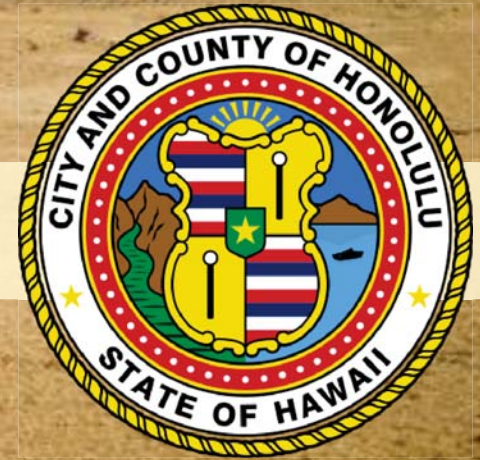


Polystyrene Ban Impact Study: Resident Segment



Prepared for:
Office of the City Auditor: Project #5629
November 2018



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Background, Objectives and Methodology

The Office of the City Auditor requested a comprehensive study with a random sample of residents of the City and County of Honolulu for the purpose of gathering insight concerning City Council Resolution 18-35, CD1.

The overall objective of the research is to obtain opinions about the financial and non-financial impact of a proposed island-wide ban on single-use plastic bags and single-use food service containers.

OmniTrak conducted the survey using an online methodology. Respondents were recruited from a professionally managed online consumer research panel, and all were screened as:

- 18 years of age or older
- Resident of the City and County of Honolulu for at least 6-months
- Has no one in their household who works for a research company or media/advertising/public relations agency

Key Takeaways: What's the Big Idea?

- 1 Residents are concerned about pollution, but those concerns do not affect their buying patterns. Respondents (69%) were concerned about takeout container materials ending up as marine pollution due to improper disposal, with 34% very concerned about this issue (9-10 rating). But, 68% of respondents also stated the material in a takeout container never impacts their decision to patronize a restaurant, with only 6% saying it always impacts their decision, and eco-friendly was one of the least important container attributes to respondents.
- 2 Consumers seem to be sensitive to the perception of price when it comes to their support of the Polystyrene Ban Bill, but the price increase associated with a bill ban would not impact consumer behaviors. While about two thirds (65%) of respondents stated that they would support a Bill that banned the use of single-use polystyrene food containers, their support fell to 58% when they were informed that the Bill might increase prices. However, respondents stated that on average it would take a price increase of \$6.62 for them to question whether or not they would support the Polystyrene Ban Bill. With local businesses saying that it would cost at most 60¢ per unit to transition, which is less than \$6.62, consumer behavior would likely not be impacted even though the cost of transitioning to compostable containers would probably be passed on to consumers.



Key Takeaways: What's the Big Idea?

- 3 Consumers are open to more eco-friendly materials in their food containers. Almost half (47%) of respondents listed alternative materials such as recycled, plant-based and compostable as an acceptable alternative for “take-out” containers if the polystyrene ban was passed. The next most cited material was paper/cardboard (33%) followed by plastic (12%). This suggests that if polystyrene food containers were banned, consumers would prefer a more natural and environmental friendly container.

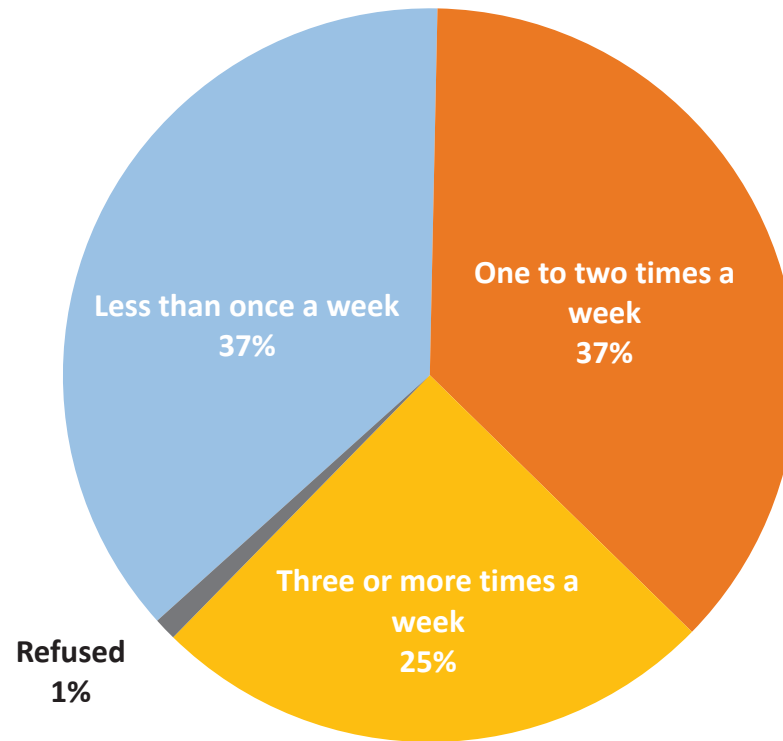




Resident: Key Insights

Frequency of “Take-Out” Meals

A majority (62%) of respondents eat “take-out” meals at least once a week, while a quarter of respondents (25%) eat them three or more times a week. Older respondents (55+) are statistically less likely to eat “take-out” meals.

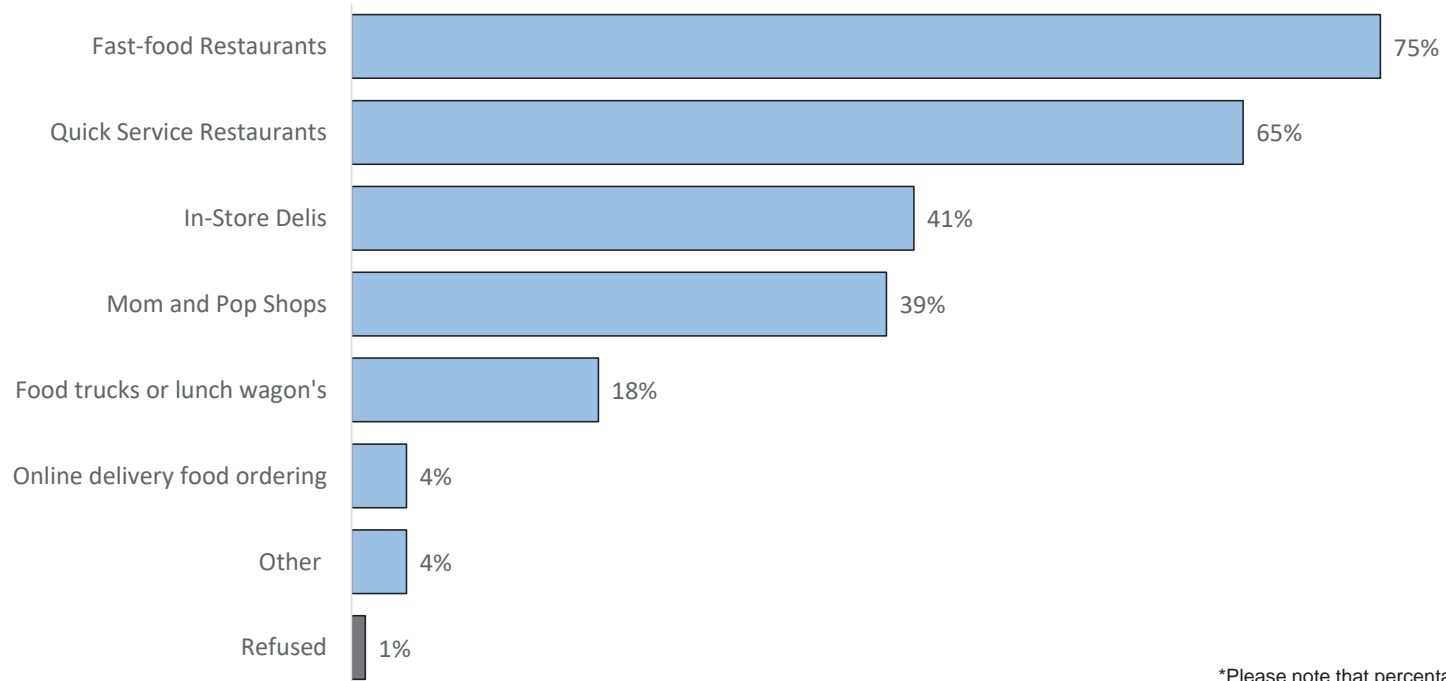


Base: 400



Popular “Take-Out” Restaurants

Fast-food (McDonald's, Subway, Taco Bell, Popeye's, etc.) and quick service restaurants (Zippy's, L&L, Rainbow Drive-in, etc.) are by far the most popular “take-out” places with residents.

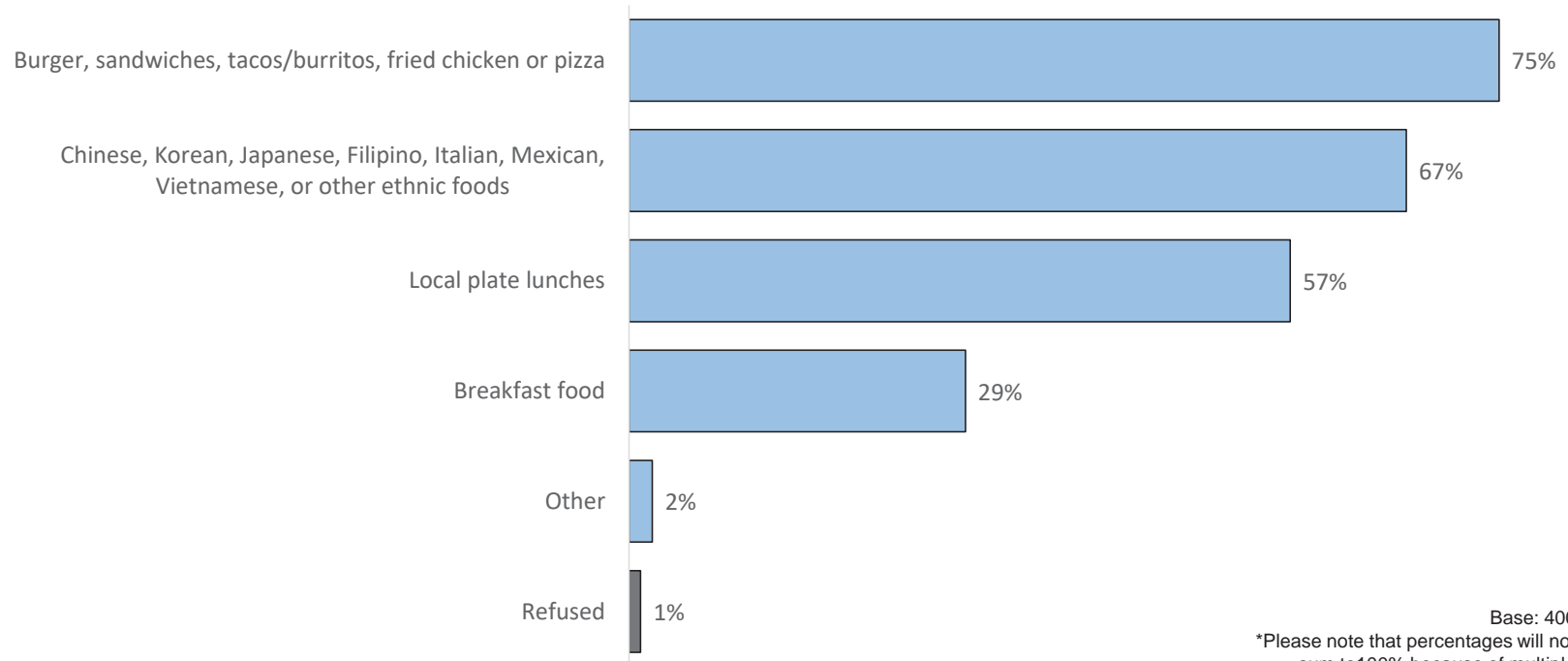


Base: 400
*Please note that percentages will not sum to 100% because of multiple responses are allowed.



Favorite Types of “Take-Out”

Consistent with the popularity of fast-food and quick service restaurants; fast-food options like burgers, sandwiches, tacos, fried chicken and pizza are the most popular “take-out” foods. Ethnic foods like Chinese and Korean are the second most popular followed by local style plate lunches.

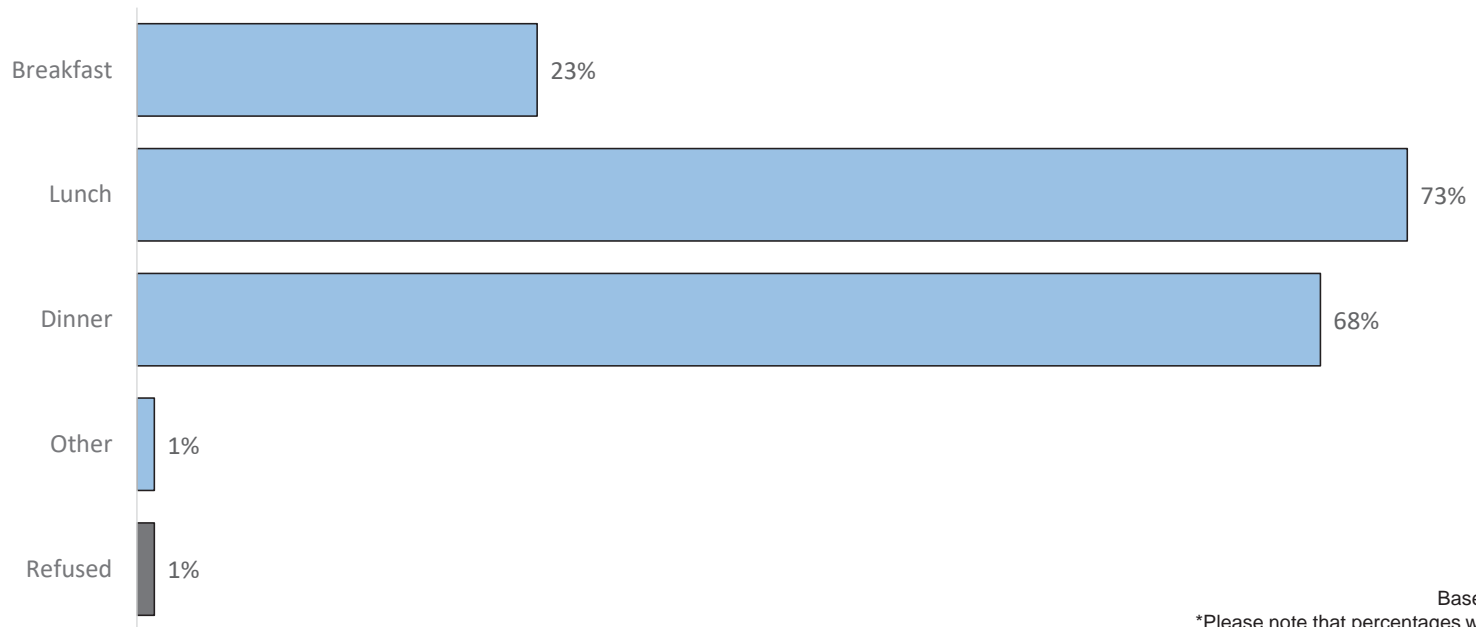


Base: 400
*Please note that percentages will not sum to 100% because of multiple responses are allowed.



“Take-Out” Meal Occasion

Lunch is the most popular occasion for “take-out” meals with almost three-quarters (73%) of respondents picking up “take-out” for lunch. Dinner is a close second with 68% followed by breakfast at 23%. Male respondents are statistically more likely to purchase breakfast “take-out” meals than female respondents.



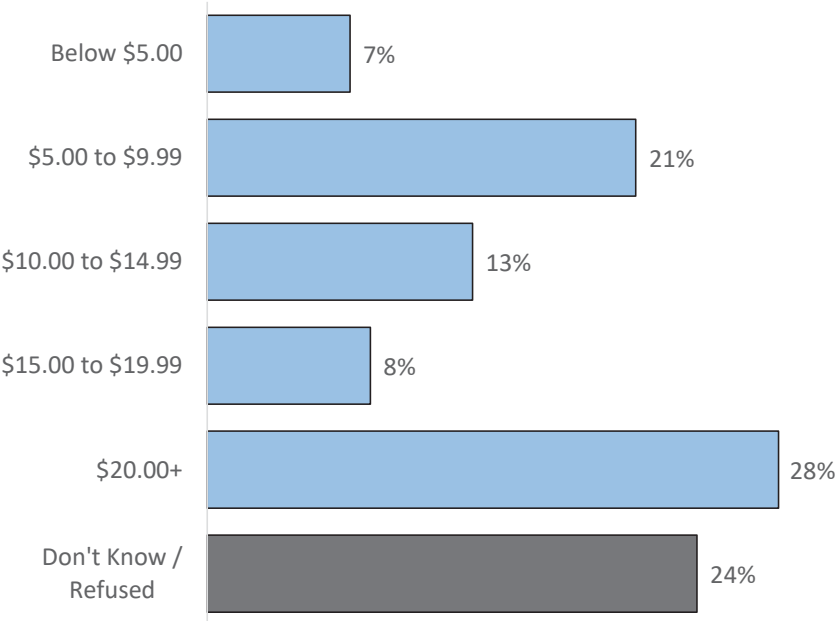
Base: 400
*Please note that percentages will not sum to 100% because of multiple responses are allowed.



Breakfast “Take-Out”

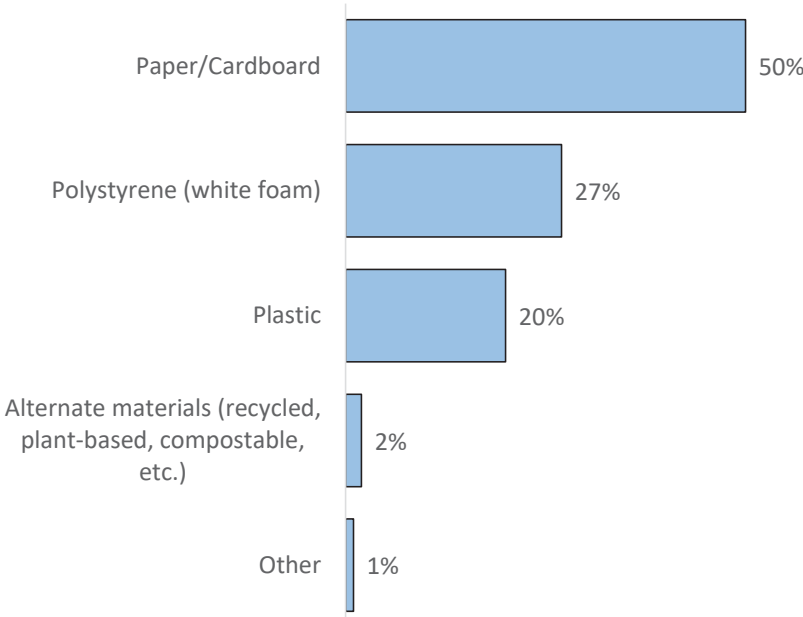
Respondents spent an average of \$18.84 for their breakfast “take-out.” Half (50%) of respondents stated that their breakfast “take-out” came in a paper/cardboard container.

Average Spent on Meal



Mean: \$18.84

Meal Container Material



Base: 92

*Please note that percentages may not sum to 100% because of rounding.

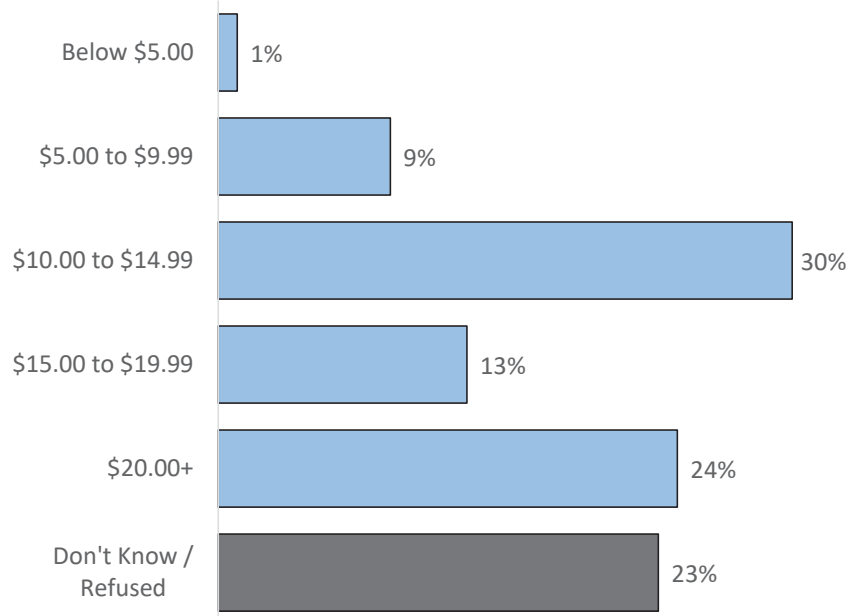


Q4b1. On average, how much do you spend for your “to go” or “take-out” [BREAKFAST]?
 Q4c1. And, what kind of container does your “to go” or “take-out” [BREAKFAST] usually come in? [SELECT ONE]

Lunch “Take-Out”

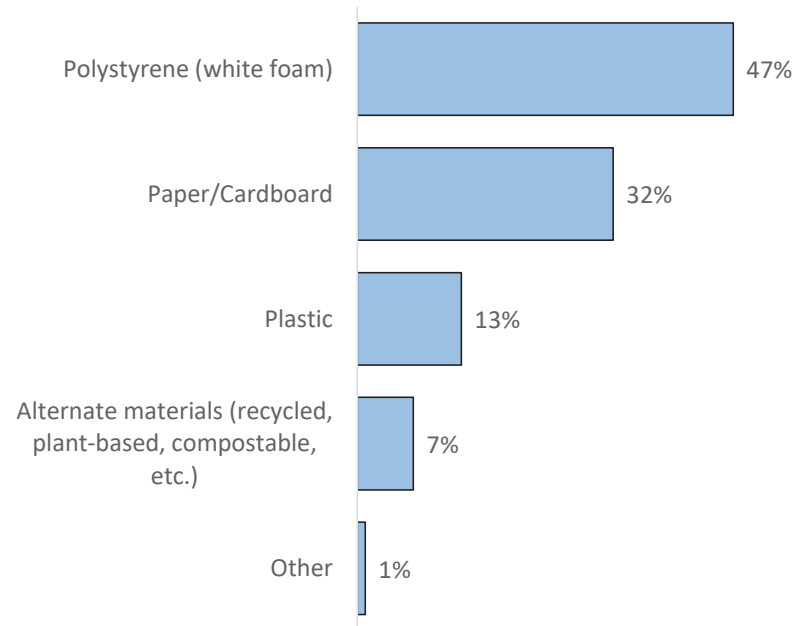
Respondents spent an average of \$16.89 for their lunch “take-out.” About half (47%) of respondents stated that their lunch “take-out” came in a polystyrene container.

Average Spent on Meal



Mean: \$16.89

Meal Container Material



Base: 291

*Please note that percentages may not sum to 100% because of rounding.

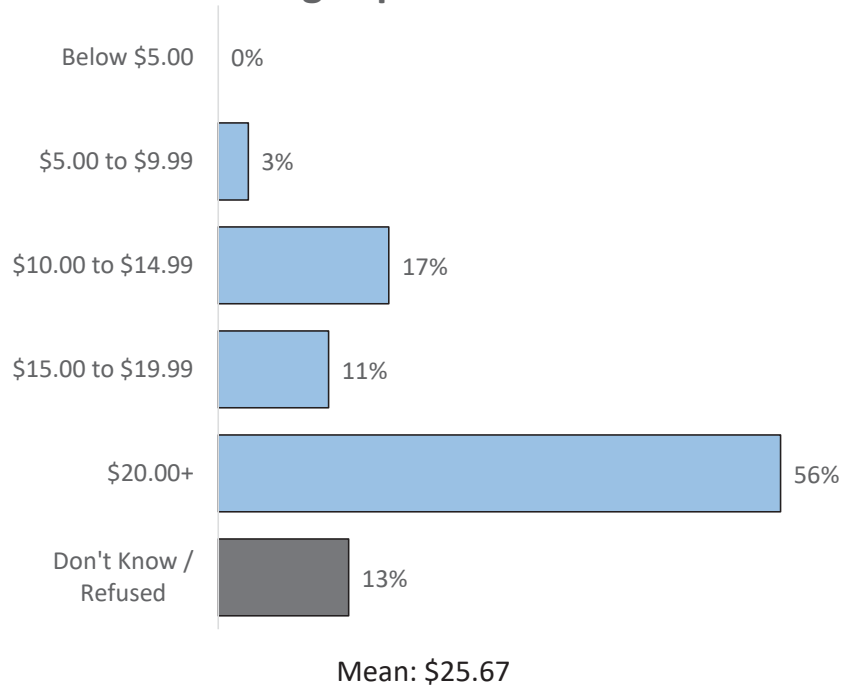


Q4b2. On average, how much do you spend for your “to go” or “take-out” [LUNCH]?
 Q4c2. And, what kind of container does your “to go” or “take-out” [LUNCH] usually come in? [SELECT ONE]

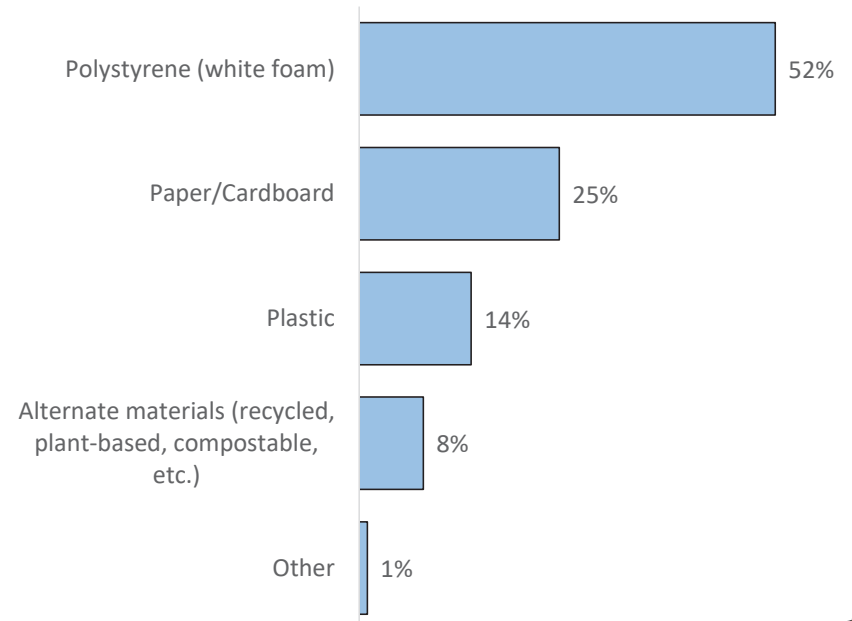
Dinner “Take-Out”

Respondents spent an average of \$25.67 for their dinner “take-out.” Just over half (52%) of respondents stated that their dinner “take-out” came in a polystyrene container.

Average Spent on Meal



Meal Container Material



Base: 271
 *Please note that percentages may not sum to 100% because of rounding.



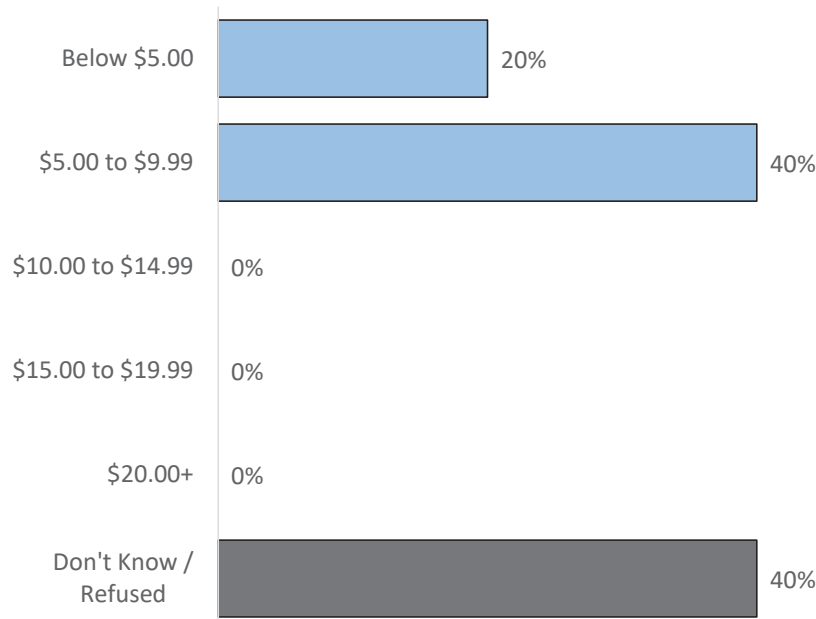
Q4b3. On average, how much do you spend for your “to go” or “take-out” [DINNER]?
 Q4c3. And, what kind of container does your “to go” or “take-out” [DINNER] usually come in? [SELECT ONE]



Other “Take-Out”

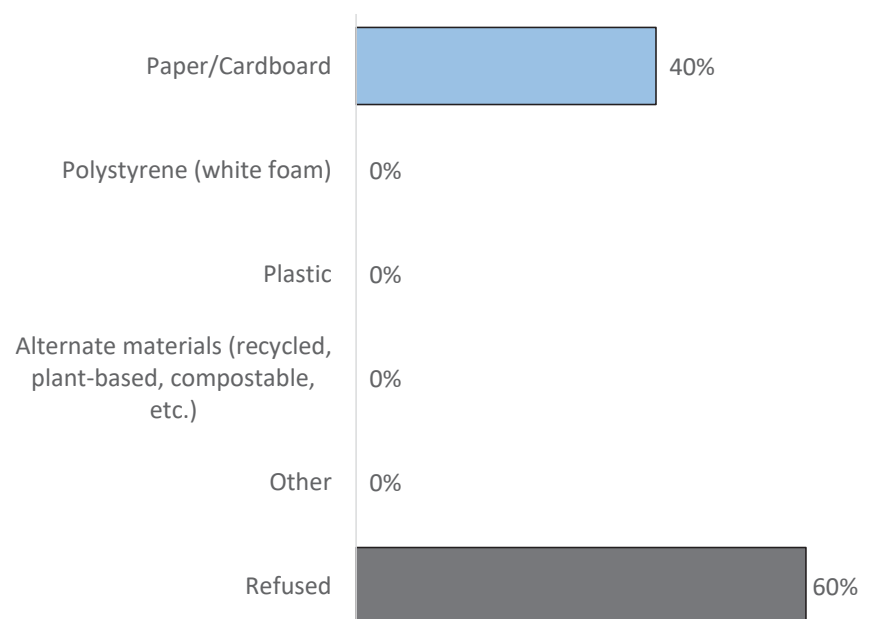
Respondents spent an average of \$4.00 for their other “take-out.” Of those who responded other, all of them stated that their meal came in a paper/cardboard container.

Average Spent on Meal



Mean: \$4.00

Meal Container Material



Base: 5

*Please note that percentages may not sum to 100% because of rounding.

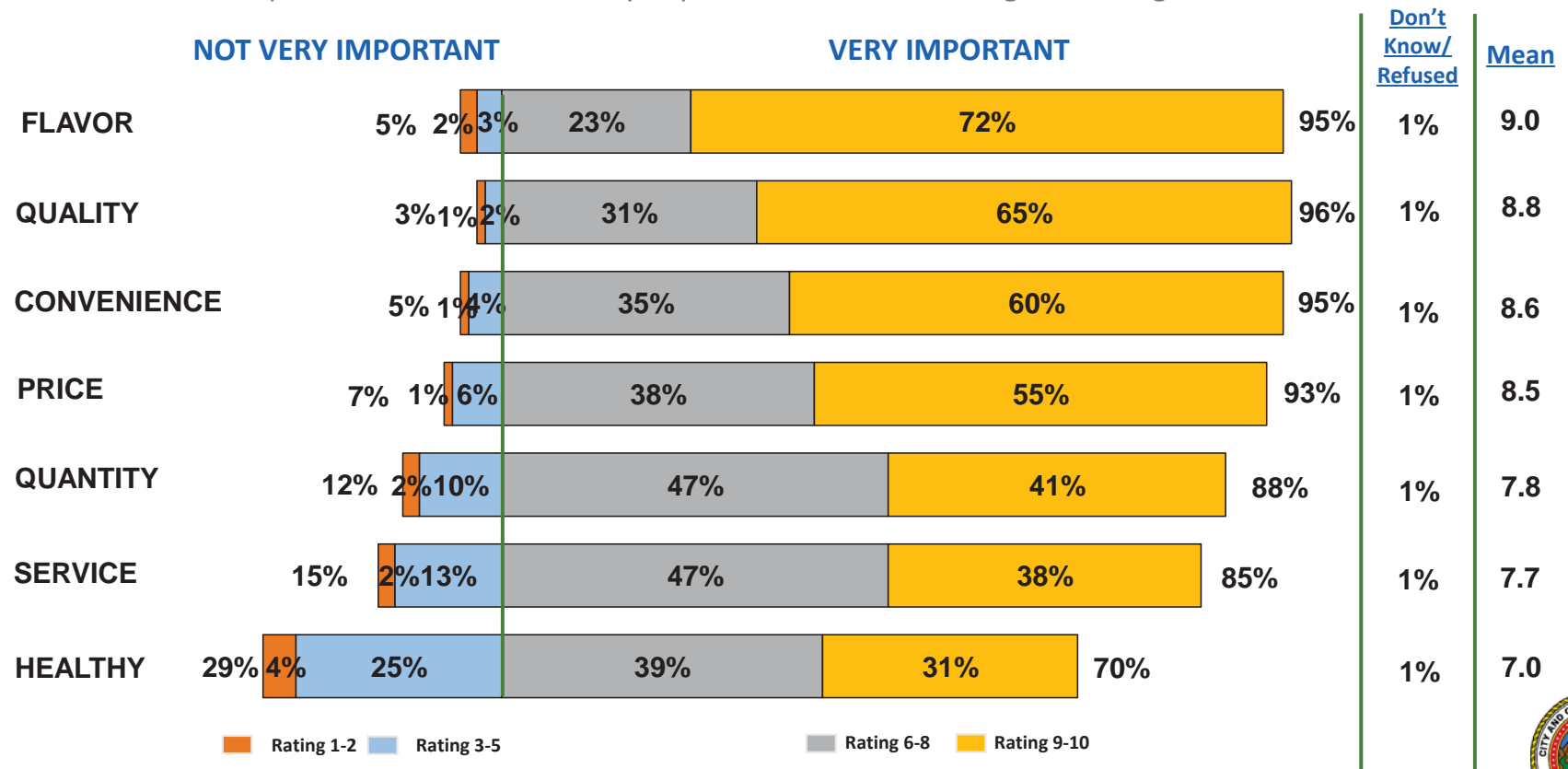


Q4b4. On average, how much do you spend for your “to go” or “take-out” [OTHER]?
 Q4c4. And, what kind of container does your “to go” or “take-out” [OTHER] usually come in? [SELECT ONE]



Most Important “Take-Out” Attributes

Flavor is the most important factor respondents cited when considering where to pick up “take-out.” Quality, convenience and price were also cited as very important when considering where to get “take-out.”



Q5. How important are the following when considering where to pick up “to go” or “take-out?” (On a scale of 1-10 with 1 being Not Very Important and 10 being Very Important.)

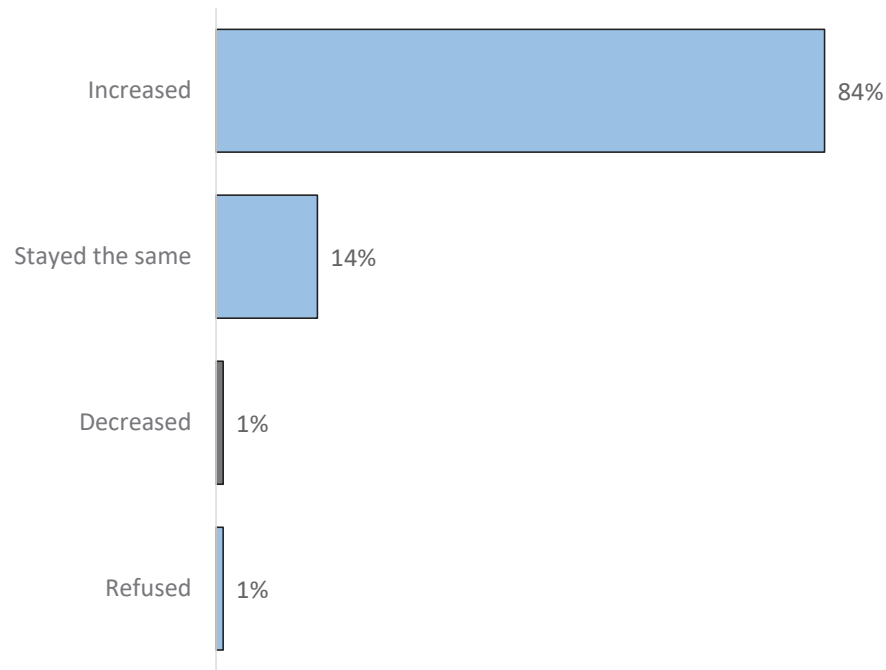
Base: 400
*Please note that percentages may not sum to 100% because of rounding.



Change in “Take-Out” Price

Eight in ten (84%) respondents stated that the cost of “take-out” has increased in the past 2-3 years. Of those who said the price increased, just under half (48%) responded that the price increase forced them to eat less “take-out.”

Cost of Take-Out

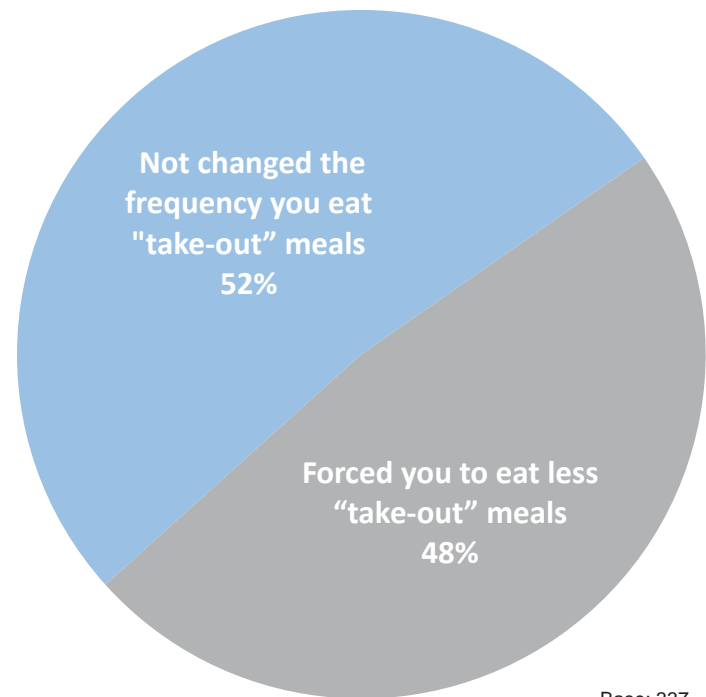


Base: 400



Q6. Over the past 2-3 years, has the cost of “take-out”...
 Q7. As a result of the price increase, would you say your “take-out” eating habits have...

Frequency of Eating Take-Out

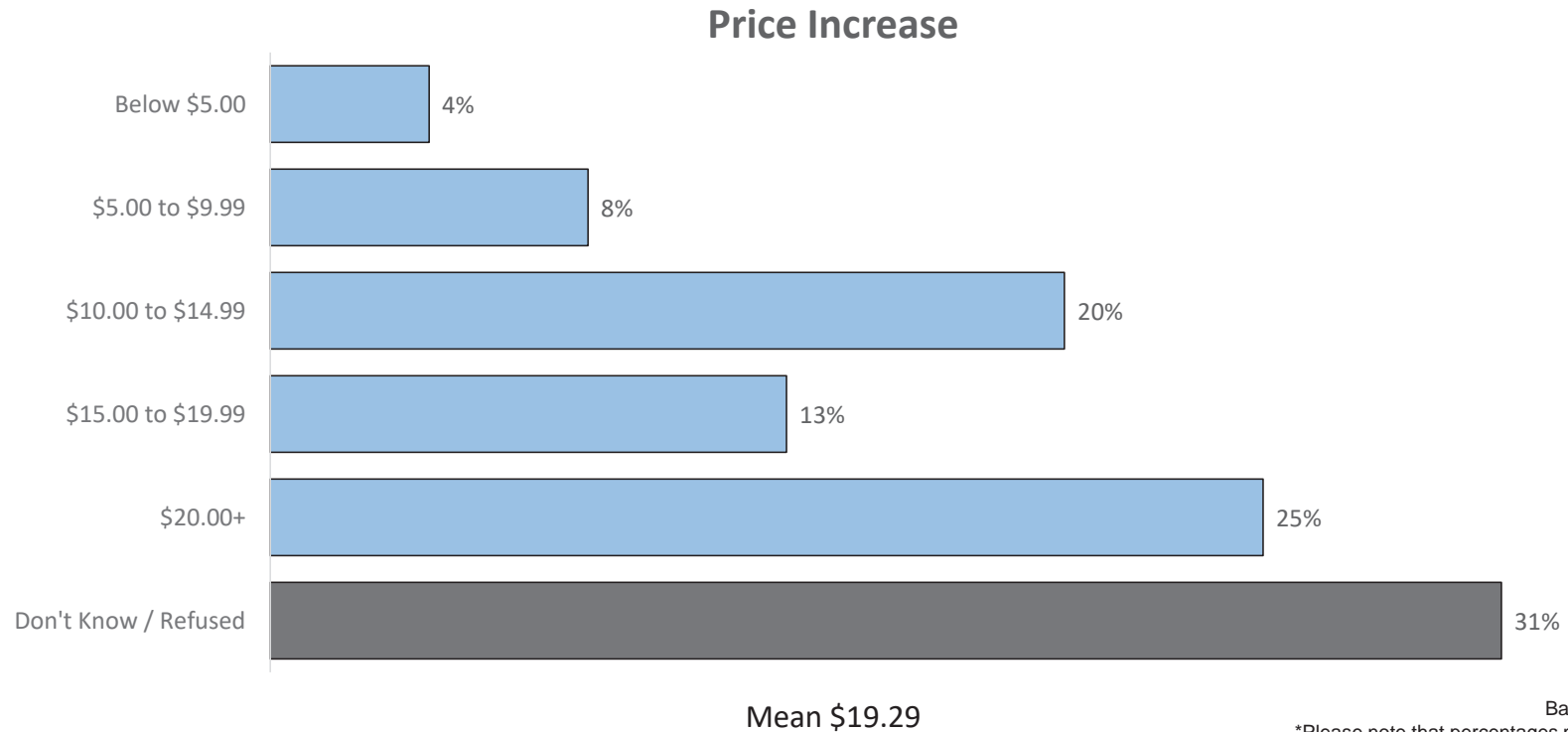


Base: 337



“Take-Out” Price Increase

Respondents stated that on average, it would take a price increase of \$19.29 to force them to change the frequency of them eating “take-out.”



Base: 174

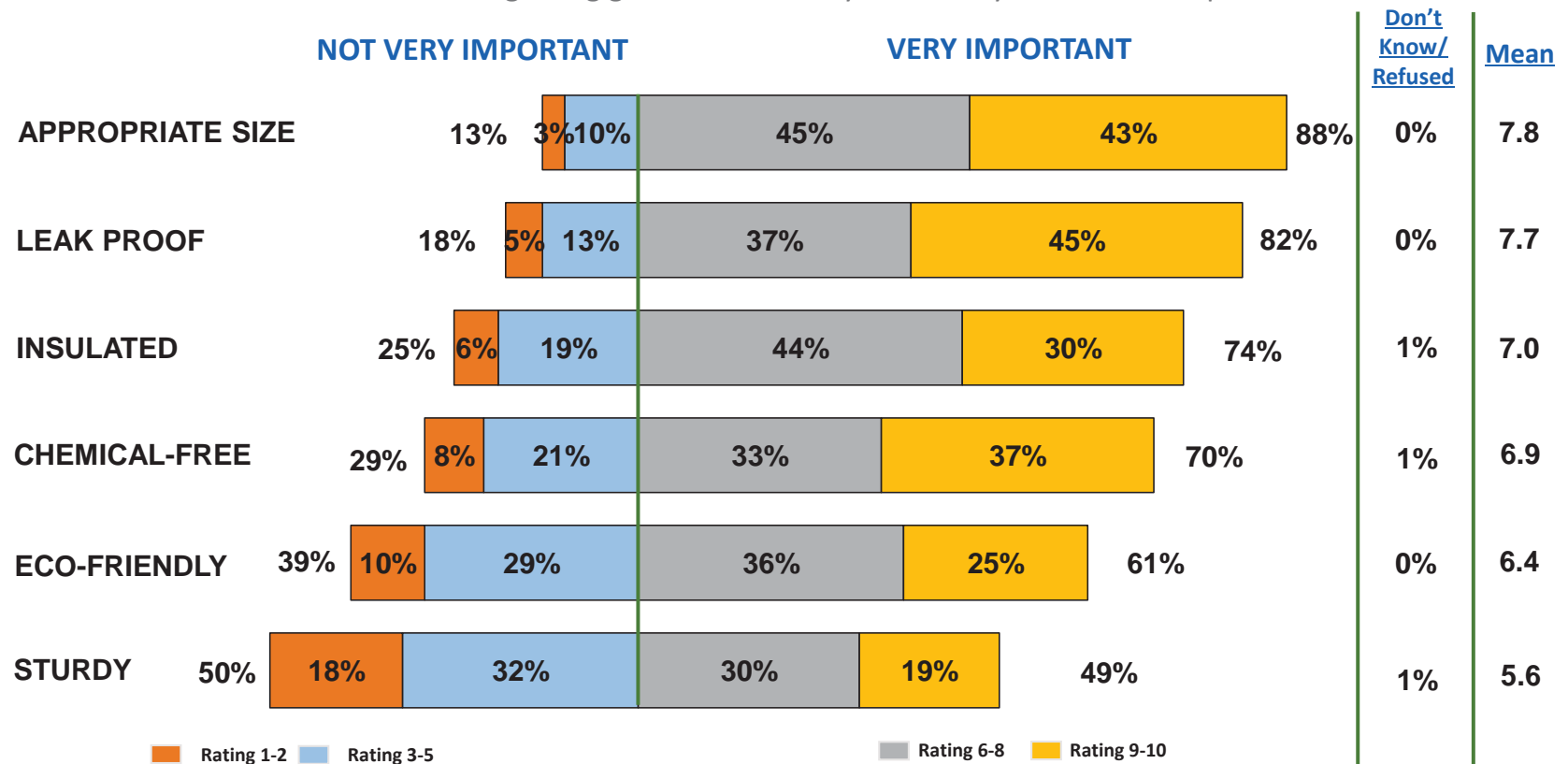
*Please note that percentages may not sum to 100% because of rounding.

**Date on price increase represent an estimate of an overall increase in spending. This estimate may be impacted by type of meal (Breakfast/Lunch/Dinner) and the number of take-out meals purchased.



“Take-Out” Container Attribute Importance

Respondents cited being leakproof and the appropriate size as the most important factors when considering their “take-out” meal container; while rating being green/eco-friendly and sturdy as the least important attributes.



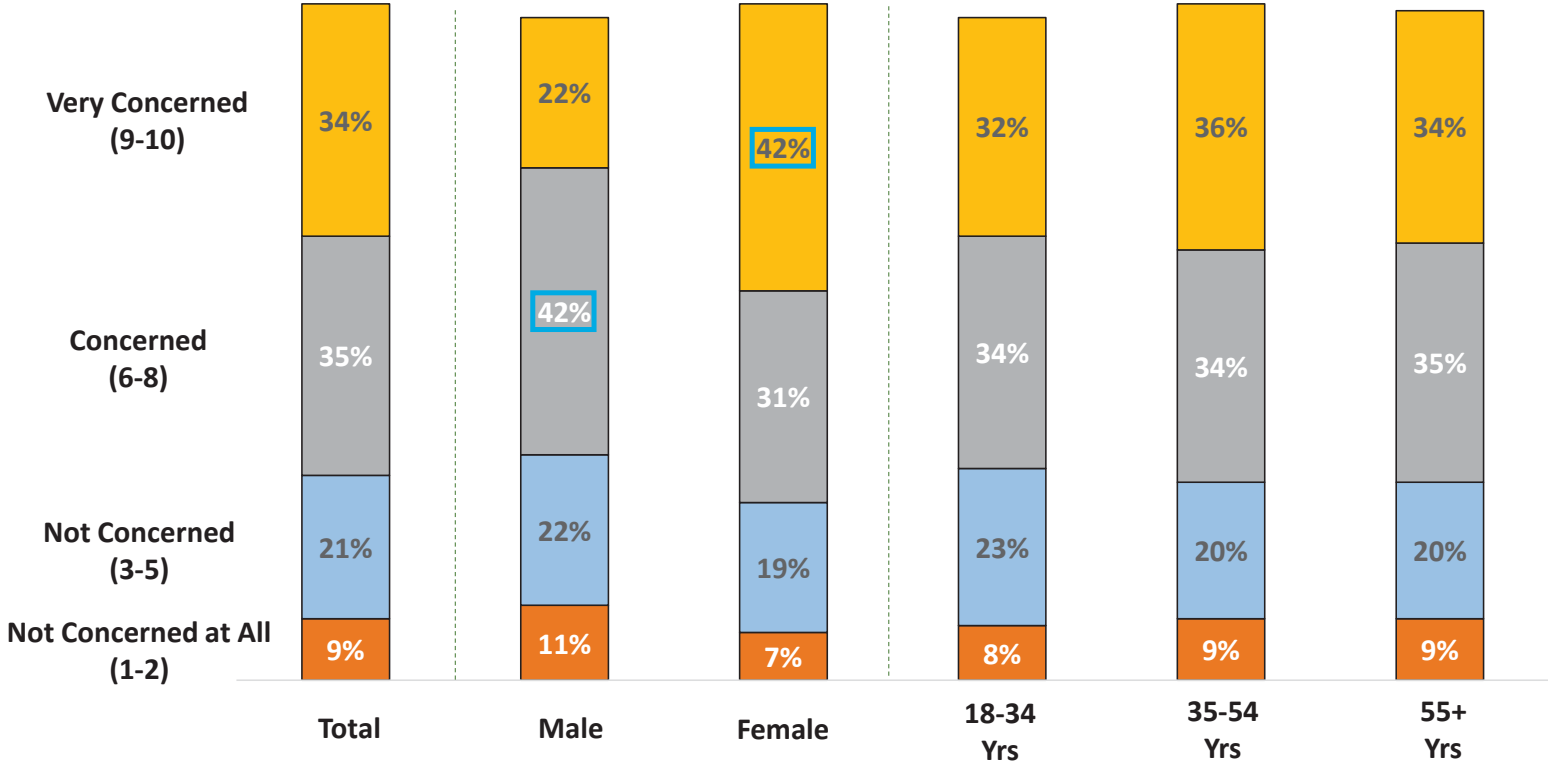
Rating 1-2 Rating 3-5

Rating 6-8 Rating 9-10



Perceptions of Polystyrene and Pollution

A majority (69%) of respondents stated that they were concerned that materials like polystyrene used in take-out food containers may pollute the marine environment due to improper disposal, while just under a third of respondents (30%) said they are not concerned. Female respondents are statistically more likely to say they are very concerned (9-10) compared to male respondents.



Base: 400
 *Please note that percentages may not sum to 100% because of rounding and don't know/refused are not included. Blue boxes indicate statistical significance.

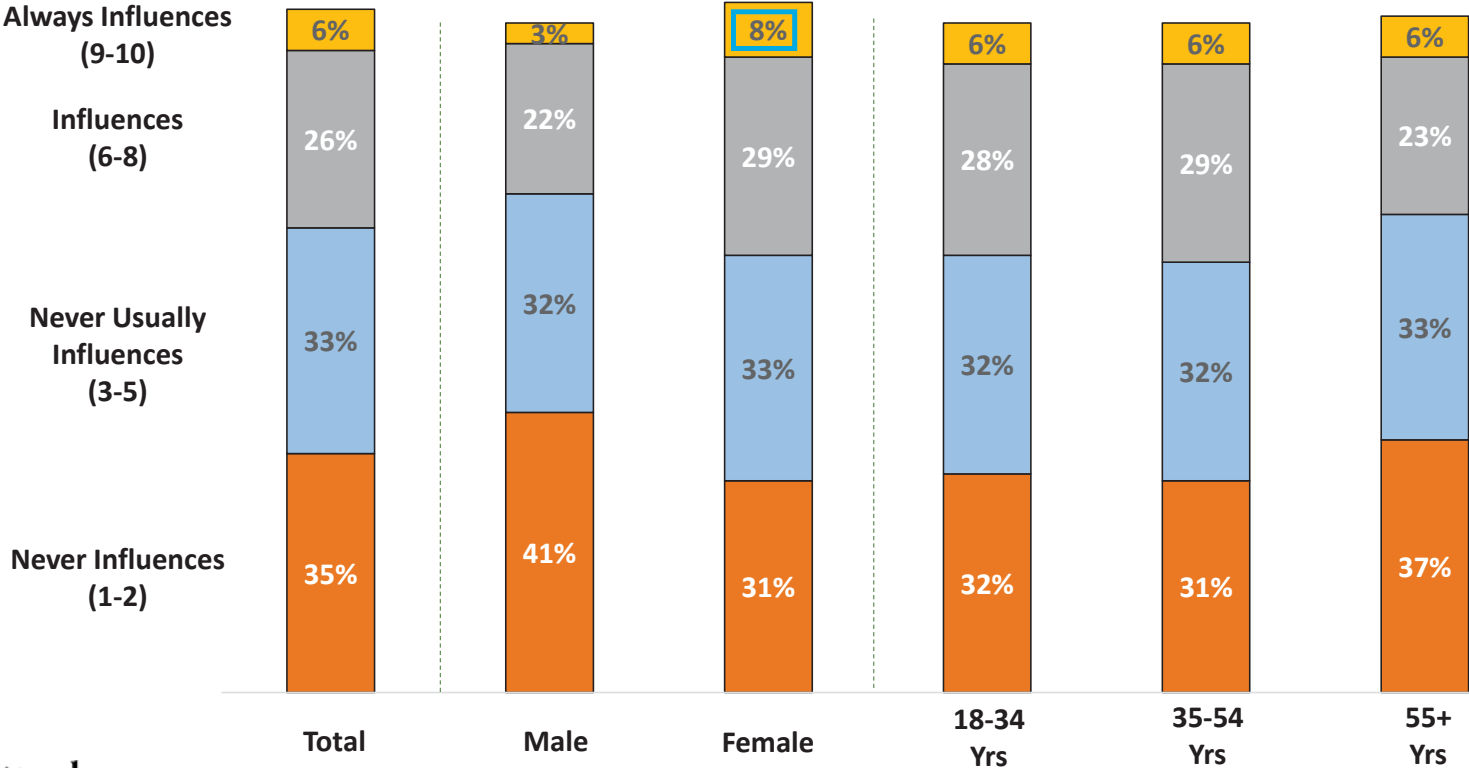


Q10. How concerned are you that materials like polystyrene (e.g. white foam) used in take-out food containers may pollute the marine environment due to improper disposal? (On a scale of 1-10 with 1 being Not Concerned at All and 10 being Very Concerned.)



Perceptions of Polystyrene and Pollution

While six-percent of respondents said that container material would always influence their decision to patronize a restaurant, a majority (68%) stated that it would never influence their decision. Female respondents are statistically more likely to say that it always their decision (9-10), while male respondents are statistically more likely to say that it never influenced their decision (1-2).



Base: 400
 *Please note that percentages may not sum to 100% because of rounding and don't know/refused are not included. Blue boxes indicate statistical significance.

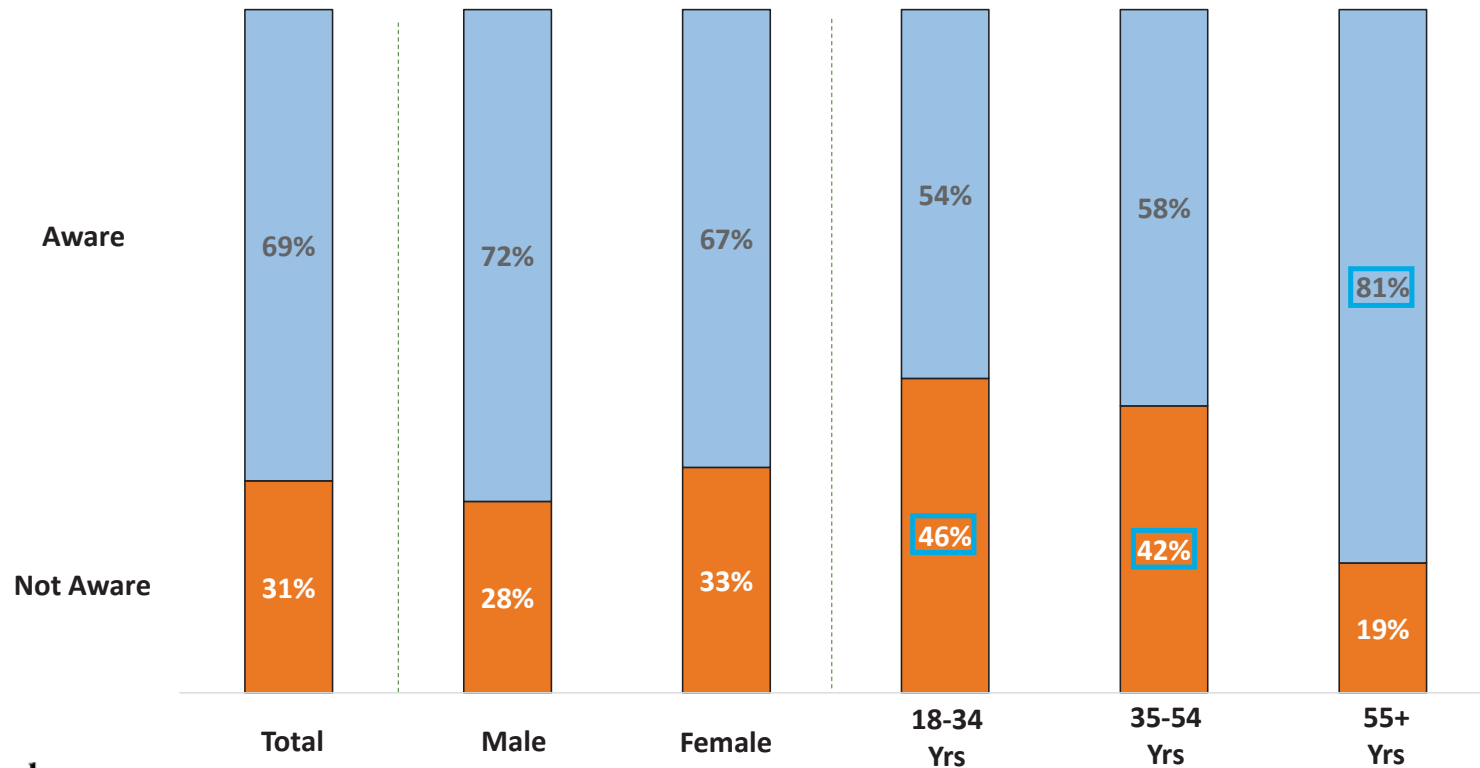


Q11. Do the materials used in take-out food and drink containers determine whether or not you patronize fast food or quick service restaurants, in-market deli counters, food trucks and others? (On a scale of 1-10 with 1 being Never Influences and 10 being Always influences.)



Awareness of City Council’s Polystyrene Ban

Over two-thirds (69%) of respondents stated that they were aware of the City Council’s proposed ban on polystyrene foam “take-out” containers. Older respondents (55+) are statistically more likely to state that they had heard of the proposed ban, while respondents making less than \$25K are statistically more likely to state that they had not heard of the proposed ban.



Base: 400
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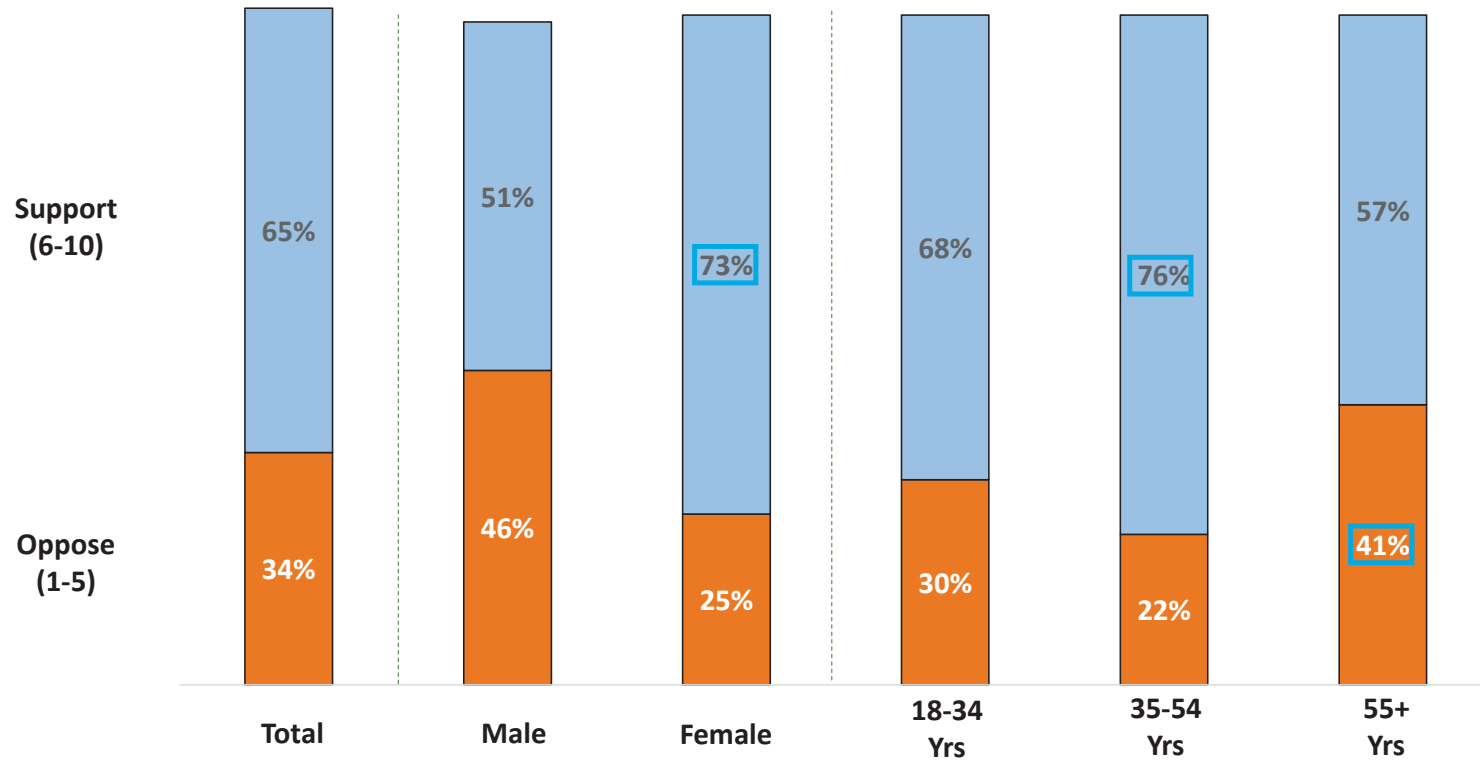


Q12. Have you heard of the City Council’s proposed ban on polystyrene foam “take-out” containers?



Support for City Council's Polystyrene Ban

About two thirds (65%) of respondents stated that they would support a Bill that banned the use of single-use polystyrene food containers, while about a third (34%) of respondents stated that they would oppose such a ban. Female respondents are statistically more likely to say they support (6-10), while older respondents (55+) are statistically more likely to state that they oppose (1-5) the ban.



Base: 400
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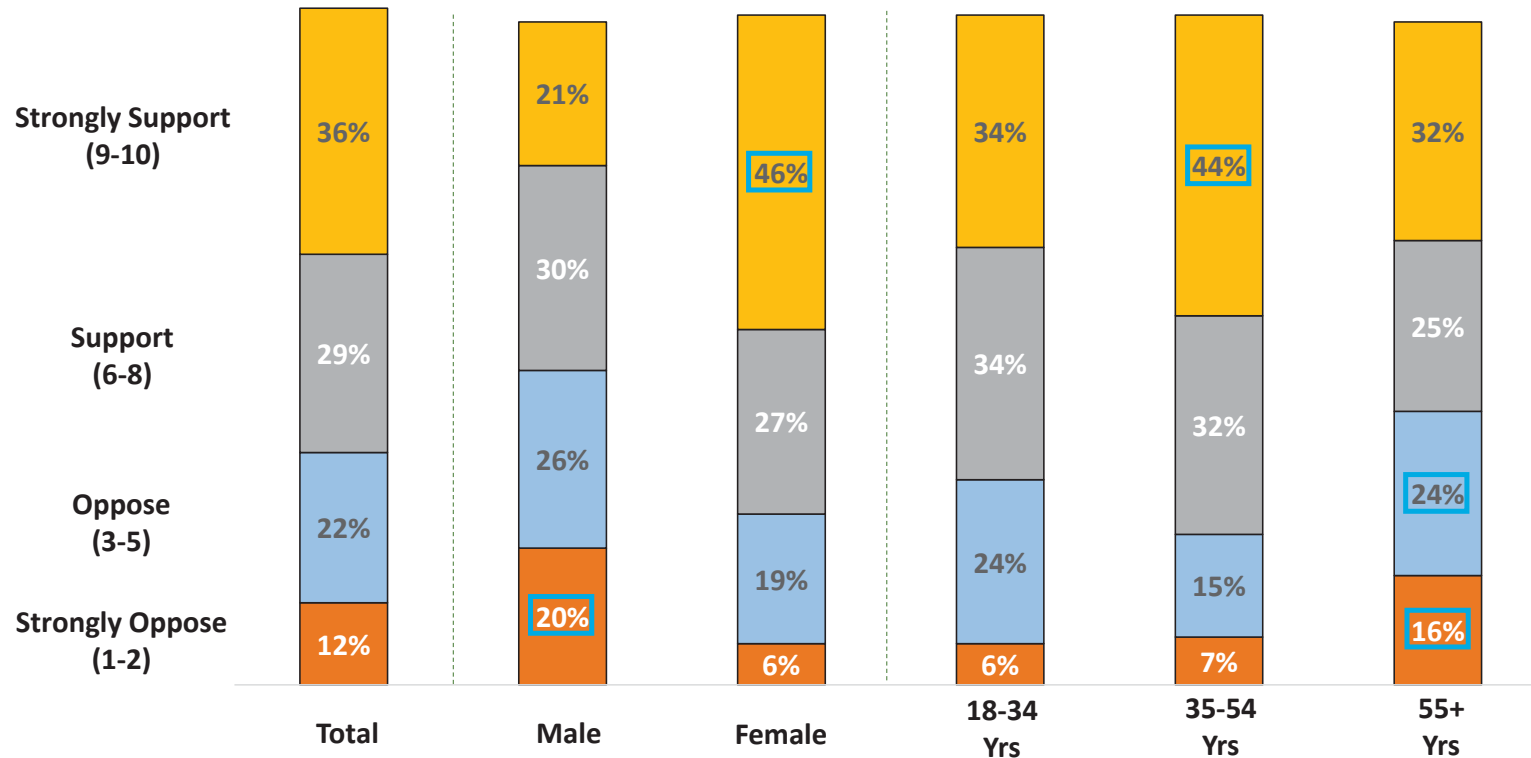


Q13. How much would you support a Bill that banned the use of single-use polystyrene (e.g. white foam) food containers by fast food or quick service restaurants, in-market deli counters, food trucks and others? (On a scale of 1-10 with 1 being Strongly Oppose and 10 being Strongly Support.)



Support for City Council’s Polystyrene Ban

Over a third (36%) of respondents stated that they would strongly support a Bill that banned the use of single-use polystyrene food containers, while about the same number (34%) of respondents stated that they would oppose such a ban. Female respondents are statistically more likely to say they strongly support (9-10), while male respondents are statistically more likely to say they would strongly oppose (1-2) the ban. Older respondents (55+) are statistically more likely to state that they strongly oppose (1-2) the ban.



Base: 400
 *Please note that percentages may not sum to 100% because of rounding and don't know/refused are not included. Blue boxes indicate statistical significance.

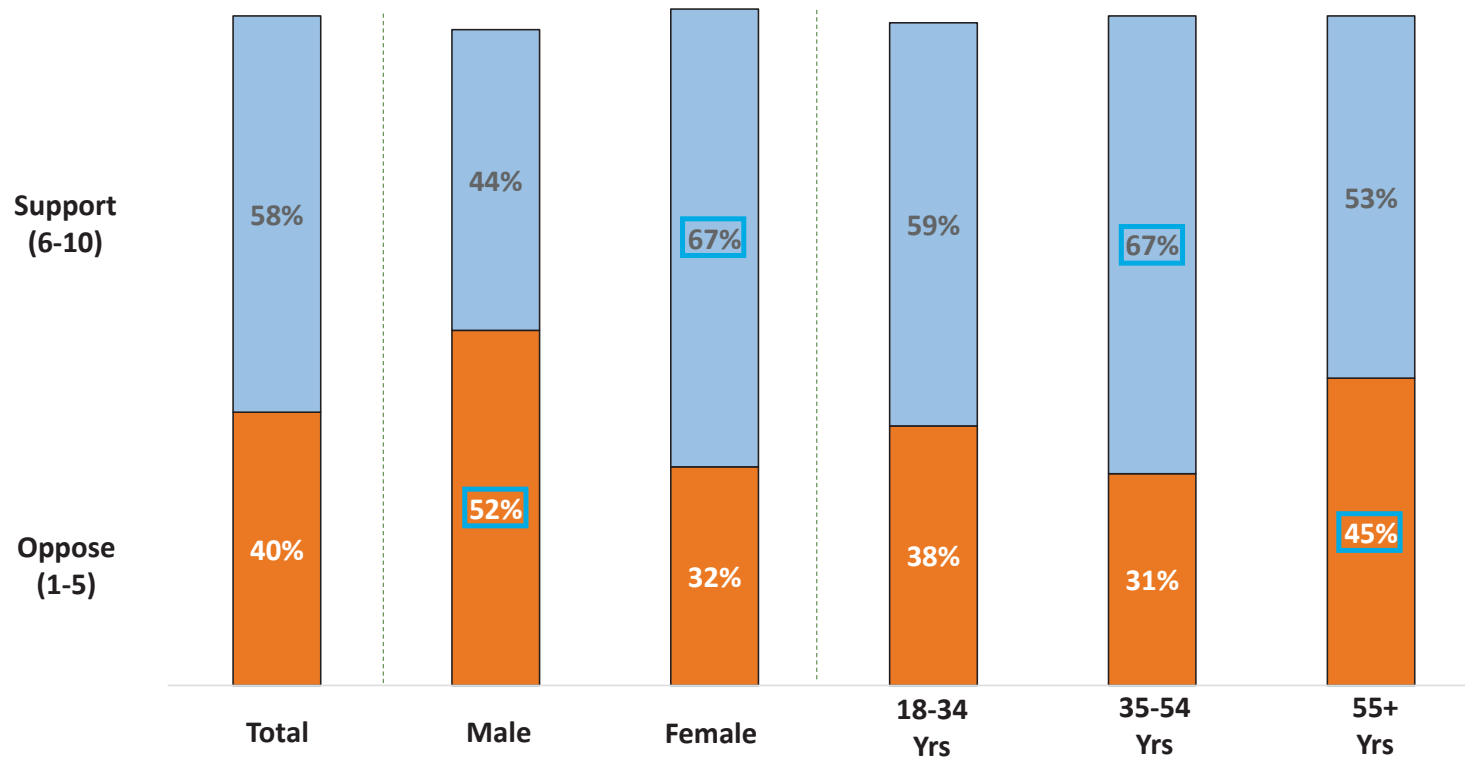


Q13. How much would you support a Bill that banned the use of single-use polystyrene (e.g. white foam) food containers by fast food or quick service restaurants, in-market deli counters, food trucks and others? (On a scale of 1-10 with 1 being Strongly Oppose and 10 being Strongly Support.)



Considering Price Increase Support for City Council’s Polystyrene Ban

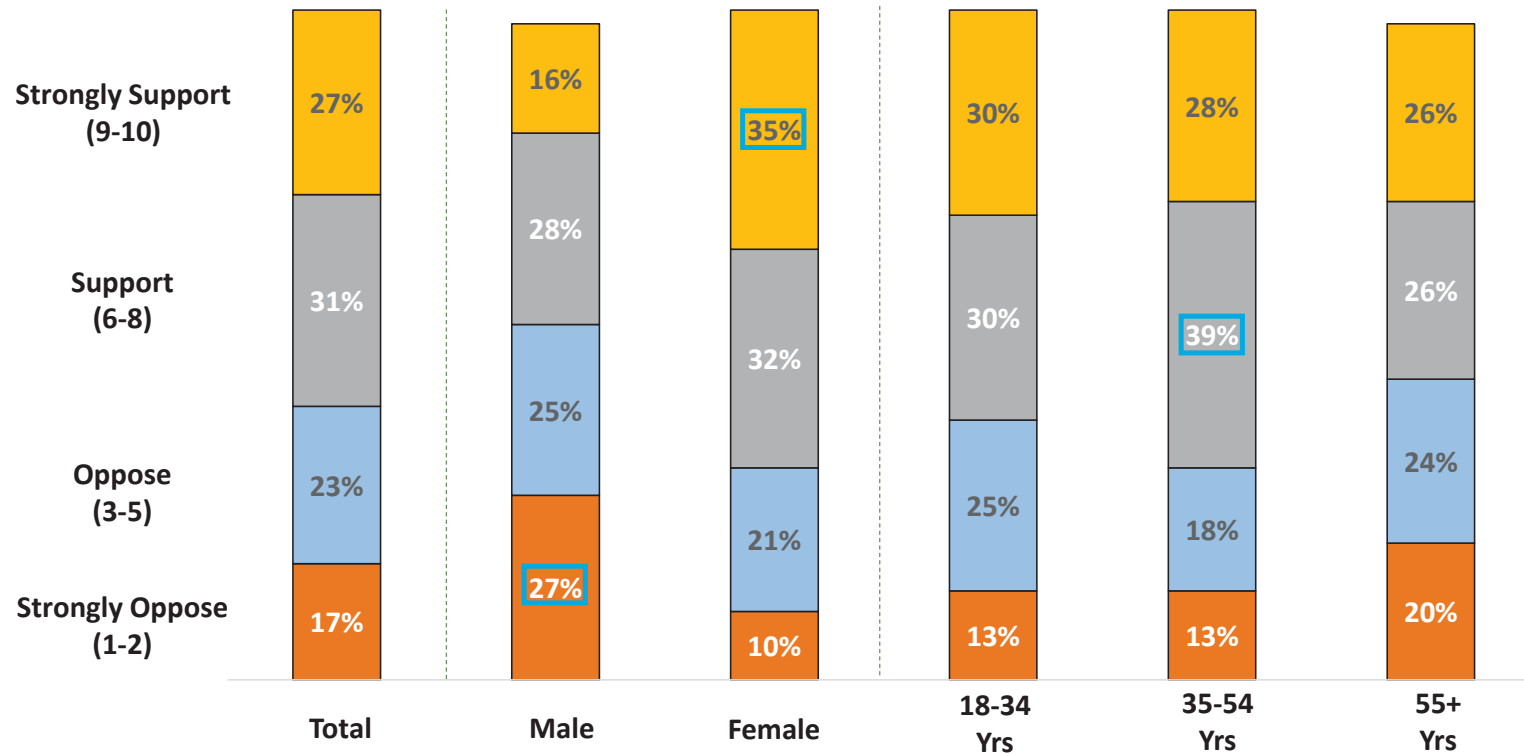
Given that a Bill that banned the use of single-use polystyrene food containers could increase prices, those that would support the Bill fell to 58%, while those that would oppose such a Bill rose to 40%. Female respondents are statistically more likely to say they support (6-10), while male respondents are statistically more likely to say they would strongly oppose (1-5) the ban if it increased prices.



Base: 400
 *Please note that percentages may not sum to 100% because of rounding and don't know/refused are not included. Blue boxes indicate statistical significance.

Considering Price Increase Support for City Council’s Polystyrene Ban

Given that a Bill that banned the use of single-use polystyrene food containers could increase prices, those that would strongly support the Bill fell to 27%, while those that would oppose such a Bill rose to 40%. Female respondents are statistically more likely to say they strongly support (9-10), while male respondents are statistically more likely to say they would strongly oppose (1-2) the ban if it increased prices.

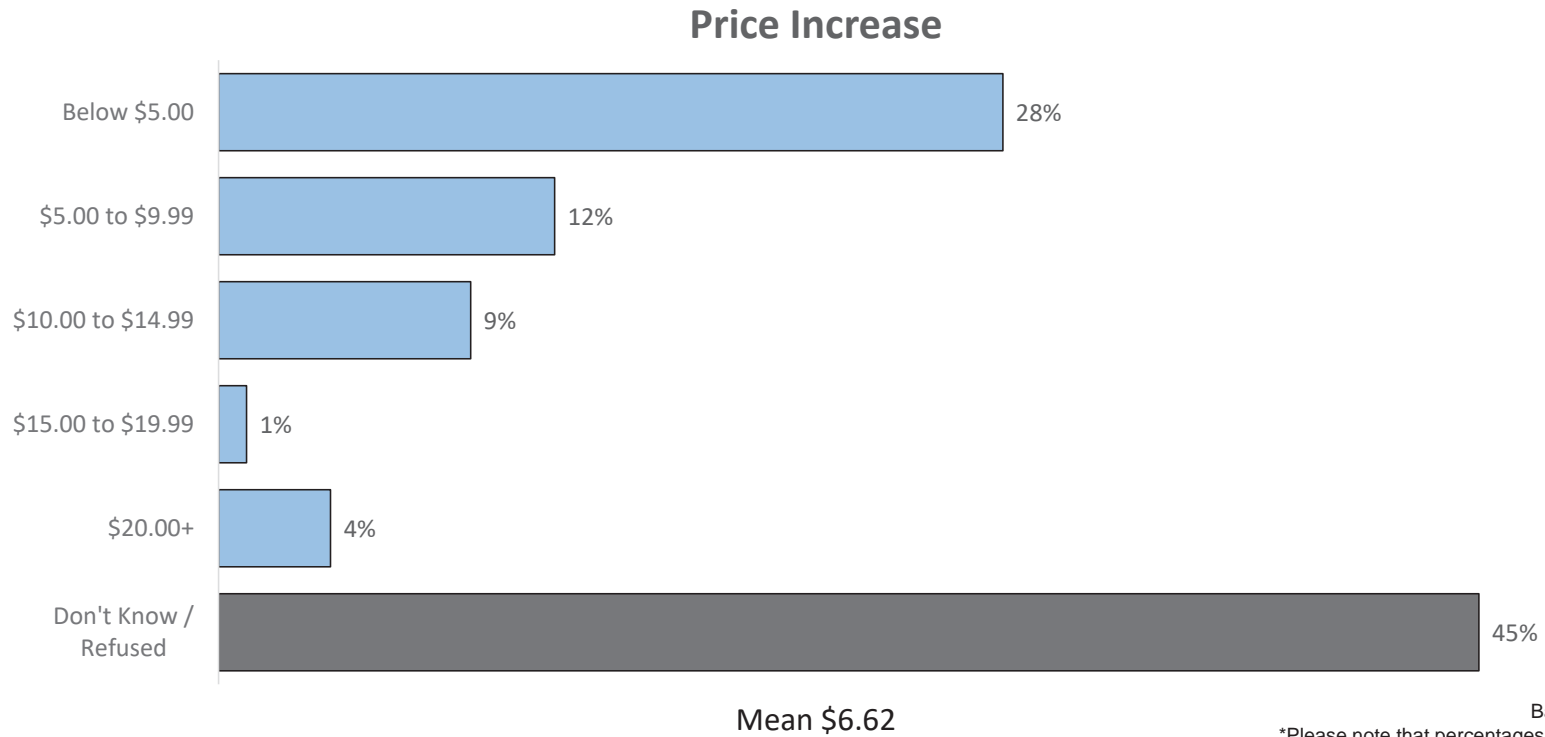


Base: 400
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Support for City Council’s Polystyrene Ban Price Increase

Respondents stated, on average, that a price increase of \$6.62 would force them to question whether or not they would support the Bill.



Base: 400

*Please note that percentages may not sum to 100% because of rounding.

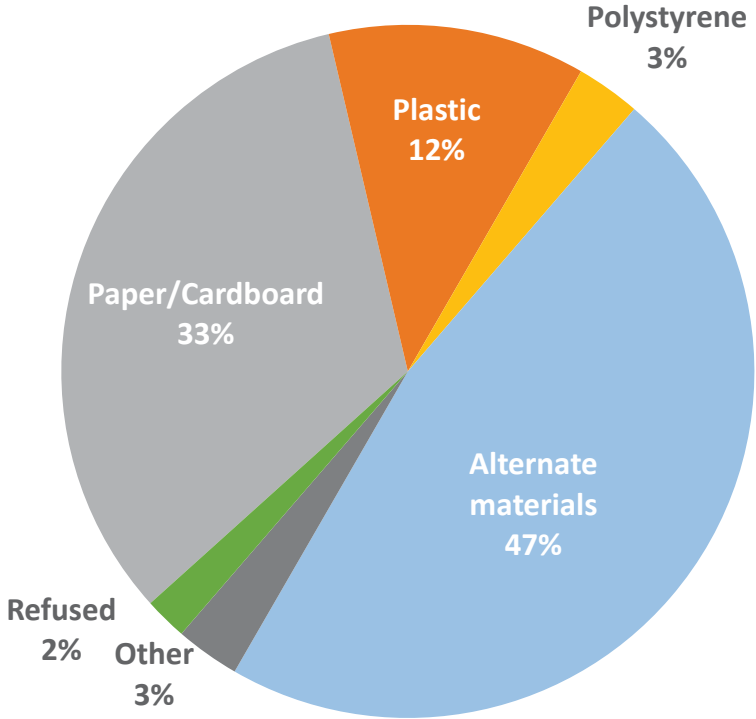
**Date on price increase represent an estimate of an overall increase in spending. This estimate may be impacted by type of meal (Breakfast/Lunch/Dinner) and the number of take-out meals purchased



Q15. At what price increase to you as the consumer, would you question whether or not you would support the Bill that banned the use of single-use polystyrene (white foam) containers?

Polystyrene Food Container Alternative

Almost half (47%) of respondents listed alternative materials such as recycled, plant-based and compostable as an acceptable alternative for “take-out” containers if the polystyrene ban was passed. The next most cited material was paper/cardboard (33%) followed by plastic (12%).



Base: 400
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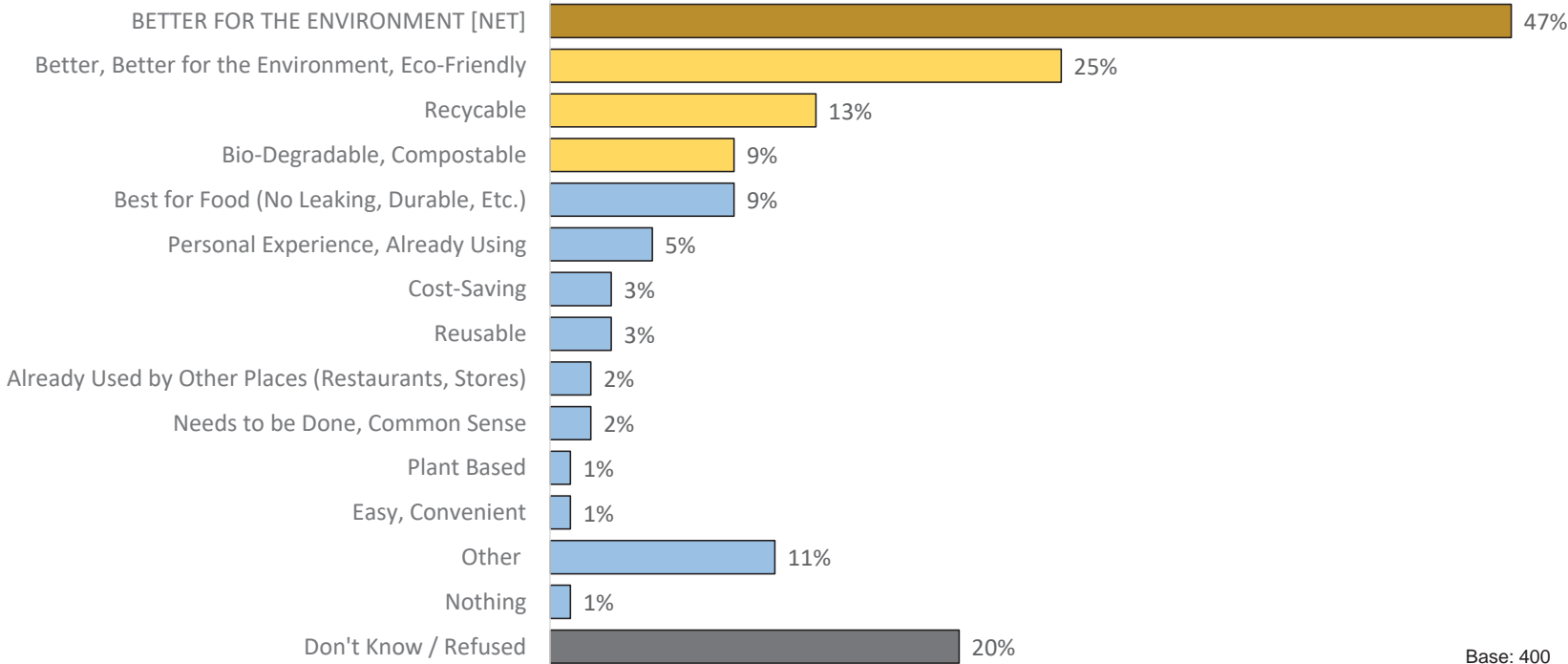


Q16. Assuming single-use polystyrene (white foam) containers were banned, which, if any, would you see as an acceptable alternative for “to go” or “take-out” meals?



Reasons for Alternative Food Container Material Choice

Almost half (47%) of respondents listed alternative materials because they were better for the environment / eco-friendly.



Q16A. Why do you say that?

Base: 400
 *Please note that percentages may not sum to 100% because of rounding.



Demographics

	Total
AGE	
18 – 34	18%
35 – 44	18%
45 – 54	14%
55-64	25%
65 and Over	25%
Refused	1%
MARITAL STATUS	
Married	54%
Single, never married	24%
Separated/divorced/widowed	15%
Domestic Partnership	4%
Other	1%
Refused	2%
HIGHEST EDUCATIONAL LEVEL COMPLETED	
High school graduate	12%
Business/trade school	3%
Some college	21%
College graduate/post graduate	63%
Refused	1%

	Total
GENDER	
Male	40%
Female	60%
YEARS OF RESIDENCY ON O'AHU	
Less than one year	2%
One to four years	9%
Five to nine years	5%
10 to 19 years	9%
20 years or more	20%
Born here	56%
Refused	<1%
HOUSEHOLD SIZE	
One	15%
Two	36%
Three	18%
Four	15%
Five	3%
Six +	6%
Refused	8%
Average	2.8

Base: 400
 *Please note that percentages may not sum to 100% because of rounding.



Demographics

	Total
ETHNICITY	
Caucasian	24%
Chinese	12%
Filipino	8%
Native Hawaiian	8%
Japanese	32%
Korean	2%
Mixed	6%
Other	1%
Refused	2%
HOUSEHOLD INCOME	
Less than \$15,000	6%
\$15,000 but less than \$25,000	2%
\$25,000 but less than \$35,000	6%
\$35,000 but less than \$50,000	9%
\$50,000 but less than \$75,000	17%
\$75,000 but less than \$100,000	15%
\$100,000 but less than \$150,000	22%
\$150,000 and over	12%
Refused	11%

	Total
AREA OF RESIDENCY	
Metro Honolulu	35%
East Honolulu	13%
Windward	10%
Central/N. Shore	10%
Waianae	2%
Ewa/Leeward	22%
Refused	7%

Base: 400
 *Please note that percentages may not sum to 100% because of rounding.



Mahalo from the OmniTrak Group!