

PATRON SURVEYS AND CONSUMER BEHAVIOR 2009

"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

- The 2008 North America Hotel Guest Satisfaction Index Study (issued by J.D. Power and Associates) found that, "Nearly nine of 10 guests (89%) say they prefer a smokefree hotel environment in 2008, compared with 79% in 2006."¹
- A national 2005 Gallup poll found that the majority of Americans favor smokefree public places.²
- Zagat Survey, LLC, is a trusted national source of information about dining in the United States surveys customers about their dining habits and preferences.
 - According to the *2008 Zagat Survey American's Top Restaurants*®, "The verdict on smoking is overwhelming with 77% of diners saying they'd eat out less if smoking were permitted in local restaurants, and only 2% saying they'd dine out more."³
 - 89% of the 115,000 American restaurant-goers surveyed for the *2006 Zagat Survey America's Top Restaurants*® support 100% smokefree restaurant dining. 72% said they would dine out more if an establishment were smokefree.⁴
 - In the *2005 Zagat Survey America's Top Restaurants*®, patrons were 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.⁵

State

- **California:** 75% 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.⁶ In addition, J.D. Power and Associates 2008 Southern California Indian Gaming Casino Satisfaction Study found that 85% of gamblers at Native American casinos in Southern California stated that they would prefer the casinos to be smokefree.⁷

- **Connecticut:** In 2003, 85% 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.”⁸
- **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 2002.⁹
- **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 2003.¹⁰
- **Massachusetts:** A 2007 study found that Massachusetts’ smokefree air law improved air quality and had no statistically significant economic impact.¹¹ 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.¹²
- **New Mexico:** Patron support has remained strong since New Mexico’s smokefree state law took effect. A 2007 survey found 37% of residents were much more likely to go to a bar or restaurant now that they are smokefree, while 15% were somewhat more likely and 36% stated it would make no difference in their habits.¹³
- **New Jersey:** A 2007 survey of New Jersey voters found 69% of respondents favored expanding the state's smokefree air law to casinos, while 85% agreed with the statement, "All New Jersey casino workers should be protected from exposure to secondhand smoke in the workplace." The survey also found that 18% stated that they would go out more often if casinos were smokefree, while 74% indicated their habits would not change at all.¹⁴
- **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.”¹⁵

- **Oregon:** In 1998, *8 out of 10* Oregon residents did not feel that a smokefree restaurant law would affect how often they eat out. A majority of those remaining felt that they would eat out more often if restaurants were smokefree.¹⁶

Local

- **Boston, MA:** A survey of adult Massachusetts smokers before and after Boston's clean indoor air ordinance was implemented found that the ordinance did not negatively impact bar patronage.¹⁷
- **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.¹⁸
- **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.”¹⁹
- **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.²⁰
- **Marion County, IN:** A 2009 survey of Marion County, Indiana, residents found that 69.5% support a smokefree ordinance for all workplaces, including bars, restaurants and bowling alleys. A total of 83.3% said a smokefree ordinance would have either no impact (43%) on the number of times they frequented bars or restaurants, or they would go out more often (40.3%).²¹
- **Middleton, MA:** 88% 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 2003.²²
- **New Orleans, LA:** According to the Zagat Survey 2009 Guide for New Orleans, Louisiana, 66% of residents were in favor of smokefree bars, clubs and lounges.²³

- **New York City, NY:** Of the 29,361 volunteer diners the Zagat (2003) 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.²⁴

International

- **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.²⁵
- **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.²⁶
- **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.²⁷
- **Thailand:** A 2009 study presented the results of a survey of 5,550 tourists in Thailand regarding their reactions to the nation's smokefree hotel lobbies regulation and their knowledge of secondhand smoke. The survey found that 80.9% of tourists were in favor of the smokefree regulation.²⁸
- **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.²⁹

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