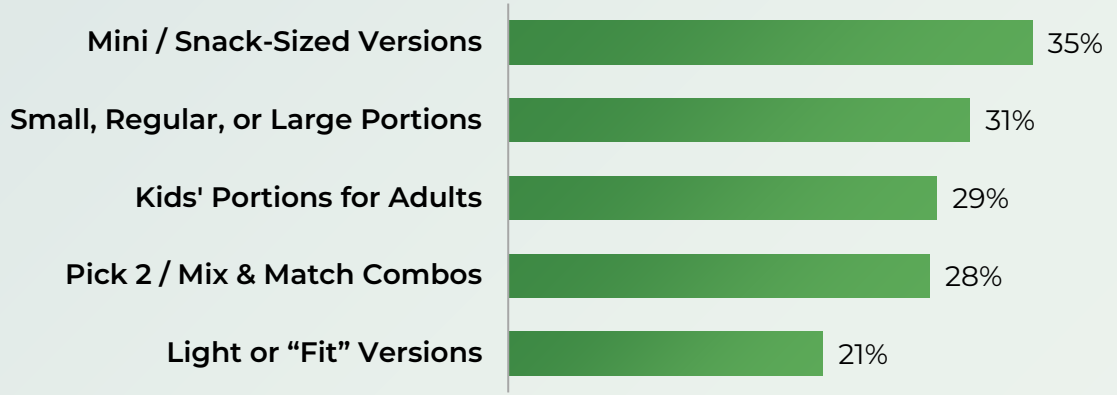
9%

TOO LITTLE FOR ONE SITTING

How Often Do Patrons Leave Food Uneaten At QSRs?



Most Popular Alternative / Flexible Portion Ideas For QSR Patrons



SEGMENT PROFILE

Fast Casual Restaurants

Fast Casual Patrons: General Habits

95%

OF CONSUMERS **GET FOOD FROM FAST CASUAL RESTAURANTS**

46%

OF FAST CASUAL PATRONS **LEAVE FOOD UNEATEN AT LEAST SOME OF THE TIME**

Patrons Believe Typical Portions At Fast Casual Restaurants Are...

18%

TOO MUCH FOR ONE SITTING

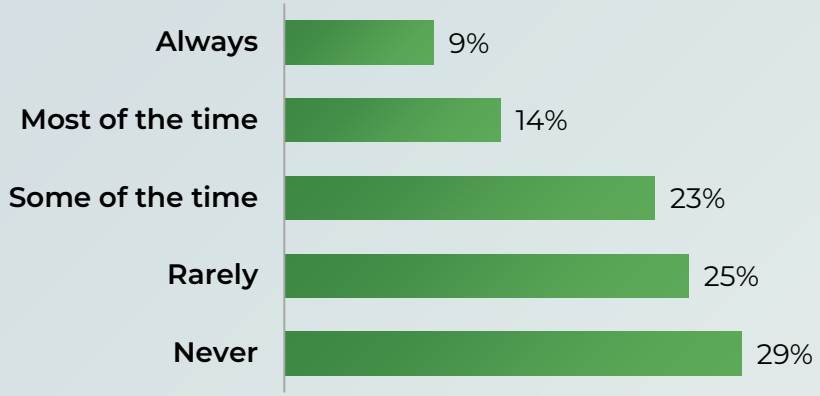
74%

THE RIGHT AMOUNT FOR ONE SITTING

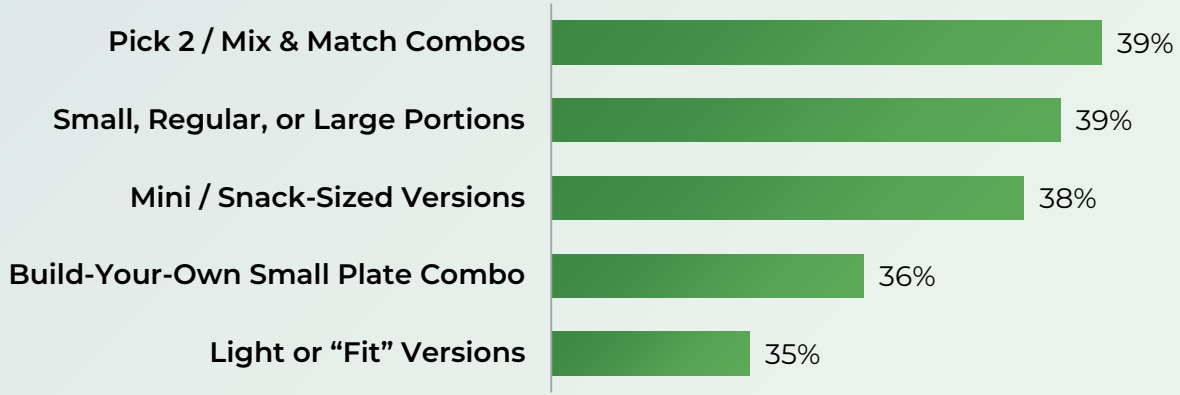
7%

TOO LITTLE FOR ONE SITTING

How Often Do Patrons Leave Food Uneaten At Fast Casual Restaurants?



Most Popular Alternative / Flexible Portion Ideas For Fast Casual Patrons



SEGMENT PROFILE

Midscale Restaurants

Midscale Patrons: General Habits

95%

OF CONSUMERS **GET FOOD FROM MIDSCALE RESTAURANTS**

50%

OF MIDSCALE PATRONS **LEAVE FOOD UNEATEN AT LEAST SOME OF THE TIME**

Patrons Believe Typical Portions At Midscale Restaurants Are...

24%

TOO MUCH FOR ONE SITTING

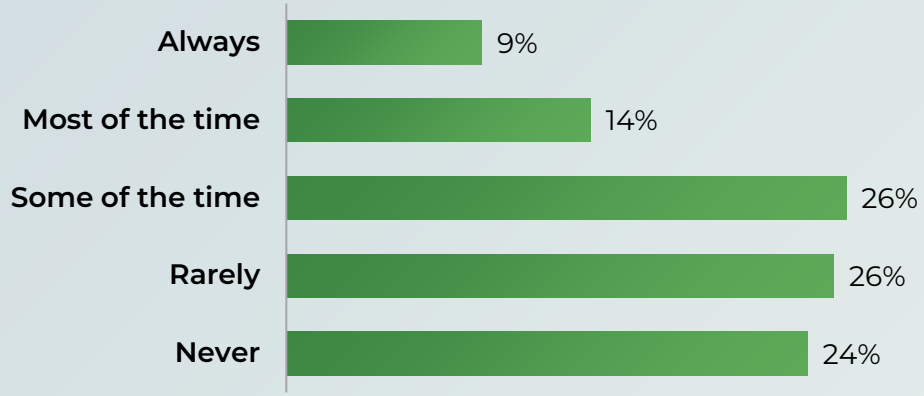
70%

THE RIGHT AMOUNT FOR ONE SITTING

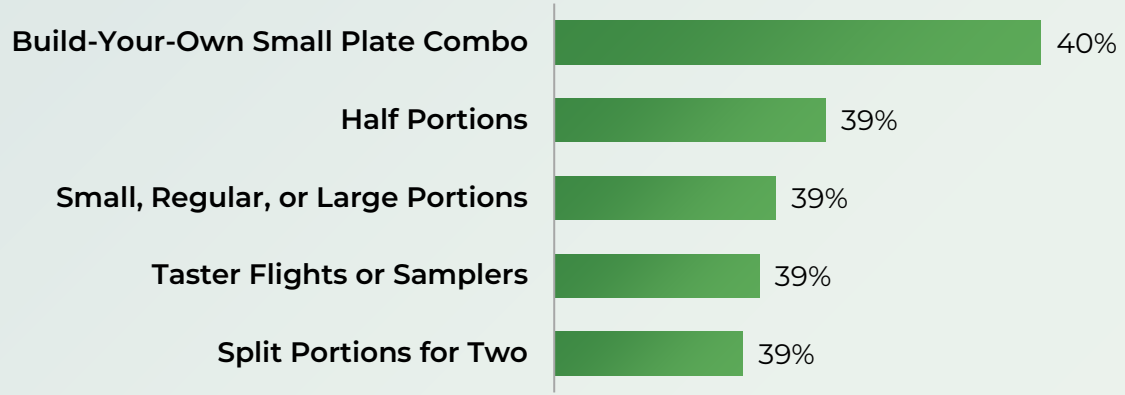
6%

TOO LITTLE FOR ONE SITTING

How Often Do Patrons Leave Food Uneaten At Midscale Restaurants?



Most Popular Alternative / Flexible Portion Ideas For Midscale Patrons



SEGMENT PROFILE

Casual Dining Restaurants

Casual Dining Patrons: General Habits

96%

OF CONSUMERS **GET FOOD FROM CASUAL DINING RESTAURANTS**

52%

OF CASUAL DINING PATRONS **LEAVE FOOD UNEATEN AT LEAST SOME OF THE TIME**

Patrons Believe Typical Portions At Casual Dining Restaurants Are...

29%

TOO MUCH FOR ONE SITTING

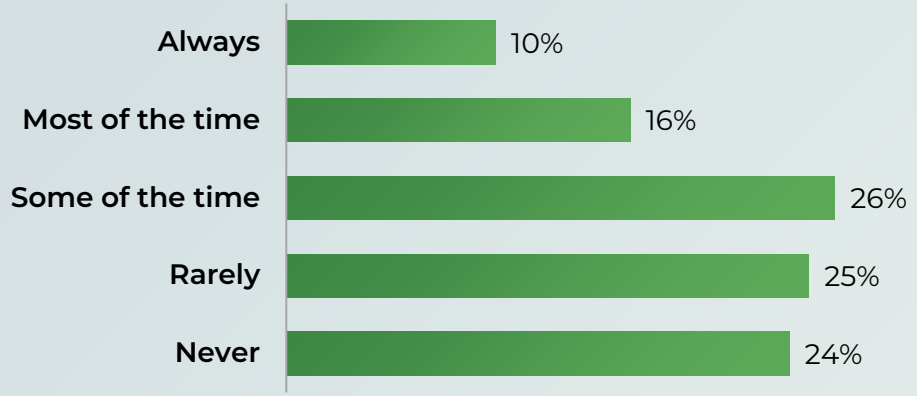
66%

THE RIGHT AMOUNT FOR ONE SITTING

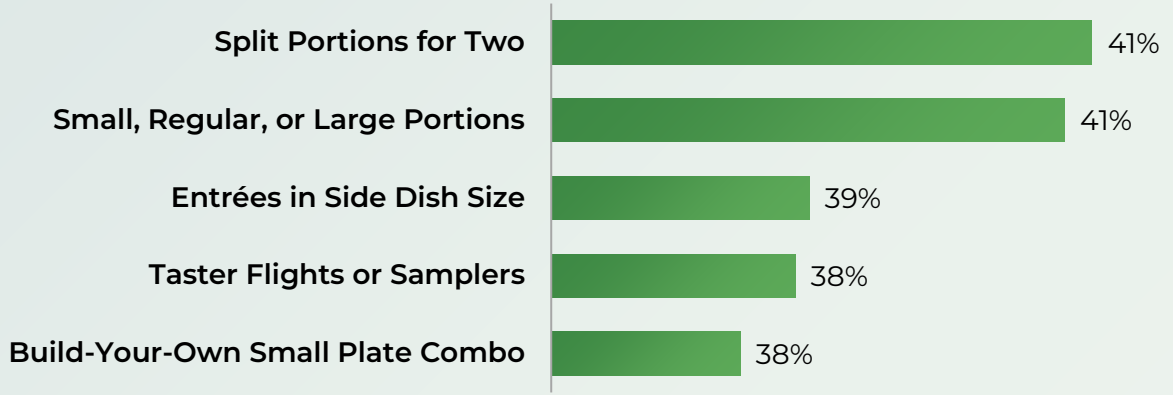
6%

TOO LITTLE FOR ONE SITTING

How Often Do Patrons Leave Food Uneaten At Casual Dining Restaurants?



Most Popular Alternative / Flexible Portion Ideas For Casual Dining Patrons



SEGMENT PROFILE

Fine Dining Restaurants

Fine Dining Patrons: General Habits

86%

OF CONSUMERS **GET FOOD FROM FINE DINING RESTAURANTS**

50%

OF FINE DINING PATRONS **LEAVE FOOD UNEATEN AT LEAST SOME OF THE TIME**

Patrons Believe Typical Portions At Fine Dining Restaurants Are...

25%

TOO MUCH FOR ONE SITTING

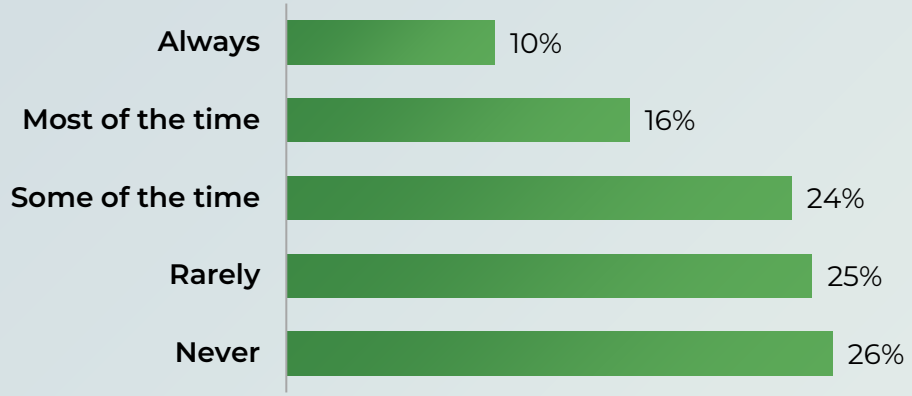
63%

THE RIGHT AMOUNT FOR ONE SITTING

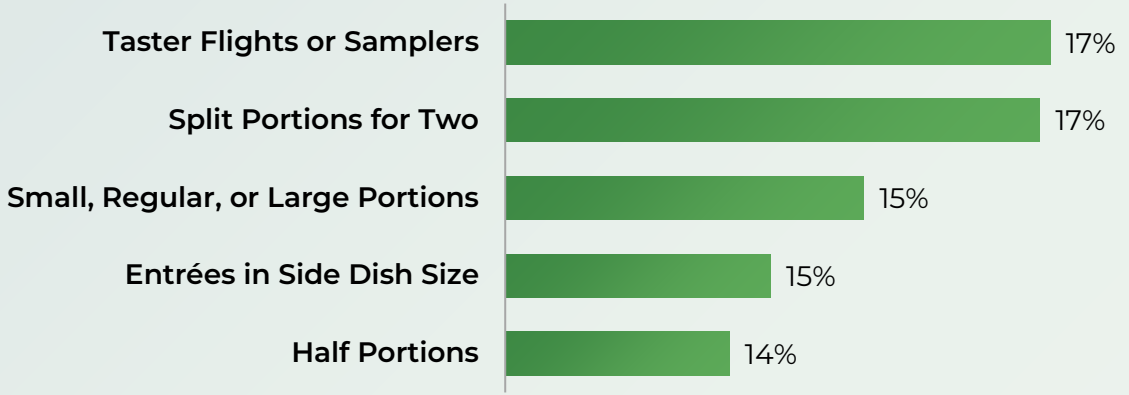
12%

TOO LITTLE FOR ONE SITTING

How Often Do Patrons Leave Food Uneaten At Fine Dining Restaurants?



Most Popular Alternative / Flexible Portion Ideas For Fine Dining Patrons



SECTION 04

Deep Dive: GLP-1 Users

Data from the following section represents n = 1,449 U.S. consumers who self-report getting food and beverages from foodservice venues at least once every few months. **184 of these consumers currently use GLP-1 medications, while the remaining 1,256 consumers do not.**

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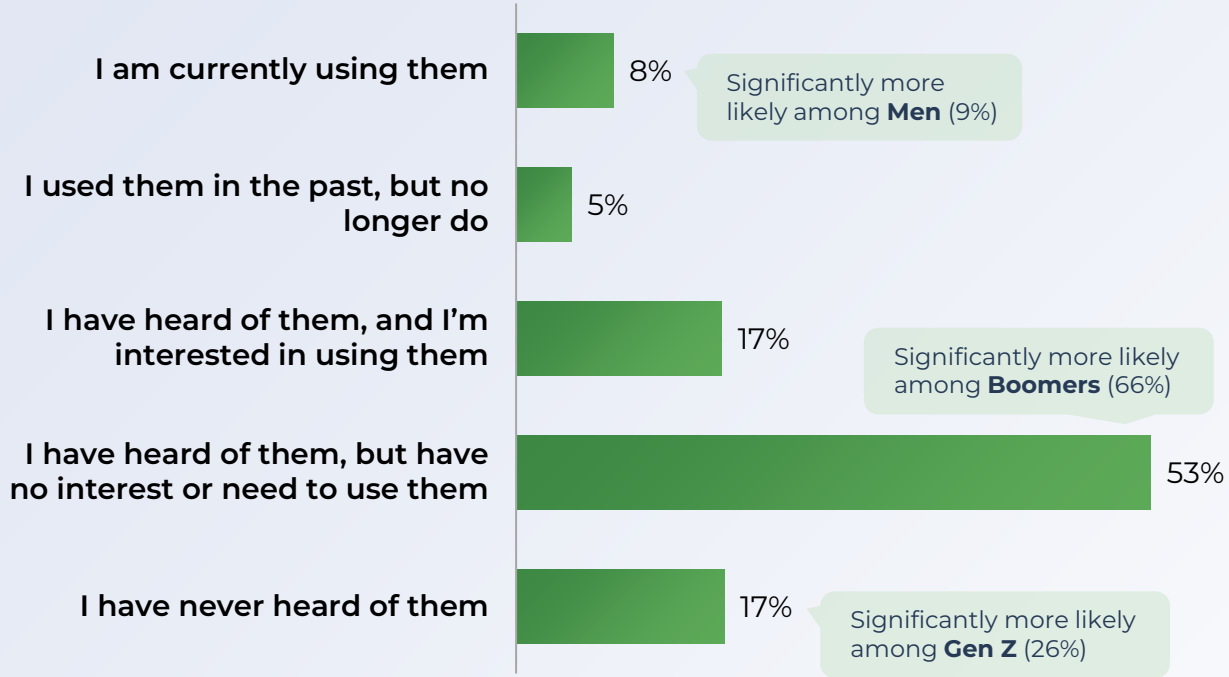
At present, 8% of consumers currently use GLP-1 medications, whether for diabetes management or weight loss.

Another 5% say have utilized them in the past but don't anymore, while 17% express interest in trying them in the future. More than half – especially Boomers – are aware of GLP-1 medications but have no interest, and fewer than 20%, particularly Gen Z, remain unfamiliar. Current GLP-1 users are significantly more likely to be based in urban areas and live in higher-income household.

HOW MANY CONSUMERS CURRENTLY...
Utilize GLP-1 Medications?



C1b: Which of the following best describes your knowledge or use of GLP-1 prescription drugs?

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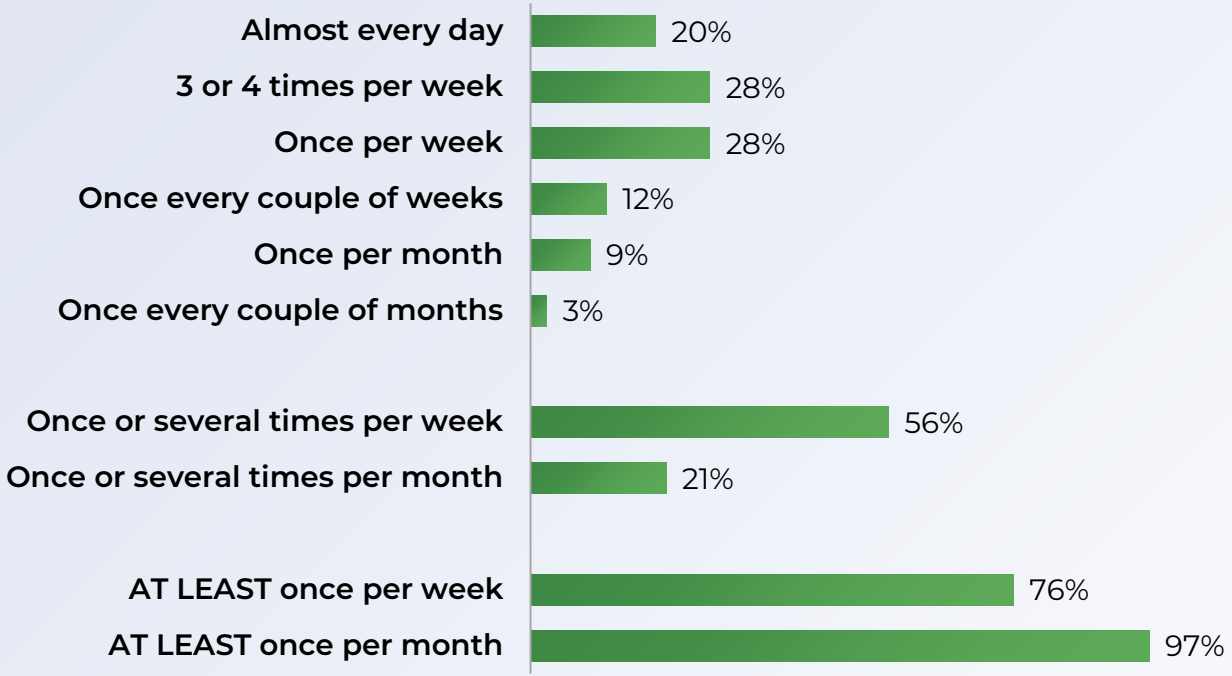
Among GLP-1 users who purchase from foodservice venues, 97% do so at least once per month, and more than three-quarters (76%) eat restaurant food at least weekly.

Compared to non-users, GLP-1 users are both more likely to incorporate restaurant food into their routines and to do so on a more frequent basis. On average, GLP-1 users are 14% more likely than non-users to dine out daily, and 4% more likely to say they purchase restaurant food three to four times per week.

HOW OFTEN DO GLP-1 USERS TYPICALLY...
Purchase From Foodservice Venues?



C1a: How often do you get food or drinks from restaurants or other foodservice venues (whether dining in, taking out, or getting delivery)?

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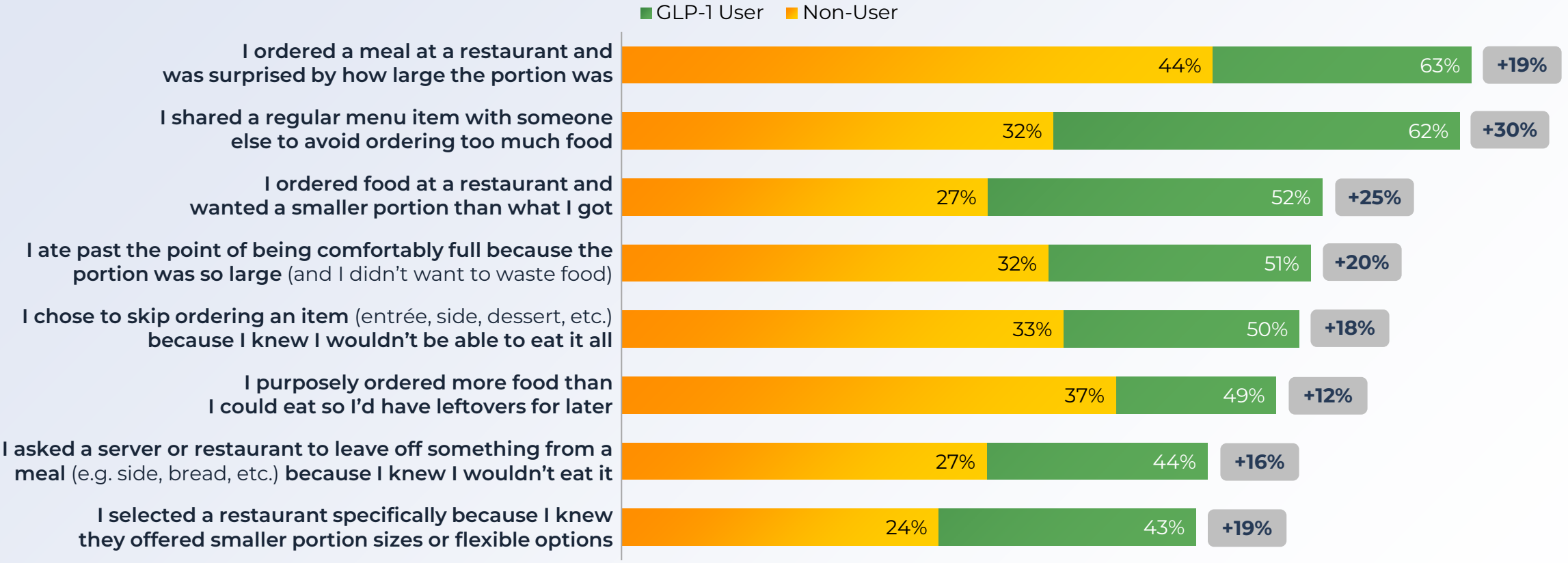
Because their diets come with added restrictions, GLP-1 users are far more likely than non-users to encounter regular challenges with restaurant portions.

In just the past month, GLP-1 users are significantly more likely than non-users to report being surprised by oversized servings or wishing for smaller portions, and over half say they ate past the point of comfort at least once in the past month because of portion size.

In turn, GLP-1 users are also more likely than non-users to adopt strategies to right-size their meals. For example, nearly two-thirds have shared a regular menu item with someone else in the past month to avoid overordering. Roughly half chose to forgo ordering a dish or item they knew would be too much to stomach, and nearly half say they have intentionally ordered extra food to save for later. More than two in five customized their restaurant meals – such as asking for sides or components to be left off – to better match their appetite.



C2: Have you experienced any of the following scenarios in the past month?

ReFED | DATASSENTIAL

In the past month, GLP-1 users were more likely than non-users to both leave food uneaten at restaurants and take leftovers home.

However, GLP-1 users handle leftovers in largely the same manner as everybody else: Nearly 90% of both GLP-1 users and non-users do try to eat their restaurant leftovers at least some of the time. That said, GLP-1 users are 7% more likely than non-users to say they eat leftovers "most of the time," but are 3% less likely to say they "always" finish them. These differences, at the end of the day, are marginal.

IN THE PAST MONTH...

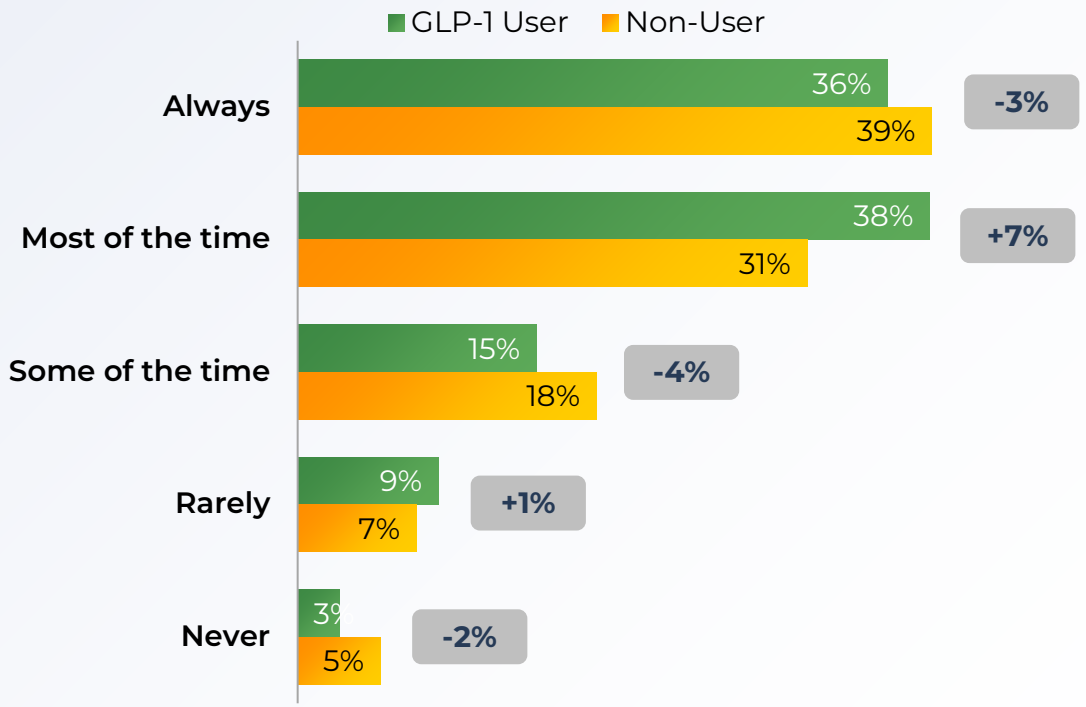
GLP-1 USERS **49%** +24% NON-USERS **25%**

DIDN'T FINISH THEIR MEAL AND LEFT FOOD ON THE TABLE AT LEAST ONCE

GLP-1 USERS **75%** +16% NON-USERS **59%**

TOOK LEFTOVERS HOME FROM A RESTAURANT AT LEAST ONCE

HOW OFTEN DO CONSUMERS EAT LEFTOVERS?



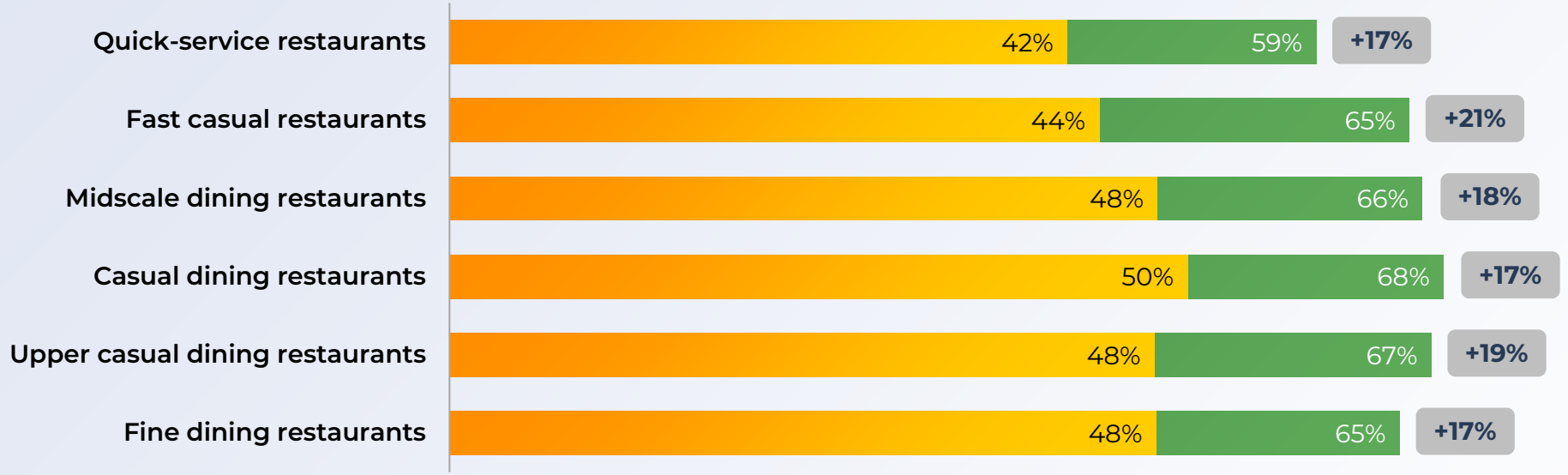
C2: Have you experienced any of the following scenarios in the past month? | **C3a:** How often do you eat your restaurant leftovers?

ReFED | DATASSENTIAL

KEY STATISTICS

How Often Do GLP-1 Users Leave Food Behind At Restaurants?

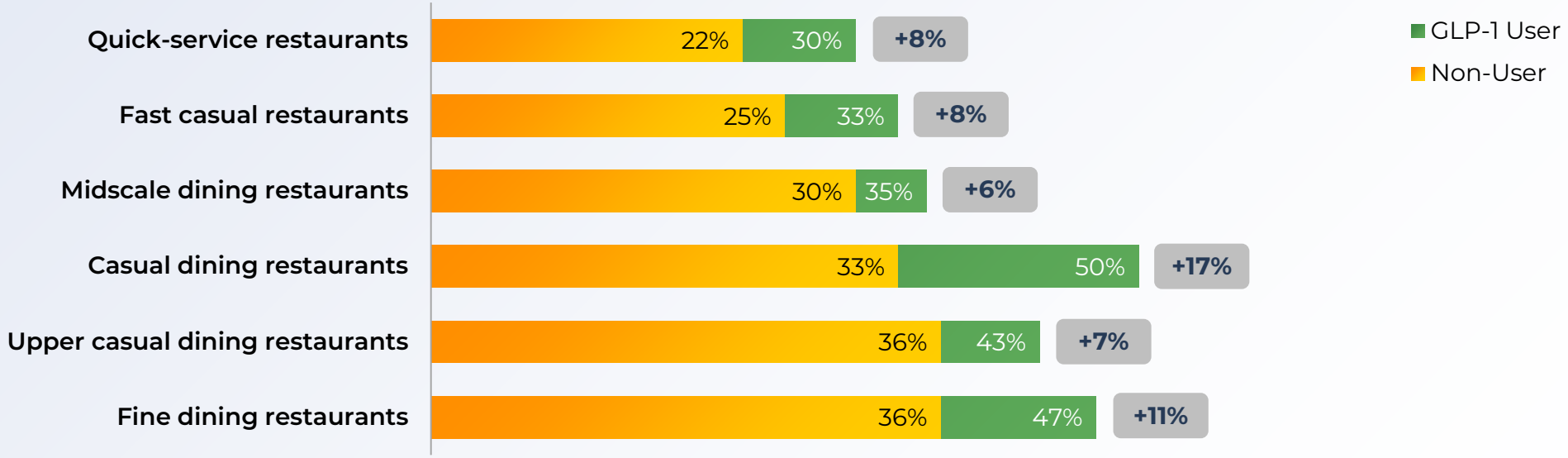
Right: % of GLP-1 users and non-users who **leave food behind at least "some of the time"**



KEY STATISTICS

How Do GLP-1 Users Feel About Typical Portion Sizes At Restaurants?

Right: % of GLP-1 users and non-users who find typical portions at each segment to be **"too much" OR "too little"**



C3b: How often do you leave food on your plate after dining at the following types of restaurants?
C4: When you eat at the restaurants, how well do the portion sizes typically match what you want to eat in a single meal or sitting?

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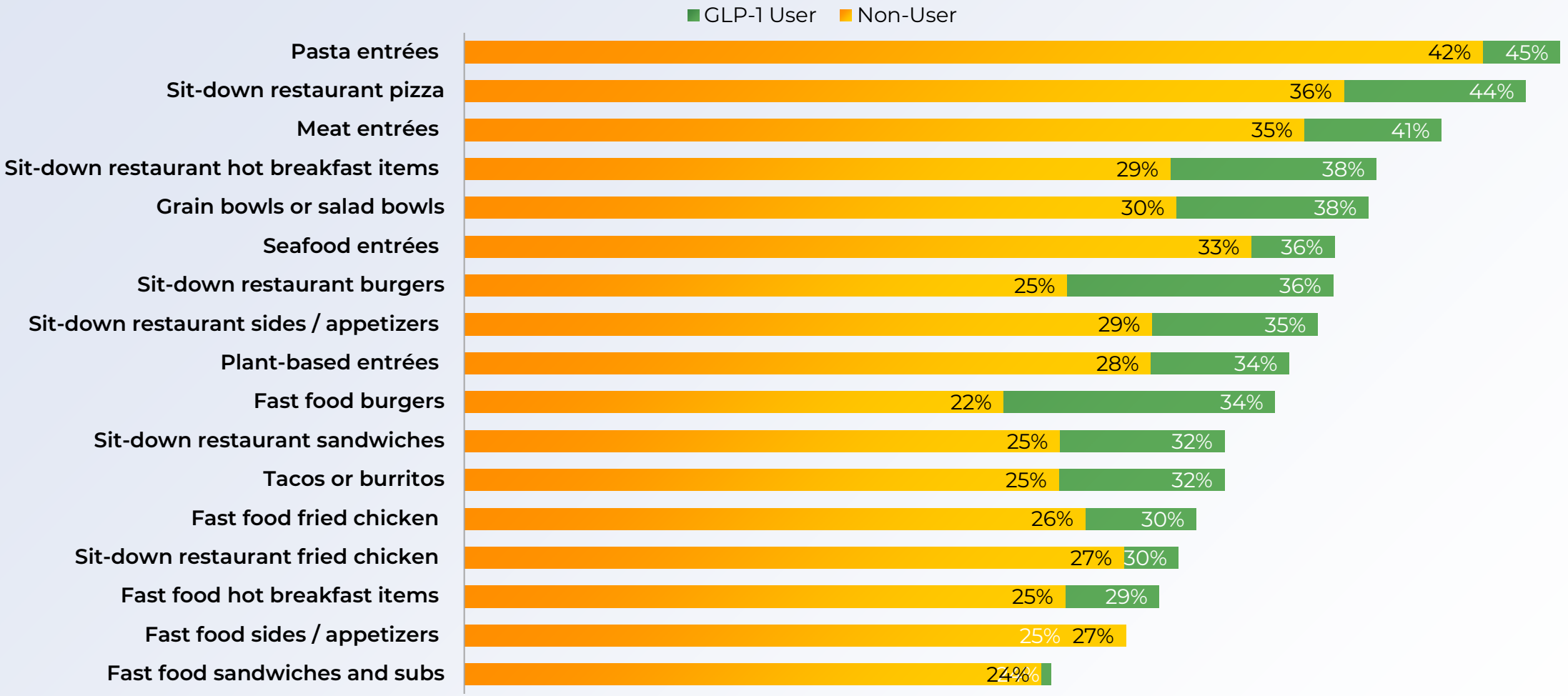
KEY STATISTICS

How Do GLP-1 Users Feel About Typical Portion Sizes For Specific Types Of Food?

Below: % of GLP-1 users and non-users who find typical portions for each dish or type of food to be **"too much" OR "too little"**



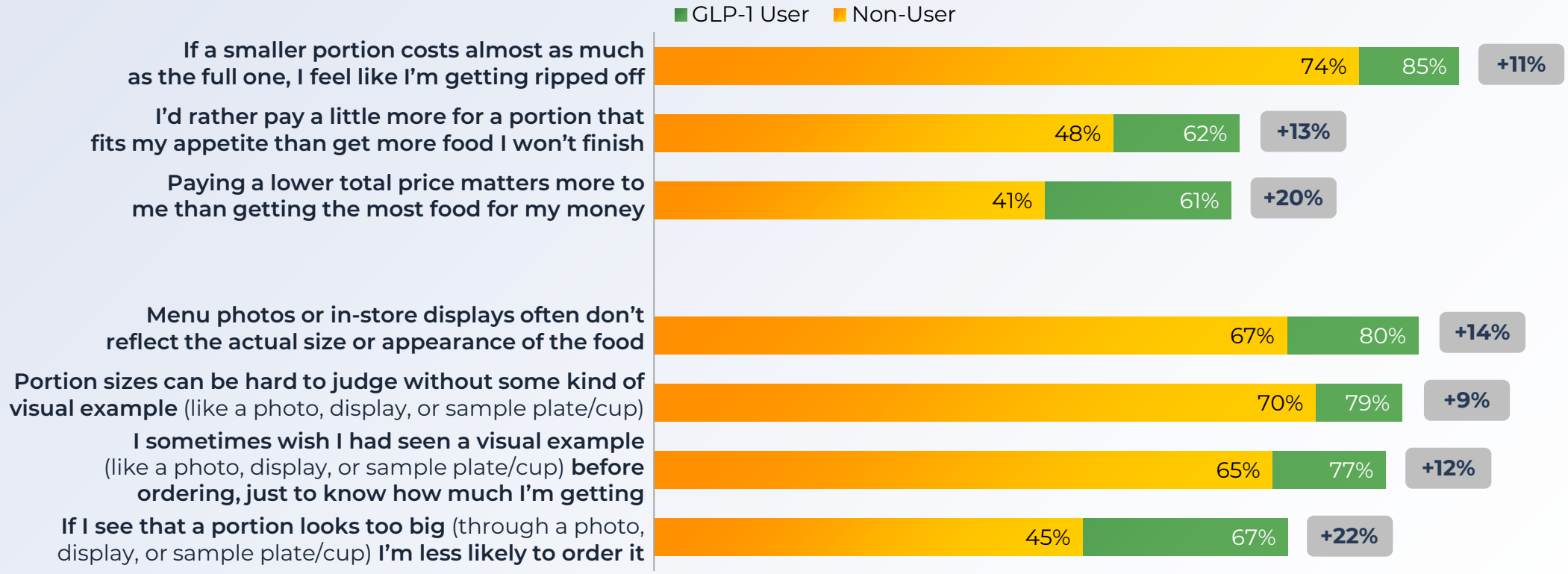
C5: When you order the foods, how well do the portion sizes typically match what you want to eat in a single meal or sitting?

ReFED | DATASSENTIAL

Compared to non-users, GLP-1 medication users show stronger concerns about how portion control and value intersect.

This isn't about necessarily being more budget-conscious, but more about balancing cost with realistic – and limited – appetites. GLP-1 users are 20% more likely to say a lower bill matters more than maximizing food for the money, 11% more likely to worry about being "ripped off" by smaller portions without smaller prices, and 13% more likely to pay extra for portions sized to their appetite – adding further credence to the idea that flexibility and personalization are especially important to this subgroup.

GLP-1 users are also more likely than non-users to appreciate visual cues or elements like photos, displays, or samples that can properly illustrate portion sizes before ordering. That said, they're also 14% more likely compared to non-users to feel that existing visuals don't often accurately reflect the final dish, highlighting a dual need for foodservice operators to both offer more visual indicators *and* enhance their accuracy.



C8: Please rate your level of agreement with the following statements. (top 2 + bottom 2; 5 pt. scale)

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GLP-1 users are especially supportive of flexible portion innovations.

Nearly three-quarters of GLP-1 users say they'd be more likely to visit a restaurant offering flexible sizes, compared to just 58% of non-users. Their interest in specific portion ideas is also consistently higher across the board. What stands out is their stronger preference for options centered on size and quantity, such as mix & match combos, structured sizes, split portions, or mini/snack-sized versions of regular dishes. These formats allow them to choose the smallest servings to fit limited appetites or divide meals across multiple occasions if need be. In comparison, concepts built around variety or abundance – like tasting flights, build-your-own combos, or protein-only dishes – are slightly less appealing, suggesting GLP-1 users are more likely to prioritize appetite management over maximizing choice or variety within a portion.

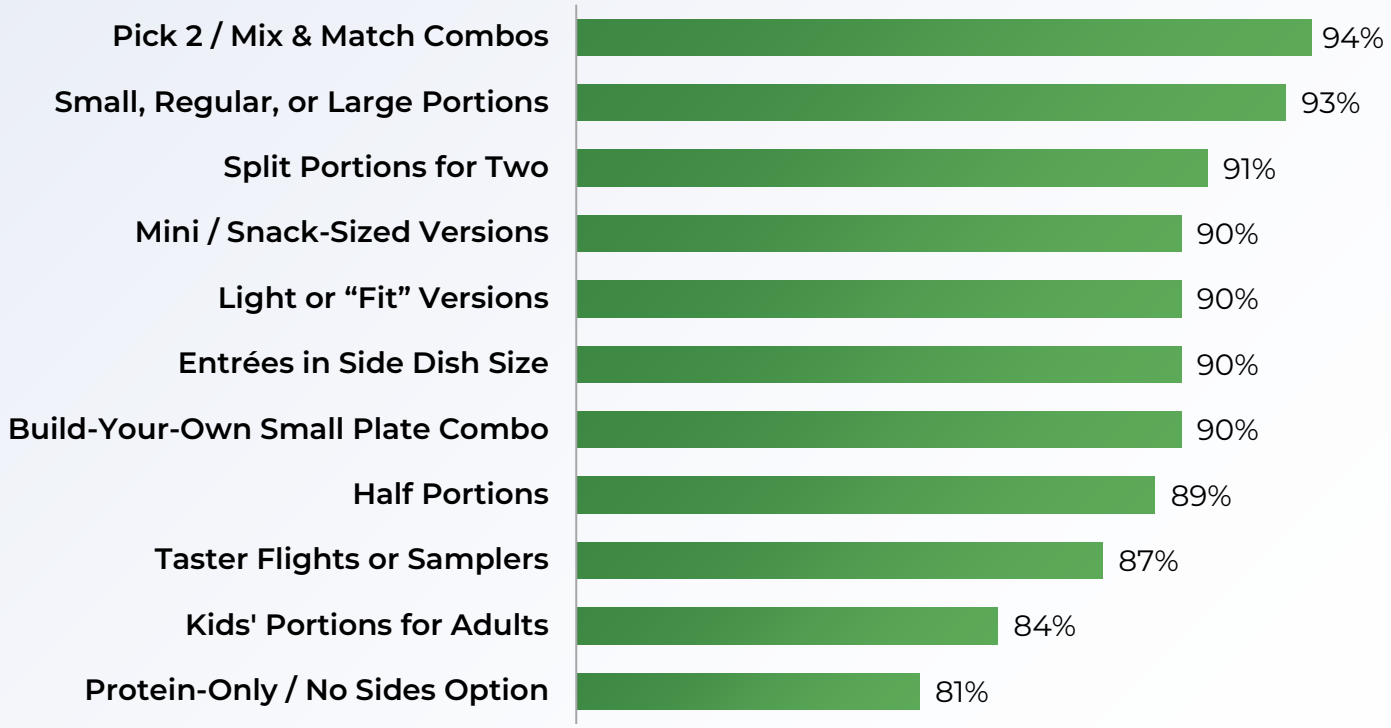
GLP-1 USERS **73%** +13% NON-USERS **60%**

AGREE: **"I FEEL GUILTY WHEN I LEAVE FOOD UNEATEN AT A RESTAURANT AND DON'T TAKE LEFTOVERS HOME."**

GLP-1 USERS **73%** +14% NON-USERS **58%**

AGREE: **"IF A RESTAURANT NEAR ME OFFERED MORE FLEXIBLE PORTION SIZE OPTIONS, I WOULD BE MORE LIKELY TO VISIT THEM."**

INTEREST IN ALTERNATIVE PORTION OPTIONS



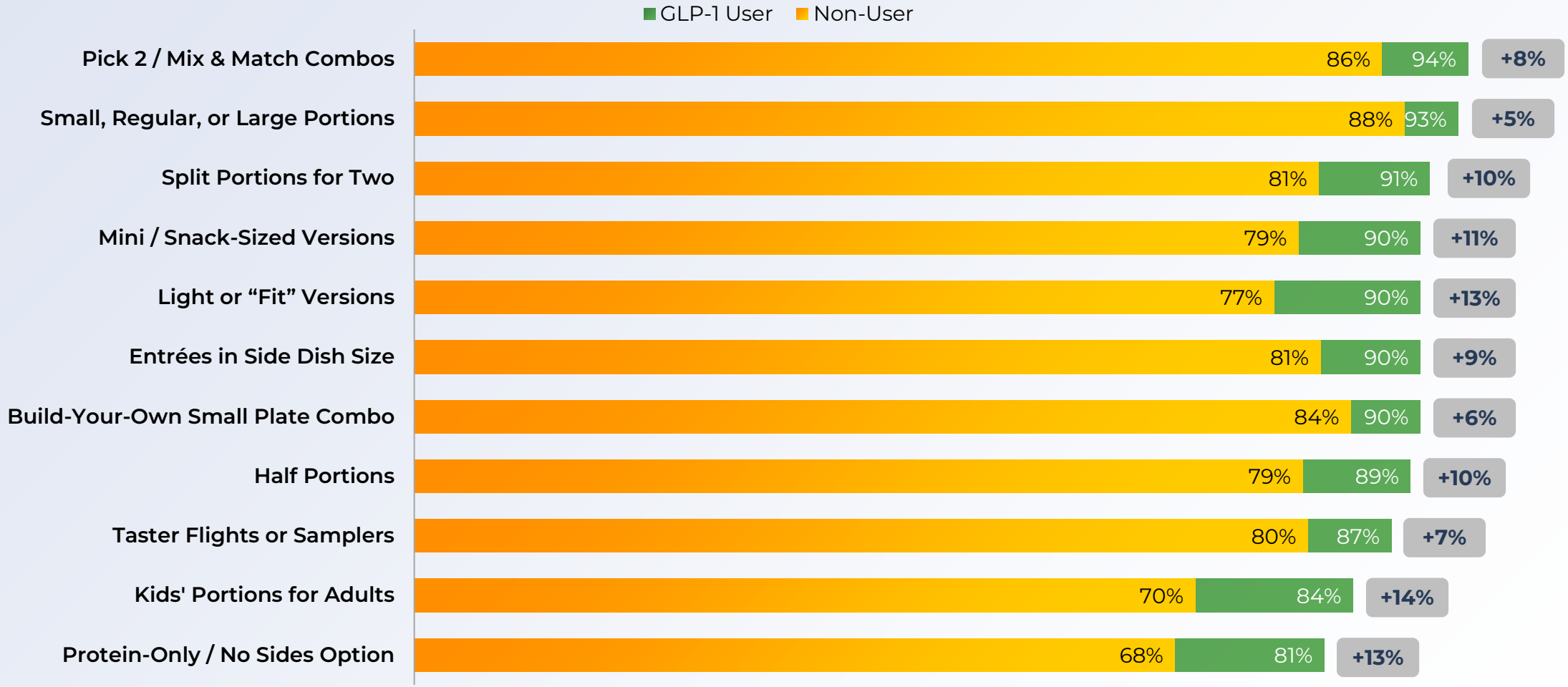
C6: Thinking about the following types of portion size options, which restaurant type(s) would you be interested in ordering them from?

ReFED | DATASSENTIAL

KEY STATISTICS

Interest in Alternative or Flexible Portion Size Options Among GLP-1 Users

Below: % of GLP-1 users and non-users who are interested in ordering each portion size idea from **at least one restaurant segment**



C6: Thinking about the following types of portion size options, which restaurant type(s) would you be interested in ordering them from?

ReFED | DATASSENTIAL

Thank You.

For additional inquiries and information, please reach out to:

DATASSENTIAL

www.datassential.com
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Social Media: **Linkedin**

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refed.org
For media inquiries, please contact Nate Clark at nate.clark@refed.org
Social Media: **LinkedIn** **Instagram**