



Georgia-Pacific

CONSUMERS AND SUSTAINABILITY IN FOODSERVICE

- ❑ Behaviors and perceptions
- ❑ Single-use plastic and legislation

July 2021

Innovation Insights | Kaylor Hildenbrand

FSS-21-5357

BACKGROUND AND METHODOLOGY

GP PRO continually seeks to understand the customer and consumer markets. With a desire to understand consumer behaviors and perceptions related to sustainability in the foodservice space, an online survey was launched July 28-30, 2021.

Key Objectives:

- Understand the appeal and impact of recyclable materials, compostable materials and reusables if offered by a restaurant as well as practices at home
- Gauge overall sentiment around single-use plastics

The online platform, InstantPop (popresearch.com), was utilized to reach a sample of 500 gen pop consumers.

Note that some totals might not equal 100% due to rounding.

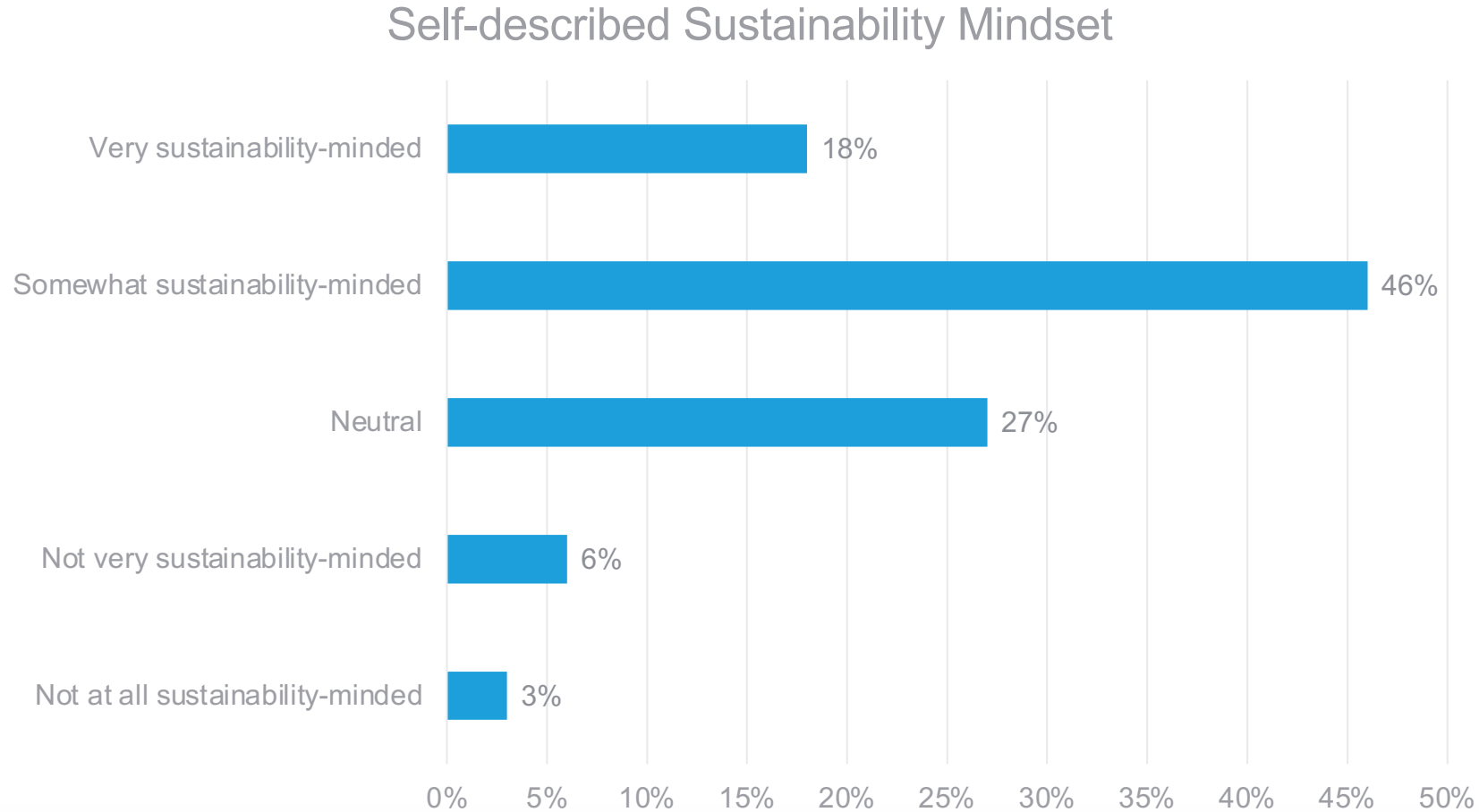
KEY INSIGHTS

- Two-thirds of consumers (64%) describe themselves as somewhat/very sustainability-minded.
- Recycling is more common than composting at home (62% T2B recycling compared to 36% composting).
- A variety of sustainability practices such as offering recyclable, recycled-content or compostable single-use items and packaging, as well as the adoption of reusables (owned or “received, returned and redistributed”) are all said to have a positive impact on overall perception of a restaurant, visit frequency and influential in having a guest choose one restaurant over another.
- Recyclable and recycled-content items seems to have a slightly stronger positive impact overall compared to compostable items and reusable programs.
- Consumers find it easier to dispose of recyclable items compared to compostable items away from home. Bringing their own reusable items from home is less convenient compared to disposing of recyclable or compostable items away from home.
- 44% of consumers think items from sustainable materials cost more and 53% think they perform as well compared to those made from traditional materials.
- More than half of consumers (58%) agree with the statement, “Single-use plastic is harmful to the environment and usage should be restricted.” (*Regional representation of the sample – 46% South, 23% Midwest, 16% West, 15% Northeast*)



CONSUMERS AND SUSTAINABILITY

Nearly two-thirds (64%) of consumers self-describe themselves as somewhat or very sustainability-minded. Only 9% are more dismissive of sustainability.



Q1. How sustainability-minded (eco-friendly) do you consider yourself to be?

n=500 gen pop consumers

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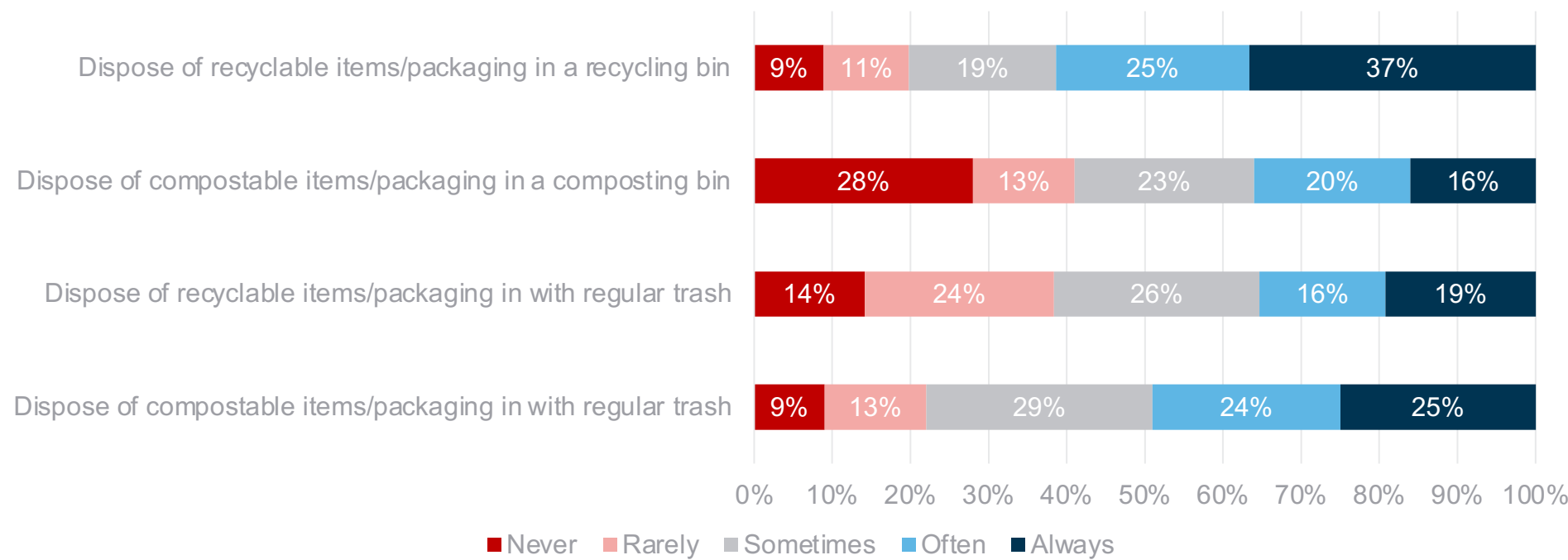


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CONSUMERS' AT-HOME DISPOSAL PRACTICES

Consumers are more likely to recycle items at home compared to composting. More than one-third (37%) of consumers said they always dispose of recyclable items in a recycling bin, while only 16% said they always dispose of compostable items in a composting bin. Still, the practice of recycling is not perfect as 19% said they always dispose of recyclable items in with regular trash.

Disposal Practices at Home



62% (T2B) always or sometimes recycle items while only 36% (T2B) always or sometimes compost at home.

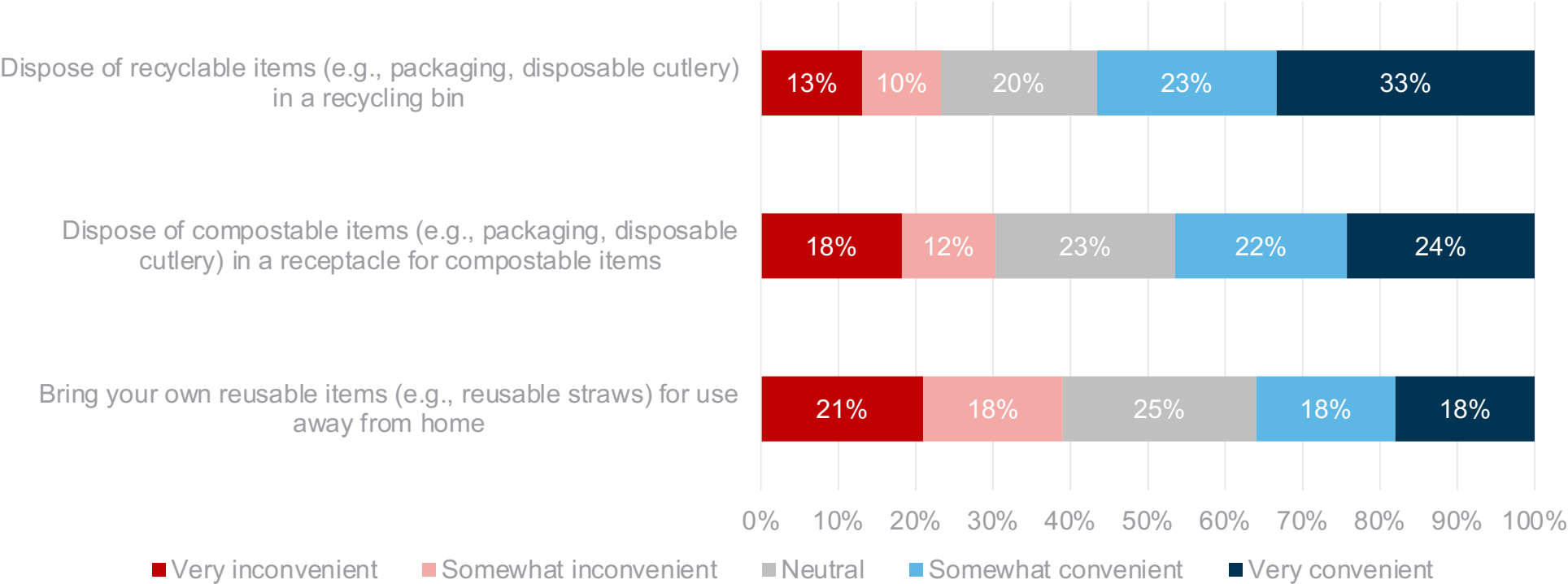
Q2. How often do you do each of the following when AT HOME?
n=500 gen pop consumers



CONVENIENCE OF SUSTAINABILITY PRACTICES AFH

Overall, consumers find it more convenient to recycle than compost away from home, with one-third (33%) finding it very convenient to recycle (compared to 24% who find it very convenient to compost). Bringing their own reusable items for use away from home is the least convenient sustainability practice of the three.

Convenience of Sustainability Practices Away from Home



Q3. Thinking about eating a fast food or casual dining meal away from home (i.e. McDonald’s, Chipotle, etc.), typically how convenient is it for you to...

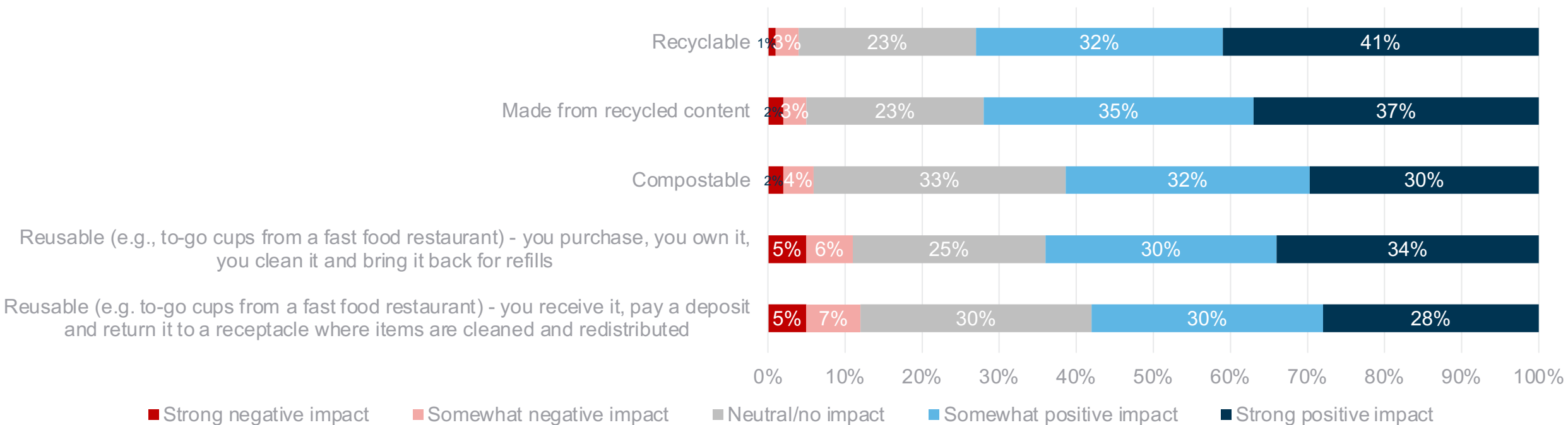
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SUSTAINABILITY PRACTICES – IMPACT ON PERCEPTIONS

Respondents reported a positive impact on perceptions of a restaurant when sustainability practices are in place, with more than half of respondents indicating a somewhat or strong positive impact for each type of effort. Offering recyclable items or items made from recycled content have a positive impact for slightly more consumers. Reusable programs, while popular overall, show more than 10% of consumers reporting a negative impact on perceptions.

Restaurants' Sustainability Practices - Impact on Perceptions



Q4. What impact, if any, does it have on your overall perception of a restaurant when they offer/use items such as packaging or disposable cutlery that is...

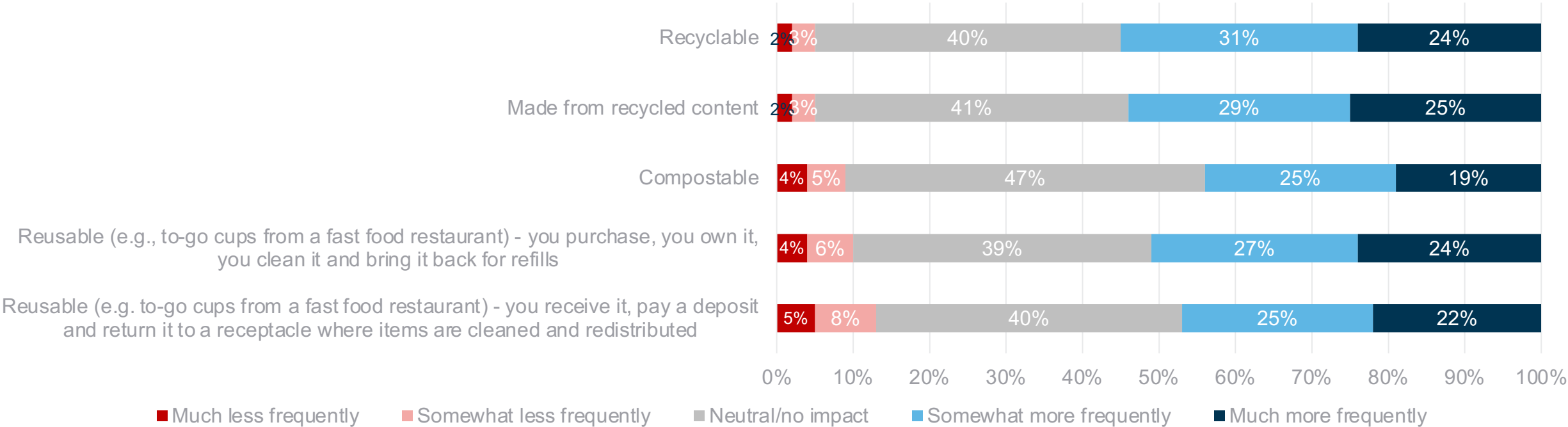
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SUSTAINABILITY PRACTICES – IMPACT ON VISIT FREQUENCY

Consumers (about half) visit restaurants more frequently when sustainability practices are in place. Offering compostable items/packaging and reuse programs where items are received, returned and redistributed lag slightly behind the other efforts in the level of positive impact on frequency. Interestingly, 13% of consumers noted a somewhat or strong negative impact on visit frequency when a restaurant implements a “receive, return and redistribute” reusables program. About 40% remain neutral no matter the efforts in place.

Restaurants’ Sustainability Practices - Impact on Visit Frequency



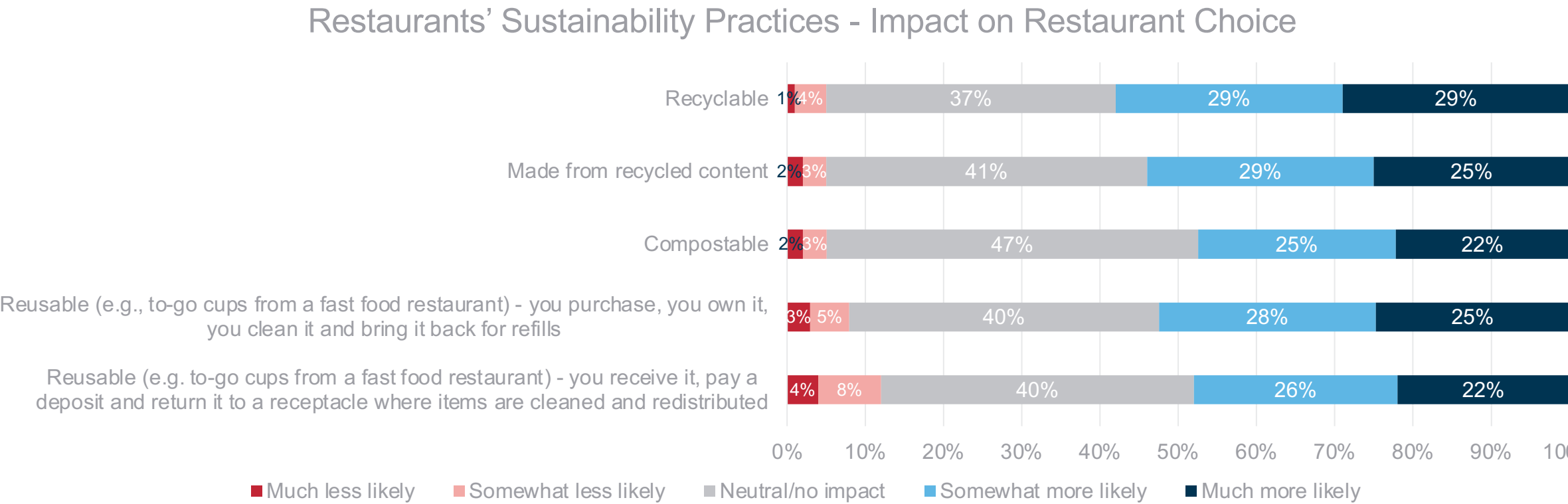
Q5. What impact, if any, does it have on how frequently you visit a restaurant when they offer/use items such as packaging or disposable cutlery that is...

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SUSTAINABILITY PRACTICES – IMPACT ON RESTAURANT CHOICE

Again, for about half of consumers report a somewhat or strong positive impact on the likelihood they will choose one restaurant over another based on the various sustainability practices with recyclable items/packaging having a positive impact for the greatest proportion of respondents (58%). A “receive, return and redistribute” reusables program is found to have a negative impact on restaurant choice for 12%. About 40% remain neutral no matter the efforts in place.



Q6. What impact, if any, does it have on how likely you are to choose one restaurant over another when they offer/use items such as packaging or disposable cutlery that is...

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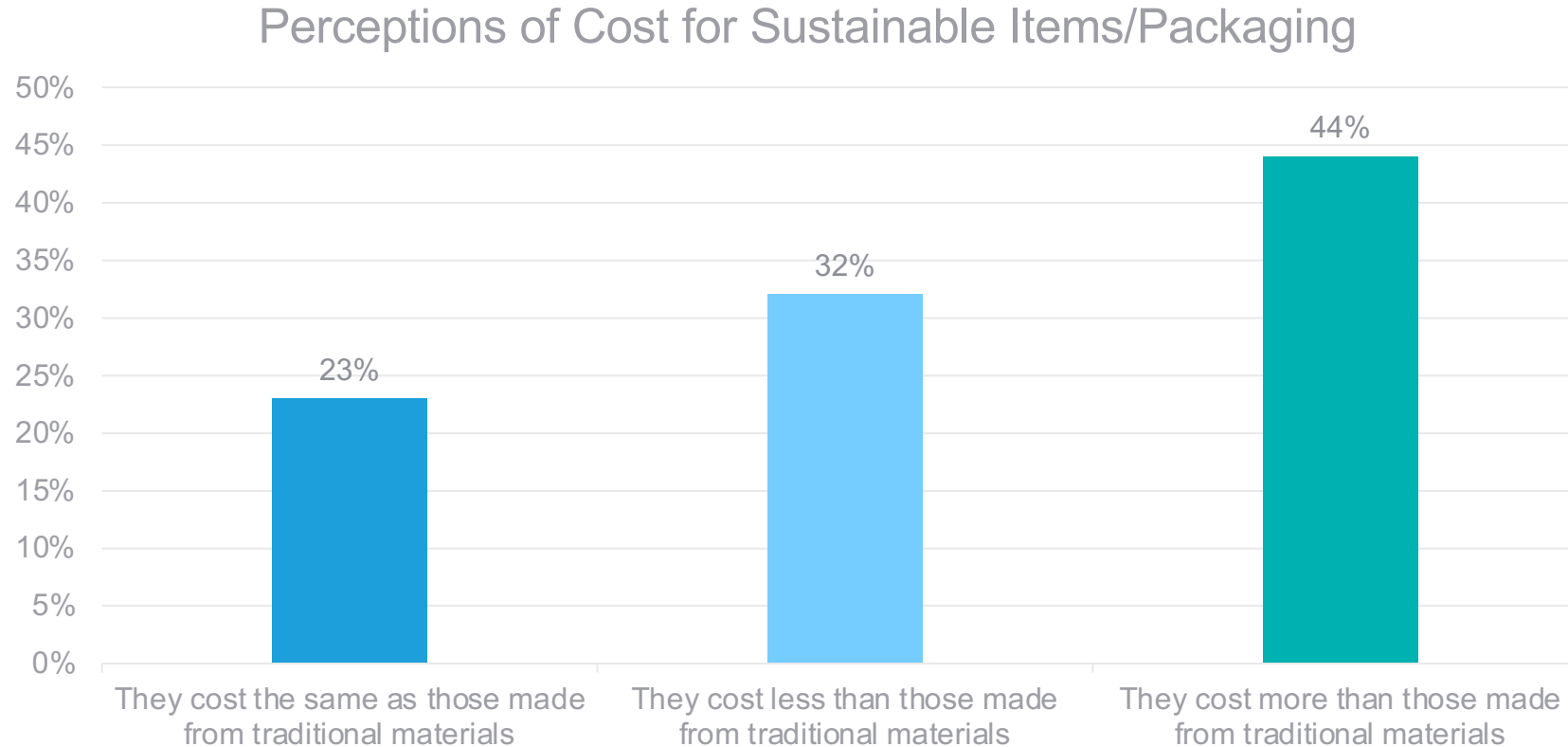
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PERCEPTIONS RELATED TO COST

While materials vary, overall, **44% of consumers believe that items/packaging made from sustainable materials cost more than those made from traditional materials.** In contrast, nearly one-third (32%) believe they cost less.



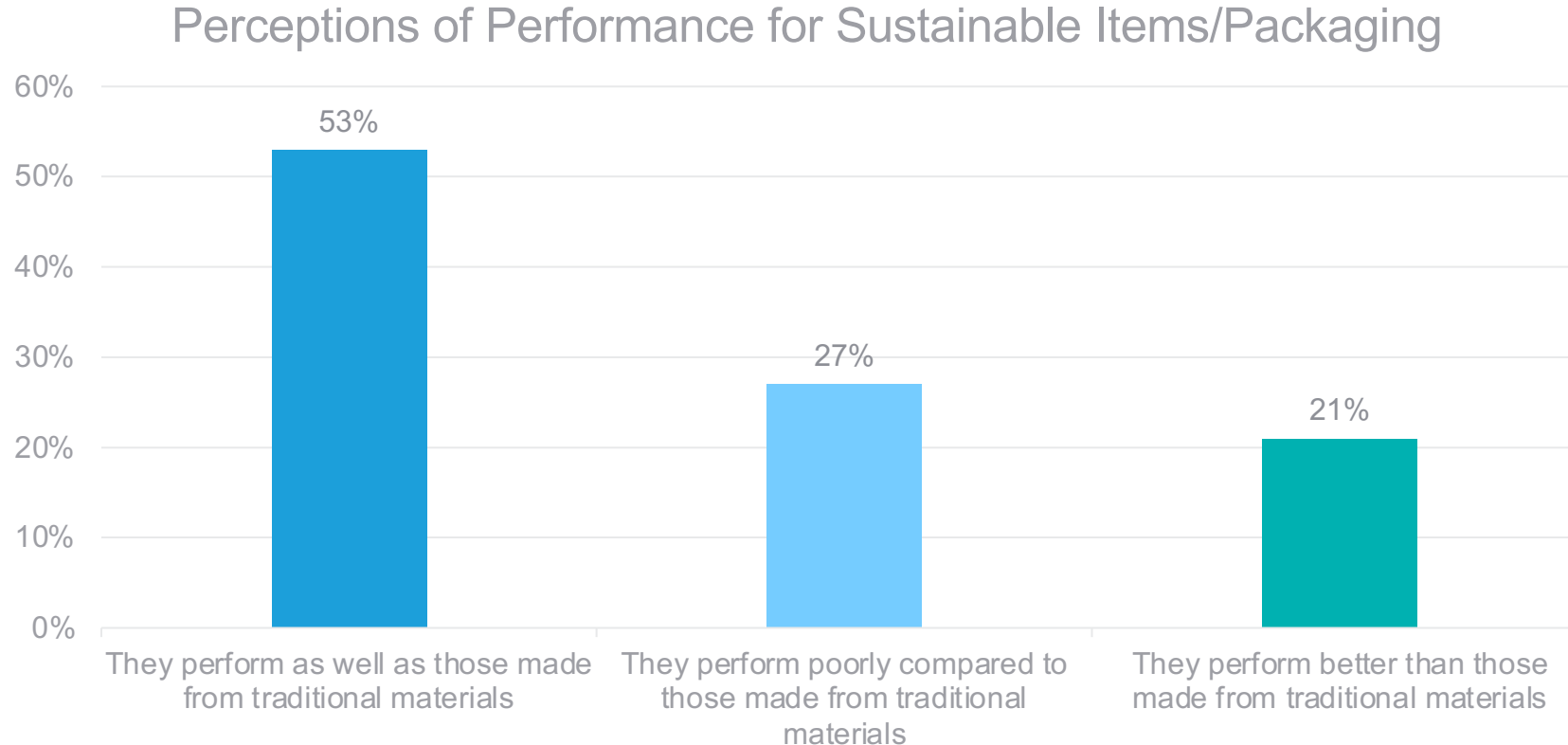
Q7. Thinking about single-use items/packaging you find at restaurants (e.g., to-go cups, disposable cutlery, etc.) made from sustainable materials or considered “environmentally-friendly,” which of the following, if any, do you believe regarding cost?

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PERCEPTIONS RELATED TO PERFORMANCE

While materials vary, overall, **more than half of consumers (53%) believe items/packaging made from sustainable materials perform as well as those made from traditional materials.** About one-fourth (27%), however, have lower expectations for these items compared to those made with traditional materials.



Q8. Thinking about single-use items/packaging you find at restaurants (e.g., to-go cups, disposable cutlery, etc.) made from sustainable materials or considered "environmentally-friendly," which of the following, if any, do you believe regarding performance?

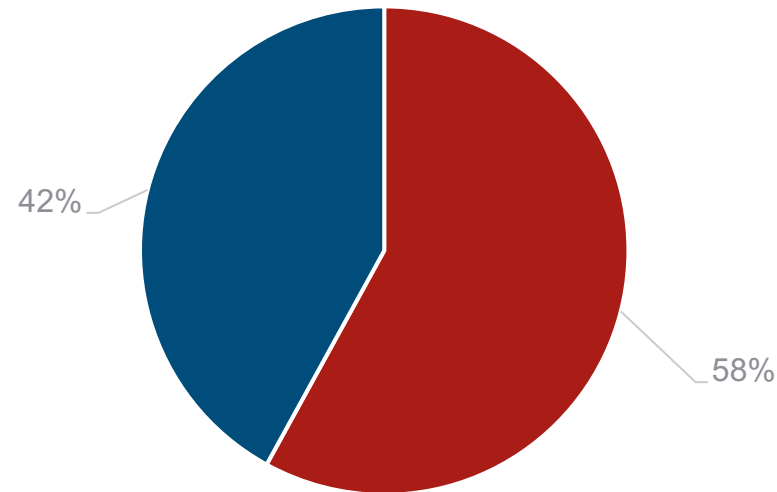
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PERCEPTIONS OF SINGLE-USE PLASTIC

Just over **one-half of consumers** agreed with the sentiment that **single-use plastic is harmful to the environment and should be restricted**. It should be noted that the degree to which it should be restricted and by whom was not defined and therefore open to interpretation.

Perceptions of Single-Use Plastic



- Single-use plastic is harmful to the environment and usage should be restricted
- Single-use plastic is convenient, necessary and usage should not be restricted

Q10. Regarding single-use plastic items / packaging like that used by restaurants (e.g., to-go cups, disposable cutlery), with which of the following are you more in agreement?

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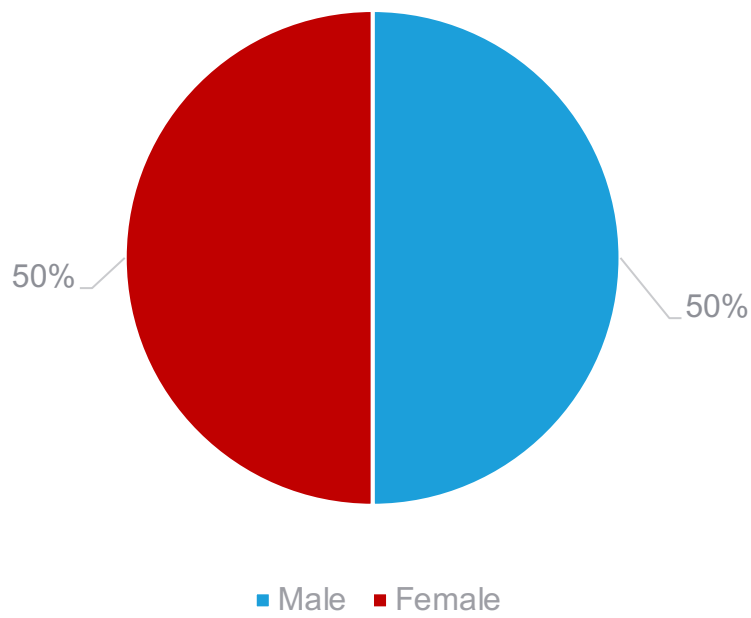
THANK YOU



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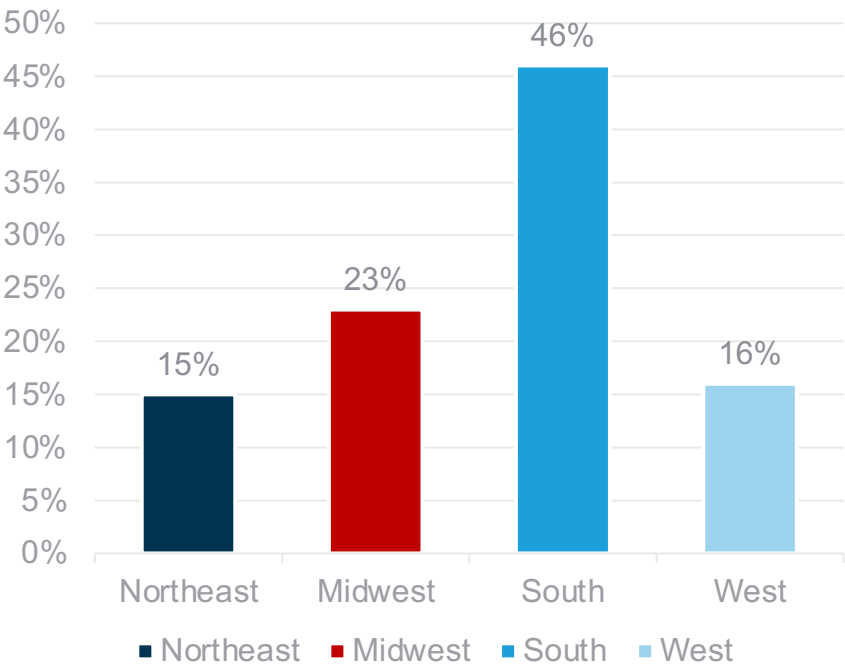
DEMOGRAPHICS

Gender



AGE	
18-24	13%
25-29	11%
30-34	11%
35-39	13%
40-44	10%
45-49	7%
50-54	10%
55 or older	26%

Region



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