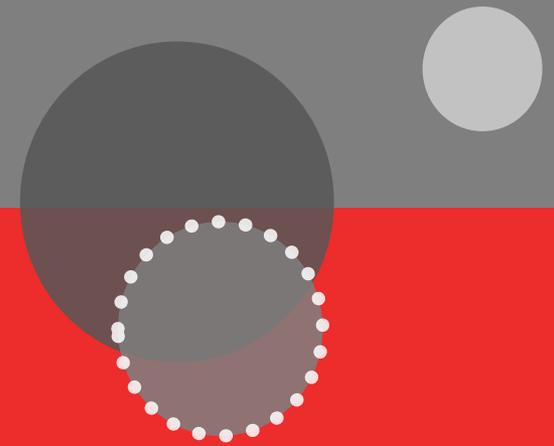
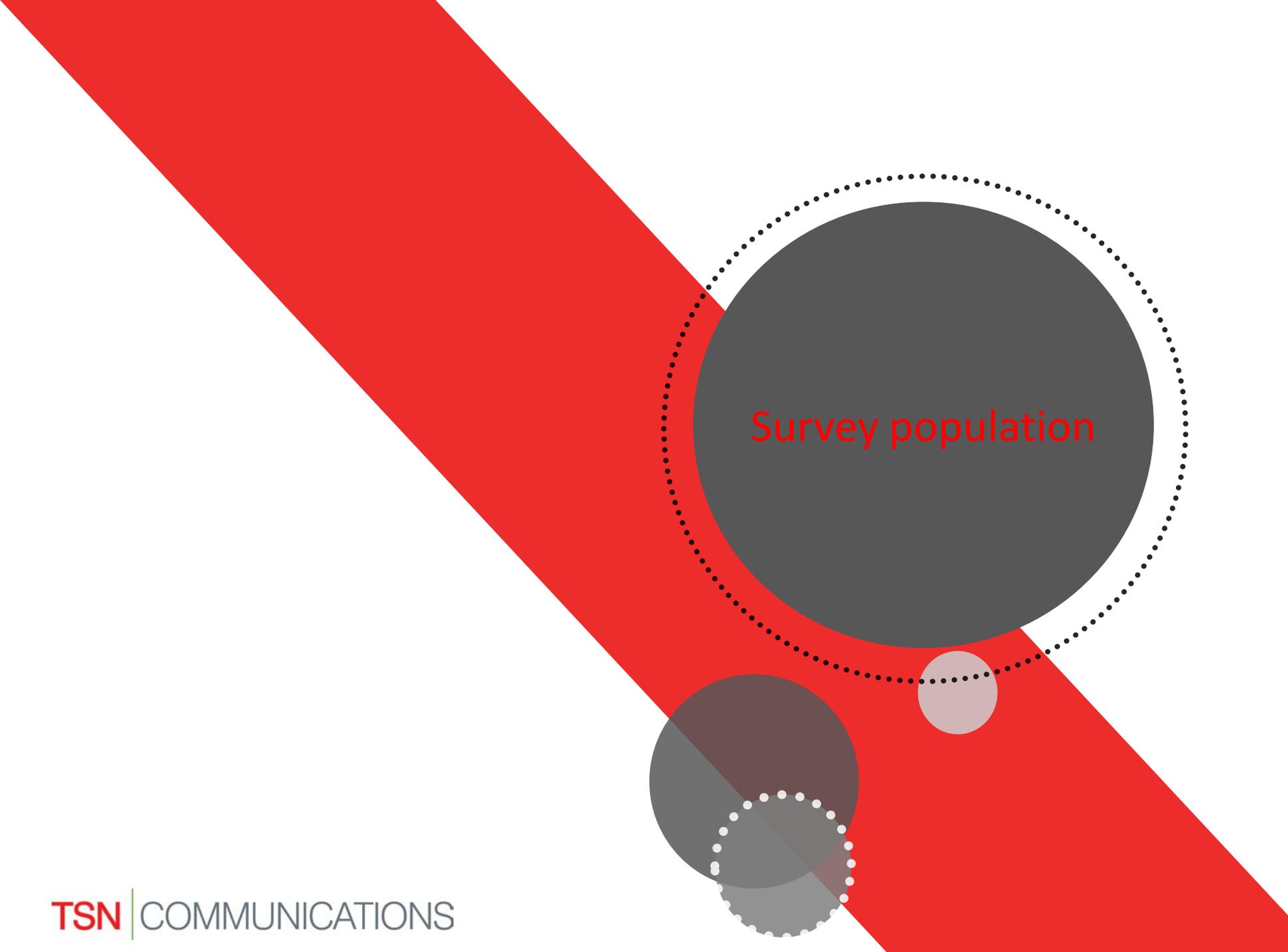


Consumer Perceptions of Food Serviceware



Outline

- Survey population
- Use of single-use food serviceware
- Importance of single-use item performance attributes
- Perceived benefits and concerns about single-use food serviceware
- Consumer behavior related to food serviceware
- Environmental issues
- *Appendix: Benefits and concerns about reusable food serviceware*



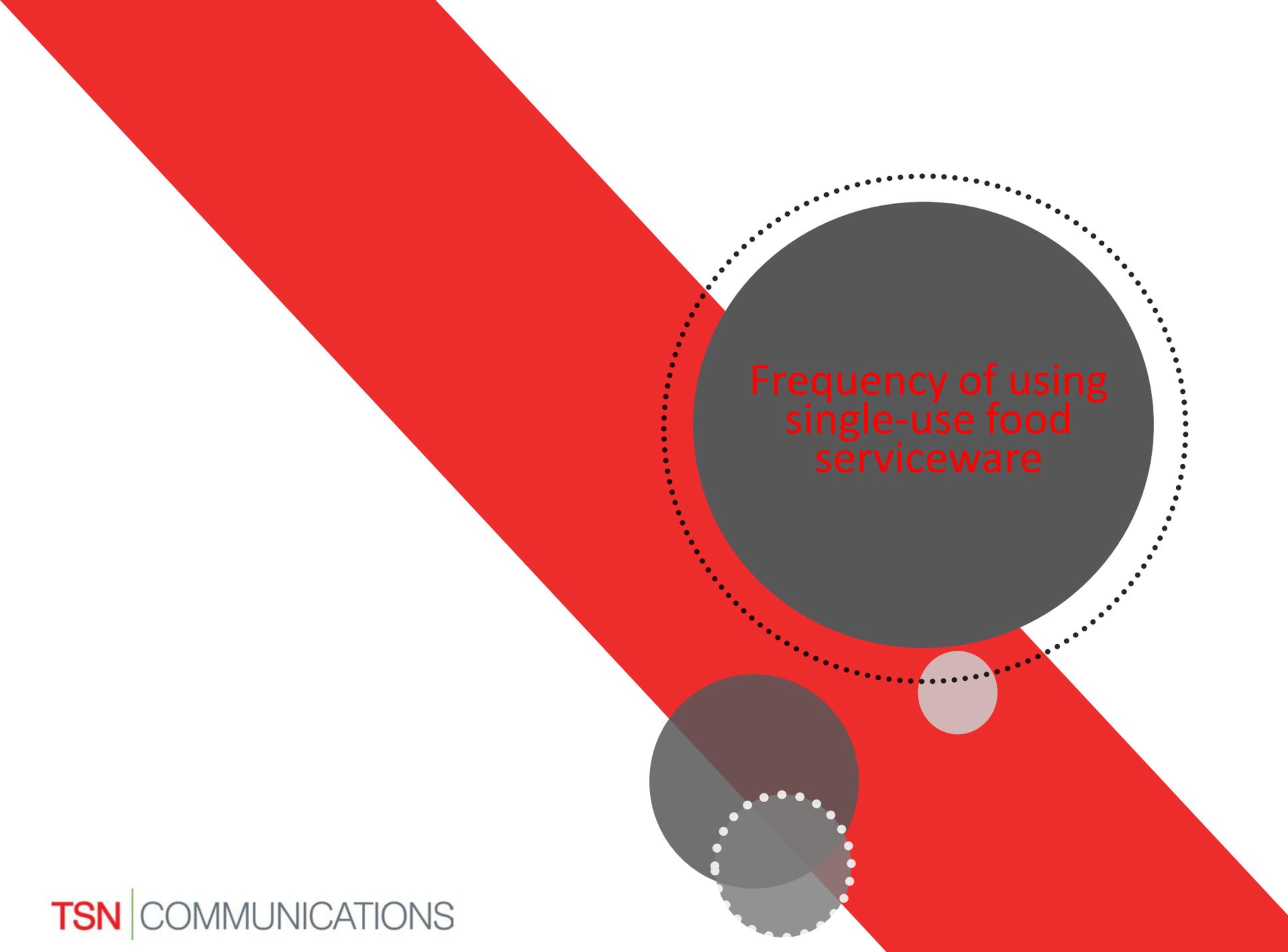
Survey population

Survey population

Who we surveyed

- U.S. and Canadian residents
- Ages 18-60+
- Balanced across income, education level, gender, region
- 400 respondents from each country
- Responses gathered April 1-3, 2019

Results represent the beliefs of the U.S. and Canadian populations with 95% confidence with +/- 5% margin of error



Frequency of using
single-use food
serviceware

Frequency of using single-use items

U.S.

15% use single-use items every day

50% use single-use at least once a week

Canada

11% use single-use items every day

52% use single-use at least once a week

U.S.

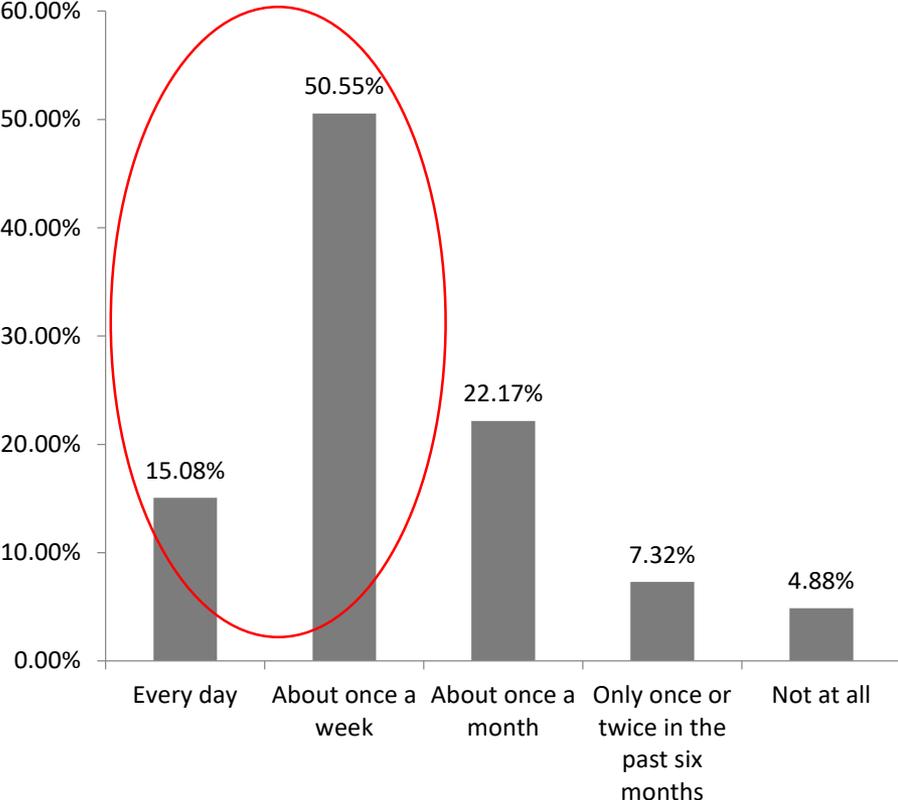
- Highest income (\$200K+) people most likely to use every day
- Higher education correlates with higher use
- There are significant differences in perceptions of food serviceware based on frequency of use

Canada

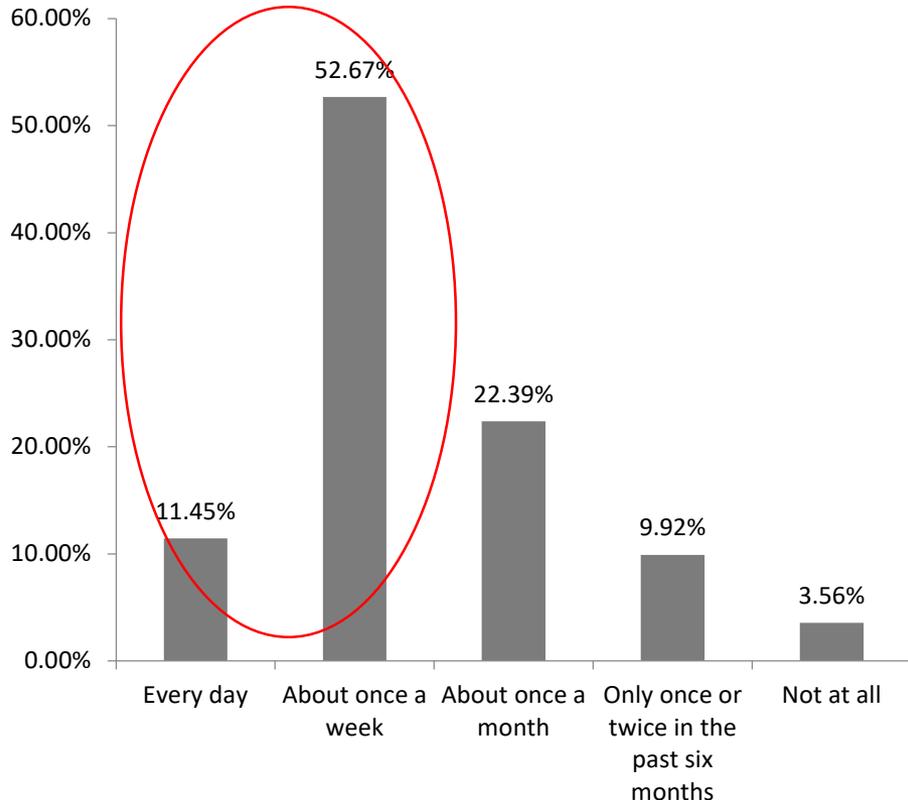
- Frequency of use was the only factor across which respondents' perceptions of food serviceware differed

Frequency of using single-use items

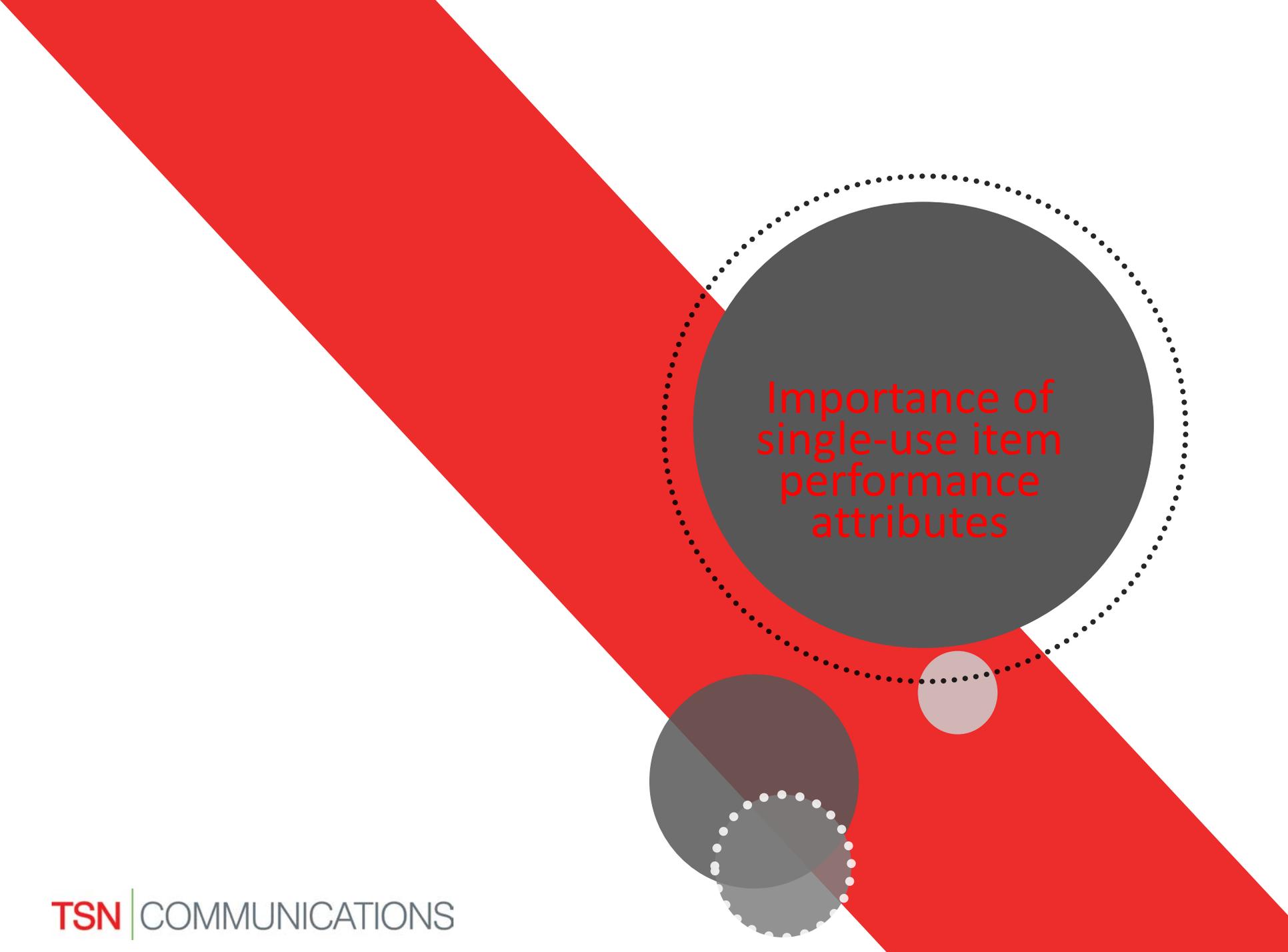
U.S.



Canada



Question: In the past 6 months, how often have you purchased foods or beverages that were served or delivered to you in/with single-use items (paper or plastic beverage cups, take-out containers, sandwich wrappers, pizza boxes and plastic utensils)?



Importance of
single-use item
performance
attributes

Single-use performance attributes

We asked about the importance of seven performance attributes for single-use items:

- Maintains correct temperature
- Keeps food separated
- Keeps food crispy
- Protects against tampering
- Leak/spill proof
- Stops oil and grease stains
- See food inside

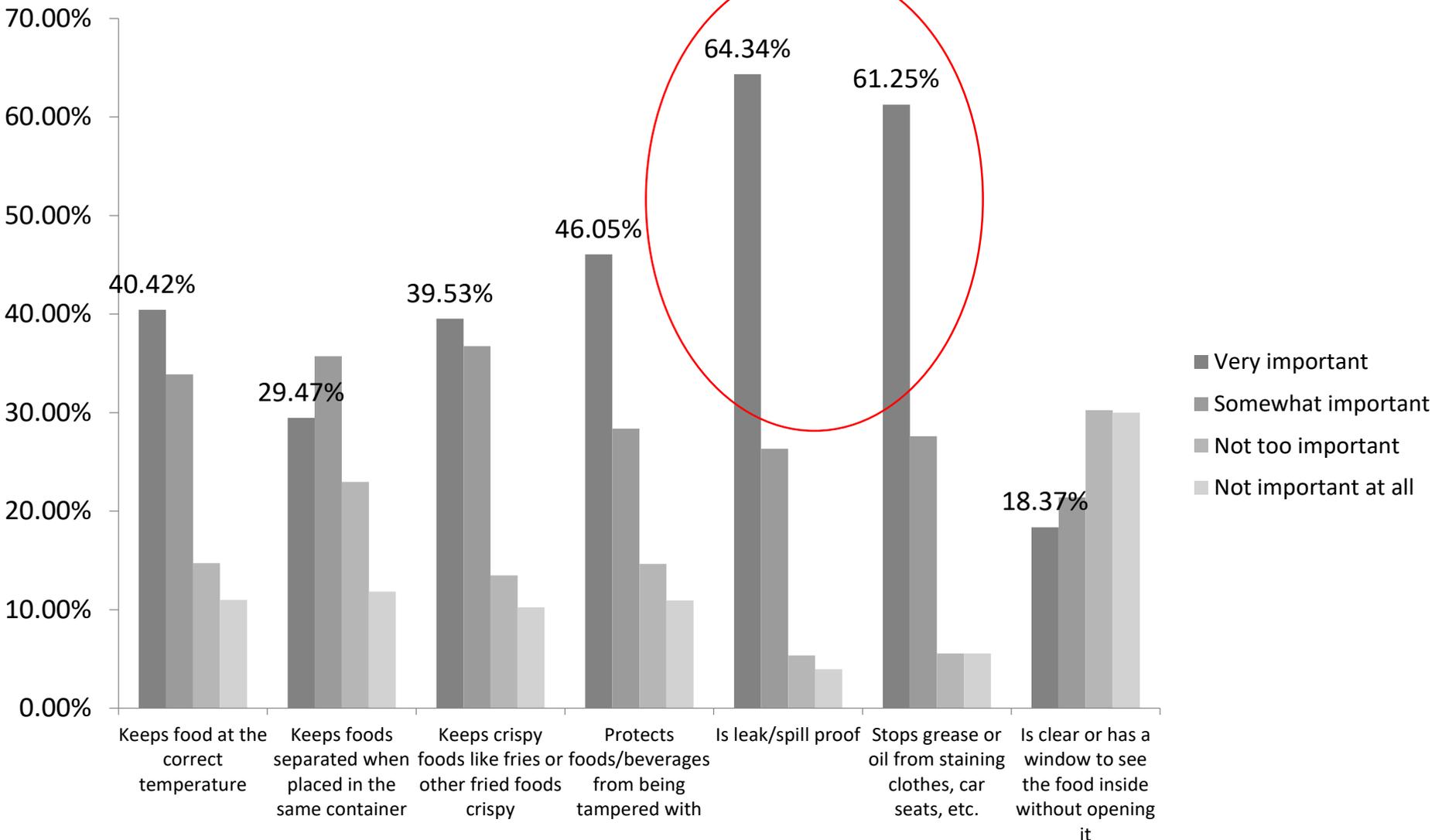
Leak/spill proof and stopping stains were the most important attributes for U.S. and Canadian respondents

- 64% U.S. / 60% Canadian respondents said leak/spill proof was very important
- 61% U.S. / 55% Canadian respondents said stopping oil and grease stains was very important

Protects from tampering was third most important in both countries

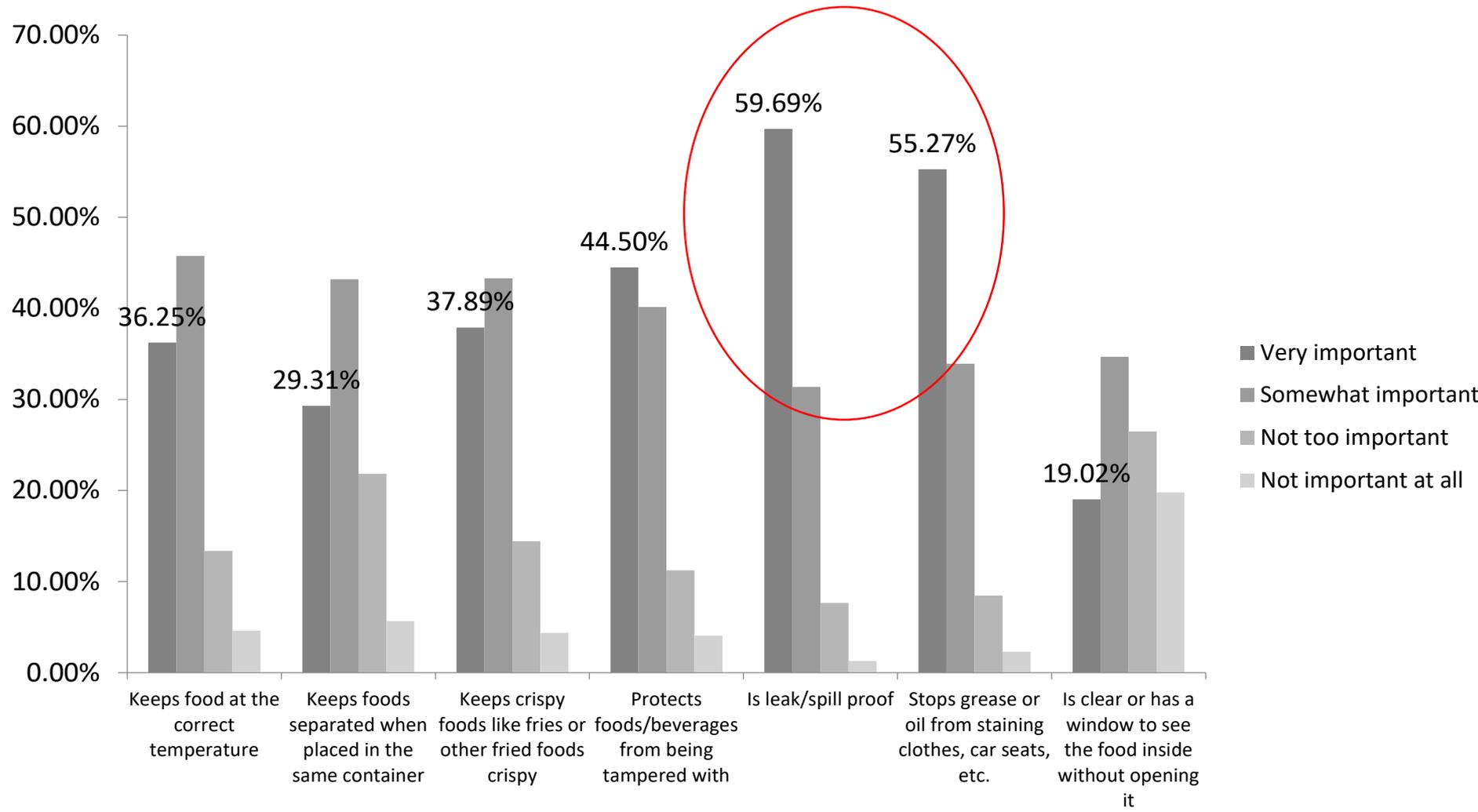
Seeing food inside was least important in both countries

Performance attributes – U.S.



Question: Single-use items can have various performance attributes. For each attribute listed below, please indicate how important it is for single-use items to have.

Performance attributes – Canada



Question: Single-use items can have various performance attributes. For each attribute listed below, please indicate how important it is for single-use items to have.

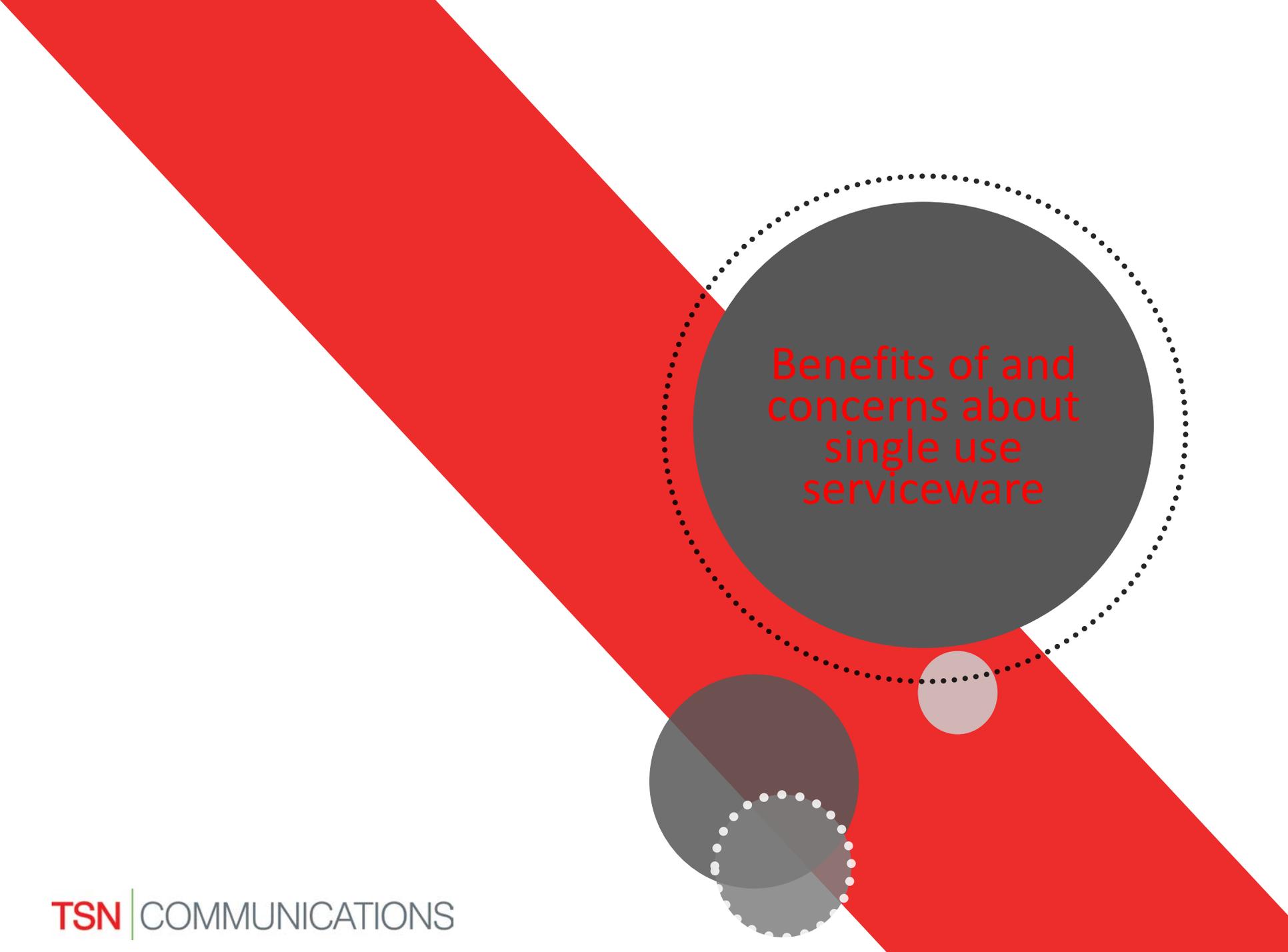
Single-use items performance attributes - differences across respondents

Demographics (U.S. only)



Frequency of use





Benefits of and
concerns about
single use
serviceware

Benefits of single-use items

We asked about the importance of four potential benefits of single-use items:

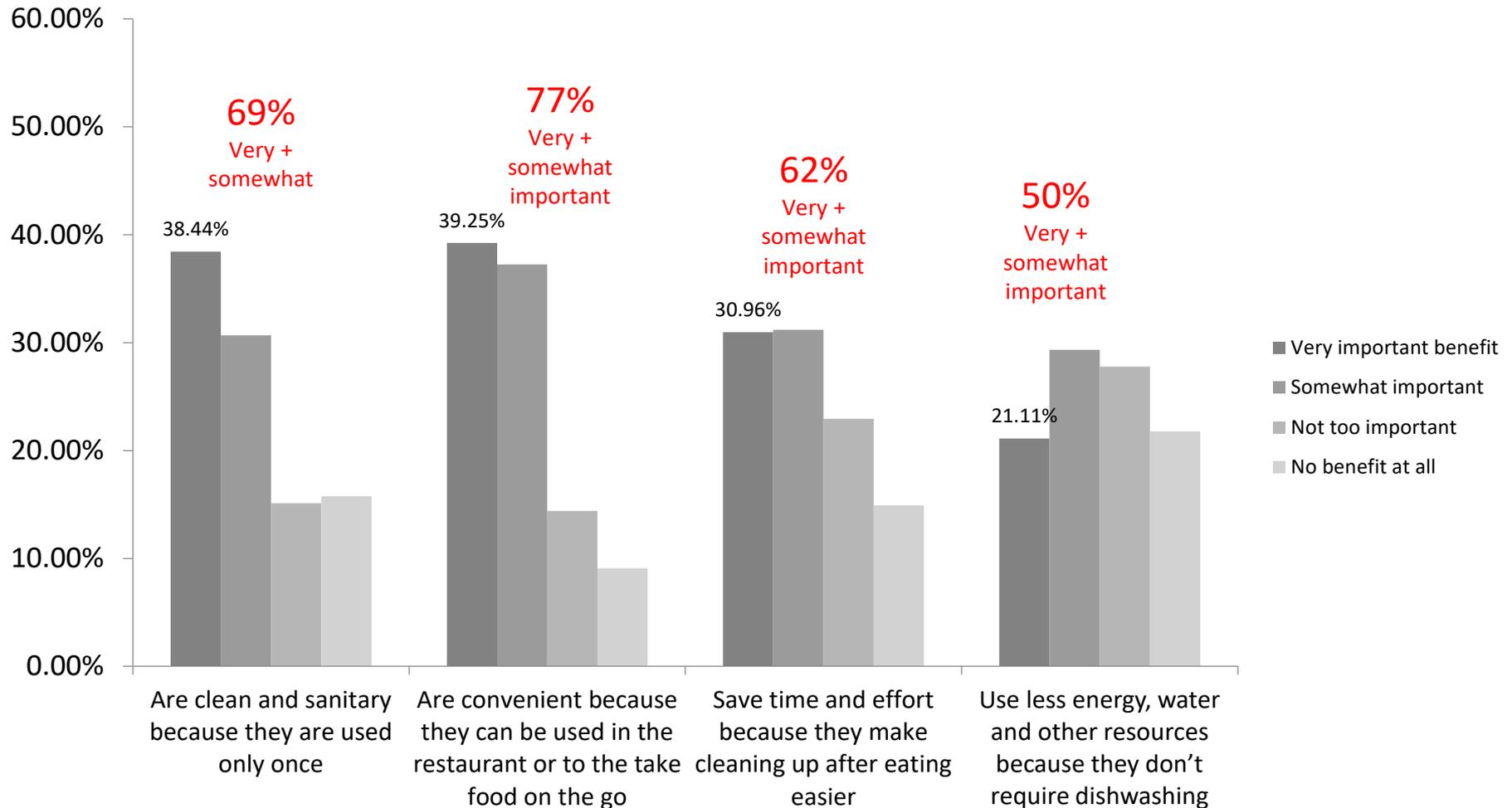
- Clean and sanitary because only used once
- Convenient, allow eating in the restaurant or taking to go
- Save time and effort by reducing clean up
- Use less resources because don't require washing

Clean/sanitary and convenient were nearly tied as the most important benefits for U.S. and Canadian respondents

- 39% U.S. / 34% Canadian respondents said convenient was very important
- 38% U.S. / 36% Canadian respondents said clean and sanitary was very important
- Convenient is a clearer “winner” when combining very and somewhat important

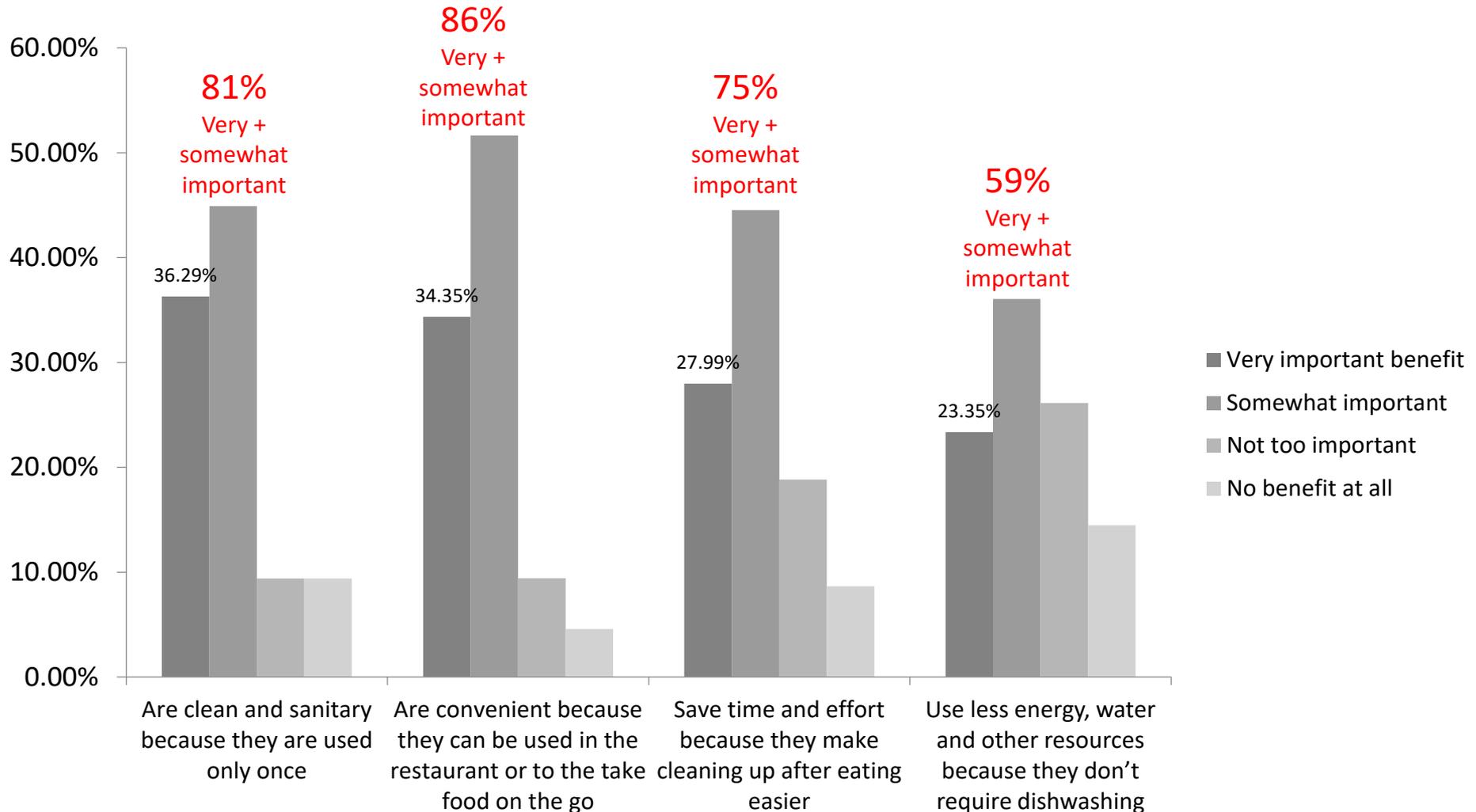
Using less resources for washing was least important in both countries, and most likely to be chosen as “no benefit at all”

Benefits of single-use item – U.S.



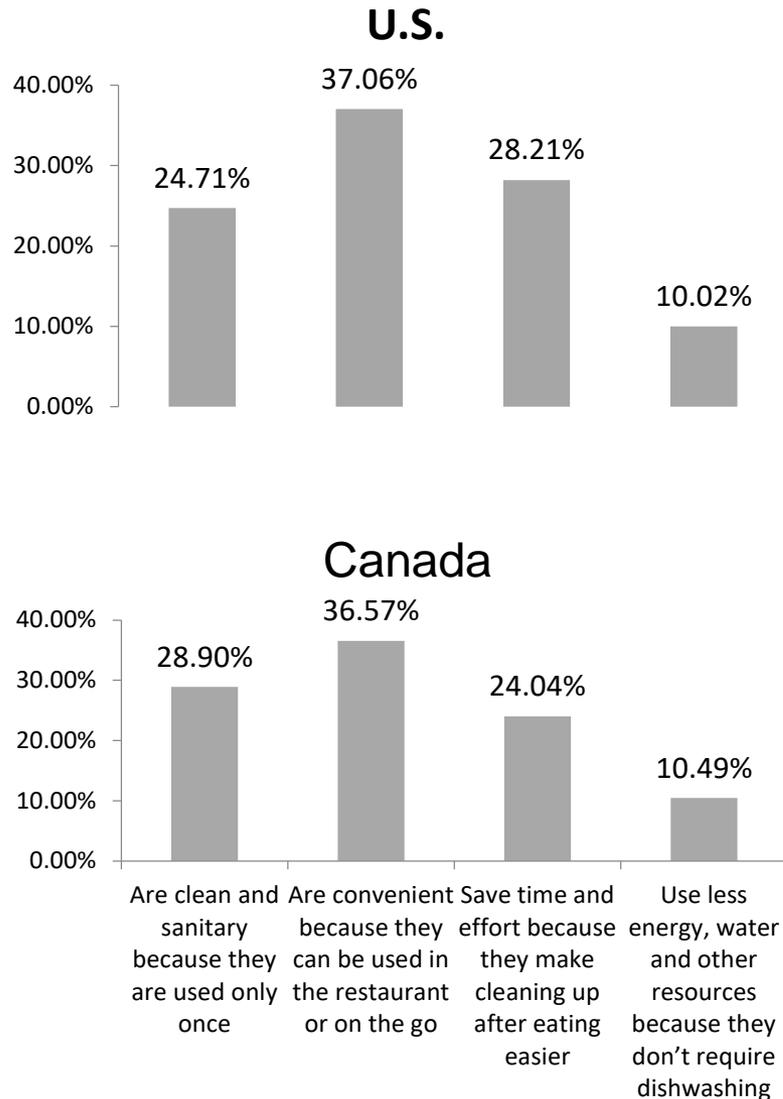
Question: Single-use items can have various performance attributes. For each attribute listed below, please indicate how important it is for single-use items to have.

Benefits of single-use items – Canada



Question: People have named a variety of benefits they associate with single-use items. Please indicate how important each benefit of single-use items is to you.

Most important benefit of single-use items



Convenience was rated as the most important benefit of single-use items in the U.S. and Canada

- 37% rated convenience as most important in U.S. and Canada

Clean and sanitary was second most important in Canada (29%)

Save time and effort by reducing clean up was second most important in U.S. (28%)

Concerns about single-use items

We asked about the importance of four potential concerns about single-use items:

- End up as litter on land and in waterways
- Can't always be recycled or composted
- Waste resources to make something only used once
- May not be safe due to chemicals used to make them

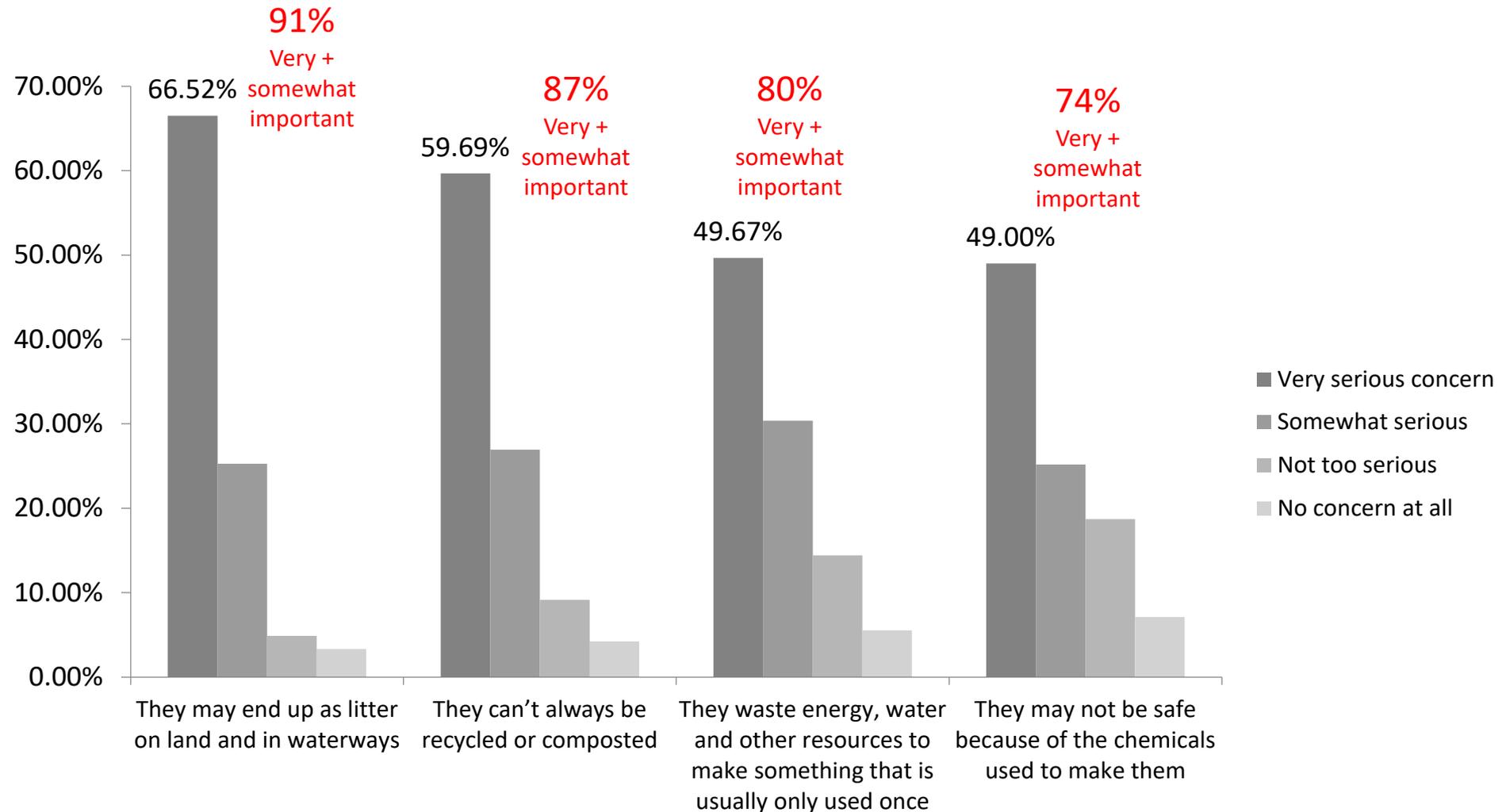
End up as litter was most important concern in the U.S. and Canada

- 67% in U.S. / 65% in Canada said ending up as litter was very important

Concerns were rated as more important than benefits

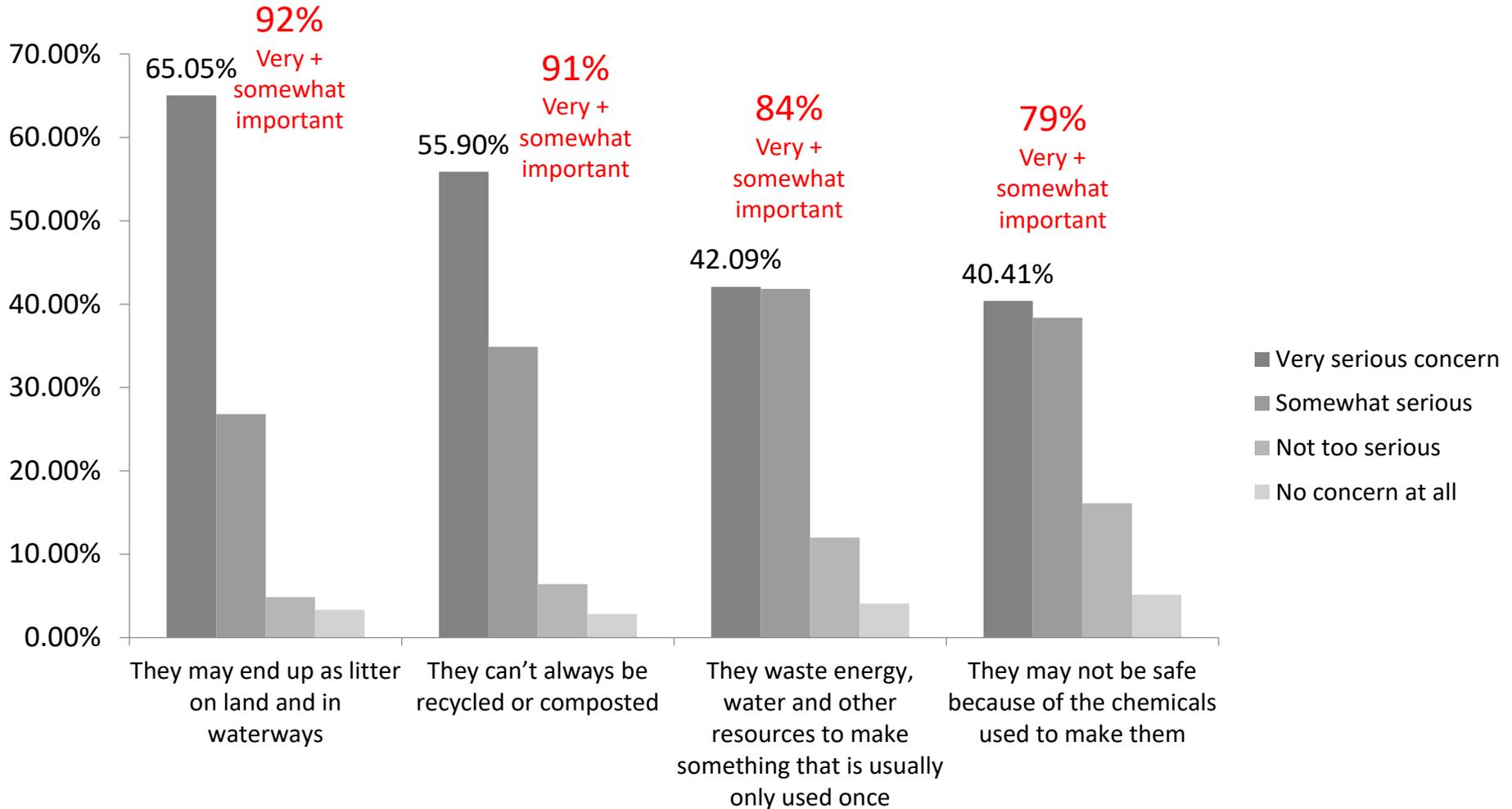
- 50-67% of respondents rated all concerns as very important in the U.S. (vs. 21-39% for benefits)
- 40-65% rated all concerns as very important in Canada (vs. 23-36% for benefits)

Concerns about single-use items – U.S.



Question: While there are benefits to single-use items, some people also have concerns about them. For each potential concern listed below, please indicate how significant a concern it is for you about single-use items.

Concerns about single-use items – Canada



Question: While there are benefits to single-use items, some people also have concerns about them. For each potential concern listed below, please indicate how significant a concern it is for you about single-use items.

Concerns about single-use items differences across respondents and time

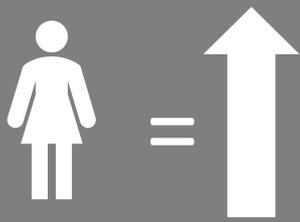
Demographics (U.S. only)



Concern about single-use not being recycled/composted and wasting resources



Concern about chemicals in single-use



Importance of all concerns

Frequency of use (U.S. only)

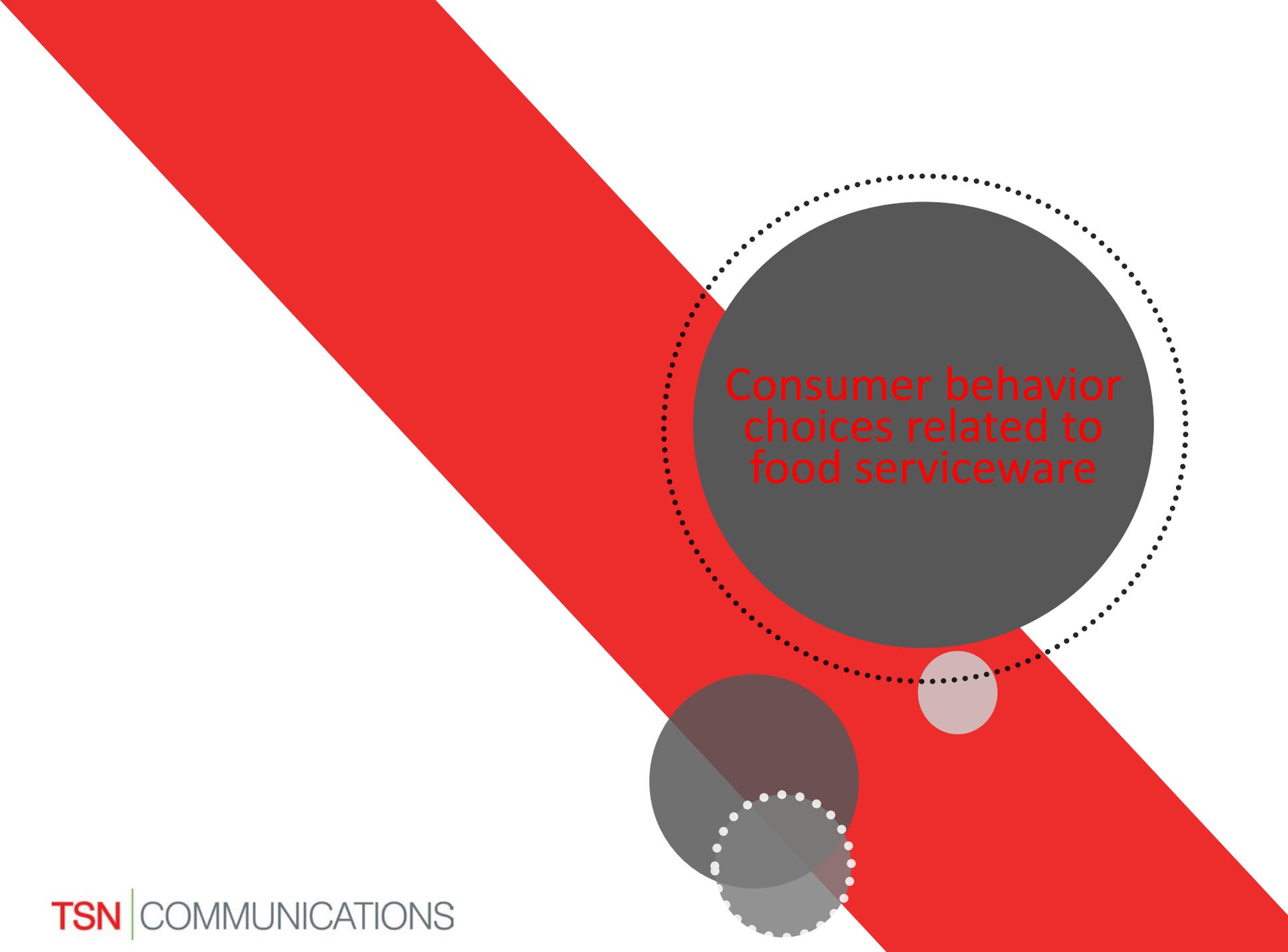


Concern about wasting resources

1992 vs. 2019 (U.S. only)

1992 = 2019

Ending up as litter an important concern



Consumer behavior
choices related to
food serviceware

Influence of food serviceware on dining decisions

We asked consumers if the kind of food serviceware a dining establishment uses influences their decisions to eat there

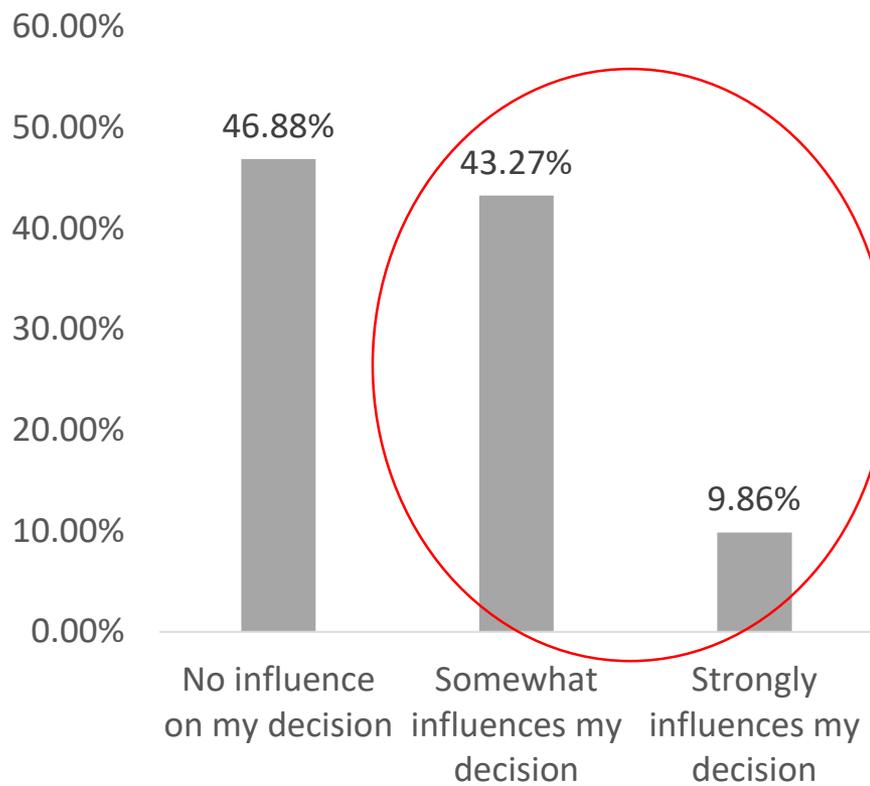
Provides preliminary insights into if/how availability of single-use vs. reusable food serviceware impacts consumers' decisions

More than 50% of respondents said the type of food serviceware DOES influence their decisions about where to eat (strongly + somewhat)

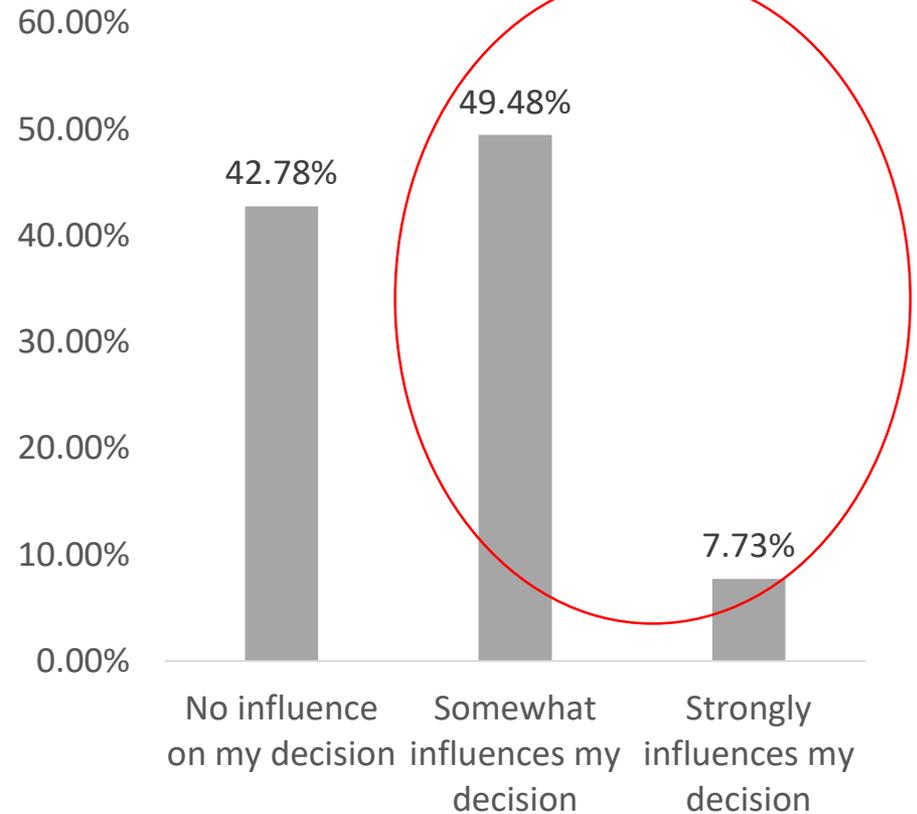
- Most said this somewhat influences their decisions
- Less than 10% in U.S. and Canada said this strongly influences decision

Influence of food serviceware on dining decisions

U.S.



Canada



Question: To what degree does the type of foodservice packaging items (single-use or reusable) a restaurant or other eating/drinking establishment uses influence your decision to buy food and beverages from them?

Willingness to bring own cup or container

We asked consumers if they would be willing to bring their own cup or container to take out beverages and food

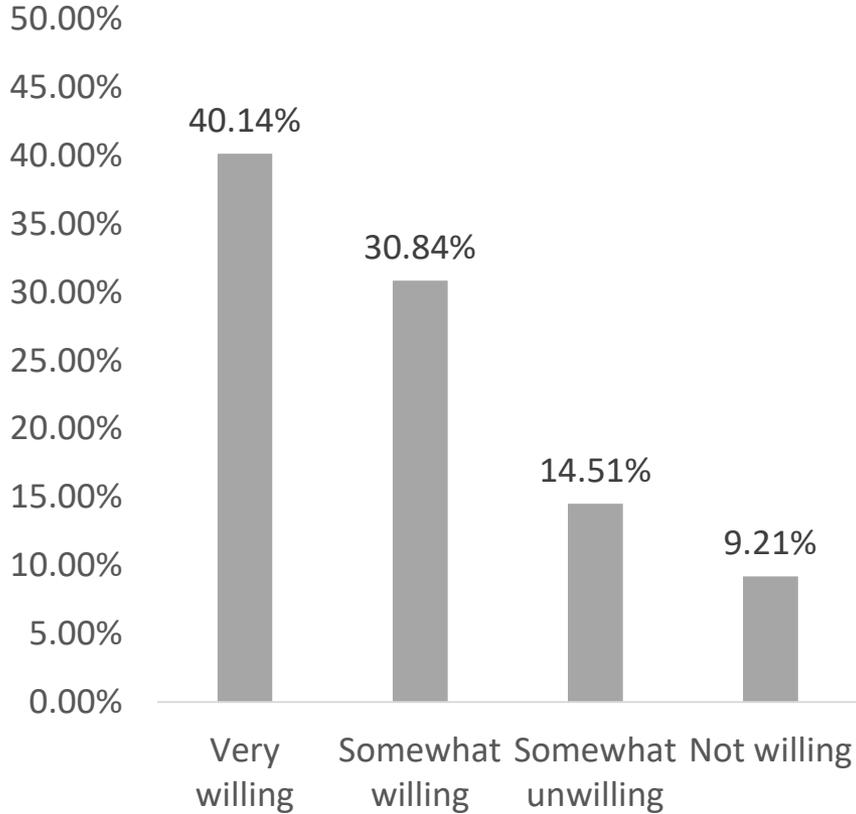
Provides preliminary insights into if consumers would spend extra effort to move away from single-use items

Over 70% of respondents in both countries said they would be willing to bring their own cup (very + somewhat willing)

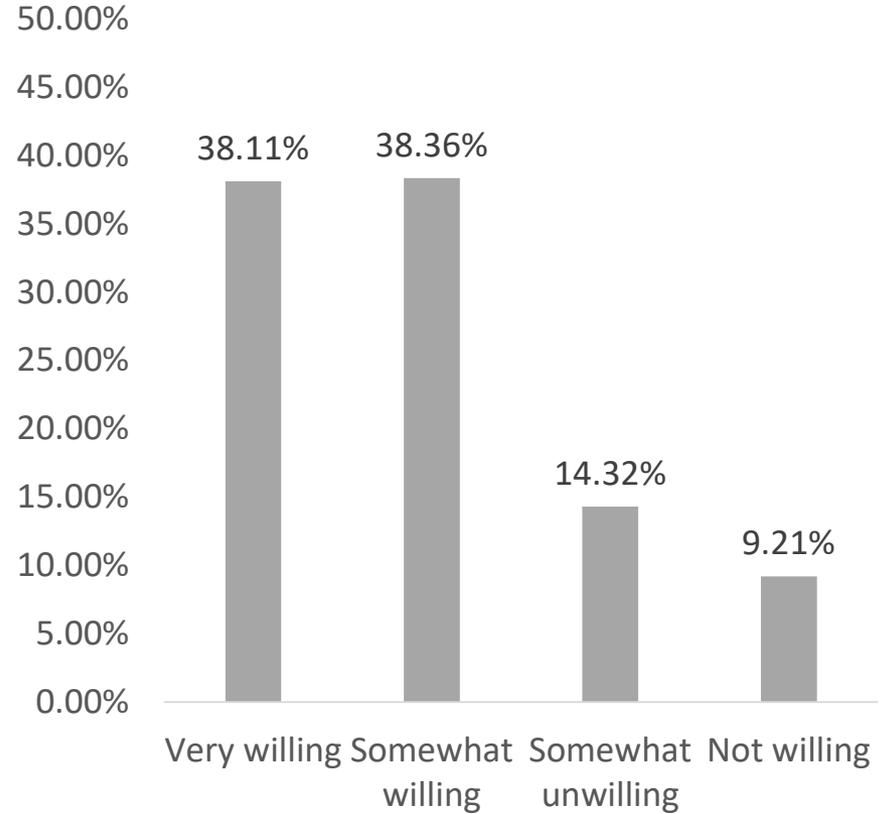
57% of U.S. respondents and 66% of Canadian respondents said they would be willing to bring their own container (very + somewhat willing)

Willingness to bring own cup

U.S.



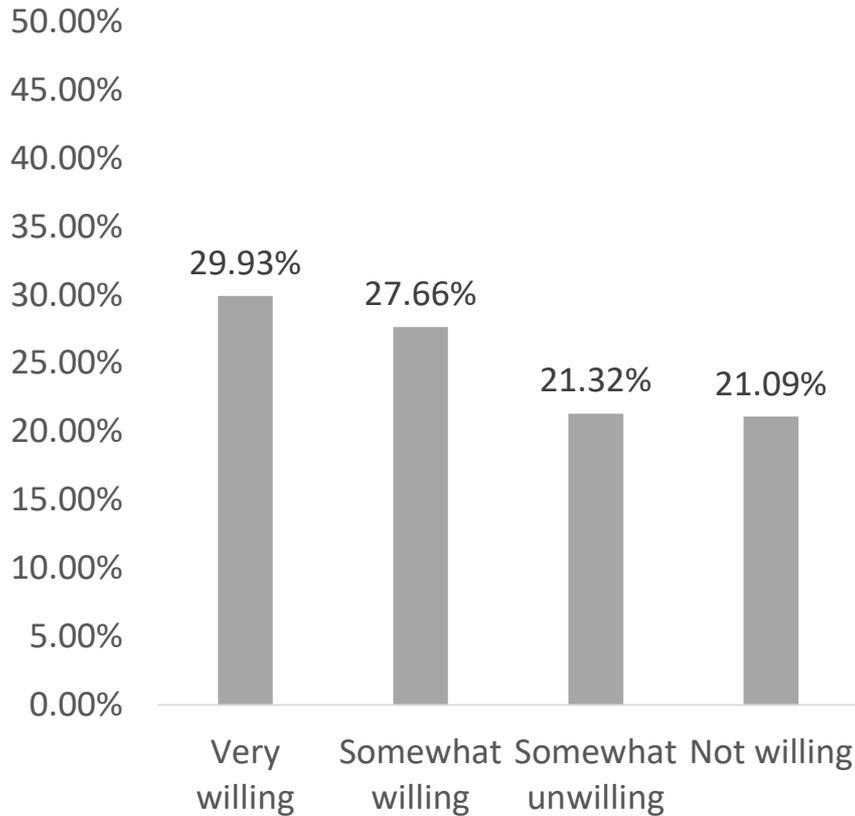
Canada



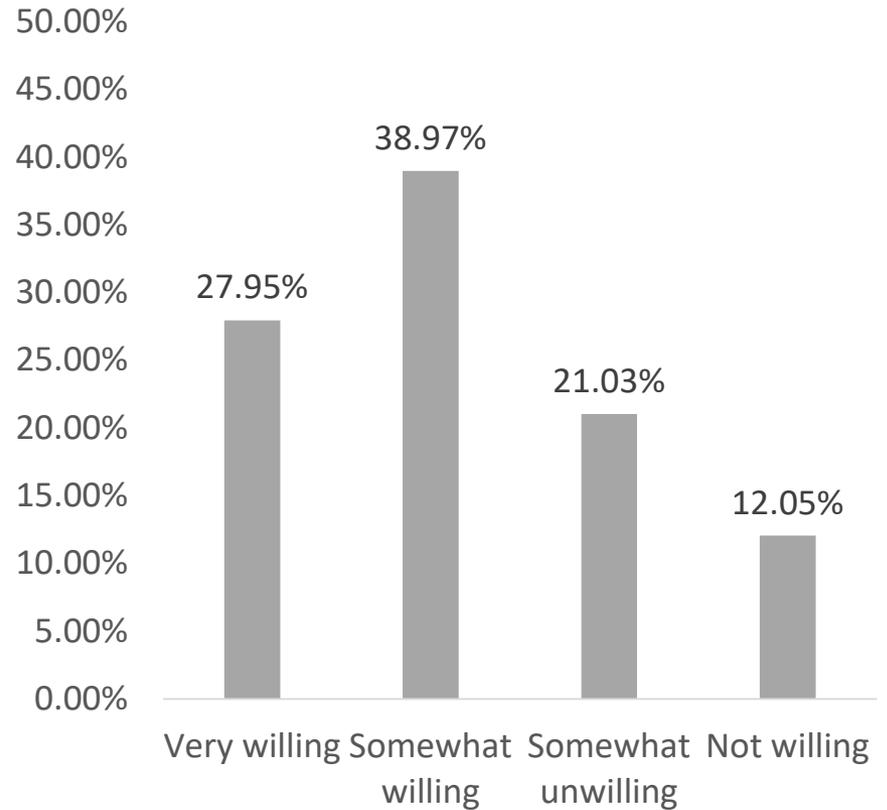
Question: How willing are you to provide your own cup when you want to take a beverage to go instead of the restaurant providing you with a single-use cup?

Willingness to bring own container

U.S.



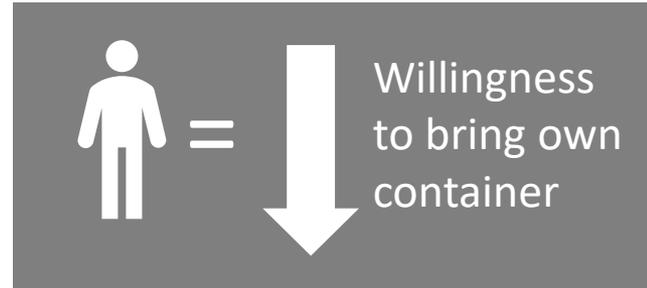
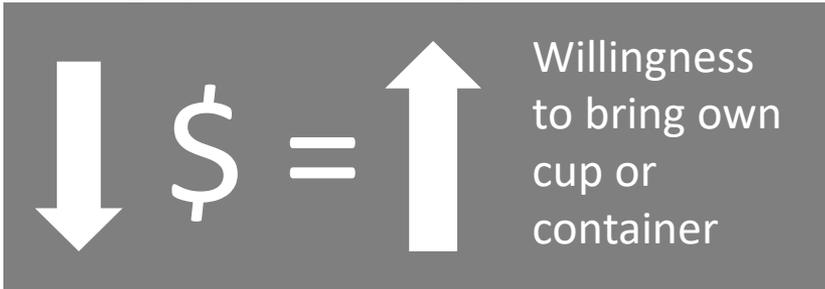
Canada



Question: How willing are you to provide your own container when you want to take food to go instead of a restaurant providing you with a single-use container?

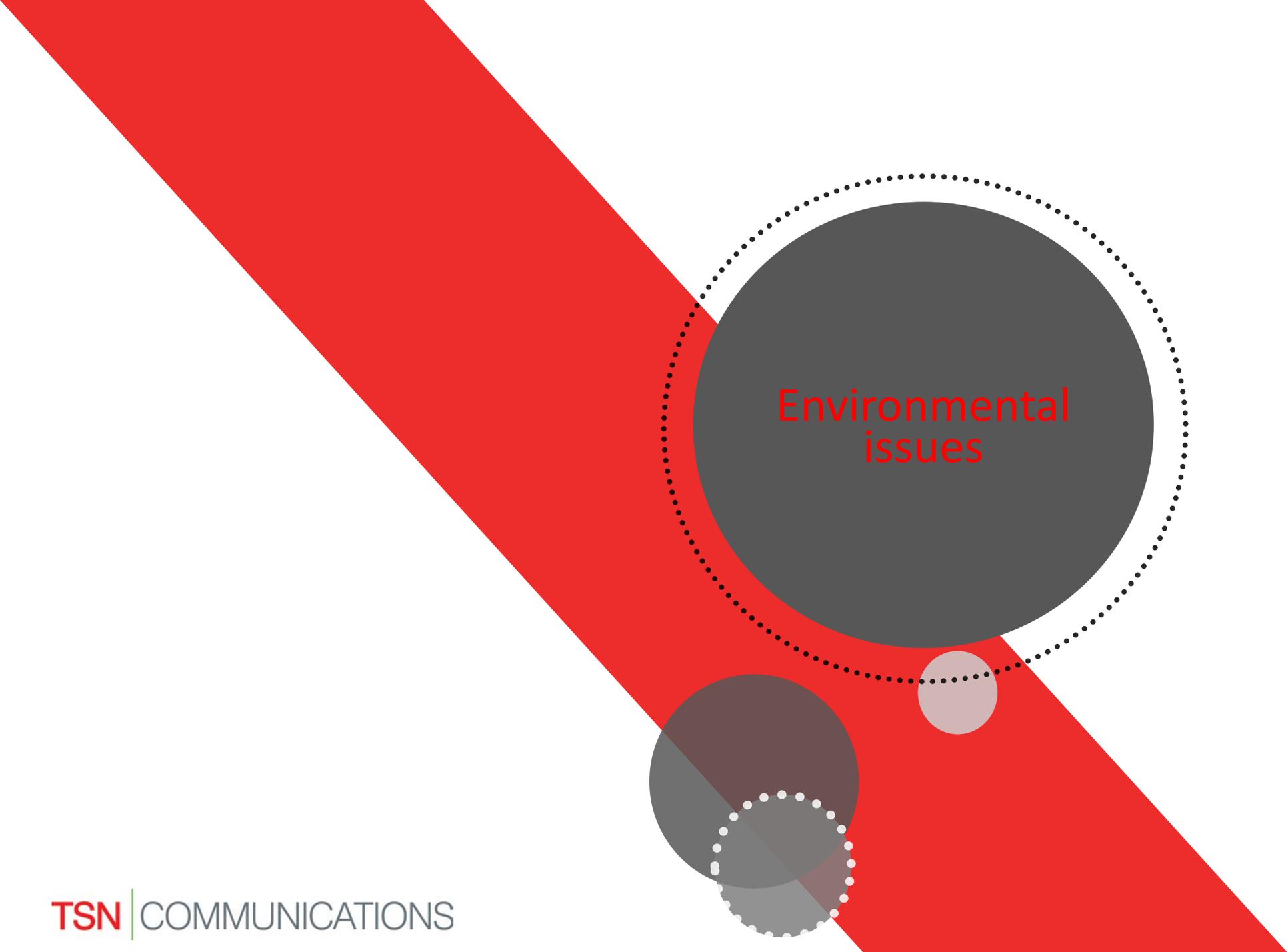
Willingness to bring own cup/container - differences across respondents

Demographics (U.S. only)



Frequency of use (U.S. only)





Environmental
issues

Environmental benefits and concerns, revisited

Negative environmental impacts of single use are high concerns

- 80-90% of respondents rated becoming litter, not always being recycled/composted, and wasting resources as important (very + somewhat)
- Open-ended responses on single use most important benefit almost all focused on environmental concerns about single-use

50-60% of respondents rate not using resources for washing as an important benefit (very + somewhat), though it's the least important benefit

Reusables “environmental attributes” are their most important benefit

- 54% (Canada) and 56% (U.S.) of respondents rated environmental attributes as very important

Importance of single-use environmental attributes

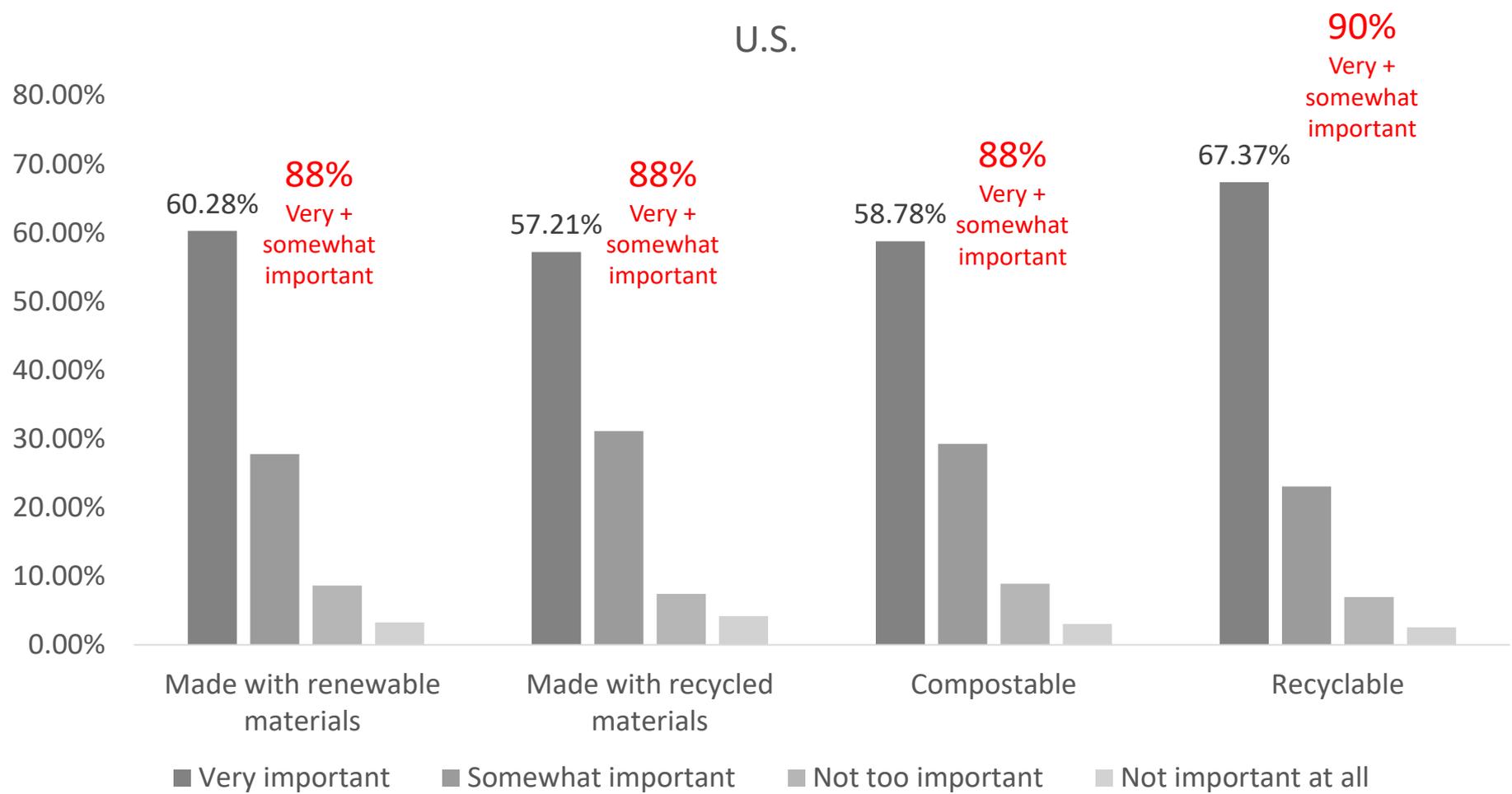
We asked consumers to rate the importance of four environmental attributes single-use items can have:

- Made with renewable materials (paper, plant-based)
- Made with recycled materials
- Compostable
- Recyclable

About 60-70% of respondents said all of environmental materials attributes were very important in both countries

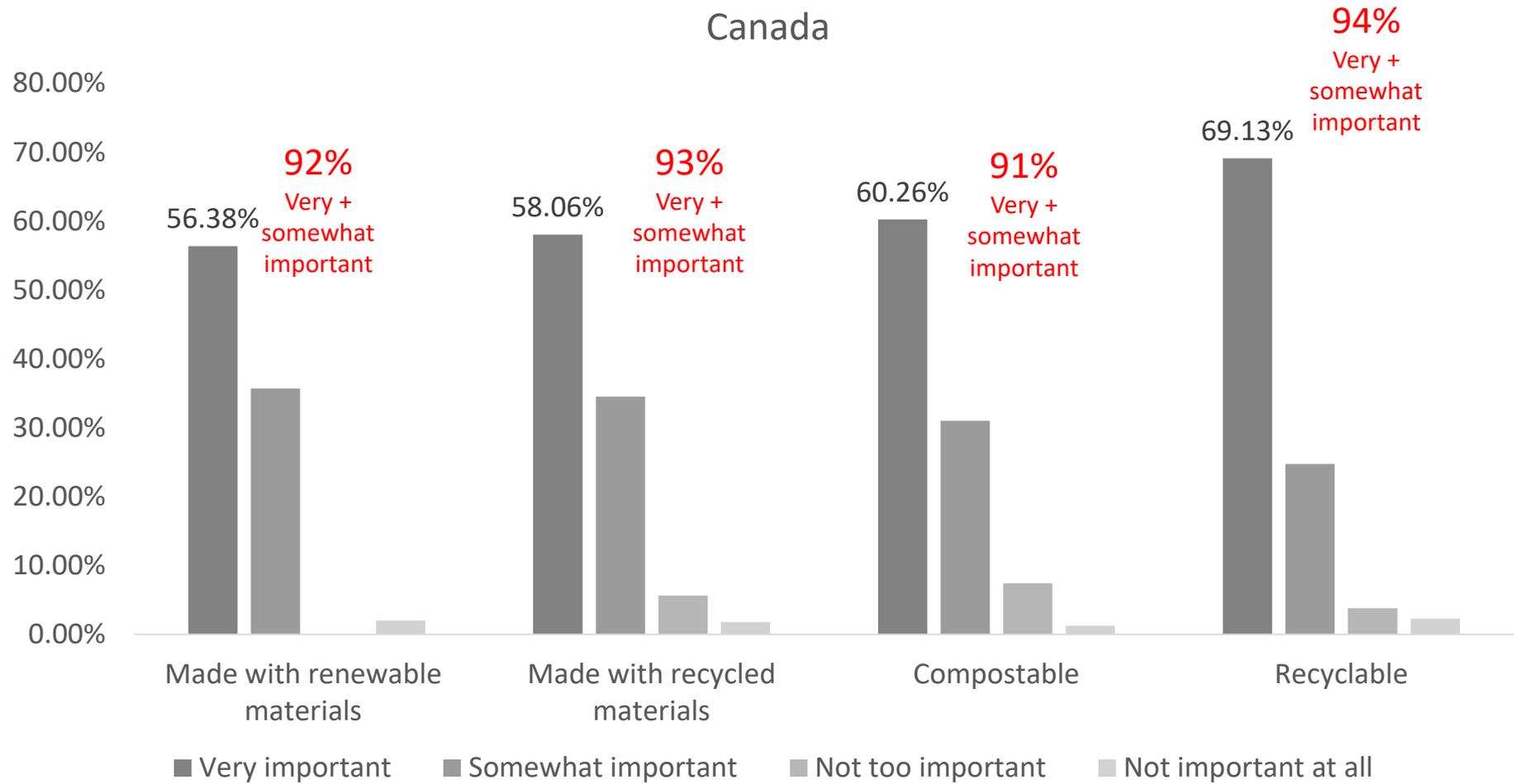
End of life environmental attributes (compostable and recyclable) were rated as a little more important in both countries, particularly recyclable

Importance of single-use environmental attributes – U.S.



Question: Single-use items can have various environmental attributes. For each attribute listed below, please indicate how important it is for single-use items to have.

Importance of single-use environmental attributes – Canada



Question: Single-use items can have various environmental attributes. For each attribute listed below, please indicate how important it is for single-use items to have.

Consumer behavior, revisited

Type of food serviceware influences consumer food purchasing behavior

- Just over 50% of respondents said food serviceware influences their decisions on where to purchase food/beverages

A majority of respondents claim they would be willing to bring their own cup or container to take food away

- Over 70% of respondents in both countries willing their own cup (very + somewhat willing)
- 57% (U.S.) and 66% (Canada) respondents willing to bring their own container (very + somewhat willing)

Willingness to pay for environmental attributes

We asked consumers if they would be willing to pay more for single-use items that had environmental materials and end-of-life attributes including:

- Made with renewable materials (paper, plant-based)
- Made with recycled materials
- Compostable
- Recyclable

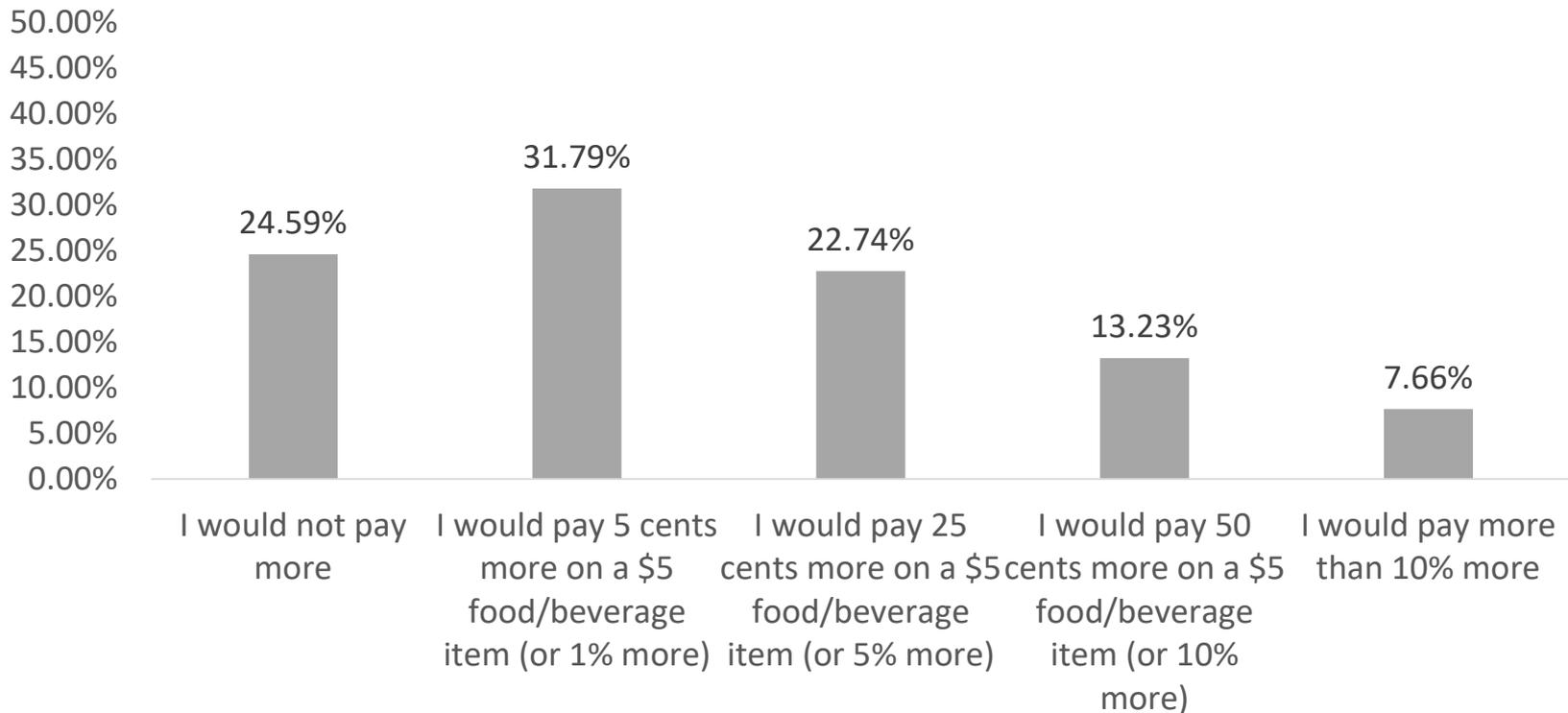
70-75% of respondents are willing to pay more for single-use items with these environmental attributes (both countries)

- In the U.S., 54% would pay 1-5% more
- In Canada, 63% would pay 1-5% more

Only 25-30% said they would not pay more for single-use items with these environmental attributes.

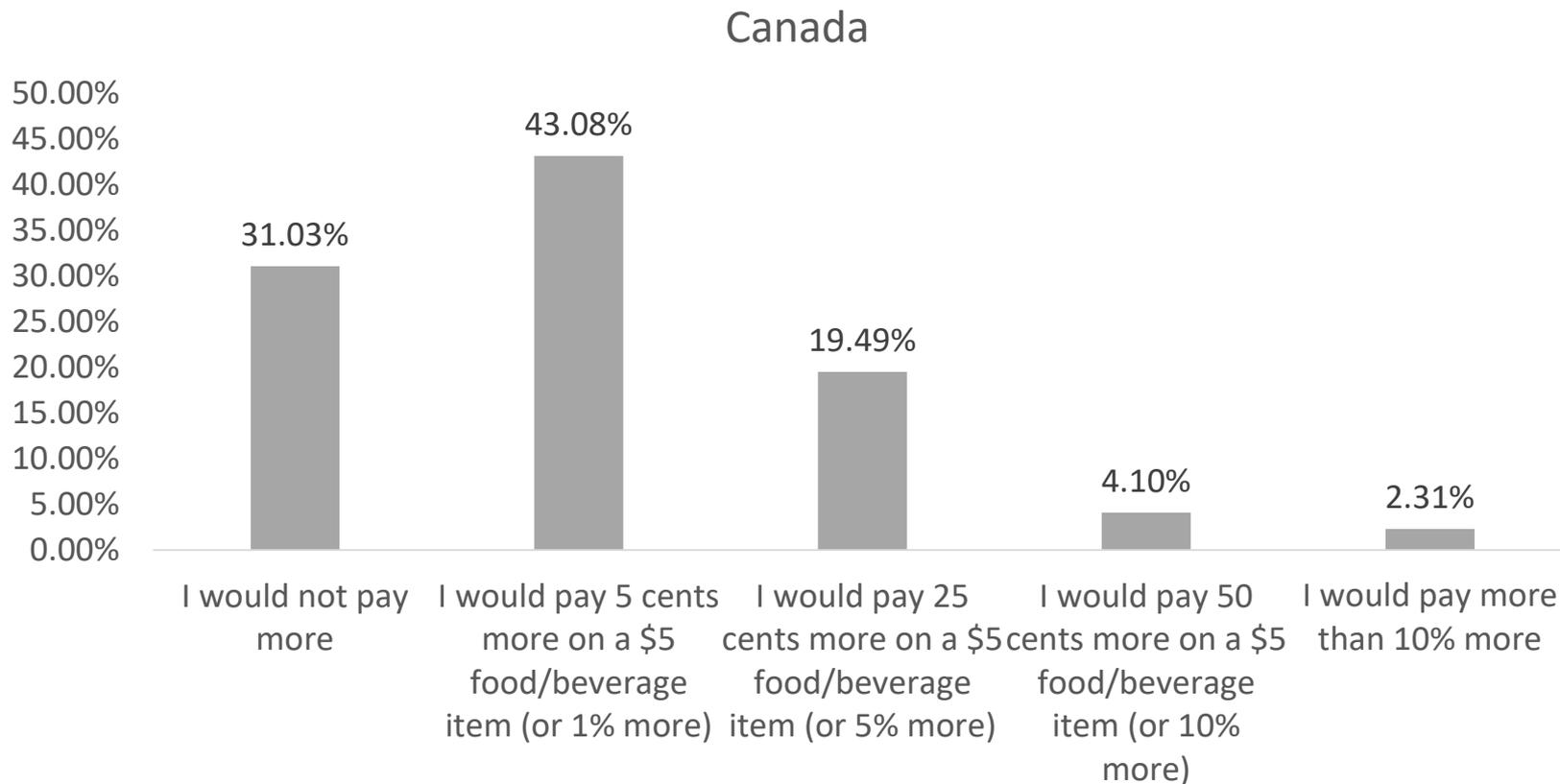
Willingness to pay for environmental attributes

U.S.



Question: If a single-use item had the environmental attributes that you find important (for example, made from renewable or recycled materials, recyclable or compostable) how much more would you be willing to pay for that food or beverage?

Willingness to pay for environmental attributes



Question: If a single-use item had the environmental attributes that you find important (for example, made from renewable or recycled materials, recyclable or compostable) how much more would you be willing to pay for that food or beverage?

Willingness to pay for single-use environmental attributes - differences across respondents

Frequency of use (U.S. only)



Willingness to pay more for environmentally friendly single-use, at least up to 5% more

Responsibility for recycling / composting

We asked consumers who they think is responsible for ensuring single-use food serviceware is recycled and composted. They ranked the following players based on their level of responsibility:

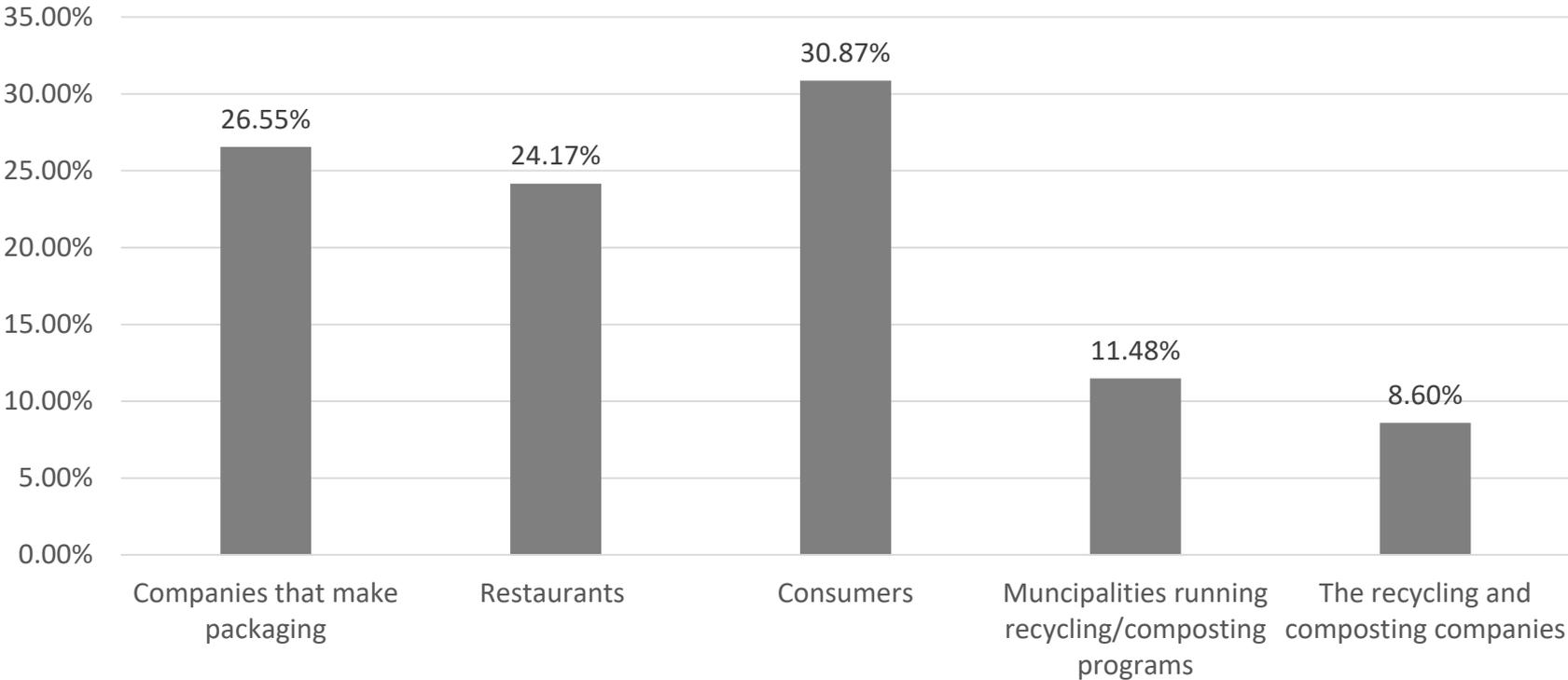
- The companies that make the packaging, together with their suppliers
- The restaurants and other establishments that use the packaging to serve their foods and beverages
- The consumers who buy these prepared foods and beverages
- The municipalities that run recycling/composting programs
- The recycling and composting companies

Packaging manufacturers, restaurants and consumers were ranked as having the most responsibility

- In the U.S., consumers were ranked as most responsible by the largest percentage of respondents (30%)
- In Canada, packaging manufacturers were ranked as most responsible by the largest percentage of respondents (29%)

Responsibility for recycling / composting

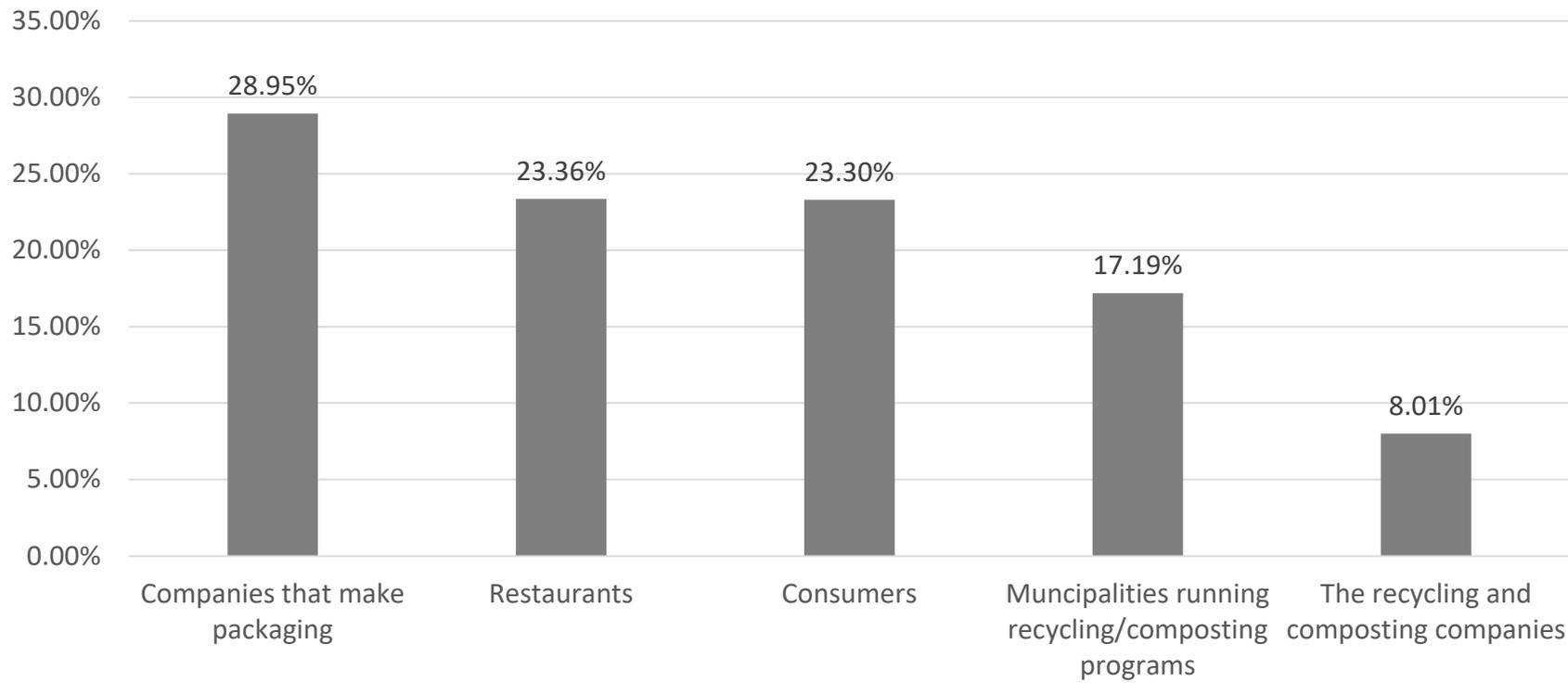
Most responsible for recycling/composting – U.S.



Question: Making sure that single-use items are recycled or composted is a shared responsibility, but perhaps not equally shared. Please rank the following stakeholders in order of how much responsibility they should have in ensuring single-use items are recycled or composted (with 1 indicating the most responsibility and 5 indicating the least responsibility).

Responsibility for recycling / composting

Most responsible for recycling/composting – Canada



Question: Making sure that single-use items are recycled or composted is a shared responsibility, but perhaps not equally shared. Please rank the following stakeholders in order of how much responsibility they should have in ensuring single-use items are recycled or composted (with 1 indicating the most responsibility and 5 indicating the least responsibility).

Key takeaways

High levels of use

- 50%+ of people use single-use food serviceware once a week or more

Preferred single-use performance attributes

- Leak/spill proof and stopping grease stains are most important attributes

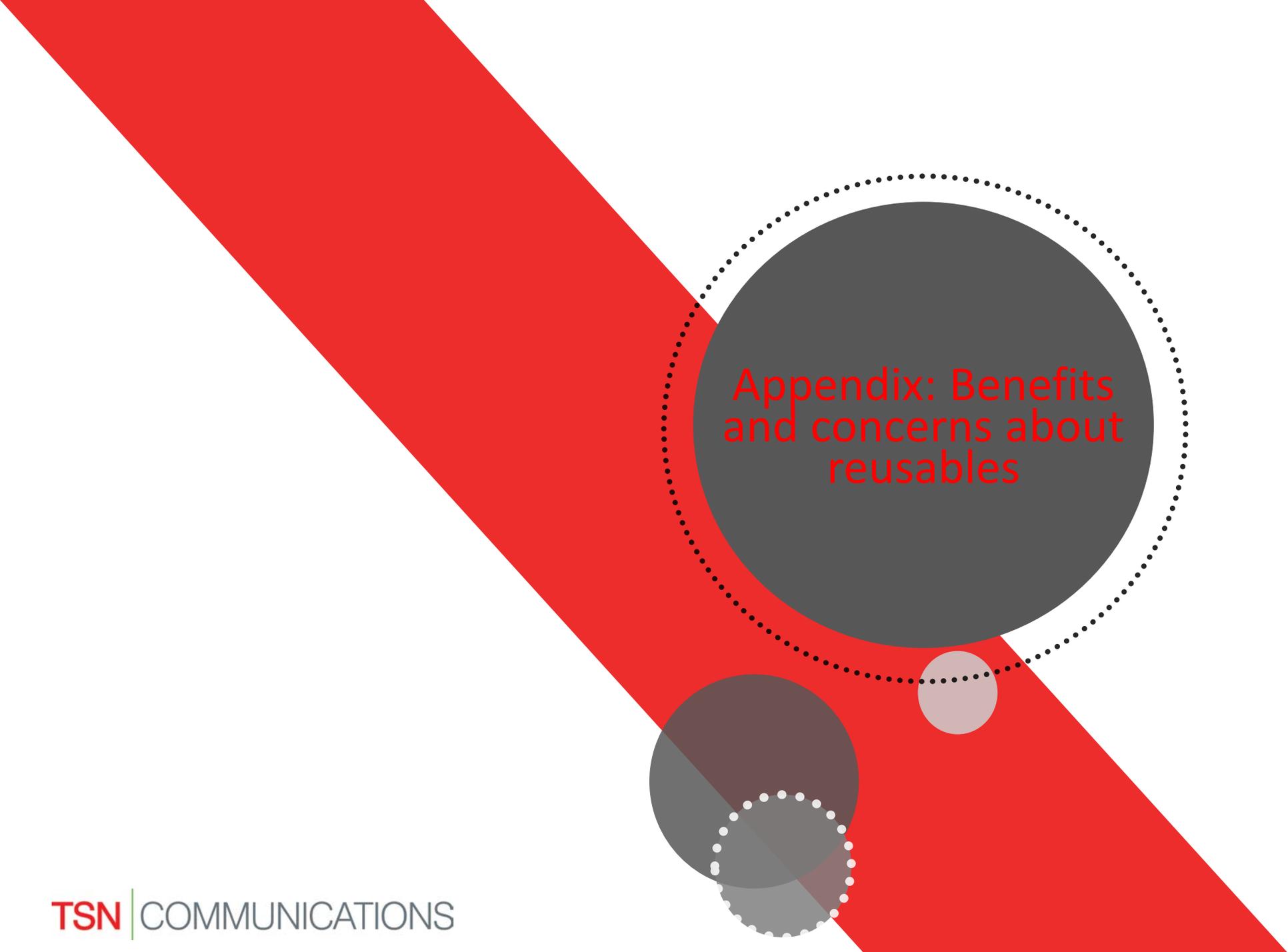
Consumer perceptions about single-use items

- Convenience and clean/sanitary are most important benefits of single-use items
- Environmental concerns about single-use items are very important
- Consumers want single-use items to be more environmentally friendly, especially recyclable
- Consumers view packaging manufacturers and restaurants as highly responsible for ensuring recycling and composting occurs

Consumer behavior choices related to food serviceware

A majority of people ...

- say their choices about where to purchase food are influenced by type of food serviceware
- claim they are willing to bring their own cup or container to take beverages and food to go
- Claim they will pay more for single-use items with environmental attributes (renewable/recycled materials and recyclable/compostable)



Appendix: Benefits and concerns about reusables

Benefits of reusable items

We asked about the importance of three possible benefits of reusable items:

- Sturdiness
- Better dining experience
- Environmental attributes

Could provide insights on ways to improve single-use items to mirror important benefits:

- Make single-use more sturdy
- Make single-use more environmentally friendly

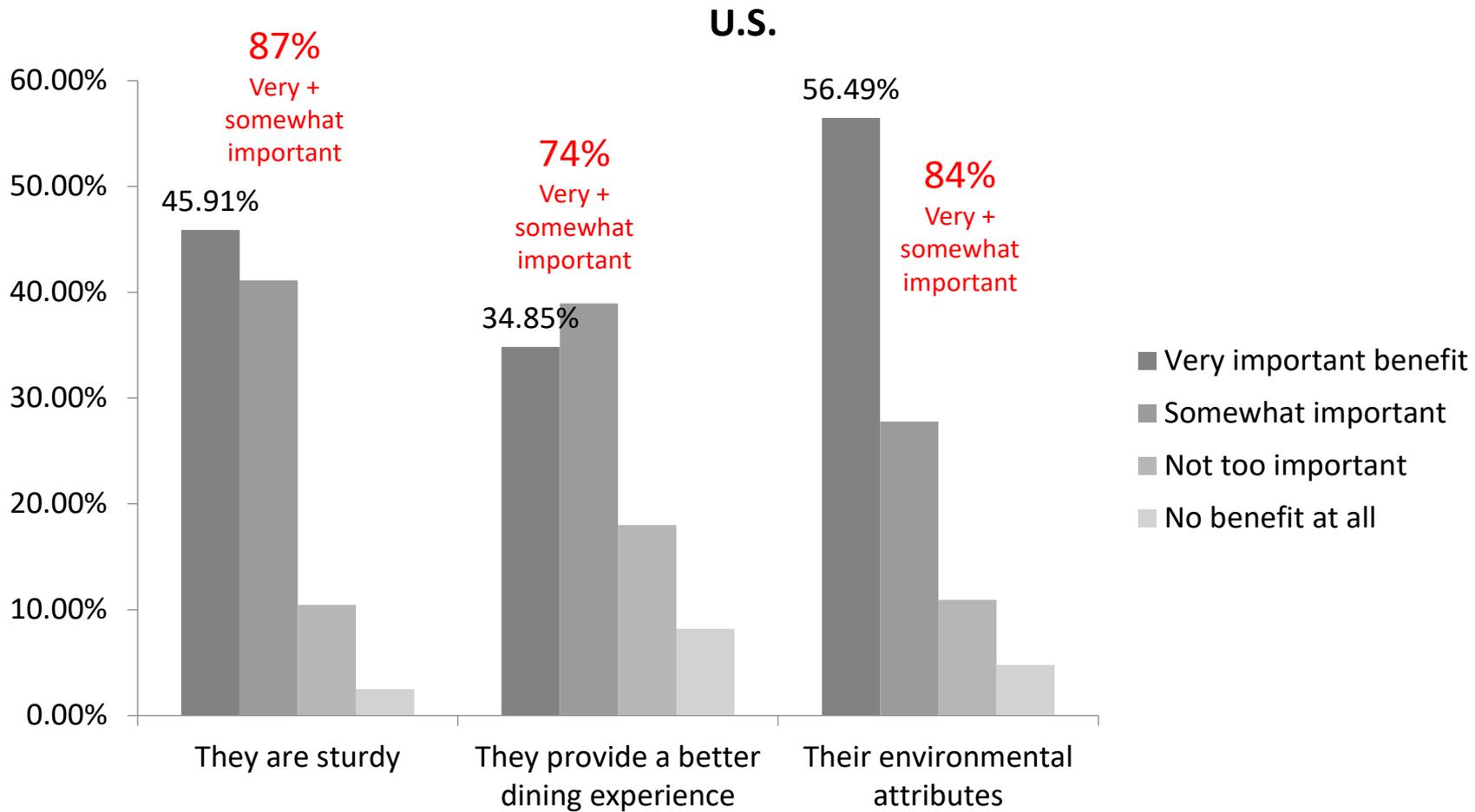
Environmental attributes was rated as very important by largest percent of respondents

- 56% in U.S. and 54% in Canada said environmental benefits were very important

But, sturdiness was rated as important (very + somewhat) by a larger percent in the U.S.

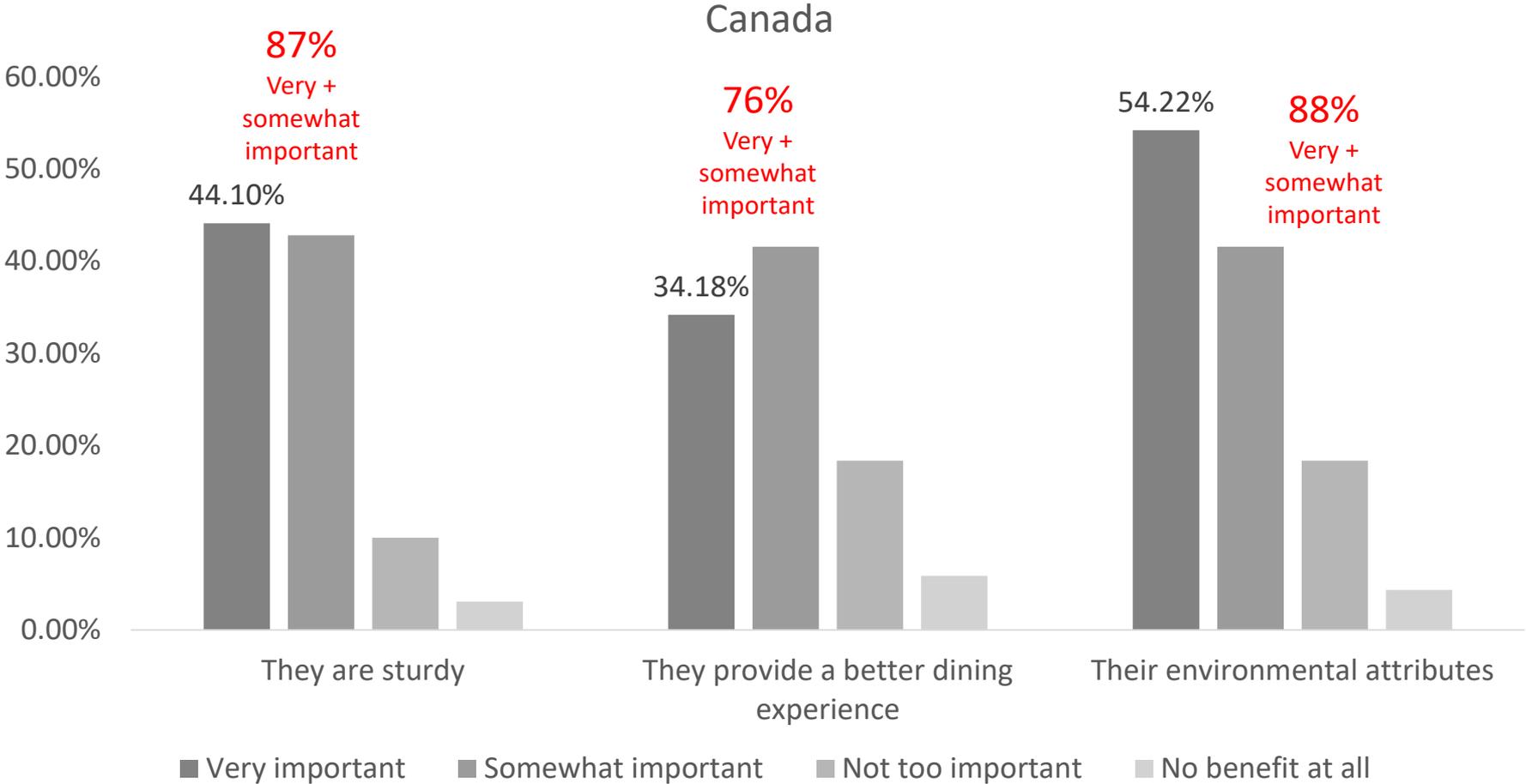
- 87% rated sturdy as important
- 84% rated environmental benefits as important

Benefits of reusable items – U.S.



Question: People have named a variety of benefits they associate with reusable items (like mugs, glasses, plates, silverware, etc.) that are provided by restaurants. Please indicate how important each benefit of reusable items is to you.

Benefits of reusable items – Canada



Question: People have named a variety of benefits they associate with reusable items (like mugs, glasses, plates, silverware, etc.) that are provided by restaurants. Please indicate how important each benefit of reusable items is to you.

Concerns about reusable items

We asked the importance of three potential concerns about reusable items:

- Not clean and sanitary
- Not convenient, can't take food/drinks to go
- Use resources to clean them

Could be used in messaging supporting single-use products

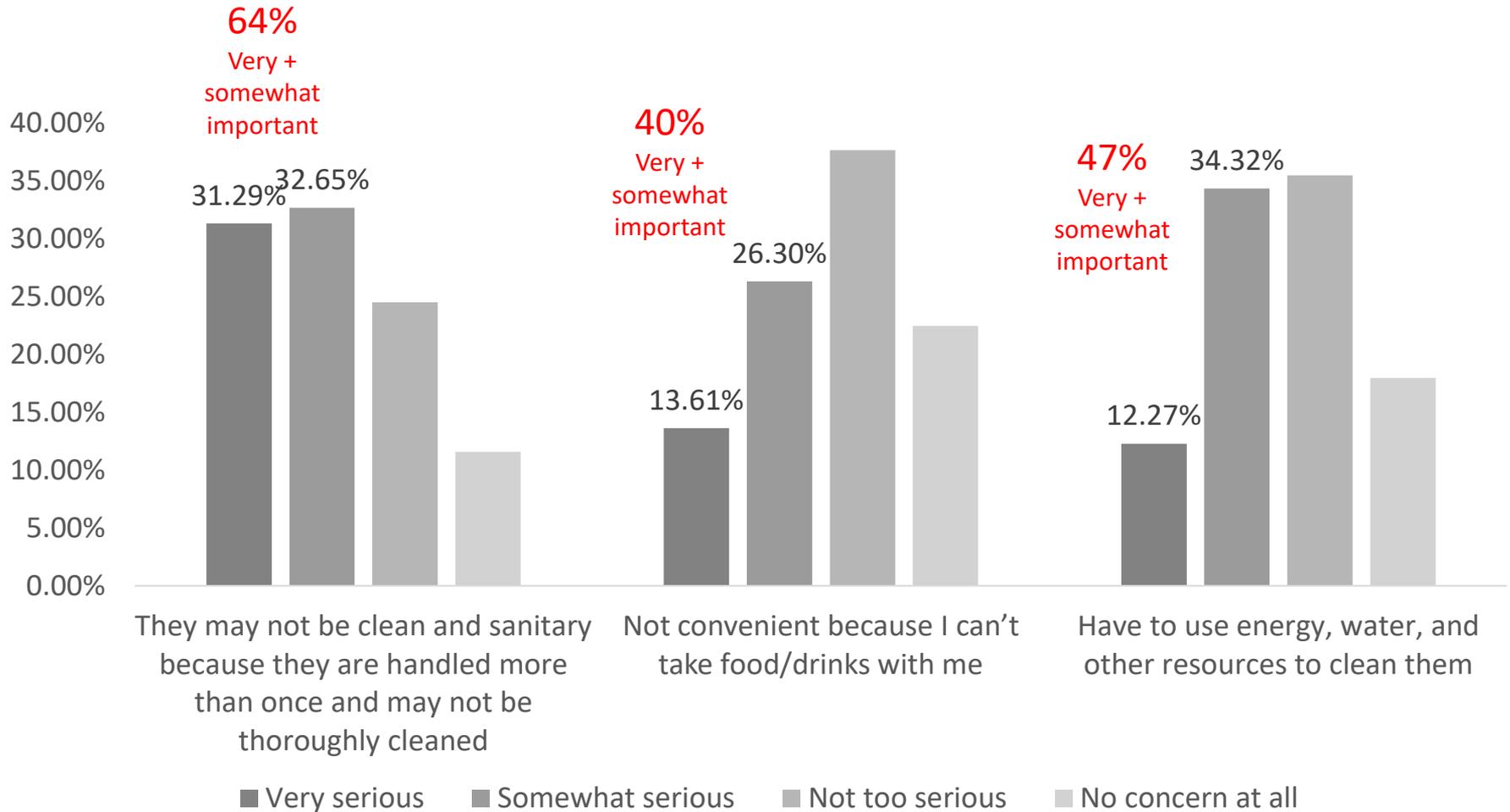
- Cleaner/more sanitary because only used once
- More convenient

Levels of concern about reusables was much lower than for single-use items

- In the U.S., only 12-30% of respondents rated any concern as very important (vs. 50-67% for single use)
- In Canada, only 12-25% rated any concern as very important (vs. 40-65% for single-use)

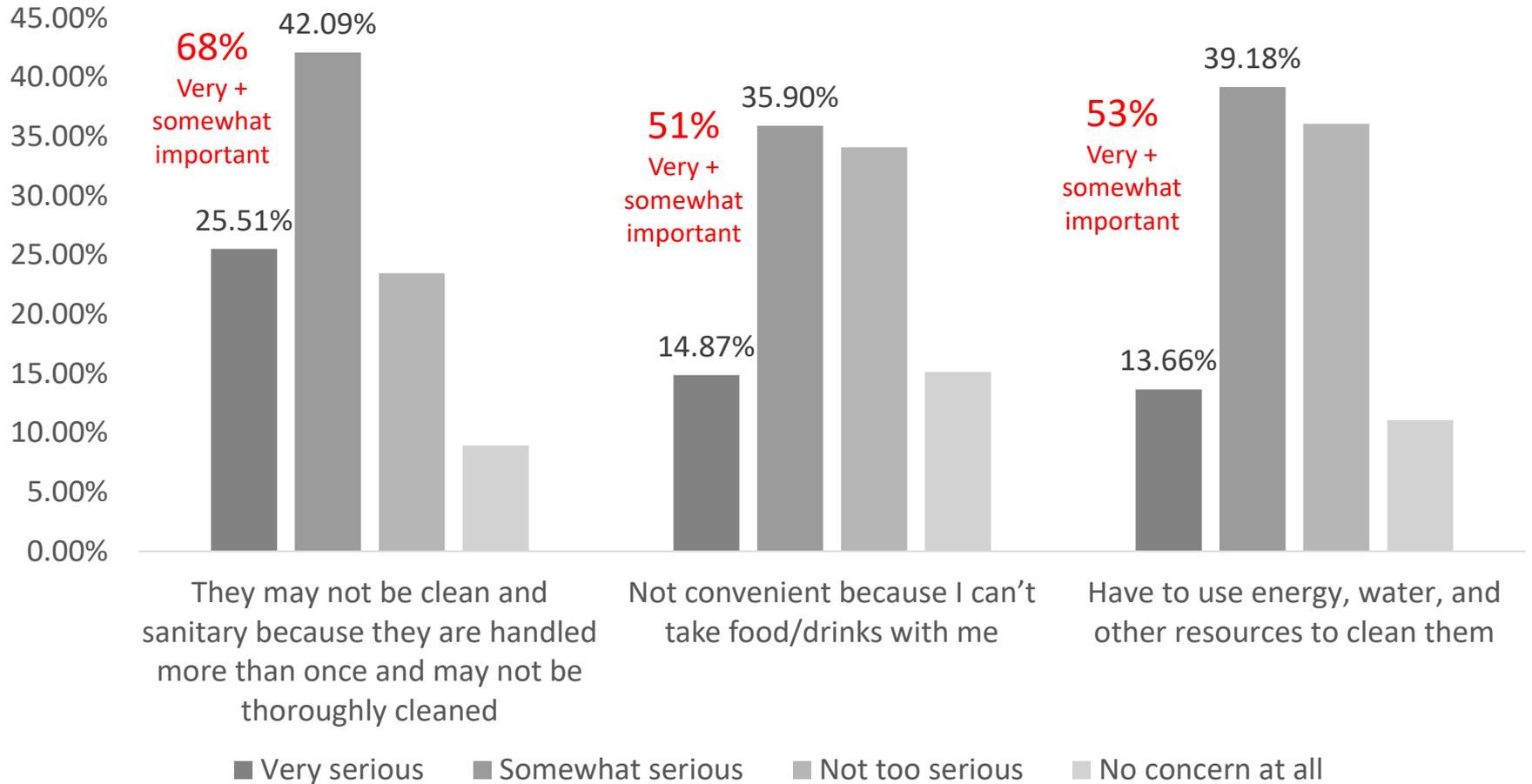
Concerns about reusables being clean and sanitary were by far the most important

Concerns about reusable items – U.S.



Question: Some people also have concerns about reusable items that are provided by restaurants. For each potential concern listed below, please indicate how significant a concern it is for you about reusable items.

Concerns about reusable items – Canada



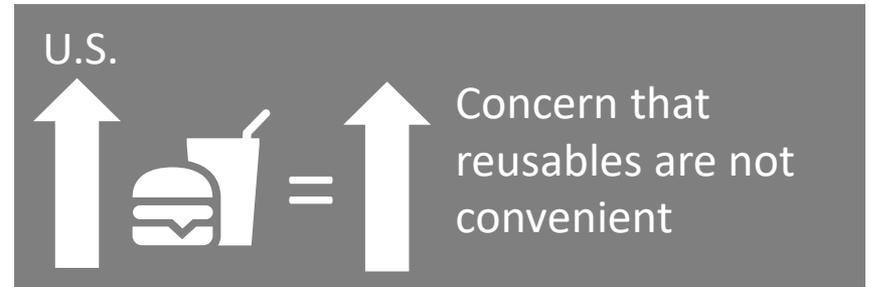
Question: Some people also have concerns about reusable items that are provided by restaurants. For each potential concern listed below, please indicate how significant a concern it is for you about reusable items.

Concerns about reusable items - differences across respondents and time

Demographics (U.S. only)



Frequency of use



1992 vs. 2019 (U.S. only)

