

PATRON SURVEYS AND CONSUMER BEHAVIOR

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“There are very few issues of taste about which people of all ages, genders and geographic regions can agree. That’s why it catches [our] attention when an issue garners the overwhelming support of the public. And it is clear from our surveys that the vast majority of Americans prefer their restaurants, bars and clubs to be smokefree.”

– Tim Zagat, CEO and Co-founder of the New York-based Zagat Survey

All statistically reliable and verifiable studies conducted on patron behaviors and consumer preferences show overwhelmingly favorable responses to smokefree laws. The public is very supportive of smokefree laws; it is only tobacco industry manipulation that creates a sense of controversy about them. It is important to distinguish between favorable studies conducted by independent researchers and academics and unfavorable studies sponsored by the tobacco industry, which rely solely on anecdotal information and predictions.

National

- Eighty-nine percent of the 115,000 American restaurant-goers surveyed for the 2006 Zagat Survey America’s Top Restaurants® support 100% smokefree restaurant dining. Seventy-two percent said they would dine out more if an establishment were smokefree.¹
- A national 2005 Gallup poll found that the majority of Americans favor smokefree public places.²
- Eighty-two percent of the 110,000 American restaurant-goers surveyed for the **2005 Zagat Survey America’s Top Restaurants®**, the world’s leading provider of survey-based consumer dining behavior, believe that restaurants should be smokefree in their entirety. When asked if a smokefree policy were to be “put into effect in restaurants, would you dine out?” 72% of respondents said their eating-out habits would not change, while 26% said they would eat out more often, versus only 3% who said they would eat out less often.³

State

- **New York:** Public support for New York’s 100% smokefree law has increased – from 64% for the first three months of the law’s implementation in 2003, to 74% in the second quarter of 2004. In addition, the percentage of New Yorkers who report going to bars and restaurants more often is 20.4% and 32.4%, respectively.⁴
- **Connecticut:** In 2003, eighty-five percent of respondents reported that they support Connecticut’s smokefree workplace law; 93% of those surveyed agreed that “restaurants and bars are healthier for customers and employees now that they are smoke-free;” and 91% of

those surveyed agreed that “all Connecticut workers should be protected from exposure to secondhand smoke in the workplace.”⁵

- **Maine:** When asked whether “all Maine workers should be protected from exposure to secondhand smoke in the workplace,” 77% of respondents agreed in December 2003. Over time, that number went up 11 points to 88%. The survey also found a majority of support from not only nonsmokers, but former smokers and active smokers, as well. Not only did former smokers (77%) express support for the smokefree law, but also over half of those smokers polled (54%) said they support Maine’s law. This represents a 14 percentage point increase over the initial measure (40%) assessed in December 2003.⁶
- **California:** Seventy-five percent of interviewed California adults preferred smokefree environments in bars in 2000, compared to the 68% found after the law’s implementation in 1998. In addition, 87% of bar patrons surveyed in 2000 said they were “as likely” or “more likely” to visit bars since the establishments had become smokefree.⁷
- **Delaware:** One year after Delaware’s smokefree law went into effect, 77% of Delaware survey respondents said they support the statewide law and 78% of those polled believed in the right to breathe clean indoor air in restaurants, bars, and casinos in 2003. Of those surveyed, 86% agreed that people should be protected from secondhand smoke, and 83% said they found their visits to restaurants, bars, and casinos “more enjoyable” since the Clean Indoor Air Act went into effect in 2002.⁸
- **North Dakota:** 54% of surveyed North Dakota nonsmokers would visit restaurants (that don’t serve alcohol) more often if they were smokefree; while 73% of tobacco users say their frequency would not change. With the majority of nonsmokers saying they are likely to increase their patronage of smokefree establishments in 2003, North Dakota State Data Center director Dr. Richard Rathge, stated, “In reality, it’s increasing the bottom line.”⁹
- **Oregon:** In 1998, 8 out of 10 Oregon residents did not feel that a restaurant smoking ban would affect how often they eat out. A majority of those remaining felt that they would eat out more often if restaurants were smokefree.¹⁰
- **Massachusetts:** In 1997, approximately two-thirds of respondents reported that smokefree policies would have no effect on their patronage of bars and restaurants. Of those respondents who felt that smokefree policies would have an effect on their restaurant patronage, 31% stated that they would dine out more often. Only 7.9% stated that they would dine out less often.¹¹

Local

- **New York City, NY:** Of the 29,361 volunteer diners the Zagat (200?) New York City Restaurant Survey interviewed, only 4% said they are eating out less, whereas, almost six times as many, roughly 23%, reported eating out more given the smokefree environment in NYC’s restaurants and bars. 73% said the law (both state and city) had no effect on their dining-out habits. In addition, 32% of surveyors reported that they are eating out more this year that they did in 2001. And 53% say they are spending more per meal this year than in 2001, with only 12% claiming to spend less.¹²

- **Middleton, MA:** Eighty-eight percent of Middleton voters would eat out as often as they currently do if town restaurants went completely smokefree, not including attached bars, while only 4% of voters said they would patronize local restaurants less frequently. Middleton voters reinforced their public support for smokefree restaurants by passing a non-binding referendum in support of smokefree restaurants by 60% in May 2003.¹³
- **El Paso, TX:** Of those El Paso residents surveyed in 2001, 26.8% responded that they would eat out more often if restaurants were smokefree, 62.9% responded that they would eat out the same amount, and 10.4% responded that they would eat out less often. Researchers concluded: “Our findings suggest that a smoking ban would increase the dining frequency of nonsmokers by more than would be reduced by smokers – thus, a positive economic impact of smoking restriction could occur.”¹⁴
- **Helena, MT:** In 2004, 66% of surveyed Helena voters “support” an ordinance that makes all indoor air places smokefree; 54% of whom “strongly support” such an ordinance. When told that Helena’s comprehensive smokefree ordinance is currently not being enforced while it is being challenged in court, 63% of surveyed voters said that they “support” (51% “strongly support”) enforcement of the smokefree law immediately, without further delays.¹⁵
- **Denver, CO:** Forty percent of regular bar patrons surveyed in 2002 would visit bars more frequently if smoking was prohibited. Even the majority of smokers, who comprised approximately 19% of the Denver adult population at that time, supported smokefree bars and restaurants.¹⁶
- **Tempe, AZ:** In 1999, more than half of those Tempe residents polled (57%) reported that they were more likely to go to a smokefree restaurant; only 9% reported that they would be less likely to go to a smokefree restaurant. When asked whether a smokefree bar ordinance would make them more or less likely to go to a bar, 34% of those polled responded that they would be more likely to go and 11% responded that they would be less likely to go.¹⁷

International

- **Ireland:** Support for Ireland’s 100% Smoke-Free at Work Law, which went into effect on March 29, 2004, remained strong one year later. Of those Irish citizens polled, 93% think the introduction of the law was a good idea, including 80% of smokers; 96% believe the law is successful, including 89% of smokers; and 98% feel that workplaces are healthier since the introduction of the law, including 94% of smokers. In addition, the majority of respondents say they are more likely to dine out more often since implementation of the smokefree law.¹⁸
- **New Zealand:** Public support for smokefree hospitality establishments continues to increase in New Zealand. According to a poll conducted by UMR Research, 73% of respondents (both nonsmokers and smokers) supported smokefree restaurants in 2004, up from 67% in April 2003. New Zealand’s 100% smokefree law went into effect on December 10, 2004, and covers all workplaces, including restaurants, bars, and casinos.¹⁹

- **Hong Kong:** In 2001, the first comprehensive survey of public opinion on smokefree policies in Asia found strong community support for smokefree dining. The majority of respondents (77.2%) anticipated no change in their dining behavior if hospitality establishments went smokefree. Of those who did predict a change, 19.7% predicted that they would dine out more often and only 3.2% predicted that they would eat out less often.²⁰
- **Victoria, Australia:** Restaurants would receive *more* business, not less, if they went smokefree. Up to 52.5% of respondents of a survey conducted in 2000 felt they would be more likely to attend smokefree venues, while only 29% of respondents felt they would be less likely to attend smokefree venues. The survey concluded that “overall smoke free venues would appear to make people more likely to attend” venues.²¹

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