

Single-Use and Takeaway Items Reduction Strategy Stage 2 Consultation Report

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1.0 Executive Summary

After previous stages of consultation activities, the City of Toronto undertook a third phase of consultation activities from February to March 2022 to receive feedback on this stage of the Waste Reduction Strategy. The Strategy proposes mandatory measures to reduce single-use plastic and takeaway items through fees and/or to require “Ask-First, By-Request” measures. Consultation efforts were designed to engage both the public and stakeholders.

Communications and notification activities were used to spread awareness about the consultation opportunities and included web page information updates, social media posts and emails. Consultation activities were used to collect feedback and included independent polling conducted by IPSOS and an online survey analyzed, emails received, written letters collected, and stakeholder and public meetings conducted by City staff.

The City of Toronto looks to incorporate feedback received through these consultation efforts into its Waste Reduction Strategy, especially the reduction of single-use and takeaway items and “Ask-First, By-Request” programs.

1.1 Key Findings

Overall, there is general support for single-use and takeaway items reduction and “Ask-First, By-Request” measures. Key findings from stakeholder and public feedback, include:

- Ensure that there is adequate promotion, communications and educational support surrounding these programs for businesses, consumers, community groups, and internal City divisions
- Provide clarity on acceptable materials, alternative materials, exemptions, and how the fees collected will be used
- Apply an equity lens to all programs, fees, and by-laws; consider the impacts of the COVID-19 pandemic
- Ensure the fees for the single-use plastics program are reasonable for businesses to adopt
- Provide support to businesses to be able to accept reusable container and/or revisit this aspect of the program
- Extend the reduction strategy more broadly to manufacturers, grocers, and other packaging users

2.0 Overview

2.1 Project Summary

In June 2021, Toronto City Council approved the Voluntary Measures Program (Program) as the first step of the Reduction Strategy to help reduce single-use and takeaway items in Toronto.

The City of Toronto is preparing to move forward into Stage 2 of the Reduction Strategy by proposing mandatory measures that will restrict single-use and takeaway items through fees and/or require “Ask-First, By-Request” measures.

A proposed bylaw will be presented in a staff report to the Infrastructure and Environment Committee and Toronto City Council in 2023. The report will include details of the Reduction Strategy with mandatory measures and implementation timelines.

This report summarizes consultation activities and feedback received during Stage 2 consultation, taking place from February 7th, 2022 – March 6th, 2022

2.2 Goals and Objectives

Stage 2 consultation activities objectives were to:

- Understand challenges related to mandatory measures
- Identify resources and supports needed by businesses to comply with the mandatory measures
- Identify resources and supports needed by businesses to encourage the use of reusables in their operations

3.0 Activities

This section describes Stage 2 Consultation activities to engage the public and stakeholders.

3.1 Communications and Notification

A variety of methods were used to notify stakeholders and members of the public the week of February 7th, 2022, about Stage 2 consultation:

Method	Results
Project Website	toronto.ca/single-use
Social Media Posts	<ul style="list-style-type: none"> • One (1) Instagram post from the City of Toronto account (@cityofto) • Five (5) Twitter posts from the City of Toronto account (@cityoftoronto)
Sponsored Social Media Posts	<ul style="list-style-type: none"> • One (1) Instagram post and one (1) Facebook post with a combined 798,155 impressions • One (1) Twitter post with 276,614 impressions • One (1) TikTok post with 426,677 impressions • One (1) Snapchat post with 318,666 impressions
Emails	<ul style="list-style-type: none"> • Sent to project list (7,908 contacts) • Sent to city-wide stakeholder list including businesses and organizations from sectors representing: food and beverage, retail, residents associations, accessibility, community health, non-profits, institutions and elected officials (609 contacts)

3.2 Consultation

Stakeholders and members of the public participated in the following consultation activities. Please note that the consultation activities were hosted virtually due to the COVID-19 Pandemic:

Method	Results
Online Survey	<ul style="list-style-type: none"> • 10,719 responses from the general public • 184 responses from businesses
Independent Polling	<ul style="list-style-type: none"> • 1000 residents participated • 250 restaurants participated
Emails	<ul style="list-style-type: none"> • 25 received from general public
Written Letters	<ul style="list-style-type: none"> • 3 received from stakeholder representatives
Stakeholder Meetings	<ul style="list-style-type: none"> • 53 stakeholders attended 4 meetings: <ul style="list-style-type: none"> ○ February 15th at 1:30 pm (21 people) ○ February 16th at 6:30 pm (10 people) ○ March 3rd at 1:30 pm (20 people) ○ March 3rd at 6:30 pm (2 people)
Public Meetings	<ul style="list-style-type: none"> • 102 people attended two meetings: <ul style="list-style-type: none"> ○ February 15th at 6:30 pm (44 people) ○ February 16th at 1:30 pm (58 people)

4.0 Stakeholder Feedback Summary

This section describes the feedback received from stakeholder groups during consultation.

4.1 Stakeholder Meetings

Four stakeholder meetings were conducted:

- February 15th at 1:30 pm (21 people)
- February 16th at 6:30 pm (10 people)
- March 3rd at 1:30 pm (20 people)
- March 3rd at 6:30 pm (2 people)

Stakeholders were invited through an email blast sent by Solid Waste Management staff to existing email lists. The meetings were facilitated by the Public Consultation Unit and Solid Waste Management delivered the presentation content. A question-and-answer period followed the presentation.

Questions and comments received at the stakeholder meetings are summarized below:

4.1.1 Encourage businesses to invest Fees into environmental programs

- Unsure why there are fees being suggested on paper bags
- Tie fees to certain actions or reinvestment in recycling – it currently only adds to profit margins for businesses
- Unsure how this will benefit a business that is solely dependent on customers using cups for hot and cold beverages

4.1.2 Materials

- Consider exempting compostable straws as they can be diverted to the green bin program

- Unclear why single-use materials would still be available in grocery stores
- Unclear if businesses will be allowed to sell products where straws are attached
- Consider exemption depending on paper bag size (i.e., such as small bags used for individual pastries or pharmaceuticals)
- Consider extended merchant/producer responsibility

4.1.3 Reusables

- In strong support of a reusables initiative
- Consider the use of tiffin, which is already used by some ethnic groups
- Support broader systematic change, including a more ample roll-out of a platform for reusable products
- Consider a one-time use fee for reusables
- Pair reusable program with a sanitation program
- Consider a unified return system for reusables
- Some grocery stores (i.e., The Big Carrot) have non-plastic food take out containers

4.1.4 Program Suggestions

- Consider learning from and adopting best-practices in other cities or countries
- Apply these measures to other businesses other than restaurants, such as grocery stores
- Unsure if these bylaws will apply to social service agencies that provide food to clients as well as organizations that host community events
- Consider the voluntary elimination of polystyrene and black plastic takeout containers ahead of the ban in 2023 to provide an easier transition period for businesses
- Use the City's procurement capabilities to help interested businesses with buying acceptable, recyclable takeout containers and apply a discount tied to the City aggregating certain levels of volumes
- Consider an outright ban on plastic and plastic bags
- In strong support of the recognition program

4.1.5 Equity

- Ensure low-income individuals are not disproportionately affected by fees
- Ensure consultations are conducted for marginalized populations (i.e., food banks)

4.1.6 Consultation and Communications

- Ensure there is adequate promotion and education and enough buffer time is given for both so that businesses can adequately prepare and adjust their operations and staff*
- Ensure internal City divisions are consulted on the elimination of single-use items, especially those that run food related businesses (i.e., Parks and Recreation)
- Keep the online survey open for longer (another month)
- Consider hosting sessions where participants can see and interact with each other (even if virtually)

4.2 Ipsos Representative Food Service Survey – Feedback from Food Service Business Establishments

4.2.1 Ask First/By Request Bylaw

Among food service business establishments, including restaurants, there is strong support for the City's proposal to implement the Ask-First, By-Request bylaw for single-use food utensils, straws, and other single-use accessory items effective September 2022, as nearly three quarters (74%) of food service business establishments agree with the proposal. Support is driven by the expectation that the Ask-First, By-Request bylaw can positively impact both the economy, the environment, and their business. A few Toronto food service business establishments offer negative comments regarding the Ask-First, By-Request bylaw timeline as one-in-ten feel that September 2022 was too early to implement the bylaw. It is important to note that a majority (62%) of food service business that participated in the survey indicated that they already had some form of an ask-first policy in effect for some single-use items.

A majority (59%) of food service business establishments do not expect the Ask-First, By-Request bylaw to have any negative repercussions for their business. Among those who do, one in five (21%) mention disgruntled customers (21%), followed by smaller proportions of businesses that cite increased costs (7%) or delays in service (6%). On the other hand, about three-quarters of food service business establishments expect some positive impacts of the bylaw, such as saving money (26%) and reducing waste (22%).

4.2.2 Fee Bylaw

Looking forward, a majority of food service establishments (who distribute or plan to distribute single-use items) support charging a fee for single-use plastic bags (60%) or cold beverage cups (55%), while half (51%) support a fee for hot beverage cups, and fewer than half (45%) support a fee for single-use paper bags. Among those food service business establishments that support a fee, most would not accept fees exceeding \$0.05 for each type of single-use item. Regarding reusable bags, just over half (56%) food service business establishments surveyed support charging customers a fee for reusable bags, with businesses most commonly saying they would support charging fees of \$0.50 (22%) or \$1.00 (22%). On the other hand, nearly four in ten (38%) say they do not want to charge customers anything for new reusable bags.

Regarding the proposed implementation timeline for the fee bylaw, more food service business establishments surveyed agree (52%) than disagree (34%) with the timeline for the proposed bylaw to charge a fee for single-use bags, single-use beverage cups, and new reusable shopping bags starting in January 2023.

Many (67%) food service business establishments anticipate some positive impact from the proposed fee bylaw, including environmental benefits (16%), cost savings (14%), and additional revenue (13%) most commonly cited. However, more businesses (78%) also expect there to be negative impacts resulting from the proposed fee bylaw for single-use items. Nearly half (43%) cite unhappy or frustrated customers, followed by about one in seven establishments that mention an increased cost for consumers (15%), or a decrease in sales or customers as a result of the fee bylaw (14%).

Currently, only 13 per cent (13%) of food service business in Toronto charge fees for at least one of the single-use items, including one in 10 (10%) who charge fees for single-use plastic bags. In addition, a few (5%) say they currently charge a fee for reusable shopping bags. Overall, 85% of businesses do not charge a fee for any single-use item.

4.2.3 Accepting Reusable Containers

While a majority of Toronto's food service establishments say they would have no difficulty accepting reusable bags (84%), and hot (70%) or cold (63%) beverage cups, there is weaker support for containers. Importantly, more than half (55%) of food service business establishments indicate that they would have difficulty accepting reusable containers. Most often establishments cite sanitary and health reasons (22%), the need for more staff to implement (14%), or issues with the size of the containers (6%) as issues.

While a large number of food service business establishments in Toronto say they are ready now to accept reusable bags and cups, there is significantly weaker acceptance for reusable containers. Specifically, the majority of food service business establishments say that they are ready anytime to accept reusable bags (58%), while almost half (46%) say they are ready now to accept reusable cups. Only one third (34%) of establishments say that they are ready anytime to accept reusable containers.

4.2.4 Feedback Towards Support Provided by the City of Toronto

Most food service business establishments surveyed would find any type of non-financial support and assistance initiatives that can be offered by the City to be useful with advertising communications being seen as particularly useful (86%). Online resources are also thought to be useful by quite a strong majority (78%) of the food service business establishments that were surveyed.

When asked what the City of Toronto can do to provide educational support for food establishments, a variety of responses are offered by food service business establishments, with general marketing events (34%) and financial supports (14%) most frequently mentioned.

5.0 Public Consultation Feedback

This section describes the feedback received from members of the public during consultation.

5.1 Public Event

Two public meetings were conducted:

- February 15th at 6:30 pm (44 people)
- February 16th at 1:30 pm (58 people)

The meetings were facilitated by the Public Consultation Unit and Solid Waste Management delivered the presentation content. A question and answer period followed the presentation.

During the two public events, participants expressed questions and comments summarized below:

5.1.1 Fees

- Concerned about businesses keeping the fees
 - Businesses could turn the reusable program into a money-making endeavour if they keep the fee
 - Companies were pocketing the money from single-use cup fees in Vancouver while not providing alternatives or accepting reuse. Ensure that Toronto does not have a similar experience
 - If businesses retain the fee, it may incentivize the use of single-use plastics for the business rather than encourage the customer to refuse single-use plastics and bring in reusable items
 - Businesses already hide fees for single-use items in their pricing
 - Customers should not be the ones who are paying
- Money collected should go towards research and development for and setting up better recycling programs
- Apply fees to bulk suppliers of single-use products as an incentive for businesses to reduce single-use items
- Extend the residential waste pick up program to all businesses at no cost – this would reduce the additional cost of recycling as well as the amount of landfill contributions
- Unclear about what fees are being proposed/changed

5.1.2 Timeline

- In support of more aggressive timelines
- Consider shortening the timeline for implementation as it seems too long
- Speed up the implementation of both the Ask-First program and the fee program to earlier than the end of this year
- Provide status on the plan and timelines to shift some of the responsibility of recycling and waste management to producers by 2026
- Apply fees to single-use items for one year followed by a complete ban
- Timing should be reconsidered to allow for more recovery from the COVID-19 pandemic

5.1.3 Reusables

- Single-use items can be more hygienic, especially in COVID-19 circumstances
- Mandate reusables – would be an easy way to reduce single-use plastics
- Consider implementing a reusable containers program for businesses as this would be the most impactful in reducing single-use items
- Prioritize, mandate and/or financially support reusable bags upcycled locally from local textile waste
- Consider an education-first way to encourage people to reuse, especially for plastic bags that can be used for compost or garbage
- Implement a uniform set of recycling choices in food courts that will allow for a greater range of recycling and composting options

5.1.4 Alternative Materials

- City should consider innovative alternatives to single-use plastics with better recycling outcomes
- Consider promoting alternative compostable materials for single-use items
- Support and create programs for businesses looking to shift to environmentally-friendly alternatives that can be managed by existing blue bin or green bin programs

5.1.5 Black Plastics

- Consider a contingency plan for black plastics should there be issues with the future bans at the federal government level
- Invest in the ability to recycle black plastics
- Work with restaurants or give them incentives or support to help them completely move away from plastic takeaway containers

5.1.6 Program

- Too focussed on restaurant and café single-use items – please make a plan to reduce packaging waste more broadly
- Ban plastics and consider expanding the ban to other items
- Ban Styrofoam and eliminate the use of ordering take-out items for dining/sitting-in restaurants/cafes
- Unclear what powers the City has to ban items entirely
- Ensure the ban on polystyrene extends to green grocers and their display of fresh produce

5.1.7 Equity

- Ensure racialized, low income and communities of colour are included in the consultation process
- Ensure cultural nuances are incorporated in the survey
- Consider making zero waste kits of reusables available for sale or for free through Live Green Toronto similar to their Fair Pass

5.1.8 Consultation and Communication

- Consider partnering with BIA's to deliver surveys to the general public
- Ensure there is a clear communications strategy
- List the businesses that participate in the Voluntary Measures Program
- The ask-first policy may require training, which could burden small businesses
- Ensure there is an education and training for businesses built into the program

5.1.9 Other

- Consider how reduction strategy will impact garbage collection if at all
- Provide compost bins in all parks
- Unclear how materials are sorted in Toronto's current waste streams/programs

5.2 Email

Comments received via email from members of the public are summarized below:

5.2.1 General

- In support of this proposal
- Options are a great start, but can do better
- Everything should be made voluntary
- Support tough measures with ample warning time and support
- Support a total ban of the manufacturing, sale and importing of single-use and hard-to-recycle plastics

5.2.2 Materials

5.2.2.1 *Black Plastics*

- Ban black plastic takeout containers as they are not recyclable and unable to be processed by the City
 - Curtail supply of them at the source
 - Prohibit restaurants from using them
 - Invest in machinery/processes to be able to recycle them
 - Encourage alternative plastic colours

5.2.2.2 *Plastic & Paper Bags*

- Encourage the use of paper bags instead of plastic bags
- Unclear what the issue is with paper bags unless they have plastic coating
- Ensure reusable bags sold at grocery stores as an alternative to plastic bags are higher quality and last longer
- Provide an alternative to plastic bags – people will have to buy them, instead of reusing what they receive at the store, to line recycling/garbage/green bin

5.2.2.3 *Plastic Containers*

- Unclear what the issue is with foam cups unless they have plastic coating

5.2.2.4 *Compostable/Biodegradable Containers*

- Legislate truly compostable containers as the only choice for restaurants and coffee shops
- Amend/expand the compost system to be able to process greater amounts and types of compostable containers
 - Will create jobs
 - Will help meet climate change goals and reduce
- Consider including PLA (poly lactic acid) as a compostable item
- Consider approving a standard or material specification that can be sent to businesses/vendors

5.2.2.5 Reusable Containers/Cups

- Ensure that it's mandatory that any food service business with seating serve food with reusable dishware/glassware
- Provide incentives to use reusable containers/cups instead of single-use and then stop providing single-use containers/cups entirely
- May be pushback to use reusable cups and containers because of hygiene issues
- Explore partnerships to deliver a reusable container pilot program

5.2.3 Programming Suggestions

- Encourage people to reuse plastics instead of littering
- Consider a credit program for businesses and consumers participating in a reusables program. This would support restaurants and businesses that have been financially impacted by the COVID-19 pandemic and incentivize the use of more sustainable packaging. Incentives would come out of a budget otherwise spent on managing SUTIs
- Partner with local initiatives and groups (i.e. Roncy Reduces, BIAs) that work with businesses on plastic reduction
- Consider partnerships with reusable container programs

5.2.4 Fees

- Do not let businesses keep the money from these fees*
 - Big box/chain stores produce the most waste and do not need these funds
 - Fees should benefit the City to further support climate, environmental and social service issues, including equity-deserving groups
 - Fees should benefit small businesses that have been hurt by the pandemic
 - The litter and pollution will continue
- Consider an upfront charge for the waste management fee, let users pay for the extra cost

5.2.5 Equity-deserving groups

- Ensure that people experiencing homelessness or that do not have access to clean utensils and food storage are considered. May negatively impact people living in difficult and insecure circumstances.
- People who bring reusable bags to stores are left to pack themselves. This proves difficult for seniors

5.2.6 Other

- Consider using the money spent on this program for other City initiatives
- Ensure this is adequately promoted

5.3 Social Media Comments

The following summarized comments were collected across all of the City's social media posts and advertisements.

5.3.1 Coordination with Businesses

- Work with businesses to decrease single-use and takeaway items and/or promote reusable
- Get grocery stores to stop wrapping produce in plastic
- Work with business and try to come up with a plan to promote and push reusable cups and utensils (e.g. they use a reusable cup and get % off the original price)
- Rethink food distribution and food courts, which were built on the concept of takeout containers and eating utensils
- Corporations who sell single-use products should have a take back program

5.3.2 Single Use Items

- Single-use and takeaway items should be eliminated/banned
- Ban water bottles

5.3.3 Packaging Regulations

- Regulate manufacturers and suppliers, not the consumer
- Excessive packaging needs to be reduced at the source
- Make manufacturers pay a disposal fee for the packaging
- Address the system and business process issue - the bag fee and it didn't work
- Single-use plastics should just be banned
- Stop making black plastic containers
- Pass regulations that require all takeaway/delivery packaging to comply with the City's program
- Place a deposit on all plastic bottles, both large & small
- Mandate 100% recyclable product packaging

5.3.4 Materials

- Make all single-use & takeaway items recyclable/compostable/biodegradable
- Consider plant based cellulose, paper takeout containers and utensils made from renewable bamboo

5.3.5 Reusables Program

- Not feasible to expect consumers to walk around with their own reusable containers and utensils
- Do not want to carry around wet, dirty reusables
- Concerned about safety issues around carrying reusable eating utensils, especially knives
- Concerned about the transfer of bacteria from consumer to business employee

5.3.6 Existing Recycling Program

- Make Toronto's recycling program as comprehensive as that of other Ontario regions/most in the world
- Accept black plastic takeaway packaging and to-go coffee cups

5.3.7 Impact of Fees on Businesses

- The increase in fees will harm struggling businesses
- Businesses cannot afford to pay new fees on top of higher food, packaging costs etc.

5.3.8 Impact of Fees on Residents

- Will increase costs as every increase in the cost of doing business is passed along to consumers
- Consider lower income groups who are already struggling without these additional fees
- Consider the costs to consumers - inflation is increasing and the lowest income groups are struggling
- Find a better way to do this other than increasing consumer costs
- Provide multi-use bags and coffee and food containers to households that need them
- Consider the impact on people everywhere (in transit deserts) and in all economic strata

5.3.9 Multi-residential waste reduction/sorting

- Residents in multi-unit buildings need to put garbage and food waste in plastic bags to go down the garbage chute – banning retail plastic grocery bags that we reuse just forces us to buy new bags.
- Not all buildings well equipped for sorting
- Residents in multi-residential buildings can't be bothered

5.3.10 Consultation

- I gave my feedback on this already- what happened to those results?

5.3.11 Other

- There is no such thing as zero waste

5.4 Ipsos General Public Survey – Feedback from Residents

5.4.1 Ask-First, By-Request Bylaw

Overall, a majority (67%) of Toronto residents support the City of Toronto's proposal to implement the Ask-First, By-Request bylaw for single-use food utensils, straws, and other single-use accessory items. Reasons for support among residents includes the environmental impact (19%), the ability of the bylaw to reduce waste (10%), minimize plastics (4%), and other environmental aspects (8%). Very few residents provided any negative comments about the proposed bylaw.

Most Torontonians agree with the idea of expanding the Ask-First, By-Request bylaw to include other single-use items. In fact, a strong majority (69%) of residents agree that the Ask-First, By-Request Bylaw should be expanded to include other single-use accessory items such as napkins, stir sticks, beverage trays, and condiment packets. However, when asked if any of these items should be excluded from an expansion of the bylaw, four in ten (38%) would agree that napkins should not be included in the bylaw, followed by one-quarter (24%) of residents who would not like to see condiment packets restricted.

5.4.2 Fees Bylaw

Most residents do not support charging a fee for hot (52%) or cold (51%) beverage cups or single-use paper bags (52%). A majority of residents do support a fee for single-use plastic bags (66%), although only a small fee amount of \$0.05 charged per bag is supported by four in ten (42%) residents.

Regarding re-usable bags, support for a fee is split as half (49%) of Torontonians support paying a fee for a new reusable bag, compared to 43% who do not support paying a fee. Among those willing to pay a fee, most (28%) would support paying a fee of \$0.50.

In terms of the implementation timeline for the proposed fee bylaws, a majority (53%) of Toronto residents agree with the City 's proposed timeline for the implementation of the fee bylaw for single-use cups, bags, and new reusable bags offered at the point of sale by January 2023.

5.4.3 Increasing Acceptance of Reusable Items

There is strong support for a bylaw mandating businesses in the City of Toronto to accept reusable shopping bags, cups, and food containers. Support is strongest regarding reusable shopping bags, as nearly four in five (79%) indicate they would support a bylaw mandating acceptance of this particular item, including a majority (56%) who say they would strongly support it. About seven in ten (69%) support a bylaw mandating acceptance of reusable cups and almost two thirds (64%) for reusable containers.

SINGLE-USE AND TAKEAWAY ITEMS REDUCTION STRATEGY: REPRESENTATIVE SURVEY

Draft Report

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METHODOLOGY

Methodology



SUMMARY

These are the findings of an Ipsos survey conducted on behalf of the City of Toronto.



SAMPLE & REPORTING CONVENTIONS

For this survey, we sampled n=1,000 Toronto residents aged 18+ via Ipsos' online omnibus.

The combined data is representative to the adult population (18+) of the City of Toronto. The sample was designed and weighted to reflect the demographic composition of the City of Toronto.

Quotas sampling and weighting has been applied by age, gender, level of education, and region within the City of Toronto to ensure the sample composition reflects the City of Toronto population.

Where applicable, statistically significant differences between those who identify as disabled vs. do not and low-income households vs. all others have been noted. If there is no mention of these subgroups, the differences are not statistically significant.



PRECISION

The precision of Ipsos online surveys is calculated via a credibility interval. In this case, the sample is considered accurate to within +/- 3.5 percentage points had all Toronto residents aged 18+ been surveyed.

Note: where totals do not add to 100% it is either due to rounding or respondents were permitted to offer more than one response.

Methodology (Cont'd)



SUBGROUP DEFINITIONS

The boroughs of Etobicoke, York, North York, Metro Toronto, East York, and Scarborough are defined by postal code.

Gender is defined as identifying as a member of one of the following groups: woman, man, trans woman, trans man, gender non-binary, two-spirit, other, or prefer not to answer.

Respondents self-identified as having a disability (or not).



METHOD AND TIMING

The survey was conducted online by Ipsos. The survey was open between February 17 and March 7, 2022.

On average, respondents took about 7 minutes to complete the survey.



ROUNDING & REPORTING CONSIDERATIONS

Where figures do not sum to 100, this is due to the effects of rounding.

For the open-ended questions, percentages do not always add up to 100% as some respondents offer more than one comment, and in some cases, provide positive and negative comments in the same response.

All percentages shown are relative to the sample size that was asked the question.

KEY FINDINGS

Key Findings

- Overall, there is strong public support for the implementation of an Ask-First/By-Request bylaw by September 2022 as two-thirds (67%) of Toronto residents agree with this timeline. In fact, most (69%) would be open to expanding the Ask-First/By-Request bylaw to include other single-use accessory items.
- There are soft levels of support for paying a fee for certain single-use items. On the one hand, a majority (66%) of residents are willing to pay a fee for single-use plastic bags, while on the other hand only a minority of Torontonians are willing to pay any amount of fee for single-use hot (41%) and cold (41%) beverage cups or single-use paper bags (42%), beginning in January 2023. About half (49%) of residents are willing to pay a fee for reusable bags.
- Among those Torontonians who would pay a fee for any single-use item, the preferred fee is low (closer to \$0.05 per item), with the exception of single-use reusable bags where the preferred fee is closer to \$0.50.
- A little over half (53%) of Toronto residents support the proposed timeline of January 2023 for the new fee bylaw to be implemented. Residents are split in their opinion about implementing an incremental fee increases over a two-year period.
- There is strong support for a future bylaw mandating businesses in the City of Toronto to accept reusable items, including shopping bags, cups, and food containers.

ASK-FIRST/ BY-REQUEST

Ask-First/By-Request Bylaw

Description Provided to Respondents:

The City of Toronto is proposing an Ask-First/By-Request bylaw that would require single-use items be distributed to a customer only after asking or upon request. Details:

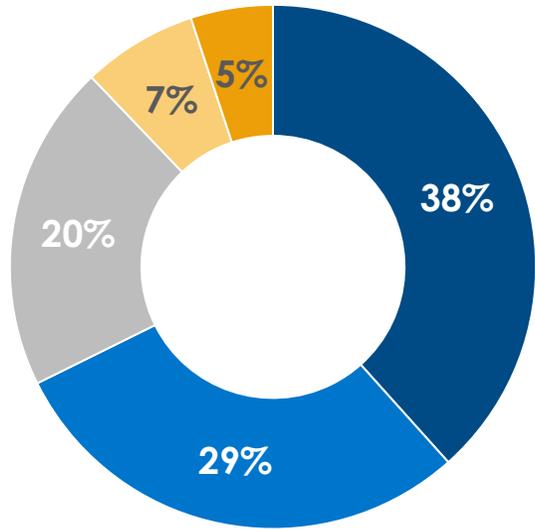
- Straws and utensils will be restricted based on support from previous consultation.
- The City of Toronto is now proposing that the Ask-First/By-Request approach be expanded to include other accessory items such as: napkins, stir sticks, beverage trays, condiment packets and other similar accessories or accompanying single-use items used as part of food or beverage service or packaging.
- Customers would ask for item or the employee would ask if the customer wants the item.
- Businesses could be restricted to keeping items behind the counter or away from public access.
- Delivery services would be required to include confirmation that the items are required for online and mobile food orders.

The bylaw would ensure no adverse effects for individuals who request single-use straws for accessibility or health reasons.

Attitudes Towards Ask-First/By-Request Bylaw and Implementation Timeline

- On balance, a majority (67%) of Toronto residents support the City of Toronto's proposal to implement the Ask-First/By-Request bylaw for single-use food utensils, straws, and other single-use accessory items, effective September 2022.

■ STRONGLY AGREE ■ SOMEWHAT AGREE ■ NEITHER AGREE NOR DISAGREE ■ SOMEWHAT DISAGREE ■ STRONGLY DISAGREE



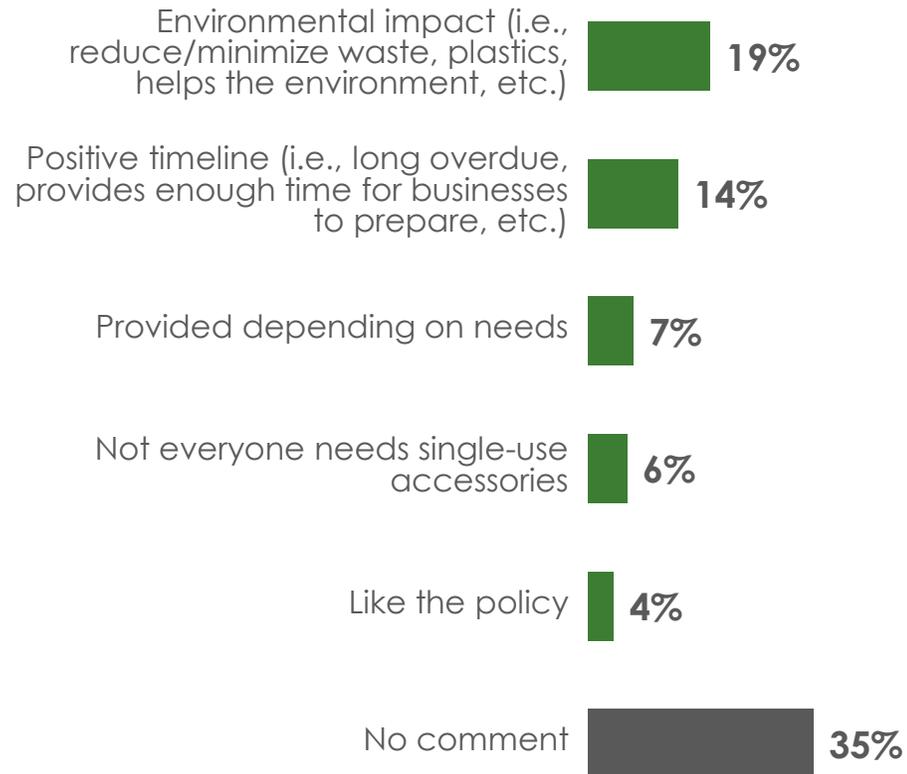
AGREE	DISAGREE
67%	13%

Base: All respondents (n=1000)
Q7A. The City is proposing implementation of the Ask-First/By-Request bylaw for single-use food utensils, single-use straws and other single-use accessories to begin in September 2022. To what extent do you agree or disagree with this timeline?



Positive Comments about the Ask-First/By-Request Bylaw

- When asked why they support/oppose the timeline for the Ask-First/By-Request bylaw, positive comments cited by residents include the environmental impact (19%), the ability of the bylaw to reduce waste (10%), minimize plastics (4%), and other environmental aspects (8%). Other positive comments are about the timeline (14%), notably because it is cited as overdue (9%) or provides enough time for businesses to prepare (5%) according to residents.

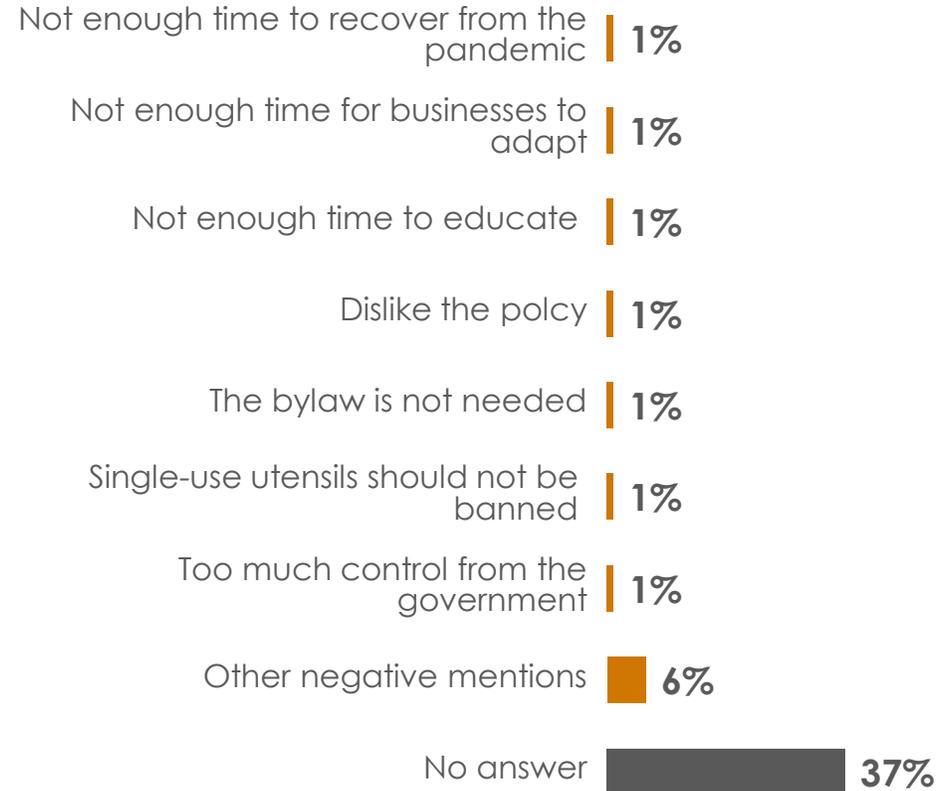


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Base: All respondents (n=1000)
Q7B. Why do you [INSERT RESPONSE] with the implementation of the Ask-First/By-Request bylaw for single-use utensils, single-use straws and other single-use accessories to begin in September 2022?

Negative Comments about the Ask-First/By-Request Policy

- Few negative comments were mentioned by residents regarding the Ask-First/By-Request policy.



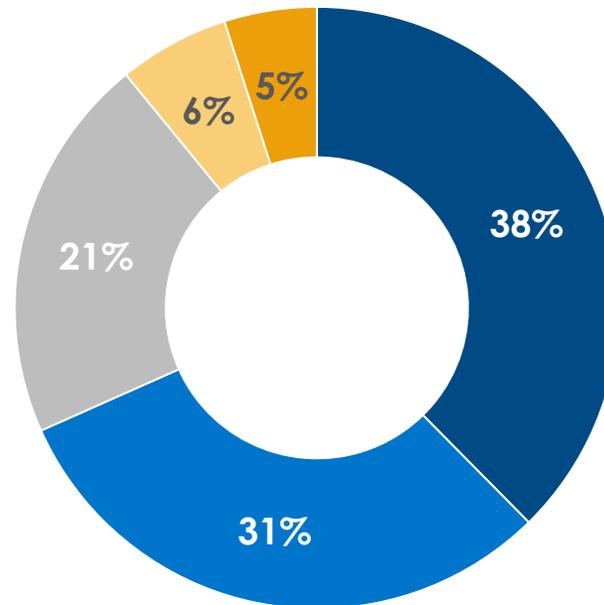
<1% values are not labeled

Base: All respondents (n=1000)
Q7B. Why do you [INSERT RESPONSE] with the implementation of the Ask-First/By-Request bylaw for single-use utensils, single-use straws and other single-use accessories to begin in September 2022?

Expanding the List of Items Covered by the Ask-First/By-Request Bylaw

- The vast majority (69%) of Toronto residents agree (69%) that the Ask-First/By-Request Bylaw should be expanded to include other single-use accessory items such as napkins, stir sticks, beverage trays, and condiment packets. Just one in 10 (11%) disagree with the idea of expanding this particular bylaw, while one in five (21%) are not sure.
- Low income households (under \$30k) are less likely (at 56%) compared to households earning at least \$30k (72%) to agree with the idea of expanding the Ask-First/By-Request Bylaw.

■ STRONGLY AGREE ■ SOMEWHAT AGREE ■ NEITHER AGREE NOR DISAGREE ■ SOMEWHAT DISAGREE ■ STRONGLY DISAGREE



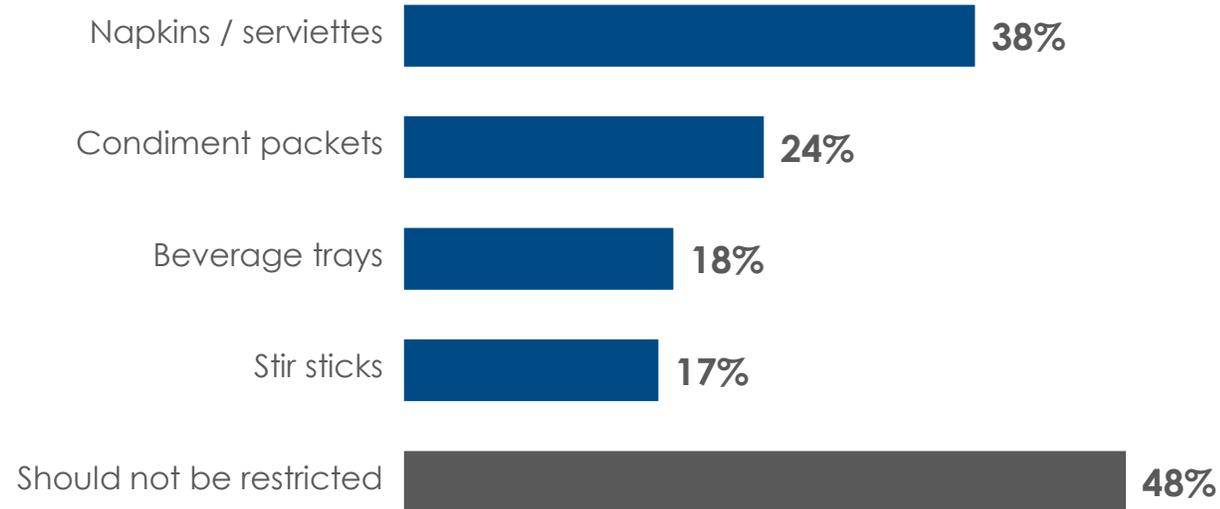
	AGREE	DISAGREE
	69%	11%

Base: All respondents (n=1000)

Q5. To what extent do you agree or disagree with an Ask-First/By-Request bylaw be expanded to include other single-use accessory items such as napkins, stir stick, beverage trays, condiment packets?

Items Residents Do Not Want to See Restricted As Part of the Bylaw

- Around half (48%) of Toronto residents say all of the following single-use items should be included in the Ask-First/By-Request bylaw. Nearly four in 10 (38%) identify napkins as items that should not be restricted, followed by condiment packets (24%), beverage trays (18%) and stir sticks (17%).



Base: All respondents (n=1000)

Q6. Are there items you feel should not be restricted by the Ask-First/By-Request approach? Select all that apply.

FEEES BYLAW

Fees Bylaw

Description Provided to Respondents:

The City of Toronto is proposing a fee bylaw that would require businesses to charge customers a fee for the following single-use and takeaway items:

Single-use hot and cold beverage cups

Single-use plastic and paper bags

Reusable shopping bags offered at point of sale

Details:

Businesses will retain the fees. Fees will not be remitted to the City.

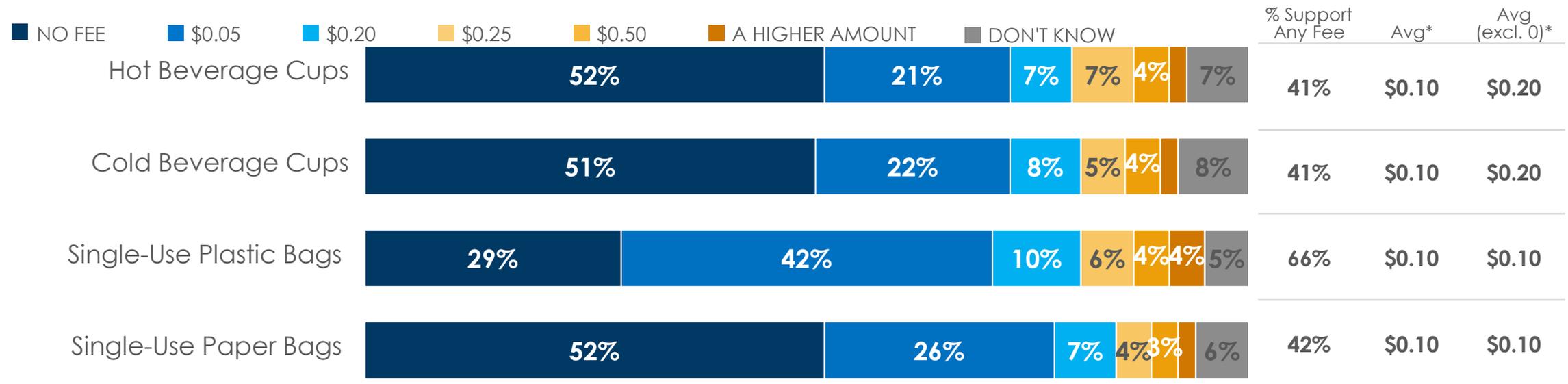
The City is proposing a minimum fee be charged for new 'reusable bags' being offered at point of sale - this addition is being considered because some businesses no longer distribute single-use bags and are instead offering reusable bags free-of-charge that may result in increased waste generation

The City is considering a phased-in approach with increased fees over a multi-year period.

The City recognizes that the COVID-19 pandemic has caused economic hardship for many residents and businesses and is seeking input again on the fee amounts for single-use beverage cups, and single-use bags (paper and plastic).

Support for Single-Use Fees

- About four in 10 Toronto resident support any fee being charged for single-use hot (41%) and cold (41%) beverage cups and single-use paper bags (42%), while two-thirds (66%) support a fee being charged for single-use plastic bags. Among those who support a fee, most residents do not support fees exceeding \$0.05 for each type of single-use item.



<3% values are not labeled

Base: All respondents (n=1000)

Q8. What, if any, fee do you support paying for single-use hot beverage cups beginning in January 2023? [single select matrix]

Q9. What, if any, fee do you support paying for single-use cold beverage cups beginning in January 2023? [single select matrix]

Q10. What, if any, fee do you support paying for single-use plastic bags beginning in January 2023? [single select matrix]

Q11. What, if any, fee do you support paying for single-use for single-use paper bags beginning in January 2023? [single select matrix]

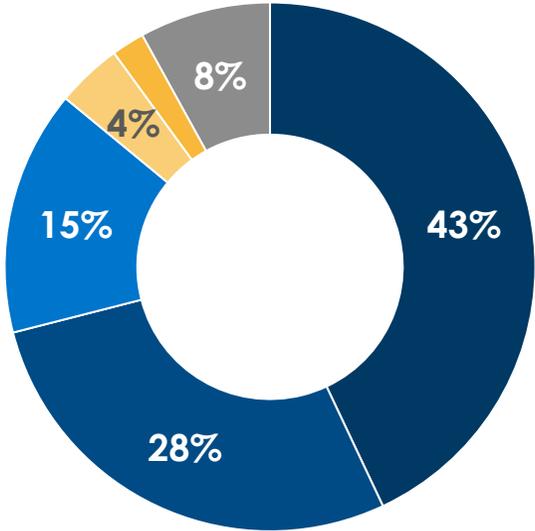
Q12. What, if any, fee do you support paying for new reusable bags beginning in January 2023? [single select matrix]

*Note: Avg fee should be interpreted with caution. Price points on scale are fixed and "a higher amount" is assumed to be \$0.75.

Support for New Reusable Bag Fees

- Nearly half (49%) of Torontonians support paying a fee for a new reusable bag, compared to 43% who do not support paying a fee. Among those willing to pay a fee, most (28%) would support paying a fee of \$0.50.
- Those who identify as having a disability are more likely (at 53%) compared to those who do not identify as having a disability (41%) to indicate that they would not support paying any fees for new reusable bags. Low-income households (under \$30k) are more likely (at 57%) compared to others (\$30k+) (39%) to indicate that they would not support paying any fees for new reusable bags.

■ NO FEE
 ■ \$0.50
 ■ \$1.00
 ■ \$2.00
 ■ A HIGHER AMOUNT
 ■ DON'T KNOW



<3% values are not labeled

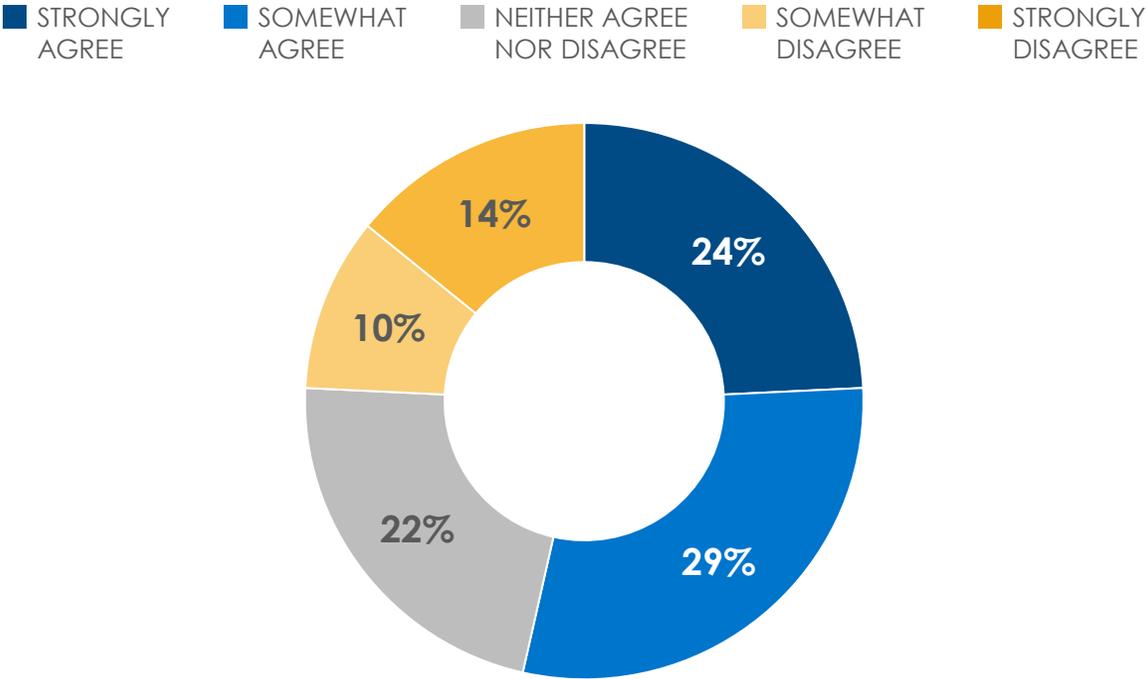
Support Any Fee	Avg.*	Avg (excl. 0)*
49%	\$0.50	\$0.80

Base: All respondents (n=1000)
 Q12. What, if any, fee do you support paying for new reusable bags beginning in January 2023? [single select matrix]
 *Note: Avg fee should be interpreted with caution. Price points on scale are fixed and "a higher amount" is assumed to be \$3.00.



Attitudes Toward Fee Bylaw Timeline

- A majority (53%) of Toronto residents agree with the City of Toronto's proposed timeline for the implementation of the fee bylaw for single-use cups, bags, and new reusable bags offered at the point of sale. One-quarter (25%) disagree and one in five (22%) are not sure about the timeline.



Base: All respondents (n=1000)
 Q13A. The City is proposing implementation of the fee bylaw for single-use beverage cups (hot and cold), single-use bags (paper and plastic), and new reusable bags offered at the point of sale to begin in January 2023. To what extent do you agree or disagree with this timeline?



Positive Comments about the Fee Bylaw

- When asked why they support/oppose the fee bylaw timeline (of January 2023), two in five (42%) decline to offer a response. Those that do offer feedback are a little more negative (29%) than positive (27%), however, with costs/fees (15%) (i.e., a belief that residents already pay too much) emerging as the most common negative mention and the timeline (11%) (i.e., being long overdue) most frequently cited as a positive consideration.

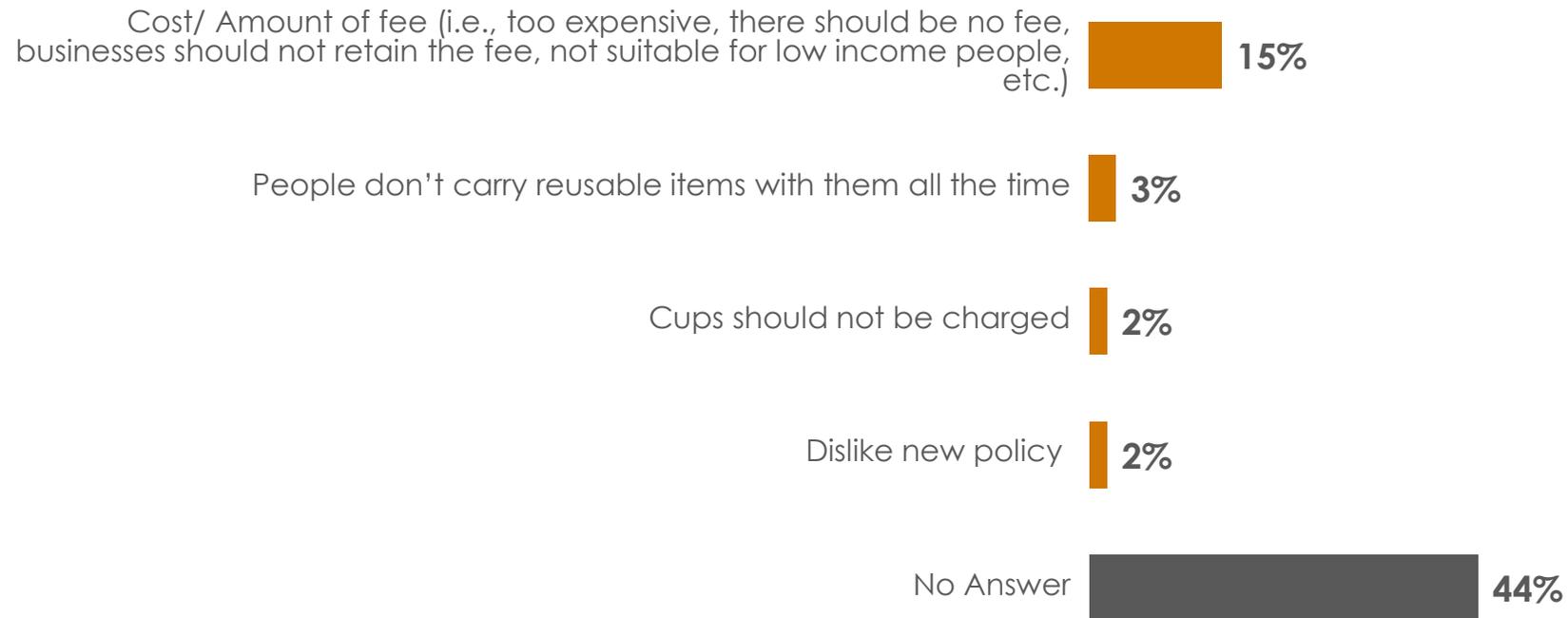


<3% values are not labeled

Base: All respondents (n=1000)
Q13B. Why do you [INSERT RESPONSE] with the implementation of the fee bylaw for single-use beverage cups (hot and cold), single-use bags (paper and plastic), and new reusable bags offered at the point of sale to begin in January 2023?

Negative Comments about the Fee Bylaw

- Most negative comments about the bylaw relate to the cost or amount of fees that could be charged (15%), as six per cent (6%) of residents feel the fees are too expensive or that there should be no fee (3%).

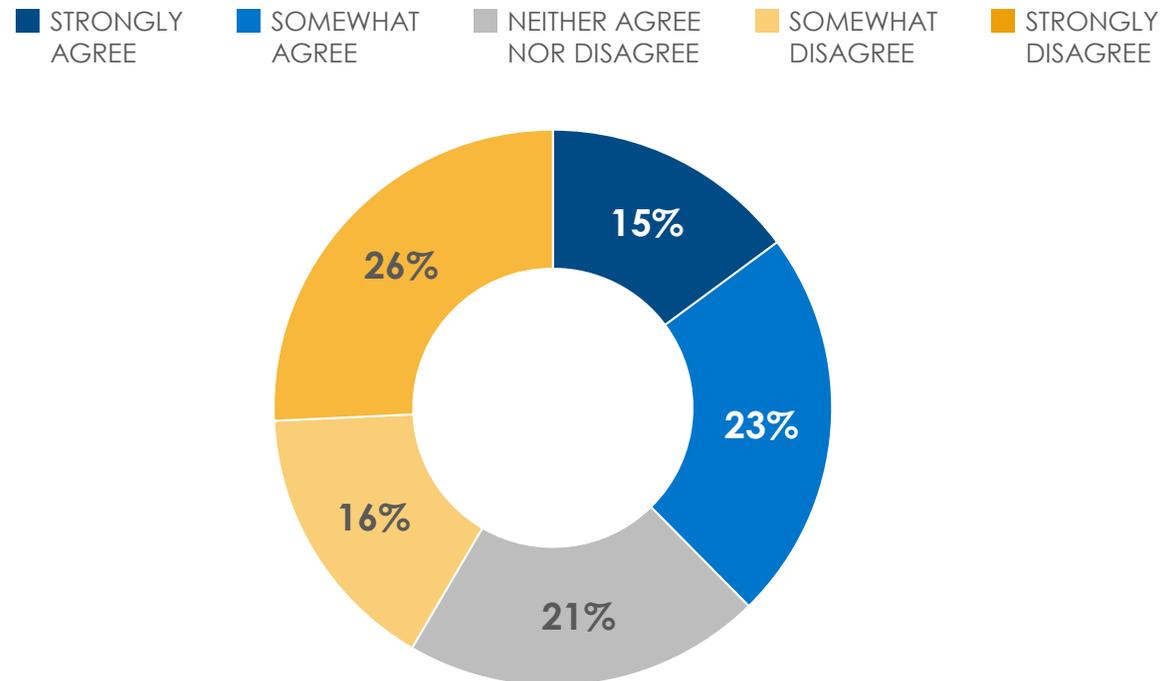


<3% values are not labeled

Base: All respondents (n=1000)
Q13B. Why do you [INSERT RESPONSE] with the implementation of the fee bylaw for single-use beverage cups (hot and cold), single-use bags (paper and plastic), and new reusable bags offered at the point of sale to begin in January 2023?

Incremental Fee Increases

- Torontonians are split on the idea of introducing a phased-in approach to fees increasing incrementally over a two-year period, 42% disagree with this and 38% agree, while 21% are not sure.



Base: All respondents (n=1000)

Q14. The City is considering that the fees be charged incrementally, with the increase over two years. See example below (incremental fee amounts below are provided for example purposes only and are not the recommended amounts). To what extent do you agree or disagree with a phased-in approach to fees incrementally over a two-year period?

INCREASING THE ACCEPTANCE OF REUSABLE ITEMS

Increasing the Acceptance of Reusable Items

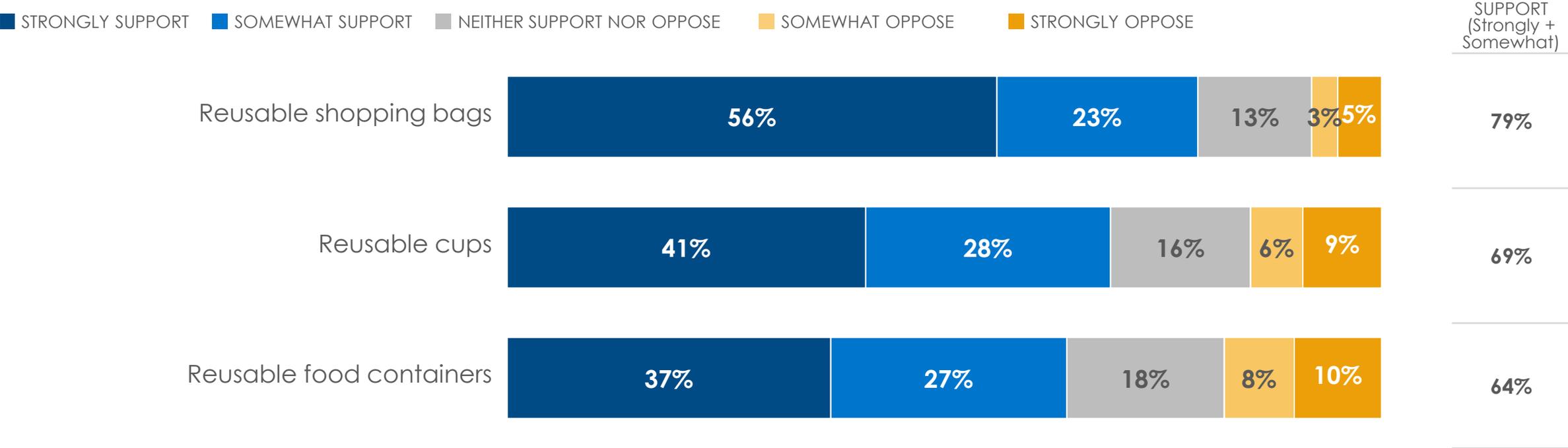
Description Provided to Respondents:

Increasing the number of businesses that accept customer-provided reusable bags, cups and food containers can help reduce the use of single-use and takeaway items and reduce waste. During previous consultations some stakeholders shared their perspectives on health and safety considerations, such as businesses being concerned about accepting these items and ensuring that they can maintain compliance with Ministry of Health regulations regarding food safety.

The City will not be proposing these approaches as part of the 2022 report back to Council, however we'd like to hear feedback from you regarding this practice.

Support for Mandating Businesses to Accept Reusables

- Overall, there is strong support for a bylaw mandating businesses in the City of Toronto to accept reusable shopping bags, cups, and food containers. Support is strongest when it comes to reusable shopping bags, as nearly four in five (79%) indicate they would support a bylaw mandating acceptance of this particular item, including a majority (56%) who say they would *strongly support* it.

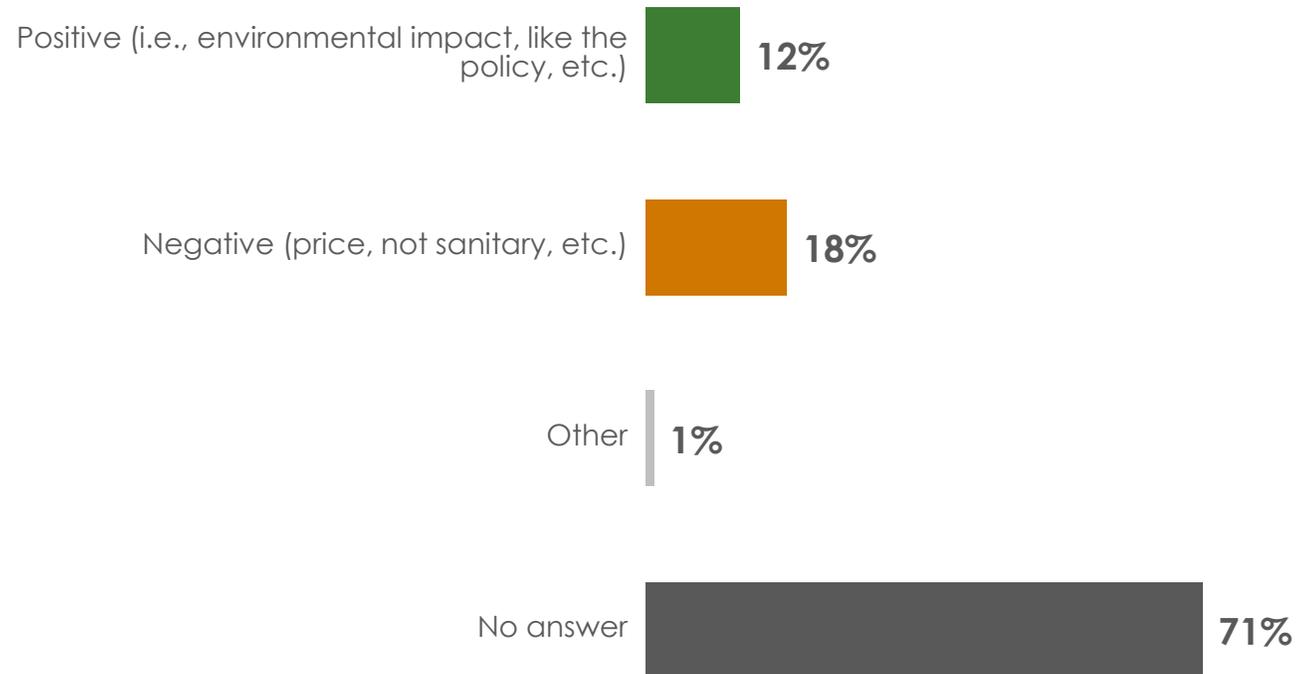


Base: All respondents (n=1000)
 Q15. To what extent would you support or oppose a bylaw mandating businesses in the City of Toronto to accept the following items provided by customers?



General Comments

- Most Toronto residents decline to offer additional feedback regarding the City of Toronto's proposed Single-Use and Takeaway Items Reduction Strategy, when asked to do so. Those that do provide a response are a little more likely to say something negative (18%), as opposed to positive (12%), with concerns related to price (6%) and cleanliness (5%) topping the list among negative mentions, while environmental benefits top the list of positive comments.



<3% values are not labeled

Base: All respondents (n=1000)

Q16. Do you have any other comments regarding the City's proposed Single-Use and Takeaway Items Reduction Strategy that you'd like to share?

Comments from Torontonians – In Their Own Words

There should be a standard inspection check to make sure the cups and containers brought by the customer are cleaned and can be used. If they do not meet the standard then customers should know in advance that they will need to pay for using the plastic, one-time used cups/containers provided by the business. Videos or instructional pamphlets should be provided to customers on how to properly clean their containers and cups. Customers should also know what types of container and cups they can bring and should not bring plastic or materials that are not reusable.

I can understand charges for single use plastic bags but i think the charge for single use takeout cups etc. is not fair - how can a person get their beverage otherwise? If there has to be a charge, then I think it should be built into the food/drink price-not a separate charge.

No idea how hard life is for people who are struggling with low paid precarious work.

Too much handling which could cause the spread of bacteria.

Can't we use single use items to be made from biodegradable components and not plastic?

As I mentioned already, this is enough. We pay too much for too many things. I strongly think this is a bad timing.

I strongly support this. I think initially some people may "bark" about paying for these items that are used to getting them for free, however, eventually they will get used to it. In all honesty food costs have increased quite a bit, not only in grocery stores, take out foods, restaurants, hairdressers, everyone is trying to recover lost income.

How is this going to help the everyday person that is just trying to survive? This will cost low- and mid-income families more.

Businesses should have right of refusal to use customers' reusable cups and bags if they feel it is unsanitary, unhealthy, or nasty.

I think we should get rid of all plastic bags, and excess packaging. People can bring their own containers and mugs to coffee shops or places can sell reusable items if customers forget to bring their own. This should not be turned into money making for the city. Just wean away from excess stuff and have people bring or buy reusable mugs and containers to out their food in.

Fees charged should be collected by the government for green initiatives, not added to business coffers.

The rate of inflation this year has far outpaced the raise I received as a cost-of-living increase. My income does not go as far as before and having to pay additional fees would be a hardship.

Base: All respondents (n=1000)

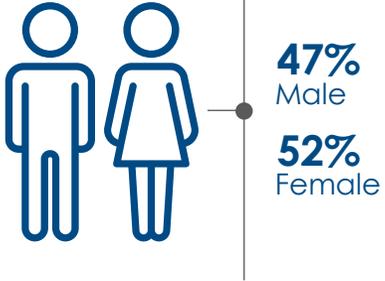
Q16. Do you have any other comments regarding the City's proposed Single-Use and Takeaway Items Reduction Strategy that you'd like to share?

DEMOGRAPHICS

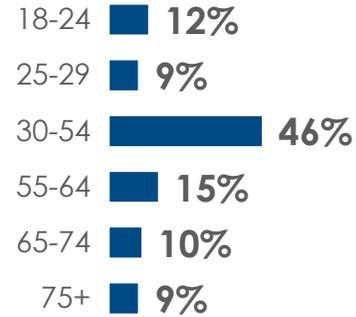
Demographics



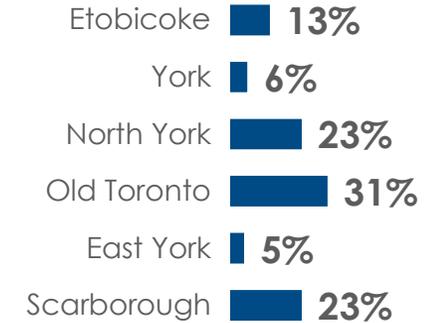
GENDER



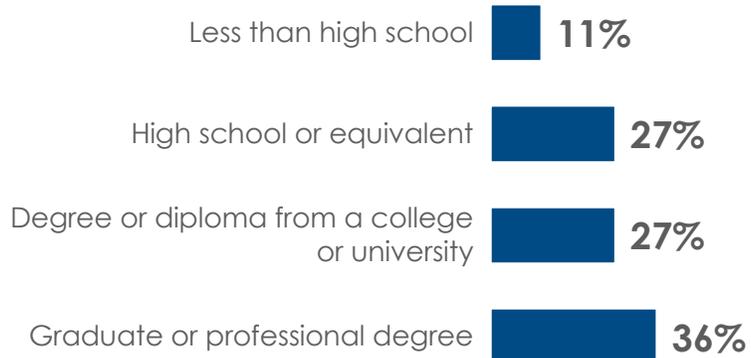
AGE



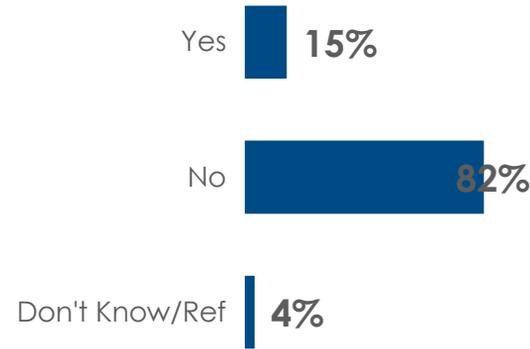
REGION



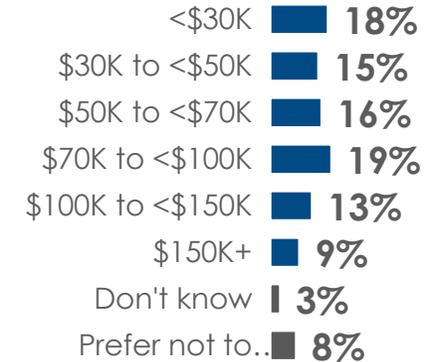
EDUCATION



DISABILITY



INCOME



SINGLE-USE AND TAKEAWAY ITEMS REDUCTION STRATEGY: PUBLIC SURVEY (BUSINESSES)

Draft Report

Prepared for the City of Toronto
August 2022

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METHODOLOGY

Methodology



SUMMARY

These are the findings of an Ipsos survey conducted on behalf of the City of Toronto.



SAMPLE

A total of 184 Toronto business owners participated in the survey, of which 117 were food service business owners and 77 were non-food service business which was made available via the City of Toronto's website. There is some overlap between the two groups, as it is possible for the same respondent(s) to have participated both as a food service business and as a non-food service business.



METHOD AND TIMING

The online survey was hosted by Ipsos. Fieldwork was conducted between February 8 and March 6, 2022.

On average, respondents took about 13 minutes to complete the public survey (residential and/or business).



ROUNDING & REPORTING CONSIDERATIONS

Where figures do not sum to 100, this is due to the effects of rounding.

For the open-ended questions, percentages do not always add up to 100% as some respondents offer more than one comment, and in some cases, provide positive and negative comments in the same response.

All percentages shown are relative to the sample size that was asked the question.

KEY FINDINGS

Key Findings

- Overall, the Toronto businesses surveyed support the City of Toronto Single-Use and Takeaway Items Reduction Strategy and most (71%) indicate agreement with the City of Toronto's plan to implement the Ask-First/By-Request bylaw, effective September 2022. Despite this, only about half (49%) claim to already have an Ask-First/By-Request policy in effect.
- Most businesses surveyed (who distribute or plan to distribute single-use items) support charging fees for single-use items. There is no clear consensus in terms of what an appropriate amount would be, though most believe fees should not exceed \$0.25 for any single-use item. Overall, far more agree (57%) than disagree (28%) with the proposed mandate to charge a fee for single-use bags, single-use beverage cups, and reusable shopping bags starting in January 2023.
- While most of the businesses surveyed do not currently accept reusable hot beverage or cold beverage cups, the majority on both counts feel as though they would have no difficulty accepting such items (61% - hot beverage cups; 55% cold beverage cups), if compelled to do so. As many as half of the businesses surveyed already offer discounts for reusable hot (50%) and cold (49%) beverage cups, though most do not offer any discounts for reusable shopping bags or reusable takeout containers.
- The vast majority of businesses say they will eventually be ready for a mandatory bylaw requiring the acceptance of reusable cups, bags, and food containers, with half or more claiming to be ready today.
- The survey suggests that any type of non-financial assistance that can be provided by the City of Toronto would be useful. Specifically, advertising (85%) and online resources (79%) are perceived as being the most useful, non-financial, support that the City of Toronto's can offer in terms of helping businesses transition away from reliance on single-use items.

Ask-First/By-Request

Ask-First/By-Request

Description Provided to Respondents:

The City of Toronto's is proposing an ask first/by-request bylaw that would require single-use items be distributed to a customer only after asking or upon request.

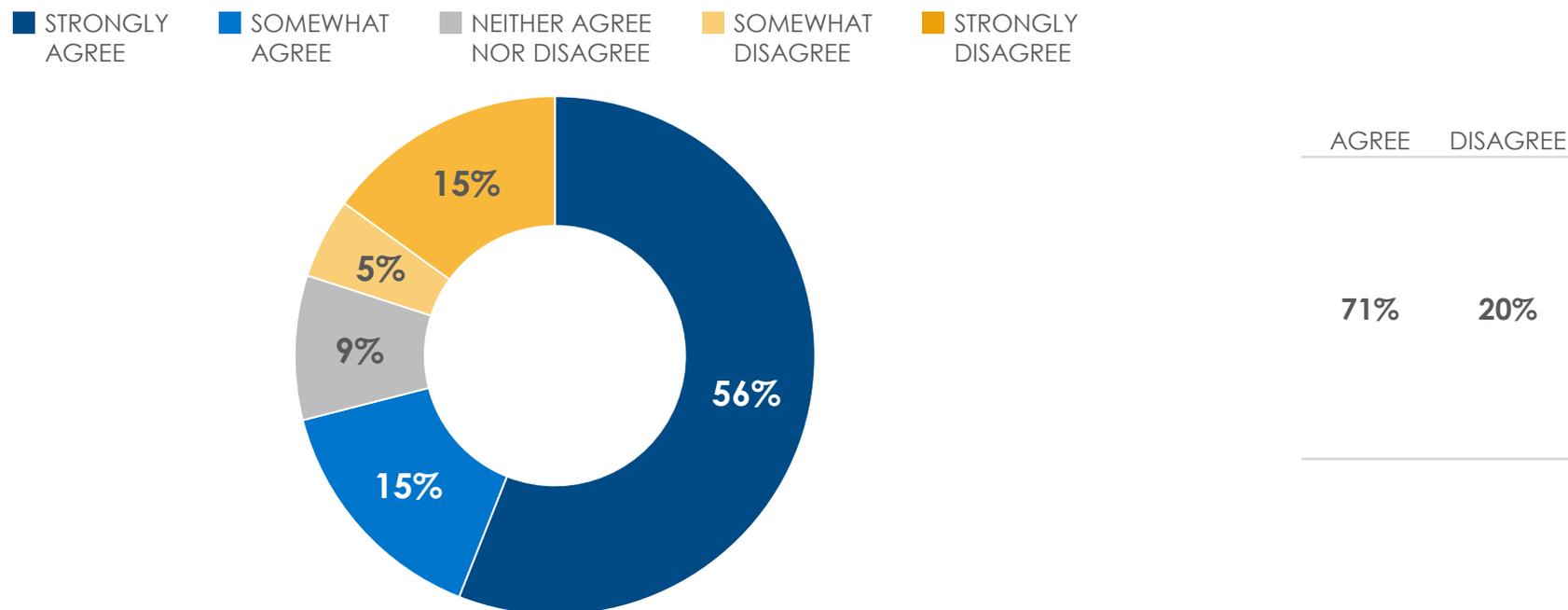
Details:

- Straws and utensils will be restricted based on support from previous consultation
- The City of Toronto is proposing the ask first/by-request bylaw be expanded to include additional accessory items such as: napkins, stir sticks, beverage trays, condiment packets and other similar accessories or accompanying single-use items used as part of food or beverage service or packaging.
- Customers would ask for the item, or the employee would ask if the customer wants the item
- Businesses could be restricted to keeping items behind the counter or away from public access
- Delivery services would be required to include confirmation that the items are required for online and mobile food orders

The bylaw would ensure no adverse effects for individuals who request single-use straws for accessibility or health reasons

Attitudes Towards Ask-First/By-Request Bylaw & Implementation Timeline

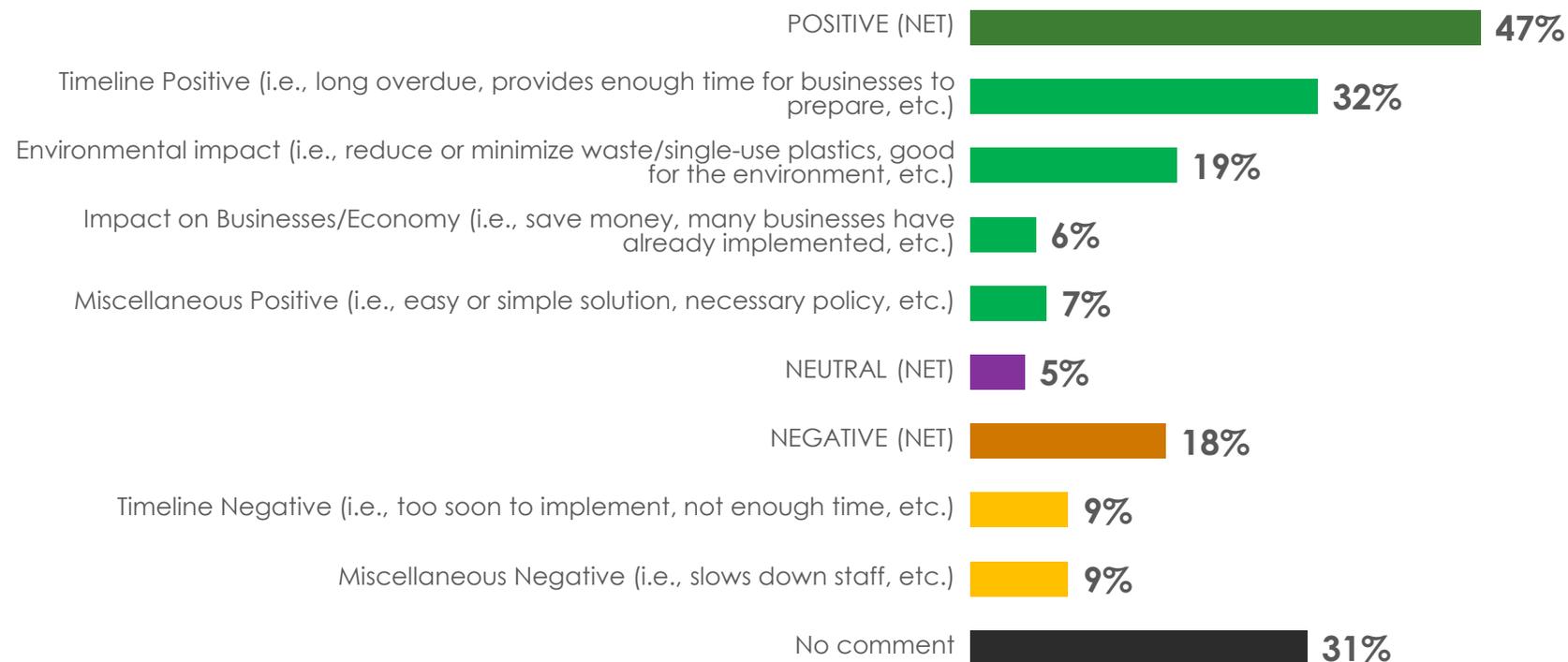
- Overall, there is strong support among food service businesses who participated in the public survey for the City of Toronto's proposal to implement the Ask-First/By-Request bylaw for single-use food utensils, straws, and other single-use accessory items in September 2022, as most (74%) agree (strongly/somewhat) with the proposed timeline. In fact, a majority (56%) say they *strongly agree* with the proposed timeline.
- Food service businesses surveyed that participate in a reusable container program are more likely (at 76%) compared to those that do not (43%) to *strongly agree* with the proposed timeline for the implementation of the Ask-First/By-Request bylaw. Those who already have an ask-first policy are more likely (at 70%) compared to those who do not (43%) to *strongly agree* with the proposed timeline for the implementation of the Ask-First/By-Request bylaw.



Base: Food service business (n=117)
Q26. The City of Toronto is proposing implementation of the Ask-First/By-Request bylaw for single-use food utensils, single-use straws and single-use accessory items to begin in September 2022. To what extent do you agree or disagree with this timeline?

Positive & Negative Comments About the Ask-First/By-Request Bylaw

- When asked why they support/oppose the timeline, positive comments (47%) far outweigh negative ones (18%). Within the positive comments, the most commonly cited reasons for supporting the bylaw include appreciation of the timeline (32%), specifically a belief that it is long overdue (26%) and provides businesses with enough time to prepare (7%). The positive environmental impact is also frequently cited (19%) by this group as a reason for supporting the bylaw. Conversely, those who oppose the timeline commonly cite negative aspects of the timeline (9%) (i.e., not enough time).
- Food service businesses surveyed that already have an ask-first policy are more likely (at 58%) compared to those that do not (37%) to offer positive comments in support of the bylaw timeline. Those that participate in a reusable container program are more likely (at 66%) compared to those that do not (35%) to offer positive comments in support of the bylaw timeline.



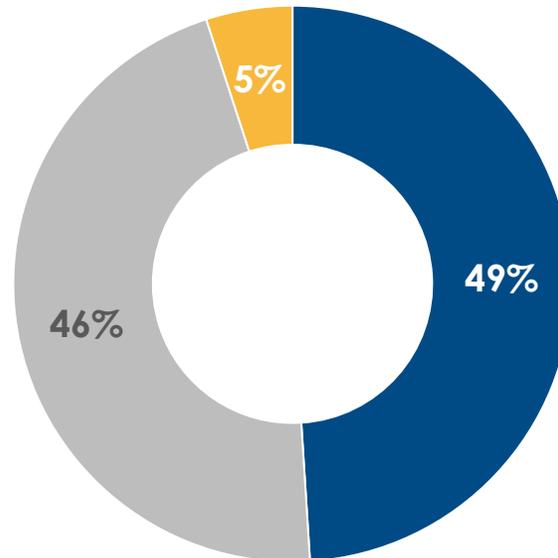
<3% values are not labeled

Base: Food service business (n=117)
 Q27. Why do you [INSERT RESPONSE] with the implementation of the Ask-First/By-Request bylaw for single-use food utensils, single-use straws and single-use accessory items to begin in September 2022?

Currently Have An Ask-First/By-Request Policy In Effect

- Half (49%) of the businesses surveyed say they have a policy that requires staff to ask customers if they need single-use accessories or customers to request this before they are handed out.
- Over two-thirds (68%) of the businesses surveyed that participate in a reusable container program indicate that they have an Ask-First/By-Request policy. By comparison, less than half (43%) of businesses that do not participate in a reusable container program have an Ask-First/By-Request policy.

■ YES ■ NO ■ IN PLACE BEFORE, BUT SUSPENDED DUE TO THE COVID-19 PANDEMIC

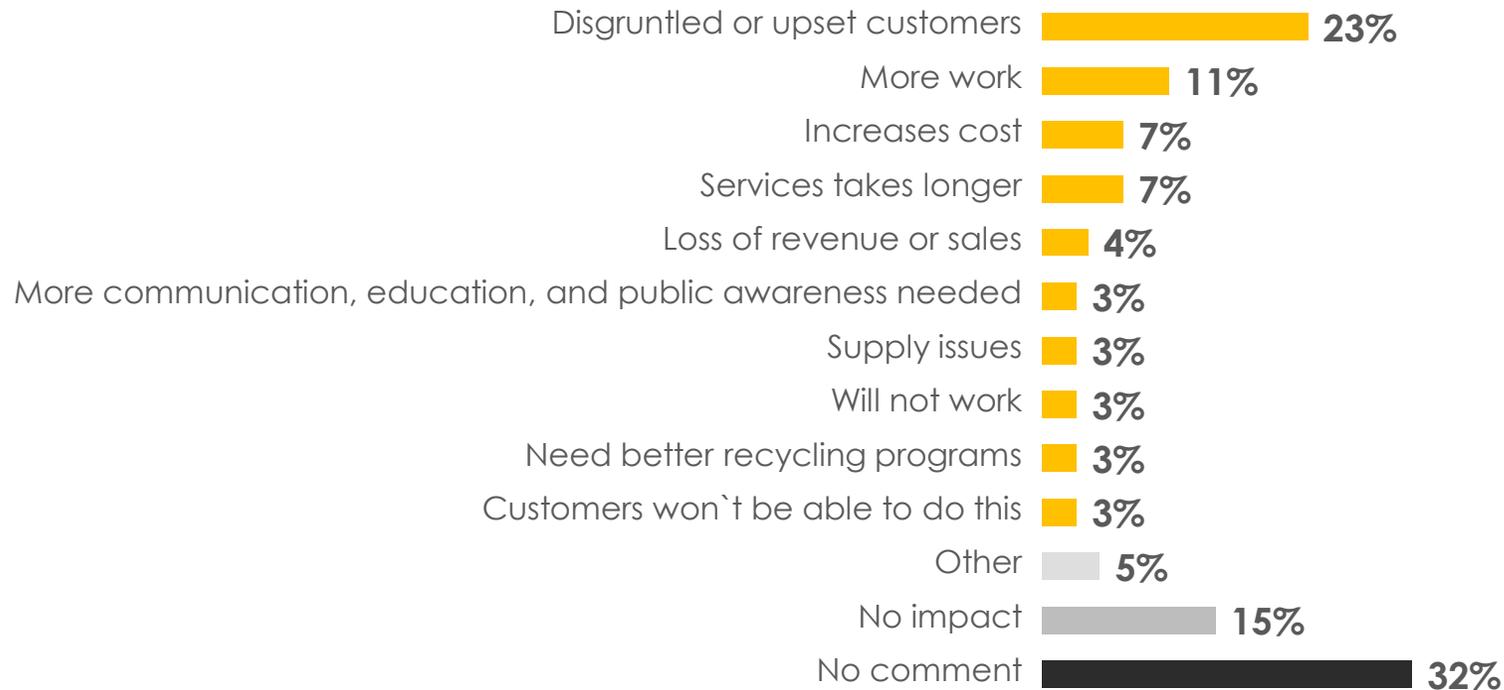


Base: Food service business (n=117)

Q25. Does your business currently have a policy that requires your staff to ask first or require customers to request single-use accessory (such as straws, utensils, napkins, stir sticks, beverage trays, condiment packets and other similar accessory items) before they are handed out?

Expected Negative Impacts of Ask-First/By-Request Policy

- Nearly one-quarter (23%) of food service businesses surveyed expect to have disgruntled and upset customers because of the Ask-First/By-Request bylaw, while one in 10 (11%) expect that they will need more staff to implement the policy.
- Those who already have an ask-first policy are more likely (at 21%) compared to those who do not (7%) to indicate that they don't believe there will be any negative impacts resulting from the Ask-First/By-Request bylaw. Those who currently participate in a reusable container program are more likely (at 26%) compared to those who do not (11%) to indicate that they don't believe there will be any negative impacts resulting from the Ask-First/By-Request bylaw.

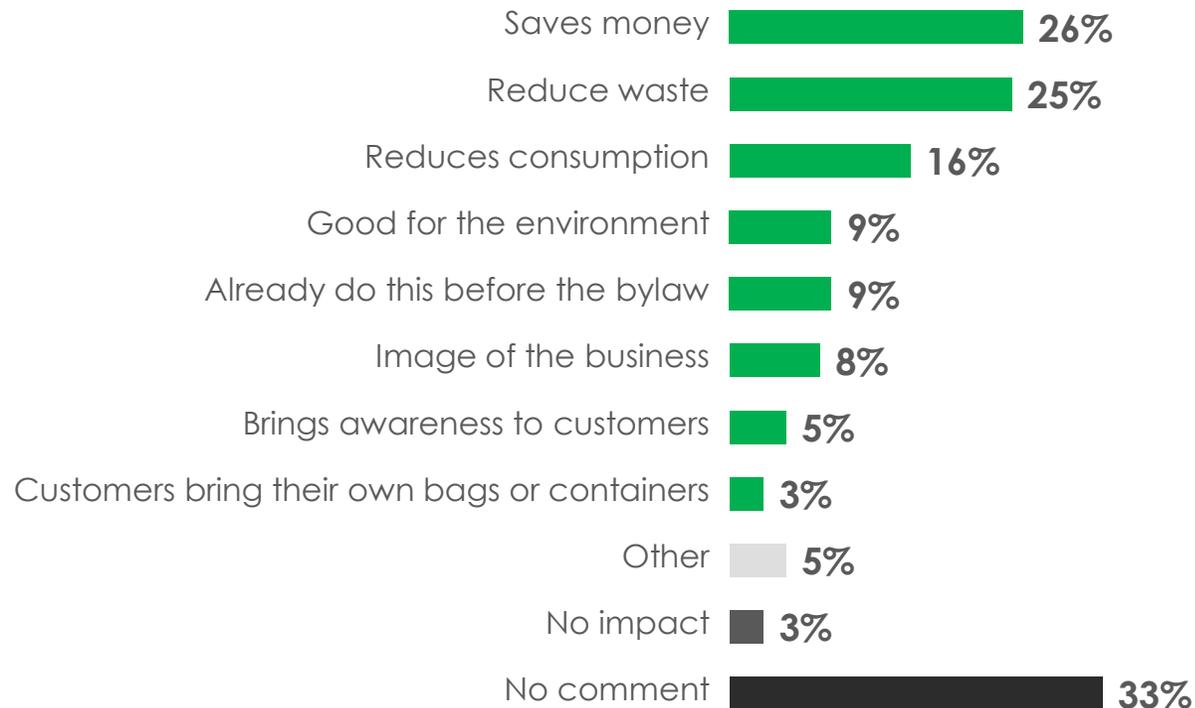


<3% values are not labeled

Base: Food service business (n=117)
Q23. What, if any, negative impacts do you anticipate that this proposed Ask-First/By-Request bylaw for single-use items could have on your business?

Expected Positive Impacts of Ask-First/By-Request Bylaw

- There is an expectation that the Ask-First/By-Request bylaw for single-use items will yield some positive benefits, as most businesses surveyed are able to think of at least some positive outcomes that can be expected to result from the policy. Saving money (26%) and reducing waste (25%) are most commonly cited as positive impacts that can be expected to result from this new bylaw.



<3% values are not labeled

Base: Food service business (n=117)

Q24. What, if any, positive impacts do you anticipate that this proposed Ask-First/By-Request bylaw for single-use items could have on your business?

FEE BYLAW

Fee Bylaw

Description Provided to Respondents:

The City of Toronto's is proposing a fee bylaw that would require businesses to charge customers a fee for the following single-use and takeaway items:

- Single-use hot and cold beverage cups
- Single-use plastic and paper bags
- Reusable shopping bags offered at point of sale

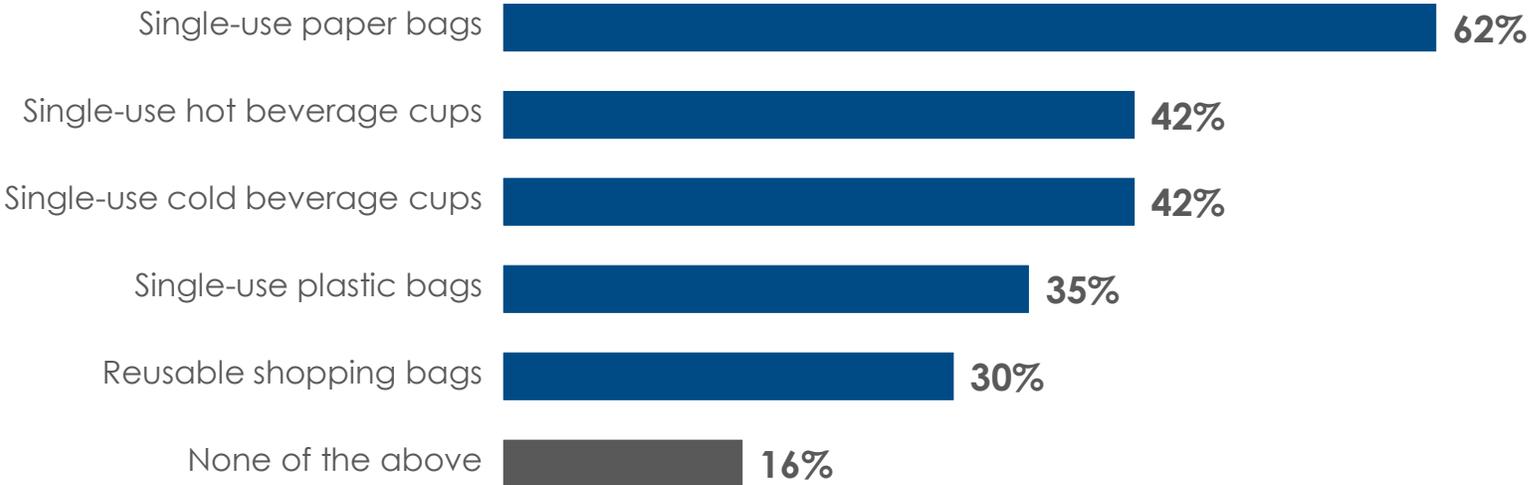
Details:

- Businesses will retain the fees. Fees will not be remitted to the City of Toronto
- The City of Toronto is proposing a minimum fee be charged for new 'reusable bags' being offered at point of sale - this addition is being considered because some businesses no longer distribute single-use bags and are instead offering reusable bags free-of-charge that may result in increased waste generation
- The City of Toronto is considering a phased-in approach with increased fees over a multi-year period

The City of Toronto recognizes that the COVID-19 pandemic has caused economic hardship for many residents and businesses and is seeking input again on the fee amounts for single-use beverage cups, and single-use bags (paper and plastic).

Single-Use Items Currently Distributed to Customers

- The vast majority (84%) of businesses that participated in the public survey indicate that they distribute at least one single-use item or reusable shopping bags. Six in 10 (62%) distribute single-use paper bags, followed by four in 10 that distribute single-use hot or cold beverage cups (42%). More than three in 10 distribute single-use plastic (35%) or reusable shopping bags (30%). Among non-food service businesses, a majority distribute single-use paper (57%) and plastic bags (51%) to customers while slightly fewer (39%) do the same for reusable shopping bags.
- Non-food service businesses are twice as likely (at 51%) compared to food service businesses (26%) to say they distribute single-use plastic bags to customers.

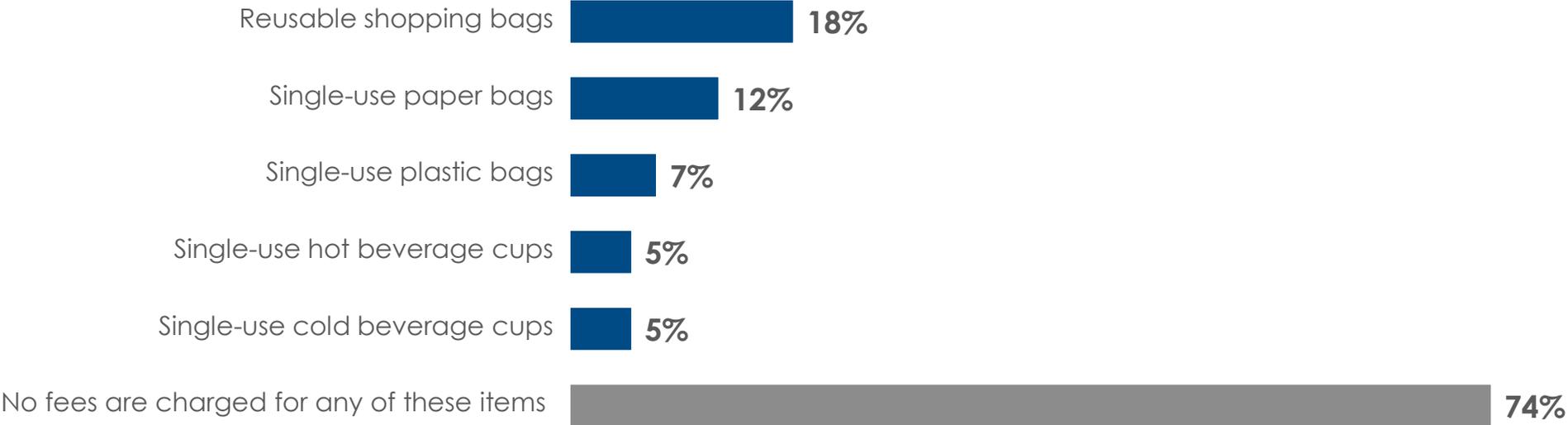


Base: Food service or non-food service business (n=184)
Q28. Which items does your business currently (or plan to) distribute to customers? Select all that apply.



Single-Use Items Currently (or Plan) Charging a Fee

- Almost three-quarters (74%) of businesses surveyed say that they do not charge a fee for any of the single-use items or reusable bags. Among those that do, nearly one in five (18%) charge a fee for reusable bags, while about one in 10 charge a fee for single-use paper (12%) or plastic bags (7%). Few charge a fee for single-use hot or cold beverage cups.
- Businesses that participate in a reusable container program are more likely (at 32%) compared to those that do not (7%) to report charging fees for at least one of the single-use items. Those that already have an Ask-First/By-Request policy are more likely (at 23%) compared to those that do not (7%) to report charging fees for at least one of the single-use items.

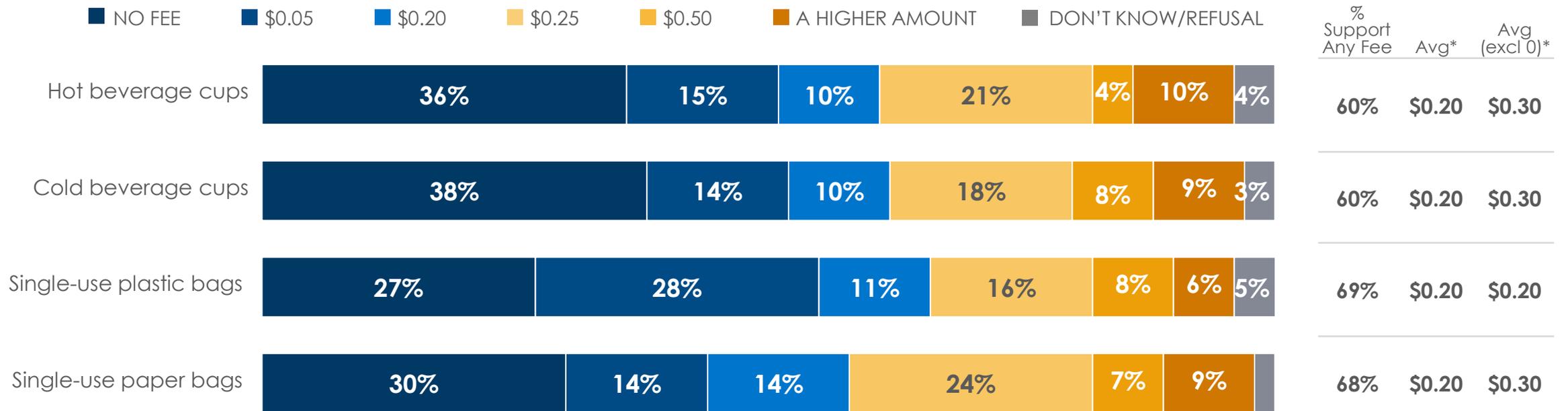


Base: Food service or non-food service business (n=155)
Q29. Does your business currently (or plan to) charge customers a fee for any of the following items? Select all that apply



Support for Single-Use Fees

- Most businesses surveyed (who distribute or plan to distribute single-use items) would support charging fees for each type of single-use item, though there is limited agreement in terms of the amount that should be charged for each item. Despite this, the vast majority do not think fees should exceed \$0.25.
- Businesses that receive waste collection services are statistically more likely to support charging more than \$0.50 for single-use cold beverage cups (at 15%) compared to those that do not receive these services from the City of Toronto (0%). Those that do not currently have an Ask-First/By-Request policy are more likely (at 48%) compared to those that do (18%) to believe that no fees should be charged for cold beverage cups.



Base: All answering (n=Base varies)

Q32. What, if any, fee do you support charging your customers for single-use hot beverage cups beginning in January 2023? [single select matrix]

Q33. What, if any, fee do you support charging your customers for single-use cold beverage cups beginning in January 2023? [single select matrix]

Q34. What, if any, fee do you support charging customers for single-use plastic bags beginning in January 2023? [single select matrix]

Q35. What, if any, fee do you support charging customers for single-use paper bags beginning in January 2023? [single select matrix]

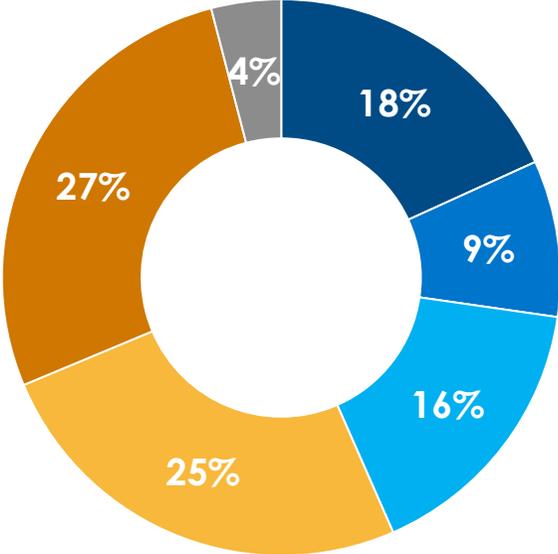
*Note: Avg fee should be interpreted with caution. Price points on scale are fixed and "a higher amount" is assumed to be \$0.75.

Data <3% not labelled

Support for New Reusable Bag Fees

- When it comes to new reusable bags, more than three-quarters (78%) of businesses that participated in the public survey support charging a fee. A little over half (52%) would advocate charging customers \$2.00 or more for new reusable bags.

■ NO FEE
 ■ \$0.50
 ■ \$1.00
 ■ \$2.00
 ■ A HIGHER AMOUNT
 ■ DON'T KNOW



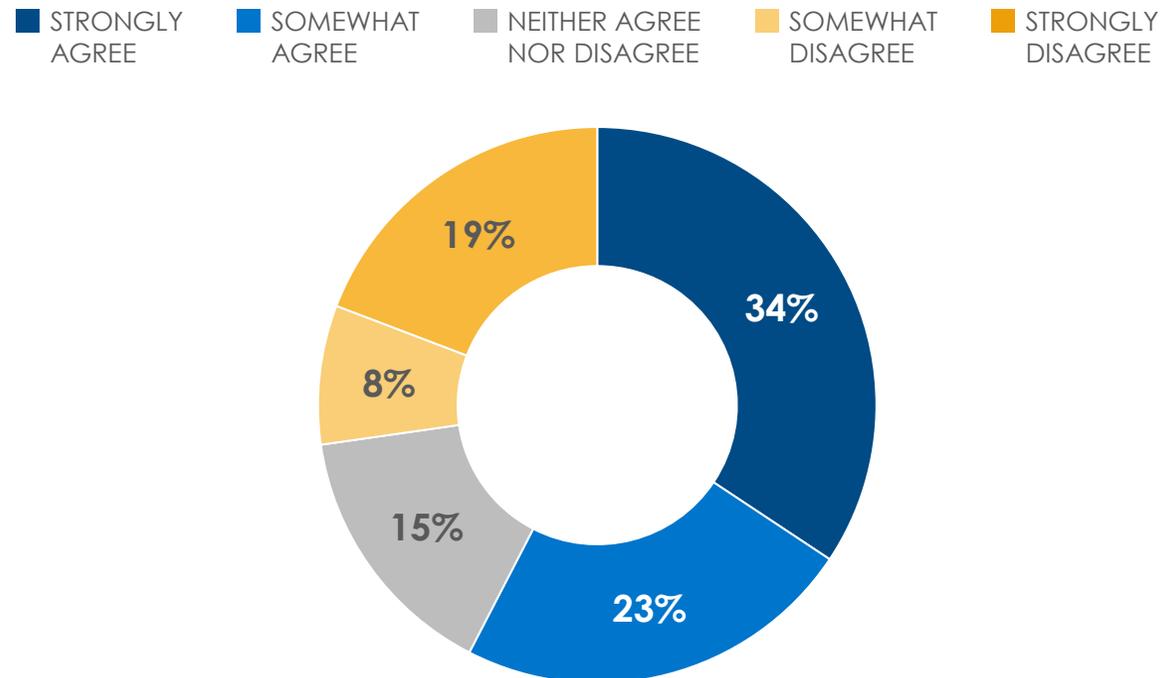
Support Any Fee	Avg.*	Avg. (excl. 0)*
78%	\$1.60	\$1.60

Base: All answering (n=55)
 Q36. What, if any, fee do you support charging customers for new reusable bags beginning in January 2023? [single select matrix]
 *Note: Avg fee should be interpreted with caution. Price points on scale are fixed and "a higher amount" is assumed to be \$3.00.



Attitudes Towards Fee for Single-Use Items Timeline

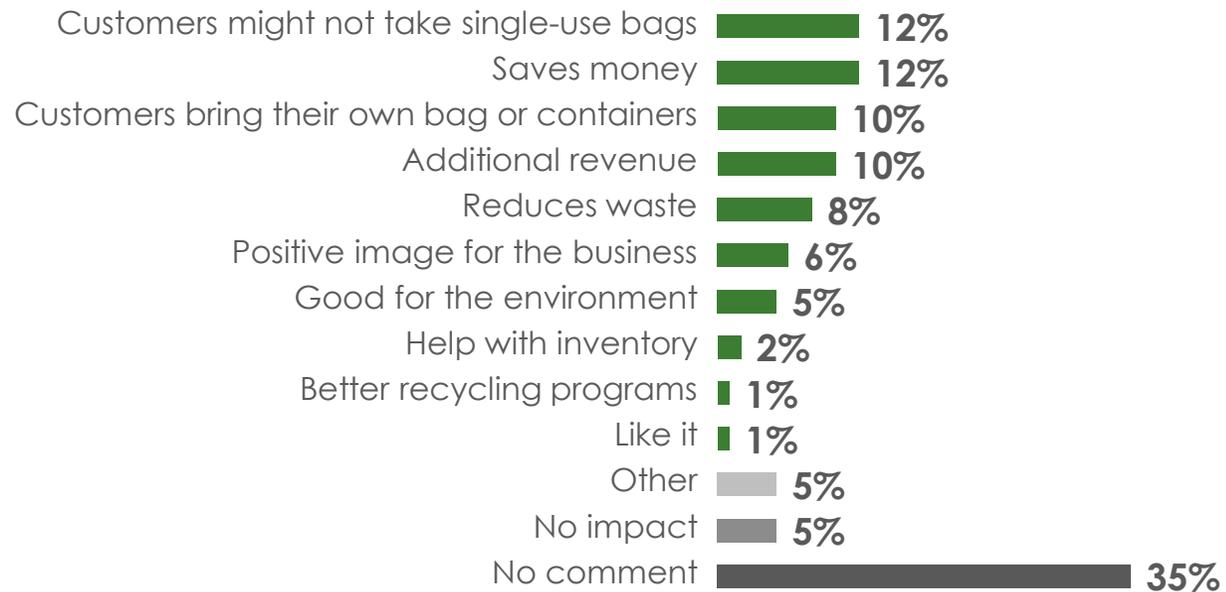
- Overall, far more businesses surveyed agree (57%) than disagree (28%) with the proposed mandate to charge a fee for single-use bags, single-use beverage cups, and new reusable shopping bags starting in January 2023.
- Those that currently have an Ask-First/By-Request policy are more likely to agree (at 69%) compared to those who do not (44%) with the proposed timeline for the upcoming single-use fee bylaw.



Base: All businesses answering (n=155)
Q38. The City of Toronto is planning to propose that the bylaw for all retail businesses to charge a fee for single-use bags (paper and plastic), single-use beverage cups (hot and cold) and reusable shopping bags start in January 2023. To what extent do you agree or disagree with this timeline?

Positive Comments About the Fee Bylaw

- When asked if businesses expect any positive impacts from the fee bylaw, the Toronto businesses surveyed mentioned a variety of impacts, including that customer may not use single-use bags (12%), saves the business money (12%), customers would bring their own bags (10%), or creates additional revenue for the business (10%).
- Non-food service businesses are significantly more likely (at 11%) compared to food service businesses (3%) to cite positive image for the business, as an expected positive impact of the bylaw. Businesses that already have an Ask-First/By-Request policy are more likely (at 19%) compared to those that do not (2%) to expect customers not taking single-use bags to be a positive impact resulting from the fee bylaw. Businesses that participate in a reusable container program are more likely (at 24%) compared to those that do not (3%) to expect customers not taking single-use bags to be a positive impact resulting from the fee bylaw.

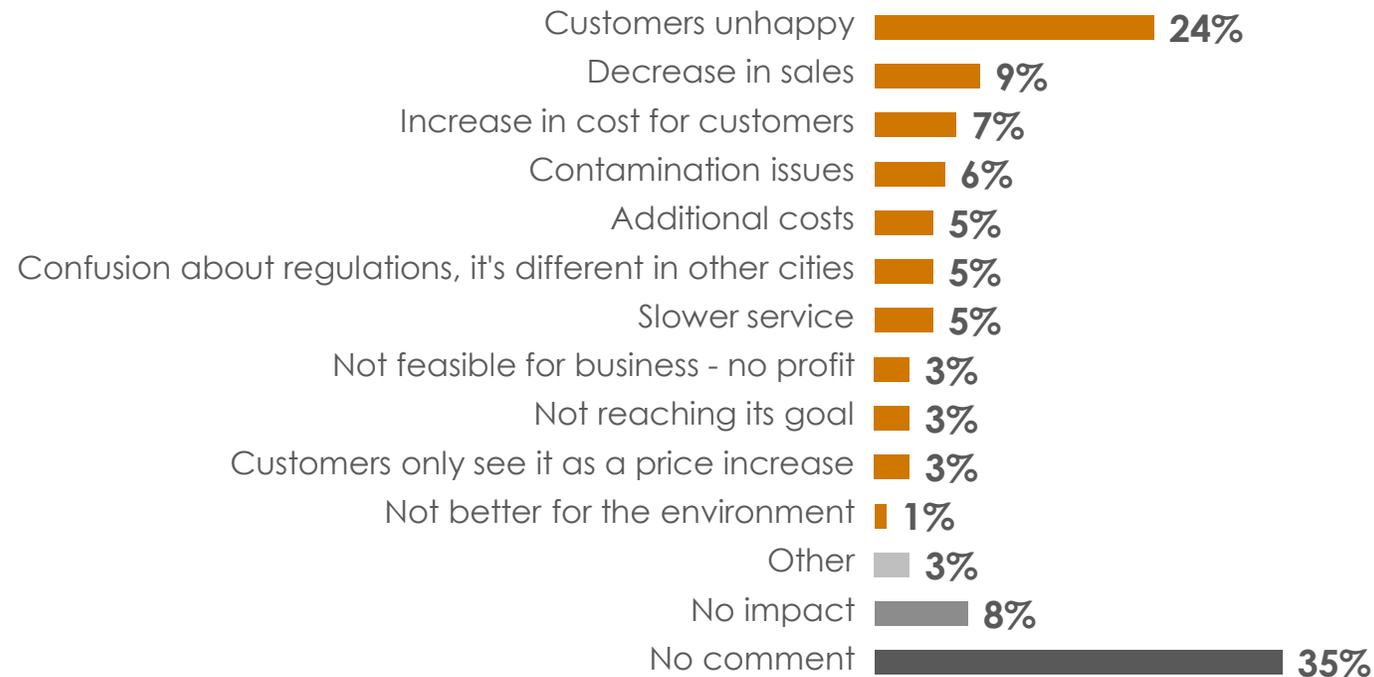


Base: All businesses answering (n=155)

Q31. What, if any, positive impacts do you anticipate that this proposed fee bylaw for single-use bags and cups and reusable bags could have on your business?

Negative Comments about the Fee Bylaw

- When asked about any negative comments about the bylaw, businesses that participated in the public survey most frequently mention unhappy or frustrated customers (24%).
- Businesses that do not receive waste collection services from the City of Toronto are more likely (at 11%) than those that do (3%) to anticipate having to contend with contamination issues, as a result of the proposed fee bylaw. Those that do not have an Ask-First/By-Request policy are more likely (at 14%) compared to those that do (0%) to anticipate having to contend with contamination issues, as a result of the proposed fee bylaw.

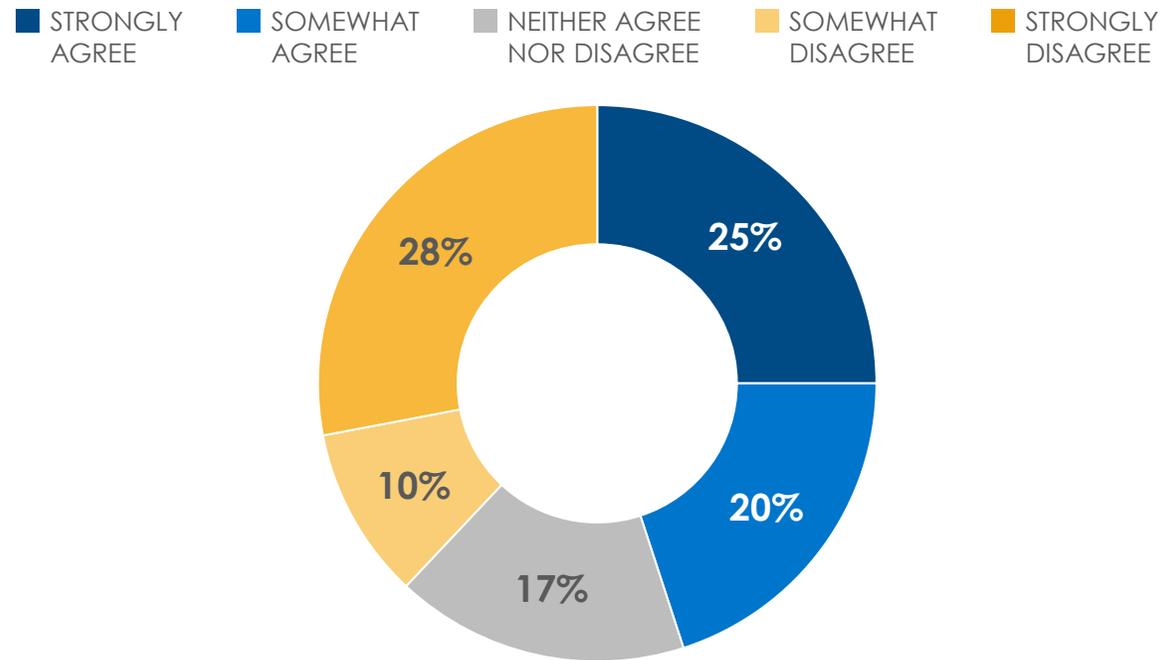


Base: All businesses answering (n=155)

Q30. What, if any, negative impacts do you anticipate that this proposed fee bylaw for single-use bags and cups and reusable bags could have on your business?

Attitudes Toward Incremental Fee Increases

- The Toronto businesses surveyed are split in their opinion about implementing an incremental fee increases over a two-year period, with only a slightly higher proportion agreeing (45%) than disagreeing (38%) with this idea.
- Businesses that currently have an Ask-First/By-Request policy are more likely (at 63%) compared to those who do not (37%) to indicate agreement with the concept of implementing incremental fee increases over a two-year period.



Base: All answering (n=155)

Q37. The City of Toronto is also considering that the fees incrementally increase over two years. See example below (incremental fee amounts provided for example purposes only). To what extent do you agree or disagree with a phased-in approach to fees incrementally over a two-year period?

Expected Positive Impacts of Fee Bylaw

- When asked why they support/oppose the timeline for the implementation of the fee bylaw for single-use beverage cups, single-use bags, and new reusable bags, a variety of positive comments are provided by businesses, including that it is long overdue (21%) and that it will reduce and minimize waste and plastics (9%).
- Those that participate in a reusable container program are more likely (at 68%) compared to those that do not (22%) to offer positive feedback. Those that already have an Ask-First/By-Request policy are more likely (at 50%) compared to those that do not (26%) to offer positive feedback. Those that receive waste collection services from the City of Toronto are more likely (at 46%) compared to those that do not (28%) to offer positive feedback.

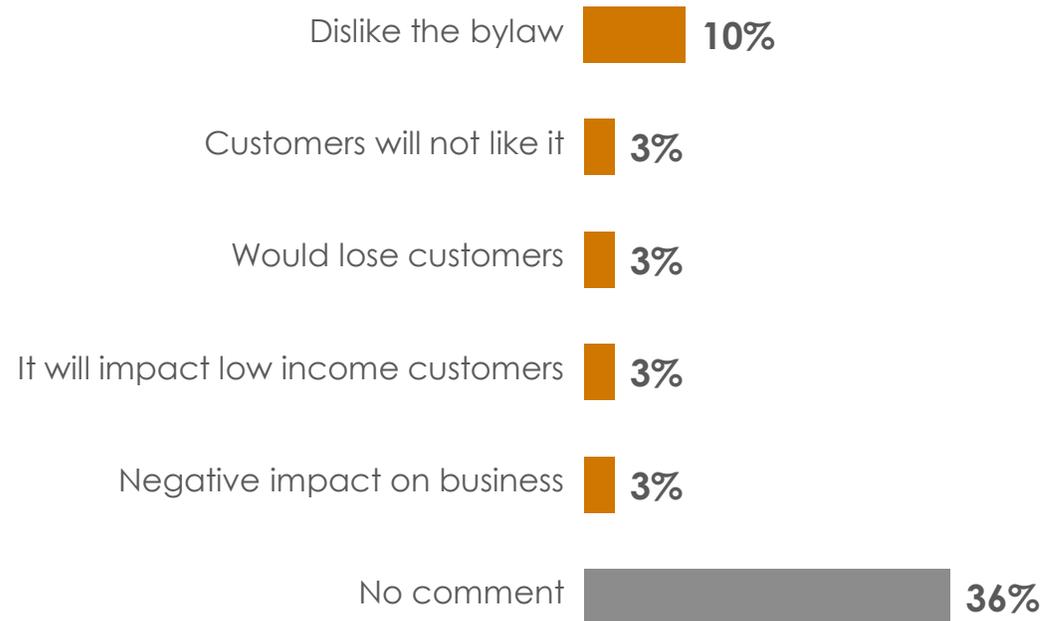


<3% values are not labeled

Base: All businesses answering (n=155)
Q39. Why do you [INSERT RESPONSE] with the bylaw for all retail businesses to charge a fee for single-use bags (paper and plastic), single-use beverage cups (hot and cold) and reusable shopping bags start in January 2023

Expected Negative Impacts of Fee Bylaw

- Negative comments about the bylaw include dislike (10%) and impacts on customers, including that Toronto businesses surveyed feel customers would not like it and they could lose customers (3%, respectively).
- Those that do not participate in a reusable container program are more likely (at 39%) compared to those that do (15%) to offer negative feedback. Those that do not have an Ask-First/By-Request policy are more likely (at 40%) compared to those that do (19%) to offer negative feedback.

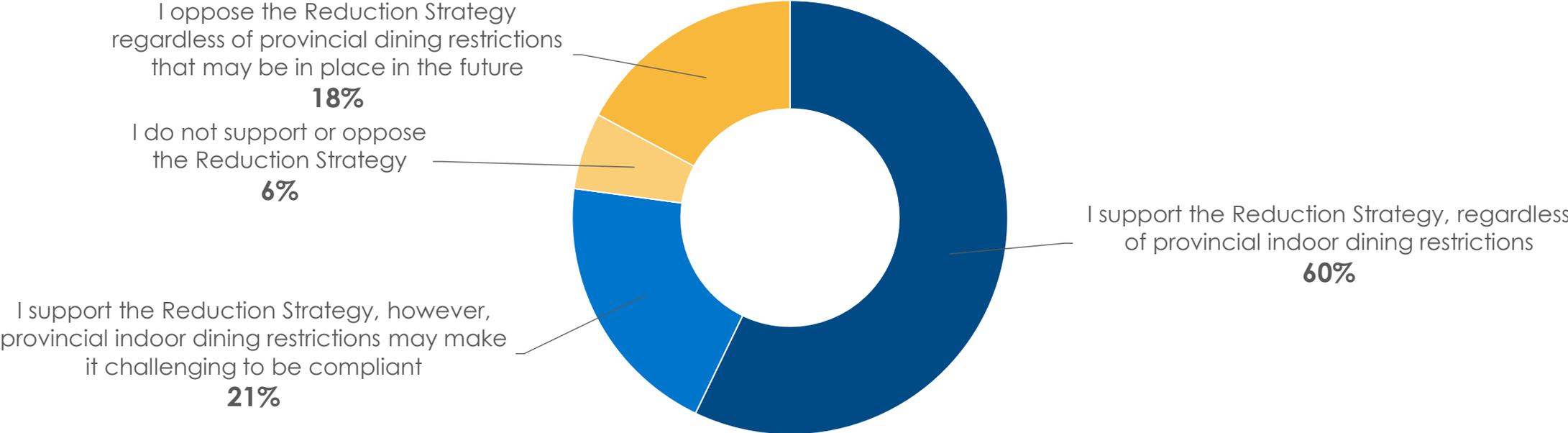


<3% values are not labeled

Base: All businesses answering (n=155)
Q39. Why do you [INSERT RESPONSE] with the bylaw for all retail businesses to charge a fee for single-use bags (paper and plastic), single-use beverage cups (hot and cold) and reusable shopping bags start in January 2023

Single-Use Reduction Strategy

- There is strong support for the City of Toronto's Single-Use and Takeaway Items Reduction Strategy, as four in five (80%) food service businesses surveyed support the Reduction Strategy, though one in five (21%) admit indoor dining restrictions may make it challenging to be compliant. Just eighteen per cent (18%) oppose the Reduction Strategy, regardless of the provincial dining restrictions that might be implemented in the future.
- Those that do not currently have an Ask-First/By-Request policy are more likely (at 13%) compared to those that do (0%) to indicate neutrality, when it comes to views as they relate to the Reduction Strategy. Those that already have an Ask-First/By-Request policy are more likely (at 72%) compared to those that do not (48%) to support the Reduction Strategy. Those that participate in a reusable container program are more likely (at 76%) compared to those that do not (49%) to support the Reduction Strategy.



Base: Food service business (n=117)
Q40. Given the challenges that businesses face resulting from provincial restrictions to indoor dining due to the COVID-19 pandemic, which of the following statements are closest to your point of view on the City of Toronto's Reduction Strategy?

REUSABLES

Reusables

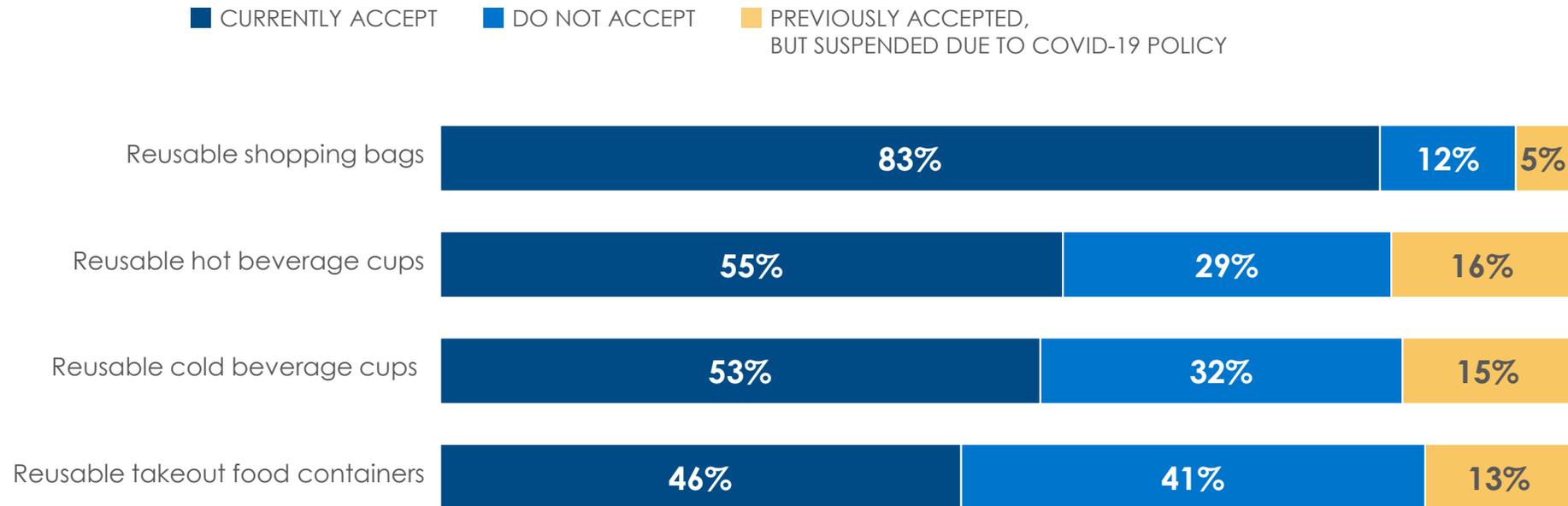
Description Provided to Respondents:

When businesses accept customer-provided reusable bags, cups and containers, the amount of single-use and takeaway items are reduced, and less waste is generated. During previous consultations some stakeholders shared their perspectives on health and safety considerations, such as businesses being concerned about accepting these items and ensuring that they can maintain compliance with Ministry of Health regulations regarding food safety.

The City of Toronto will not be proposing these approaches as part of the 2022 report back to Council, however, we'd like to hear feedback from you regarding this practice.

Reusable Items Accepted

- At well over eight in ten (83%), the vast majority of businesses surveyed indicate that reusable shopping bags are currently accepted or will be accepted by their business in the future. By comparison, just over half accept or plan to accept reusable cold beverage cups (53%) or reusable hot beverage cups (55%), while slightly fewer (46%) plan to do the same for reusable takeout food containers.
- Businesses that receive waste collection services from the City of Toronto or participate in a reusable container program are more likely to claim to be currently accepting reusable shopping bags, takeout food containers, and hot and cold beverage cups. Those that already have an Ask-First/By-Request policy are more likely to claim to be currently accepting takeout food containers, and hot and cold beverage cups.

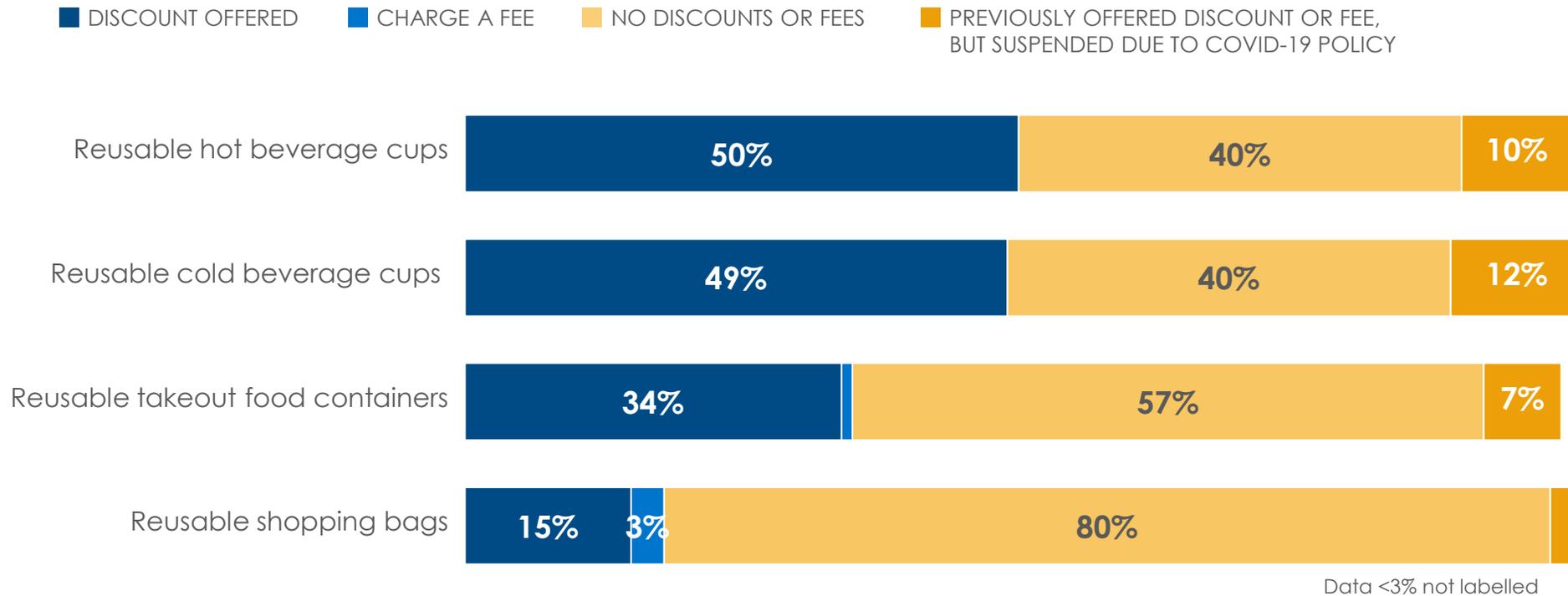


Base: Food service or non-food service business (Rebased to exclude not applicable selection, n=Base Varies)

Q41. Does your business currently (or plan to) accept or not accept any of the following items from customers? Select all that apply. Please indicate 'not applicable' if the item does not apply to your business or you do not offer the single-use type container.

Discounts Offered for Reusables

- As many as half of the businesses surveyed offer discounts for reusable hot (50%) and cold (49%) beverage cups. Most, however, do not offer any discounts for reusable shopping bags or reusable takeout containers.
- Businesses that participate in a reusable container program are more likely (at 38%) compared to those that do not (13%) to report offering discounts for reusable shopping bags. Food service businesses are more likely (at 24%) compared to non-food service businesses (5%) to offer discounts for reusable shopping bags.

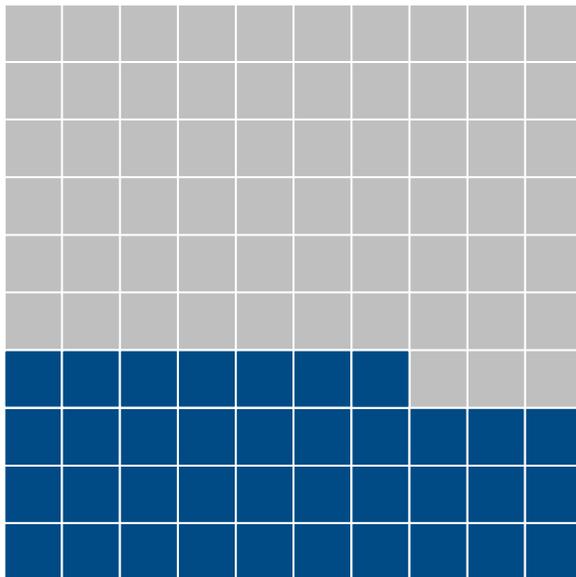


Base: Food service or non-food service business (n=Base Varies)

Q42. Does your business currently (or plan to) offer customers a discount if they bring any of the following items or charge a fee for the single-use alternative? Select all that apply.

Reusable Container Program

- Fewer than two in five (37%) of the businesses surveyed say they currently participate in a reusable container program, or did prior to the COVID-19 pandemic. *Note that businesses may refer to a reusable container program as offering customers reusable containers or participation in a reusable container program.*
- Businesses that have an Ask-First/By-Request policy are more likely (at 48%) compared to those that do not have one (23%) to report participating in a reusable container program. Those that receive waste collection services from the City of Toronto are more likely (at 45%) compared to those that do not (23%) to report participating in a reusable container program.



37%

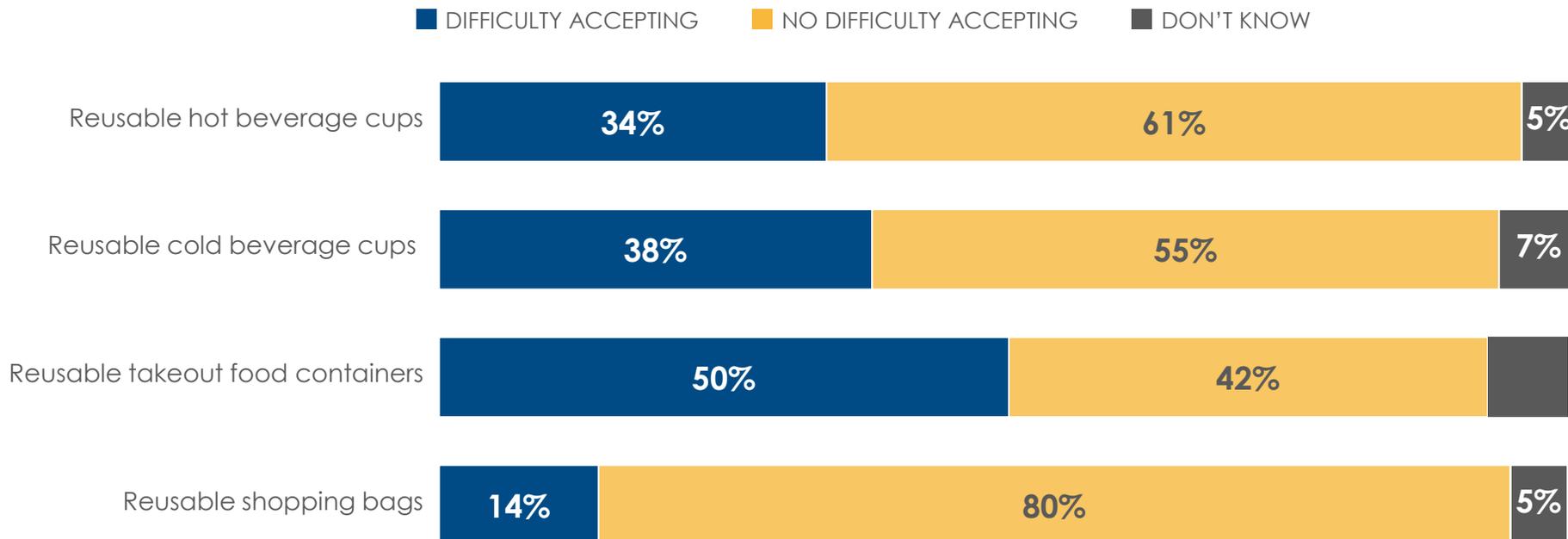
business currently participate in a reusable container program (or prior the COVID-19)

Base: Food service or non-food service business (n=103)

Q43. Does your business currently participate in a reusable container program, or did your business participate in one prior to the COVID-19 pandemic?

Difficulty Accepting Reusable Items

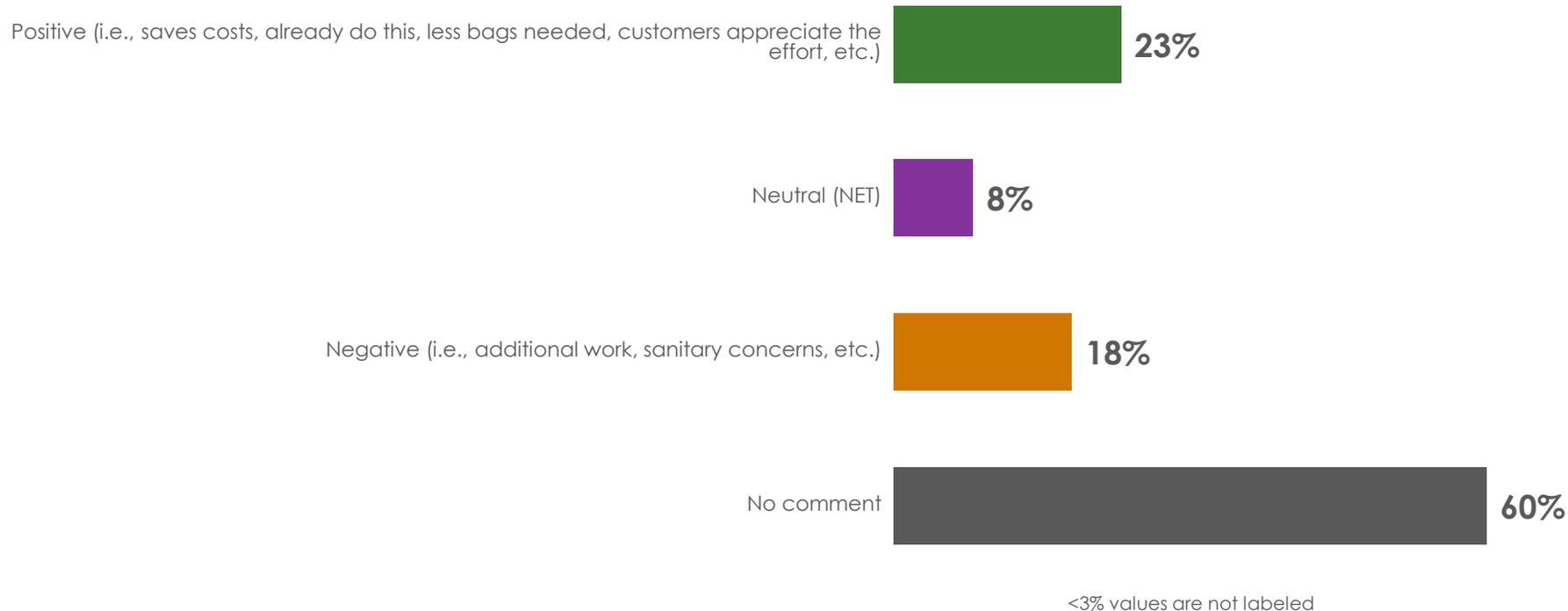
- With the exception of reusable takeout food containers, most businesses surveyed (who accept, previously accepted, or don't accept reusables) say they would have no difficulty accepting reusable items. However, half (50%) admit they would have some difficulty accepting reusable takeout food containers.
- Businesses that do not currently participate in a reusable container program are more likely compared to those that do to admit they would have difficulty accepting reusable hot beverage cups, cold beverage cups, takeout food containers, and shopping bags. Those that do not already have an Ask-First/By-Request policy are also more likely to say they would have difficulty accepting reusable hot beverage cups, reusable cold beverage cups, takeout food containers, and shopping bags.



Base: Food service or non-food service business (n=Base Varies)
Q44. Indicate if your business would have or currently has any difficulty accepting the following items

Impact if Required to Accept Reusable Bags

- Nearly three-fifths (59%) of businesses surveyed (who indicate that reusable shopping bags are applicable to their business) decline to offer feedback, when asked to describe the impact to their business if required to accept reusable bags. Those that do offer feedback feel more positive (23%) than negative (18%) about the impact, with cost savings (8%) and a belief that their business already does this (7%) topping the list as the most common comments.
- Businesses that do not participate in a reusable container program are more likely (at 22%) compared to those that do (6%) to offer negative feedback. Those that do not have an Ask-First/By-Request policy are more likely (at 27%) compared to those that do (8%) to offer negative feedback.

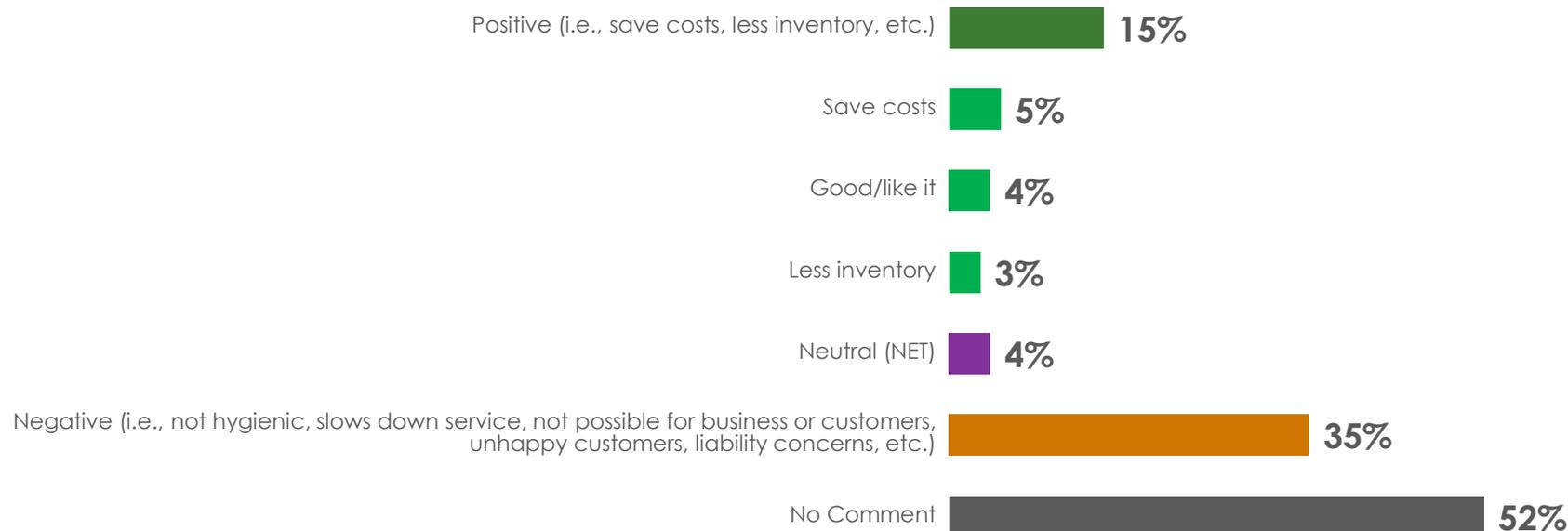


Base: Food service or non-food service business, reusable shopping bags applicable (n=146)

Q45. How, if at all, do you anticipate your business could be positively or negatively impacted if required to accept customer-provided reusable bags? Please consider impacts to customer satisfaction, ordering, inventory and storage space, profit, revenue and staffing when providing your answer.

Impact if Required to Accept Reusable Cups

- When asked what, if any, impact a requirement to accept reusable cups would have on their business, half (50%) of businesses surveyed (who indicate that reusable cups are applicable to their business) feel as though there would be limited to no impact. However, those that do offer feedback feel more negative (35%) than positive (15%) about the impact, with a lack of hygiene (20%) and slowing down more service (11%) topping the list as the most common mentions.
- Businesses that already have an Ask-First/By-Request policy are almost twice as likely (68%) to decline to offer any feedback, compared to those who do not have any such policy (37%). Those that do not currently have an Ask-First/By-Request policy are more likely to offer negative feedback (at 47%) compared to those that do (20%). Businesses that currently participate in a reusable container program are more likely to offer positive feedback (at 26%) compared to those that do not (9%).



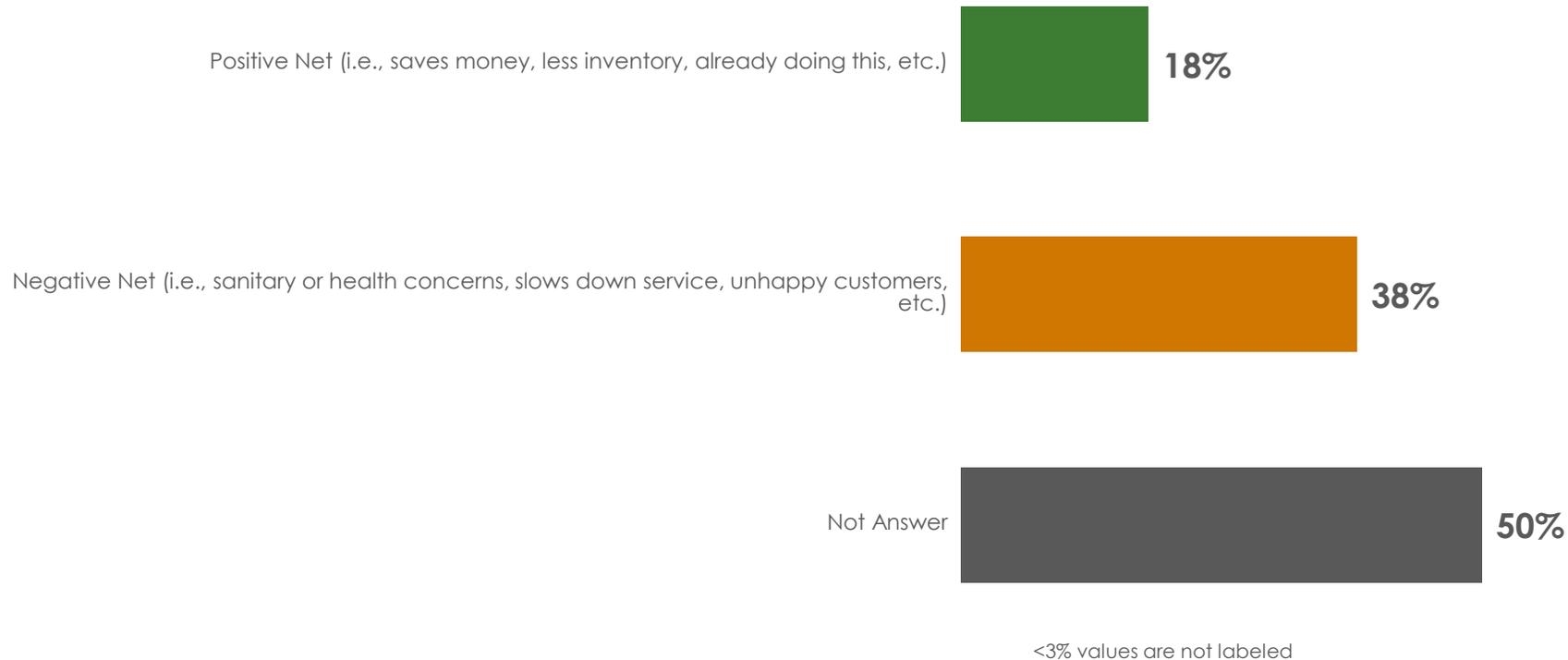
<3% values are not labeled

Base: Food service or non-food service business, hot or cold beverage cups applicable (n=102)

Q46. How, if at all, do you anticipate your business could be positively or negatively impacted if required to accept customer-provided reusable cups? Please consider impacts to customer satisfaction, ordering, inventory and storage space, sales, profit, revenue and staffing when providing your answer.

Impact if Required to Accept Reusable Takeout Containers

- The response, when asked about what impact the requirement to accept reusable takeout containers would have on their business, is somewhat negative as about twice as many feel as though the impact will be negative (38%) than positive (18%).
- Businesses that do not currently participate in a reusable container program are more likely (at 50%) compared to those that do (19%) to offer negative feedback.



Base: Food service or non-food service business, takeout containers applicable (n=113)

Q47. How, if at all do you anticipate your business could be positively or negatively impacted if required to accept customer-provided reusable takeout containers? Please consider impacts to customer satisfaction, ordering, inventory and storage space, profit, revenue and staffing when providing your answer.

Time Needed to Prepare for Bylaw

- Across the board, the vast majority of businesses say they will eventually be ready for a mandatory bylaw requiring the acceptance of various reusable items, with half or more claiming to be ready now for this bylaw to be applied to reusable bags (69%), reusable cups (56%) or reusable containers (50%).
- Businesses that currently participate in a reusable container program are more likely (at 81%) compared to those that do not (60%) to indicate that they would be ready anytime for a mandatory bylaw requiring the acceptance of reusable bags. Businesses that currently participate in a reusable container program are more likely (at 81%) compared to those that do not (47%) to indicate that they would be ready anytime for a mandatory bylaw requiring the acceptance of reusable cups. Businesses that currently participate in a reusable container program are more likely (at 75%) compared to those that do not (38%) to indicate that they would be ready anytime for a mandatory bylaw requiring the acceptance of reusable containers.



<3% values are not labeled

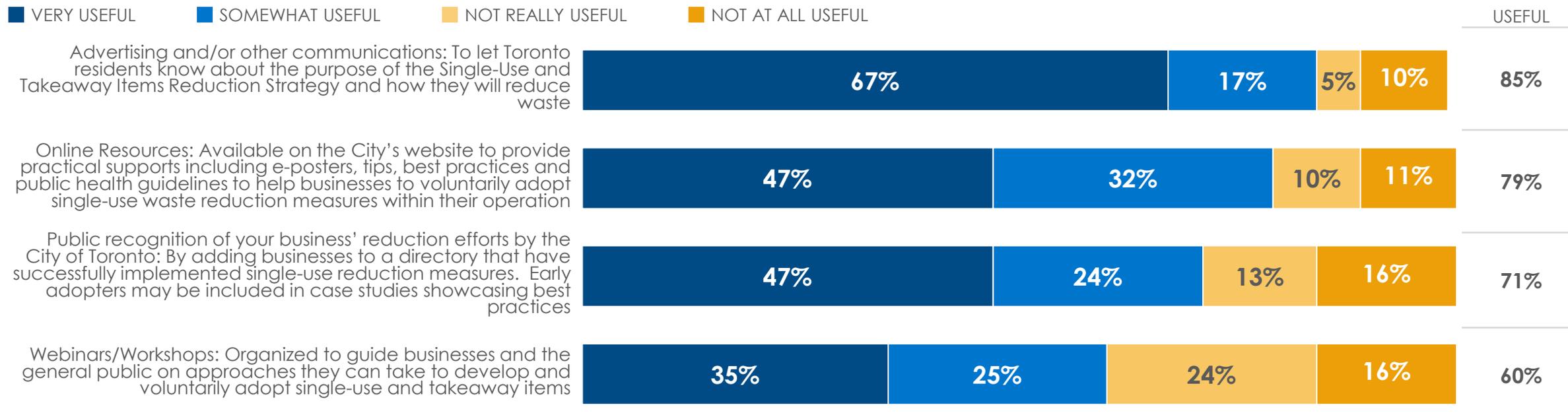
Base: Food service or non-food service business (n=Base varies)
 Q48. How long would you require to prepare for a mandatory bylaw requiring the acceptance of the following reusable items?



CITY SUPPORT

Usefulness of Non-Financial Support & Assistance Initiatives

- Most businesses surveyed think any type of non-financial support and assistance initiatives offered by the City of Toronto's would be useful. Over four in five (85%) believe advertising communications to be a useful initiative, with a clear majority (67%) who view it as 'very useful'. Online resources are also thought to be useful by a strong majority (79%) of the businesses surveyed.
- Businesses that participate in a reusable container program are more likely compared to those that do not participate in any such program to feel as though having online resources, advertising or other communications, and public recognition of their business' reduction efforts would be very useful to their business. Businesses that have an Ask-First/By-Request policy are more likely (at 79%) compared to those that do not (61%) to feel as though advertising or other communications would be very useful to their business.

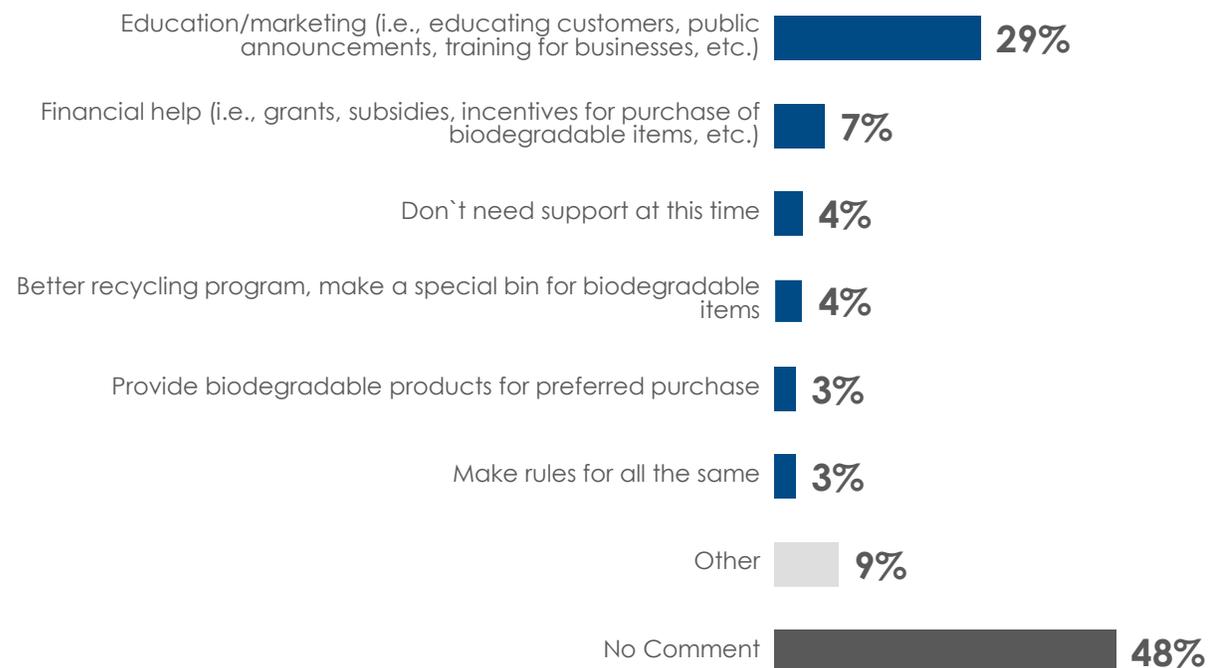


Base: All businesses (n=184)

Q50. Below are some of the different non-financial support and assistance initiatives that the City of Toronto is considering that can be provided to businesses. To what extent would each of the following be useful for your business?

Educational Supports

- When asked what the City of Toronto can do to provide educational supports, a variety of responses are offered, with general marketing events from the City of Toronto (29%) most frequently mentioned by the businesses that were surveyed. More specifically, nearly two in five (18%) cite public announcements as educational supports that can be offered, while a little over one in 10 (12%) believe that distributing posters or booklets or other signage would be helpful.
- Those who do not receive waste collection services from the City of Toronto's are more likely (at 59%) compared to those that do (39%) to decline to offer suggestions, in terms of educational support, when asked to do so.

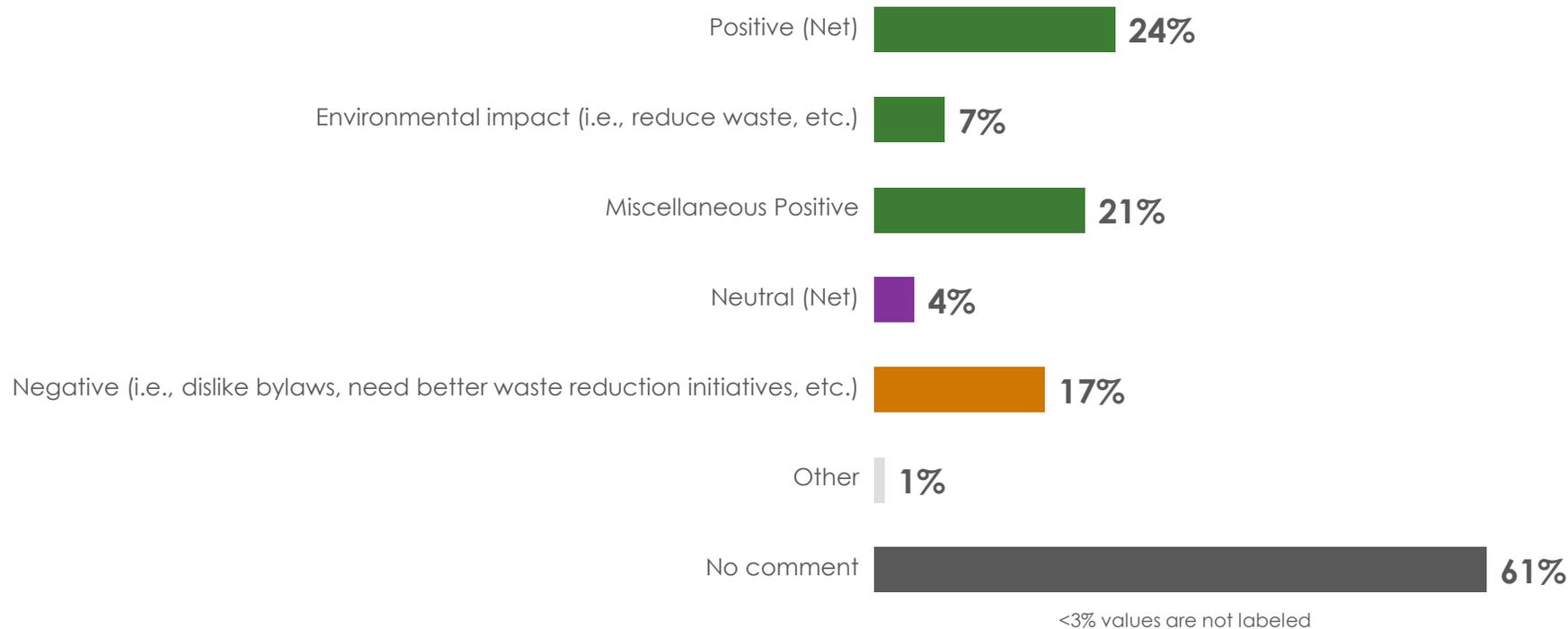


Base: All businesses (n=184)

Q49. The City of Toronto plans to offer educational and outreach supports and resources to help businesses that face difficulty with compliance for the proposed restrictions. What, if any, supports and/or resources can the City of Toronto's provide your business to assist with the reduction of single-use items?

General Comments: Business Survey

- Just two-fifths (41%) of food service businesses surveyed offer general comments and feedback, with more positive (24%) than negative (17%) feedback received.
- Businesses that currently participate in a reusable container program are more likely (at 42%) compared to those that do not (15%) to offer positive feedback. Those that have an Ask-First/By-Request policy are more likely (at 35%) compared to those that do not (15%) are more likely to offer positive feedback.



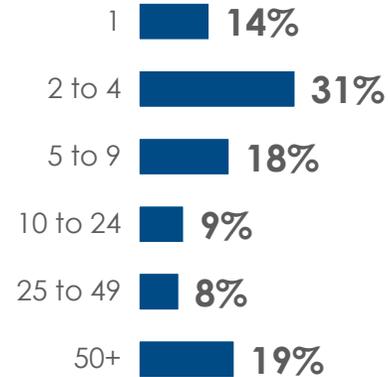
Base: All businesses (n=184)

Q51. Do you have any other comments regarding the City of Toronto's proposed Single-Use and Takeaway Items Reduction Strategy that you'd like to share?

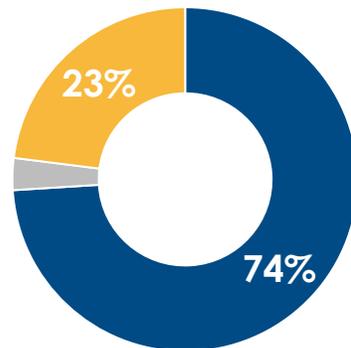
FIRMOGRAPHICS

Firmographics: Non-Food Service Businesses

EMPLOYEE HEADCOUNT

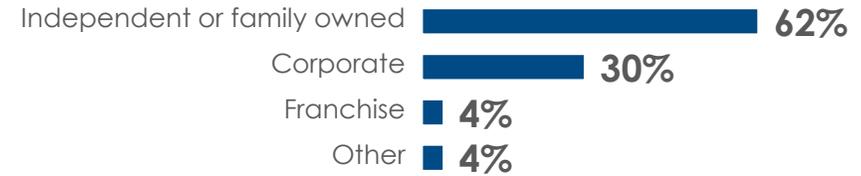


BUSINESS LOCATION

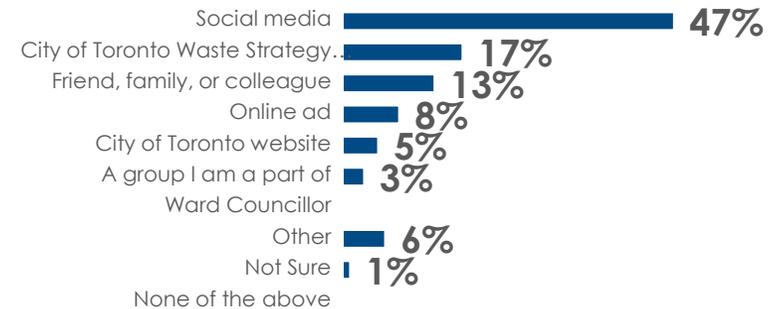


■ Toronto
■ Outside Toronto
■ In and outside of the City of Toronto

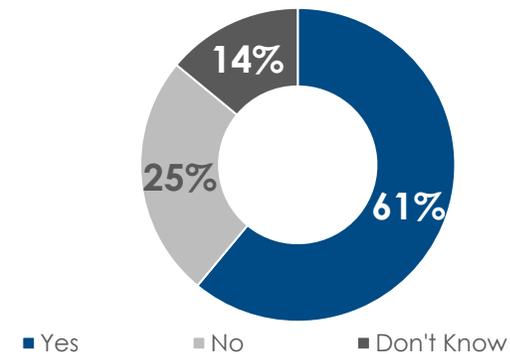
OWNERSHIP TYPE



HOW LEARNED ABOUT SURVEY

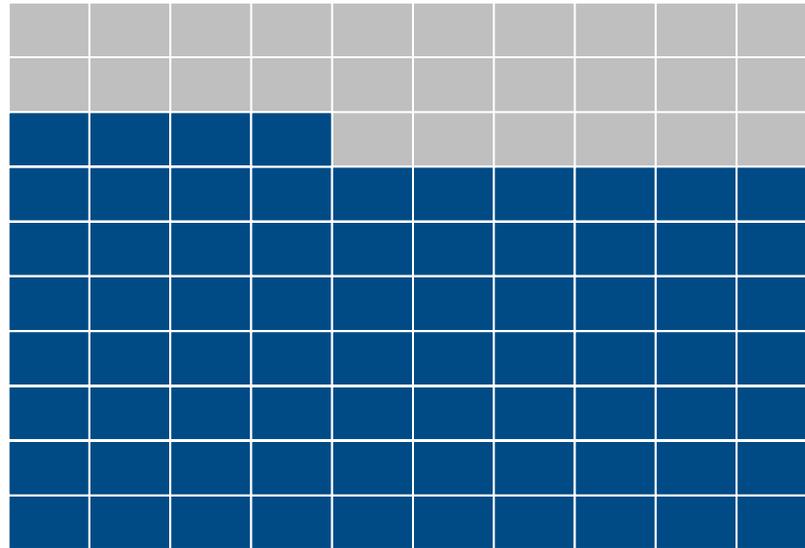


RECEIVE WASTE COLLECTION SERVICES FROM THE CITY OF TORONTO



Firmographics: Non-Food Service Business (Cont'd)

- Nearly three-quarters (74%) of non-food service businesses surveyed indicate that they are the owner, operator, or decision-maker for a business that distributes single-use or reusable bags to customers.



74%

Distributes single-use or reusable bags to customers

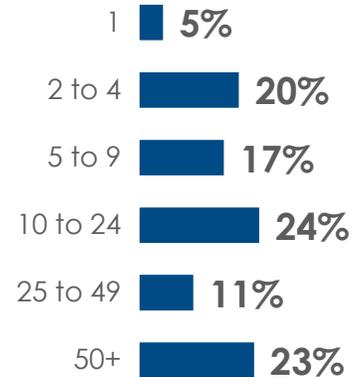
Base: non-food service (n=77)

Q18. Are you an owner, operator, or decision maker for a business that distributes single-use or reusable bags to customers?

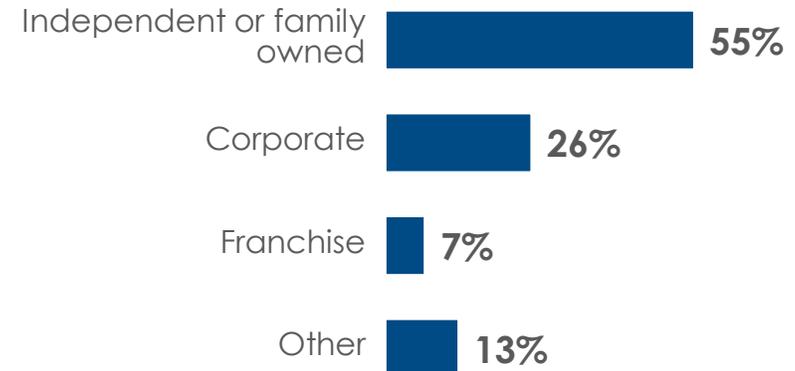
x

Firmographics: Food Service Businesses

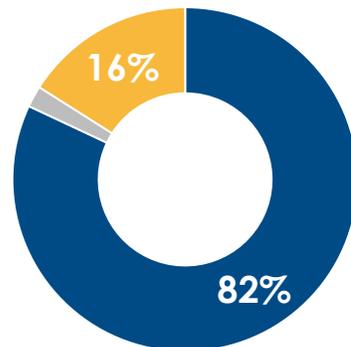
EMPLOYEE HEADCOUNT



OWNERSHIP TYPE



BUSINESS LOCATION



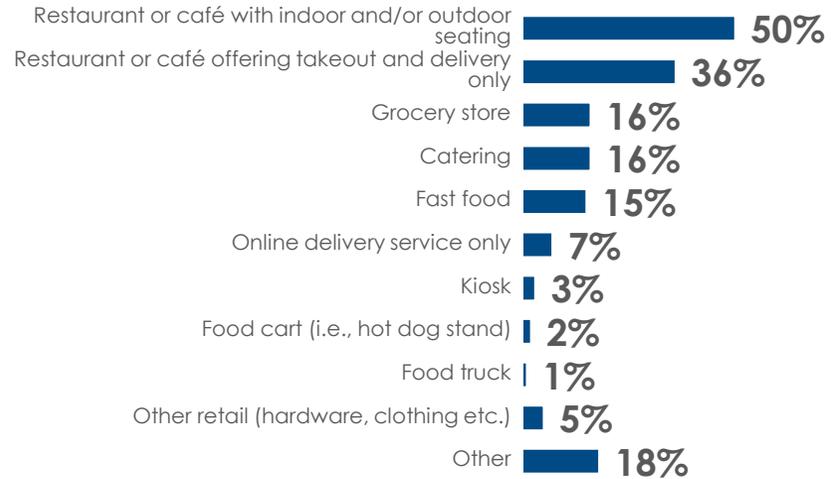
■ Toronto
■ Outside Toronto
■ In and outside of the City of Toronto

HOW LEARNED ABOUT SURVEY

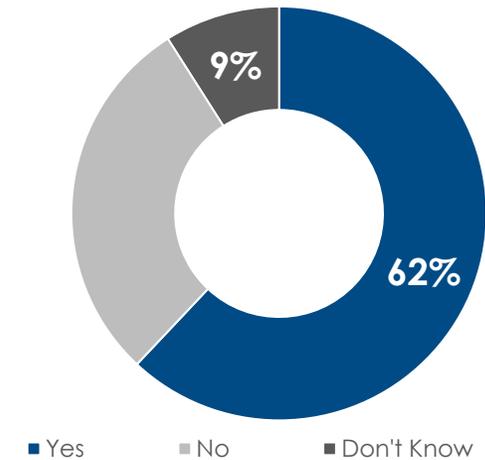


Firmographics: Food Service Businesses (Cont'd)

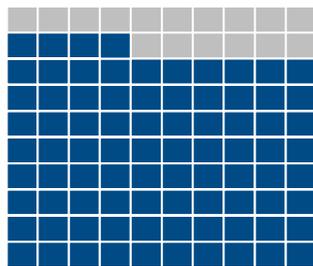
FOOD/BEVERAGE BUSINESS TYPE



RECEIVE WASTE COLLECTION SERVICES FROM THE CITY OF TORONTO



FOOD SERVICE BUSINESS: DECISION-MAKER



84%

Owner, operator, or decision maker

SINGLE-USE AND TAKEAWAY ITEMS REDUCTION STRATEGY: PUBLIC SURVEY (RESIDENTS)

Draft Report

Prepared for the City of Toronto
August 2022

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METHODOLOGY

Methodology



SUMMARY

These are the findings of an Ipsos survey conducted on behalf of the City of Toronto.



SAMPLE

A total of 10,719 Toronto residents aged 13+ participated in the residential survey which was made available via the City of Toronto's website. The sample is not representative, as anyone who visited the City's website could take the survey. The result is a sample that, to some extent, skews female, aged 30+, Metro Toronto (downtown boroughs), highly educated (university degree or higher), and higher income households (\$100k+ household income).



METHOD AND TIMING

The online survey was hosted by Ipsos. Fieldwork was conducted between February 8 and March 6, 2022.

On average, respondents took about 13 minutes to complete the public survey (residential and/or business).



ROUNDING

Where figures do not sum to 100, this is due to the effects of rounding.

For the open-ended questions, percentages do not always add up to 100% as some respondents offer more than one comment, and in some cases, provide positive and negative comments in the same response.

All percentages shown are relative to the sample size that was asked the question.



SUBGROUP DEFINITIONS

The boroughs of Etobicoke, York, North York, Metro Toronto, East York, and Scarborough are defined by postal code.

Gender is defined as identifying as a member of one of the following groups: woman, man, trans woman, trans man, gender non-binary, two-spirit, other, or prefer not to answer.

Respondents self-identified as having a disability (or not).

KEY FINDINGS

Key Findings

- Among Toronto residents who participated in the public survey there is overwhelming support for the implementation of an Ask-First/By-Request bylaw by September 2022. In fact, the vast majority (92%) would like to see this bylaw expanded to include other single-use accessory items such as napkins, stir sticks, beverage trays, and condiment packets.
- A majority of public survey participants support paying fees for all types of single-use items. While there is no clear consensus in terms of what an optimal fee would be, the highest proportion indicate a preference for charging \$0.05 for each single-use item.
- Most (71%) Toronto residents who participated in the public survey agree with the City of Toronto's proposed timeline of January 2023 for the implementation of the fee bylaw for single-use items offered at the point of sale. The survey results suggest that phasing in fees incrementally over a two-year period could be a viable strategy, as a majority (54%) of Toronto residents who took the public survey agree with this approach.
- Toronto residents who participated in the public survey overwhelmingly favour the idea of having a future bylaw mandating the acceptance of reusable shopping bags, cups, and food containers.
- It is noteworthy that Toronto residents who participated in the survey and identify as having a disability generally seem to perceive the City of Toronto's single-use and takeaway items reduction strategy less favourably. This group is less likely to support expanding the Ask-First/By-Request bylaw to include other single-use accessory items, the proposed timeline for the Ask-First/By-Request bylaw, the City of Toronto's proposed fee bylaw timeline, the inclusion of all single-use items in the Ask-First/By-Request bylaw, a phased-in approach to fee increases, a bylaw mandating acceptance of reusable cups, and are among the most likely to believe that no fees should be charged for reusable bags or any of the single-use items.

ASK-FIRST/BY- REQUEST

Ask-First/By-Request

Description Provided to Respondents:

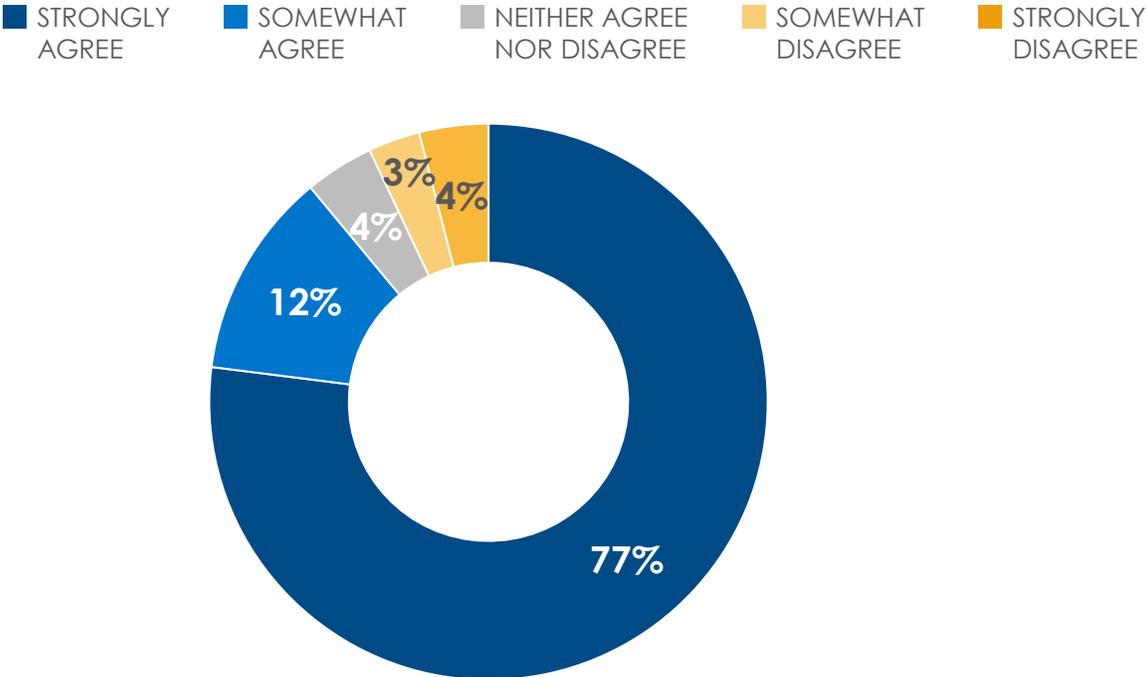
The City of Toronto's is proposing an Ask-First/By-Request bylaw that would require single-use items be distributed to a customer only after asking or upon request. Details:

- Straws and utensils will be restricted based on support from previous consultation.
- The City of Toronto is now proposing that the Ask-First/By-Request approach be expanded to include other accessory items such as: napkins, stir sticks, beverage trays, condiment packets and other similar accessories or accompanying single-use items used as part of food or beverage service or packaging.
- Customers would ask for the item or the employee would ask if the customer wants the item.
- Businesses could be restricted to keeping items behind the counter or away from public access.
- Delivery services would be required to include confirmation that the items are required for online and mobile food orders.

The bylaw would ensure no adverse effects for individuals who request single-use straws for accessibility or health reasons.

Attitudes Towards Ask-First/By-Request Bylaw and Implementation Timeline

- At nearly nine in 10 (89%), there is overwhelming support for the City of Toronto's proposal to implement the Ask-First/By-Request bylaw for single-use food utensils, straws, and other single-use accessory items, effective September 2022, among respondents to the public survey. In fact, nearly four in five (79%) residents who participated in the public survey say they strongly support the City of Toronto's proposed timeline.
- Those who do not identify as having a disability are more likely (at 91%) compared to those who have a disability (84%) to indicate agreement with the City of Toronto's proposed timeline for the Ask-First/By-Request bylaw.



AGREE	DISAGREE
89%	7%

Base: All respondents (n=10719)
 Q7A. The City of Toronto is proposing implementation of the Ask-First/By-Request bylaw for single-use food utensils, single-use straws and other single-use accessories to begin in September 2022. To what extent do you agree or disagree with this timeline?

<3% values are not labeled



Positive Comments About the Ask-First/By-Request Bylaw

- Positive feedback (69%) outweighs negative feedback (6%) among those who offer feedback about the implementation of the Ask-First/By-Request bylaw. Mentions related to the timeline (i.e., long overdue, enough time) (47%) and the environmental impact (27%) emerge as the most commonly cited reasons in favour of the proposal. Other positive mentions include a belief that not everyone needs single-use items (9%).
- Those who do not identify as having a disability are more likely (at 69%) compared to those who have a disability (63%) to offer positive comments about the bylaw.

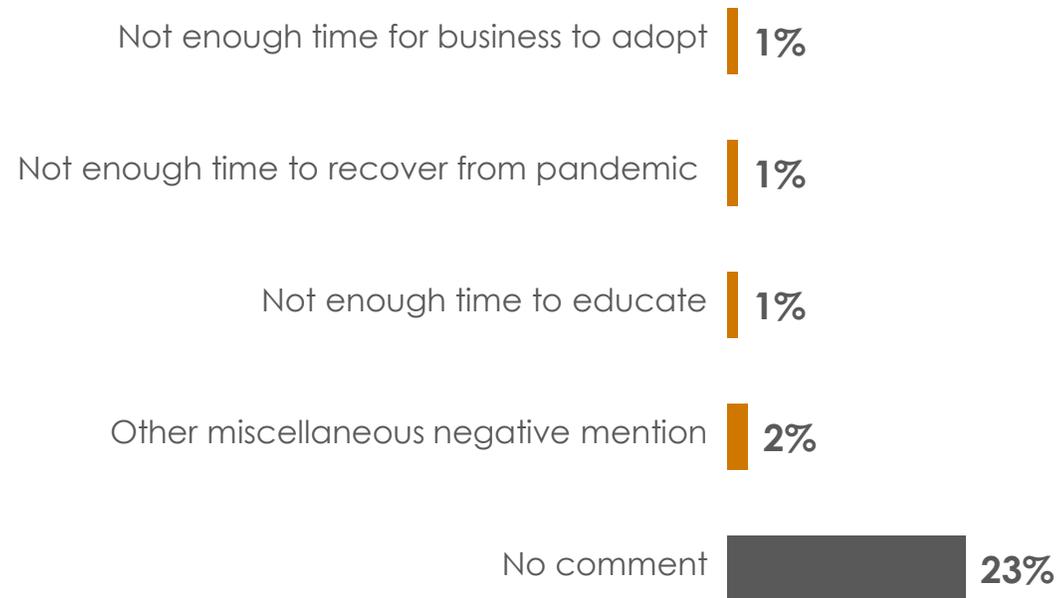


<2% values are not labeled

Base: All respondents (n=9515)
Q7B. Why do you [INSERT RESPONSE] with the implementation of the Ask-First/By-Request bylaw for single-use utensils, single-use straws and other single-use accessories to begin in September 2022?

Negative Comments About the Ask-First/By-Request Bylaw

- Very few Toronto residents who participated in the public survey offer negative comments about the Ask-First/By-Request bylaw (only 6% of responses in total).

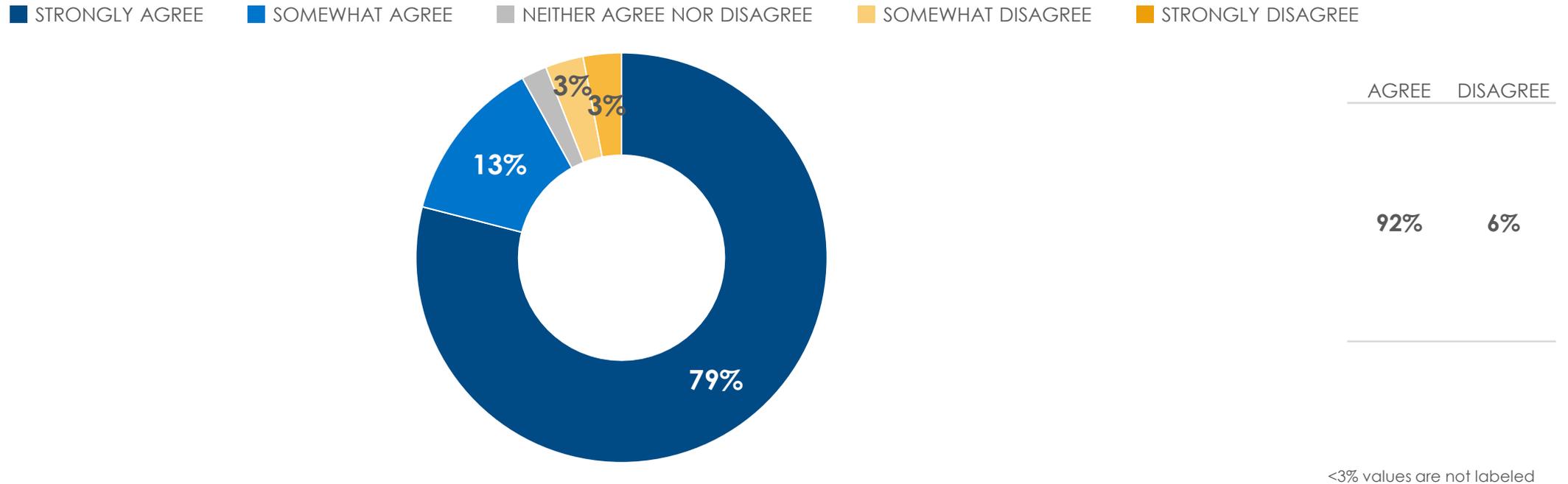


<1% values are not labeled

Base: All respondents (n=9515)
Q7B. Why do you [INSERT RESPONSE] with the implementation of the Ask-First/By-Request bylaw for single-use utensils, single-use straws and other single-use accessories to begin in September 2022?

Expanding the List of Items Covered by the Ask-First/By-Request Bylaw

- The vast majority (92%) of Toronto residents who participated in the public survey agree with the idea of expanding the Ask-First/By-Request bylaw to include other single-use accessory items such as napkins, stir sticks, beverage trays, and condiment packets. Few (6%) disagree with the idea of expanding this bylaw.
- Those who do not identify as having a disability are more likely (at 94%) compared to those who have a disability (89%) to indicate agreement with the idea of expanding the Ask-First/By-Request bylaw to include other single-use accessory items.

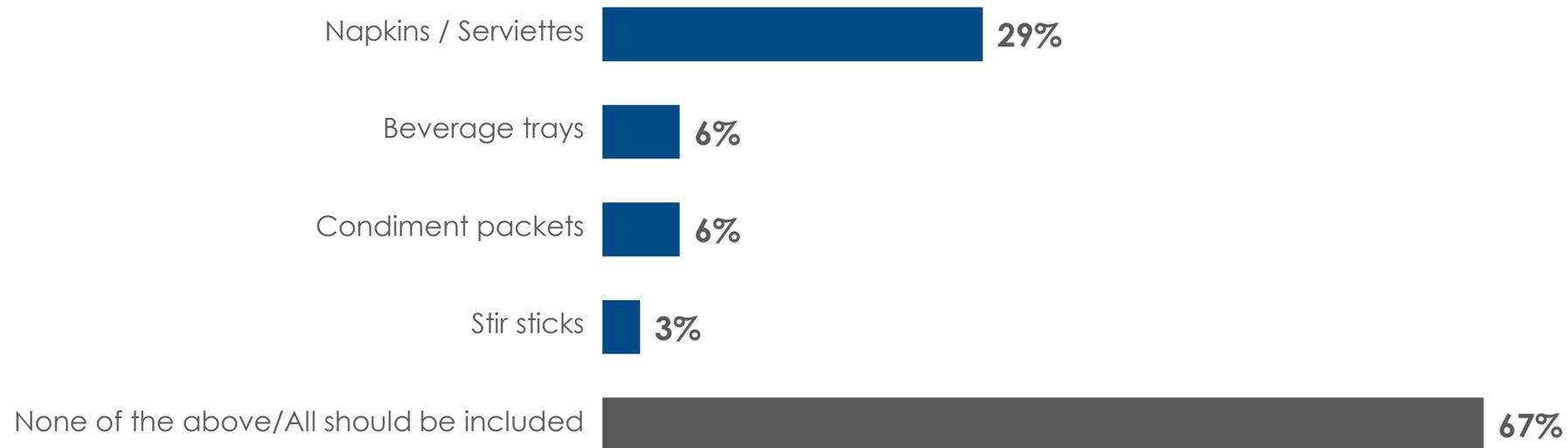


Base: All respondents (n=10719)

Q5. To what extent do you agree or disagree with an Ask-First/By-Request bylaw be expanded to include other single-use accessory items such as napkins, stir stick, beverage trays, condiment packets?

Items Residents Do Not Want to See Restricted As Part of the Bylaw

- Two-thirds (67%) of Toronto residents who participated in the public survey think all single-use items should be included in the Ask-First/By-Request bylaw.
- Those who do not identify as having a disability are more likely (at 68%) compared to those who have a disability (62%) to feel as though all single-use items should be included in the Ask-First/By-Request bylaw



Base: All respondents (n=10719)

Q6. Are there items you feel should not be restricted by the Ask-First/By-Request approach? Select all that apply.

FEE BYLAW

Fee Bylaw

Description Provided to Respondents:

The City of Toronto's is proposing a fee bylaw that would require businesses to charge customers a fee for the following single-use and takeaway items:

- Single-use hot and cold beverage cups
- Single-use plastic and paper bags
- Reusable shopping bags offered at point of sale

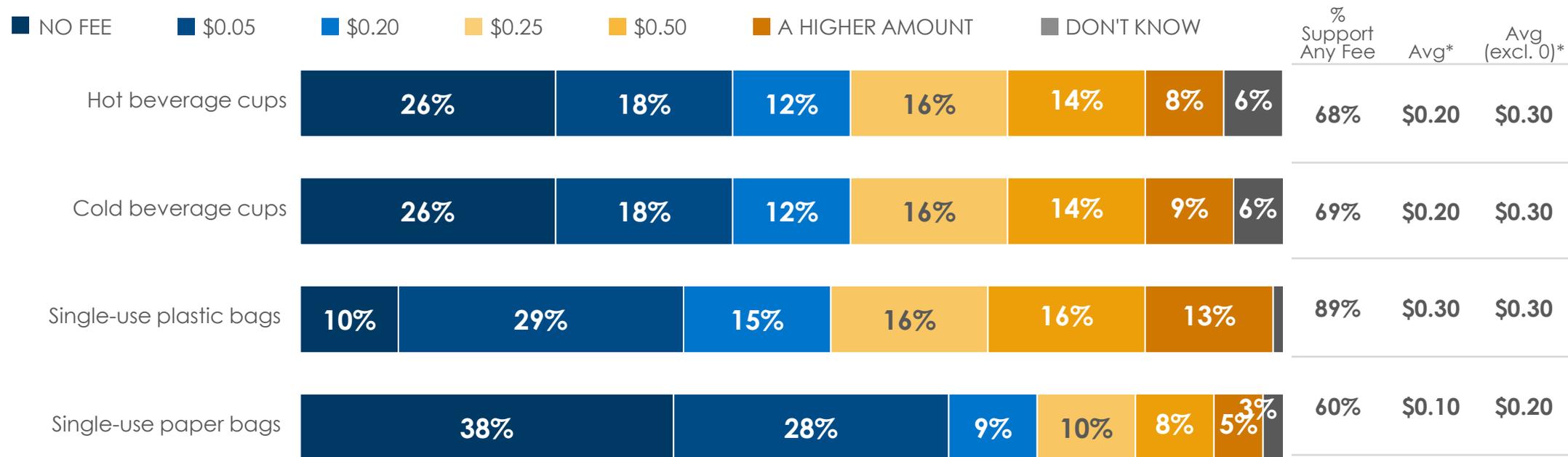
Details:

- Businesses will retain the fees. Fees will not be remitted to the City of Toronto.
- The City of Toronto is proposing a minimum fee be charged for new 'reusable bags' being offered at point of sale - this addition is being considered because some businesses no longer distribute single-use bags and are instead offering reusable bags free-of-charge that may result in increased waste generation
- The City of Toronto is considering a phased-in approach with increased fees over a multi-year period.

The City of Toronto recognizes that the COVID-19 pandemic has caused economic hardship for many residents and businesses and is seeking input again on the fee amounts for single-use beverage cups and single-use bags (paper and plastic).

Support for Single-Use Fees

- A majority of public survey participants support paying fees for all types of single-use items. There are similar levels of support for paying various amounts of fees for hot and cold beverage cups, though most Toronto businesses surveyed support a smaller fee of \$0.05 for single-use plastic and paper bags.
- Toronto residents who identify as having a disability are among the most likely to believe that no fees should be charged for any of the single-use items.



Base: All respondents (n=10719)

Q8. What, if any, fee do you support paying for single-use hot beverage cups beginning in January 2023? [single select matrix]

Q9. What, if any, fee do you support paying for single-use cold beverage cups beginning in January 2023? [single select matrix]

Q10. What, if any, fee do you support paying for single-use plastic bags beginning in January 2023? [single select matrix]

Q11. What, if any, fee do you support paying for single-use for single-use paper bags beginning in January 2023? [single select matrix]

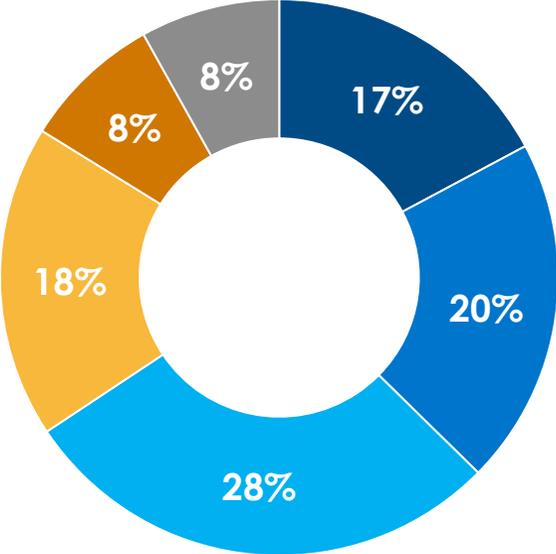
*Note: Avg fee should be interpreted with caution. Price points on scale are fixed and "a higher amount" is assumed to be \$0.75.

<3% values are not labeled

Support for New Reusable Bag Fees

- Among Toronto residents who took the public survey, there is strong support for paying at least some fee for new reusable bags beginning in January 2023. Nearly three in 10 (28%) feel as though \$1.00 would be the appropriate amount.
- Those residents who identify as having a disability (22% vs. 16% no disability) are among the most likely to believe that no fees should be charged for new reusable bags. Residents whose household income is less than \$150k are significantly more likely to feel as though the reusable bag fee should be \$0.50 (21% vs. 17% \$150k+ household income).

■ NO FEE
 ■ \$0.50
 ■ \$1.00
 ■ \$2.00
 ■ A HIGHER AMOUNT
 ■ DON'T KNOW



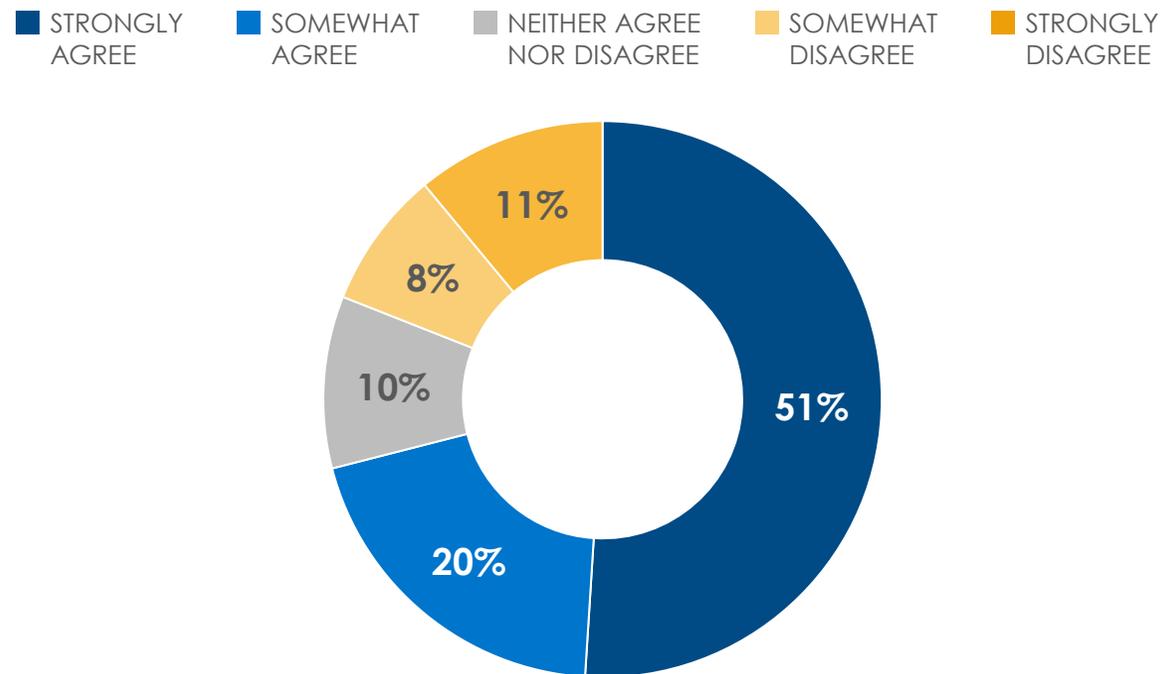
Support Any Fee	Avg.*	Avg. (excl 0)*
74%	\$1.10	\$1.20

Base: All respondents (n=10719)
 Q12. What, if any, fee do you support paying for new reusable bags beginning in January 2023? [single select matrix]
 *Note: Avg fee should be interpreted with caution. Price points on scale are fixed and "a higher amount" is assumed to be \$3.00.



Attitudes Towards Fee Bylaw Timeline

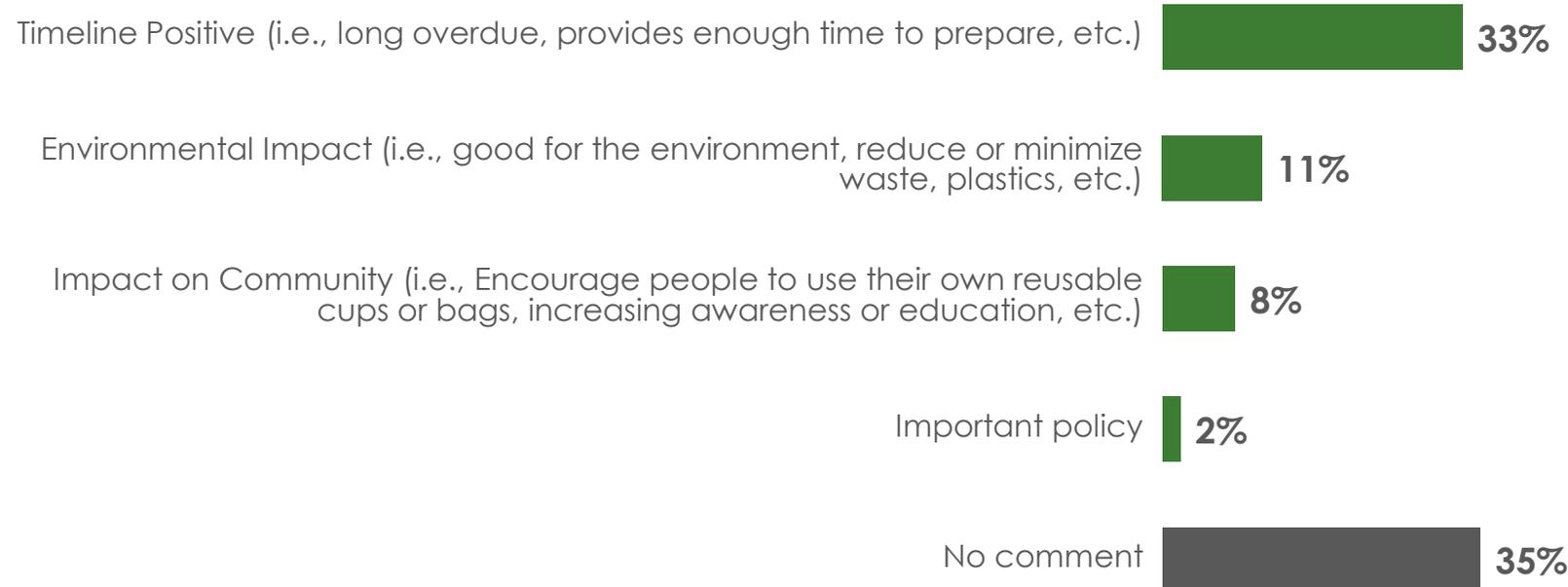
- At seven in 10 (71%), most of the public survey participants indicate agreement with the City of Toronto's proposed timeline for the implementation of the fee bylaw for single-use cups, bags, and new reusable bags offered at the point of sale. In fact, more than three times as many agree (71%) than disagree (19%) with the City of Toronto's proposed timeline, and half (51%) *strongly agree* with the timeline.
- Those who do not identify as having a disability are more likely (at 73%) compared to those who have a disability (62%) to agree (strongly/somewhat) with the City of Toronto's proposed fee bylaw timeline.



Base: All respondents (n=10719)
Q13A. The City of Toronto is proposing implementation of the fee bylaw for single-use beverage cups (hot and cold), single-use bags (paper and plastic), and new reusable bags offered at the point of sale to begin in January 2023. To what extent do you agree or disagree with this timeline?

Positive Comments About the Fee Bylaw

- When asked why they support/oppose the fee bylaw timeline (of January 2023), almost half (45%) provide a positive comment. These positive comments most often refer to the timeline (33%), the environmental impact (11%) or the impact on the community (8%).
- Those who do not identify as having a disability are more likely (at 45%) compared to those who have a disability (36%) to offer positive comments.

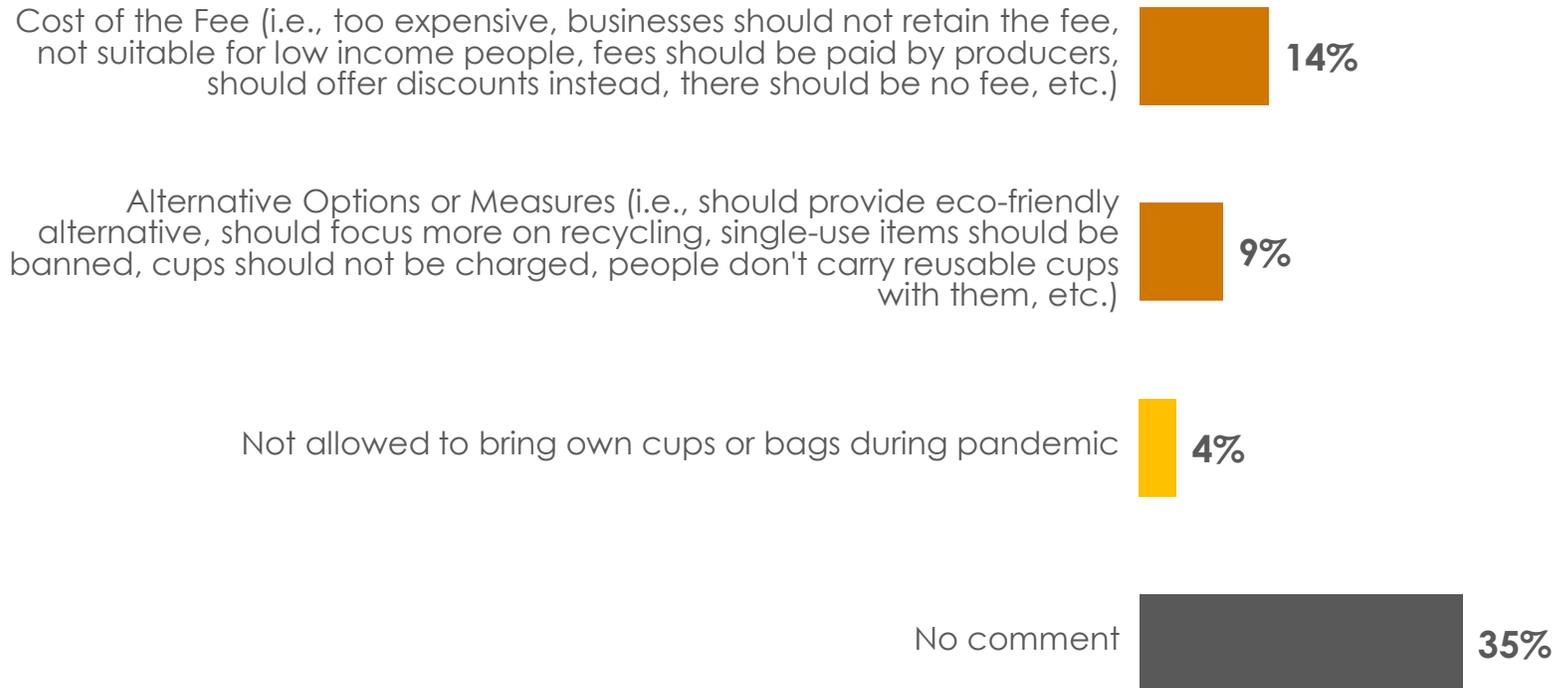


<2% values are not labeled

Base: All respondents (n=10719)
Q13B. Why do you [INSERT RESPONSE] with the implementation of the fee bylaw for single-use beverage cups (hot and cold), single-use bags (paper and plastic), and new reusable bags offered at the point of sale to begin in January 2023?

Negative Comments About the Fee Bylaw

- Of the one in four (27%) who provide a negative comment about the fee bylaw, most (14%) cite the cost of the fee or a belief that alternative measures should be implemented instead of a fee (9%), as reasons for holding negative perceptions of the bylaw timeline.

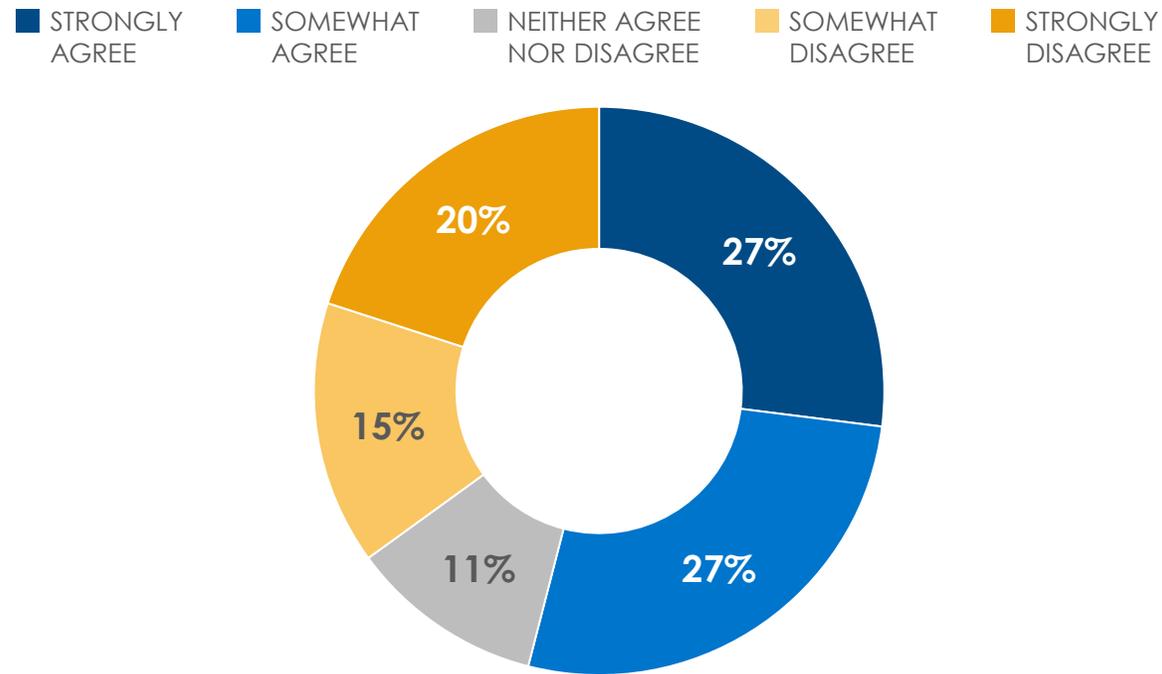


<2% values are not labeled

Base: All respondents (n=10719)
Q13B. Why do you [INSERT RESPONSE] with the implementation of the fee bylaw for single-use beverage cups (hot and cold), single-use bags (paper and plastic), and new reusable bags offered at the point of sale to begin in January 2023?

Incremental Fee Increases

- A majority (54%) of those who took the public survey agree with the idea of taking a phased-in approach to fees incrementally, over a two-year period.
- Those who do not identify as having a disability are less likely (at 32%) compared to those who have a disability (40%) to disagree with the phased-in approach to fee-increases.



Base: All respondents (n=10719)

Q14. The City of Toronto is considering that the fees be charged incrementally, with the increase over two years. See example below (incremental fee amounts below are provided for example purposes only and are not the recommended amounts). To what extent do you agree or disagree with a phased-in approach to fees incrementally over a two-year period?

INCREASING THE ACCEPTANCE OF REUSABLE ITEMS

Increasing the Acceptance of Reusable Items

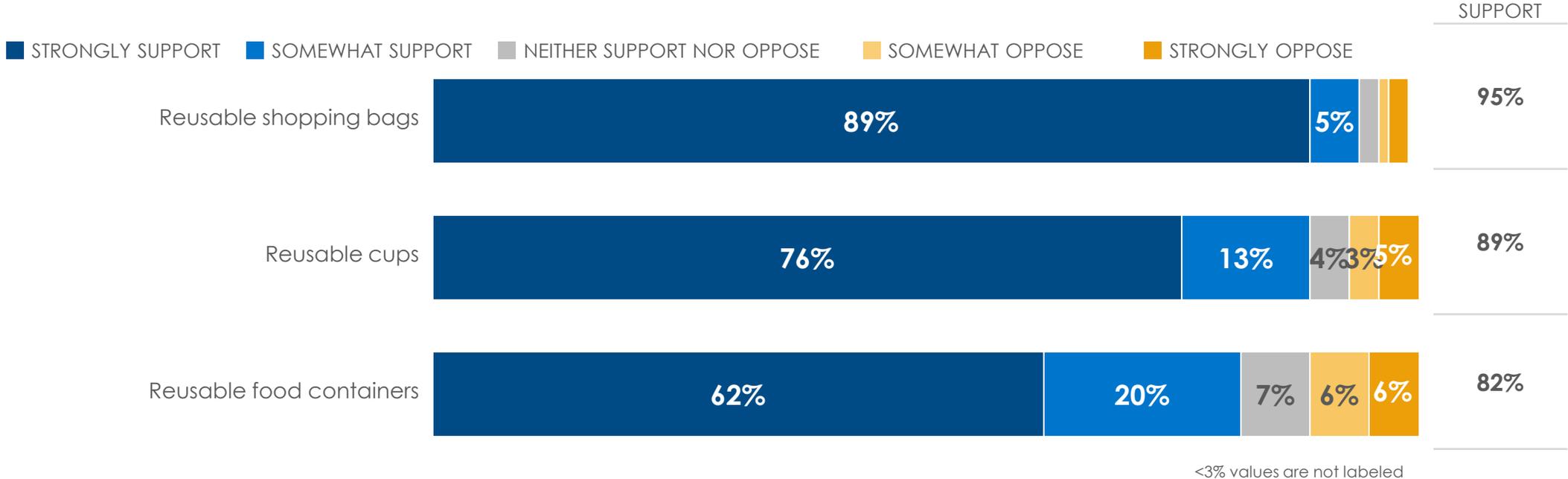
Description Provided to Respondents:

Increasing the number of businesses that accept customer-provided reusable bags, cups and food containers can help reduce the use of single-use and takeaway items and reduce waste. During previous consultations some stakeholders shared their perspectives on health and safety considerations, such as businesses being concerned about accepting these items and ensuring that they can maintain compliance with Ministry of Health regulations regarding food safety.

The City of Toronto will not be proposing these approaches as part of the 2022 report back to Council, however, we'd like to hear feedback from you regarding this practice.

Support for Mandating Businesses to Accept Reusables

- Virtually all (95%) Toronto residents who participated in the public survey support a bylaw mandating businesses in the City of Toronto's to accept reusable shopping bags and there is a consensus that bylaws mandating businesses to accept reusable cups (89%) and food containers (82%) should be implemented. What's more, most Toronto residents who participated in the public survey *strongly support* bylaws mandating acceptance of reusable shopping bags, cups, and food containers, indicating a high level of support for these initiatives.
- Those who do not identify as having a disability are more likely (at 90%) compared to those who have a disability (86%) to indicate support for a bylaw mandating acceptance of reusable cups. Those who do not identify as having a disability are more likely (at 83%) compared to those who have a disability (79%) to indicate support for a bylaw mandating acceptance of reusable food containers.

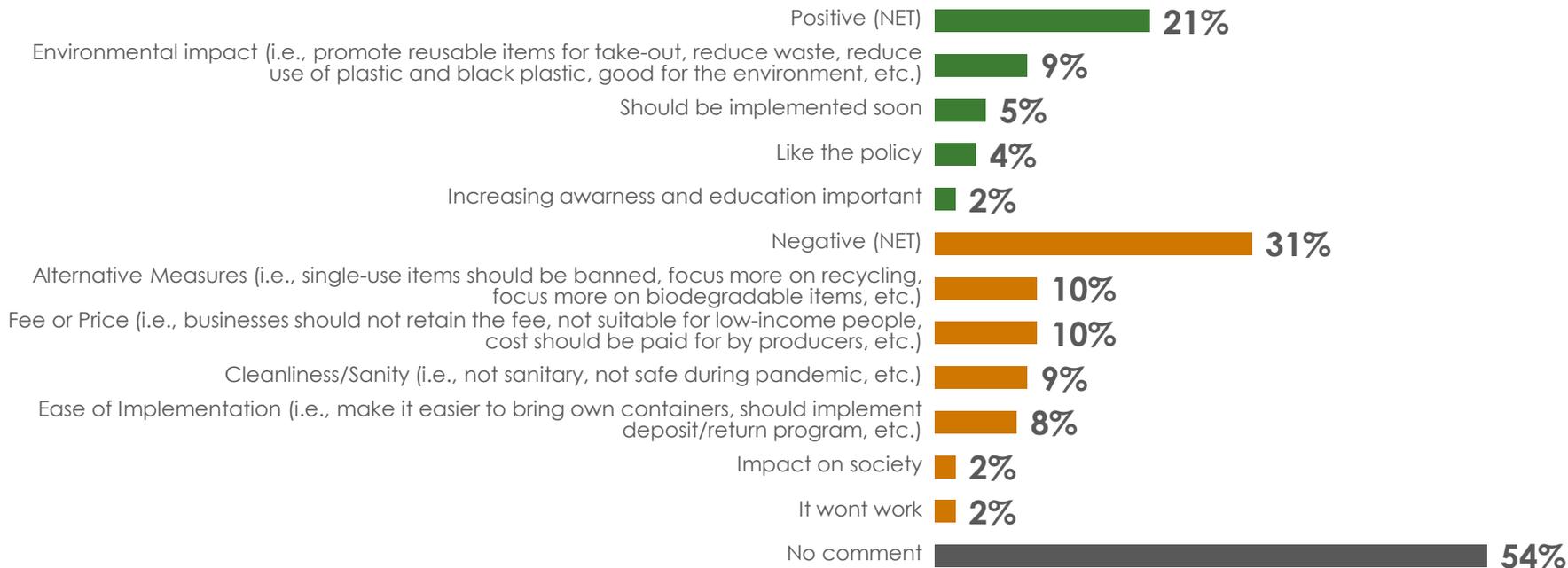


Base: All respondents (n=10719)
 Q15. To what extent would you support or oppose a bylaw mandating businesses in the City of Toronto's to accept the following items provided by customers?



General Comments

- A majority (54%) of Toronto residents who participated in the public survey decline to offer additional feedback regarding the City of Toronto's proposed Single-Use and Takeaway Items Reduction strategy, when asked to do so. Notably, those who do provide a response are more likely to say something negative (31%), as opposed to positive (21%), with concerns related to price (10%) and alternative measures (10%) most frequently cited in the negative comments.
- Those who identify as having a disability are more likely (at 37%) compared to those who do not have a disability (30%) to offer negative comments.



<2% values are not labeled

Base: All respondents (n=10719)

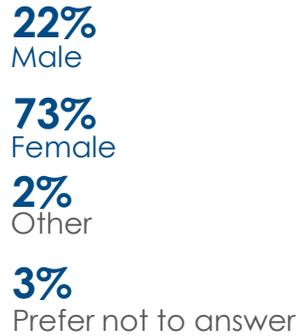
Q16. Do you have any other comments regarding the City of Toronto's proposed Single-Use and Takeaway Items Reduction Strategy that you'd like to share?

DEMOGRAPHICS

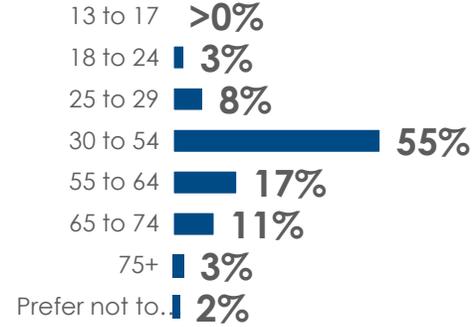
Demographics



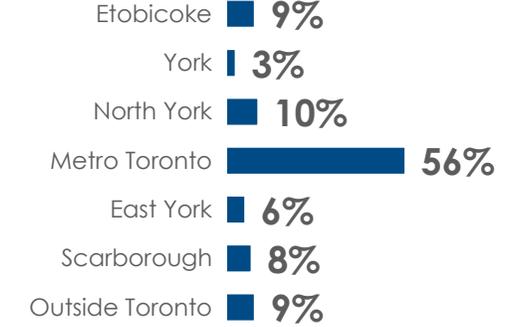
GENDER



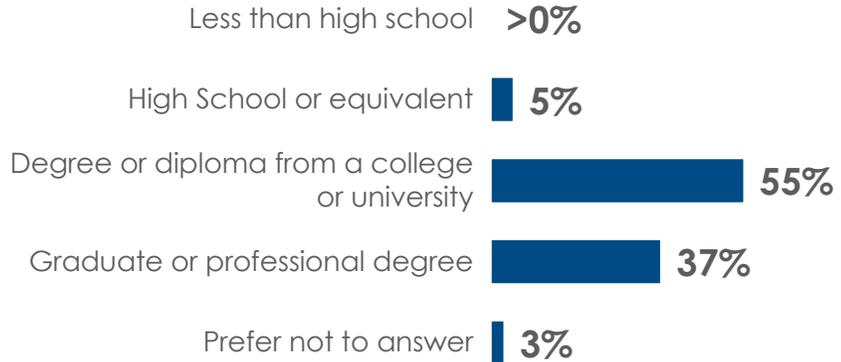
AGE



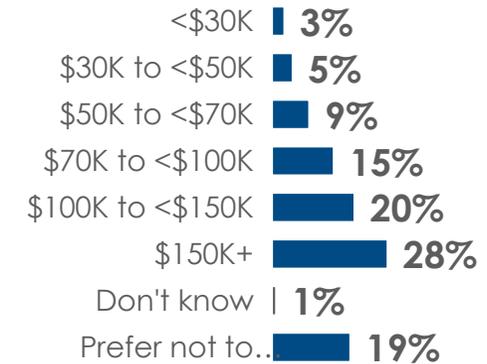
REGION



EDUCATION



INCOME



SINGLE-USE AND TAKEAWAY ITEMS REDUCTION STRATEGY: FOOD SERVICE SURVEY

Draft Report

Prepared for the City of Toronto
August 2022

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METHODOLOGY

Methodology



SUMMARY

These are the findings of an Ipsos survey conducted on behalf of the City of Toronto among food service establishments.



SAMPLE

For this survey, Ipsos sampled n=250 food service establishments in the City of Toronto. Within this sample group, n=160 of the food service establishments are located in the former Metro Toronto/East York region, n=30 are based in Etobicoke/York, n=30 are based in North York, and n=30 are based in Scarborough.



METHOD & TIMING

Interviewing was conducted by telephone (CATI, or Computer Assisted Telephone Interviews) between February 7 and March 1, 2022.

The average phone interview was about 24 minutes in length.



PRECISION

The margin of error for the survey is +/- 6.1%, nineteen times out of twenty, had all food service businesses in Toronto been surveyed.



ROUNDING & REPORTING CONSIDERATIONS

Where figures do not sum to 100, this is due to the effects of rounding.

For the open-ended questions, percentages do not always add up to 100% as some respondents offer more than one comment, and in some cases, provide positive and negative comments in the same response.

All percentages shown are relative to the sample size that was asked the question.

KEY FINDINGS

Key Findings

- On balance, there is strong support for the implementation of an Ask-First/By-Request bylaw among food service businesses. In fact, many establishments surveyed claim to already have an Ask-First/By-Request policy in place.
- A small majority of food service establishments support charging a fee for single-use plastic bags (60%) and cold beverage cups (55%), while half support charging a fee for hot beverage cups (51%), and slightly fewer than half (45%) support charging a fee for single-use paper bags.
- Among food service businesses that support charging a fee, most would not accept charging fees that exceed \$0.05 for each type of single-use item, while almost half would support a fee of at least \$0.50 for reusable bags.
- A majority of establishments indicate that they would have no difficulty accepting reusable hot (70%) or cold beverage (63%) cups or reusable shopping bags (84%). On the other hand, more than half of food service businesses indicate that they would have difficulty accepting reusable food containers (55%). About half of establishment would be ready to accept reusable bags or cups at any moment, while only one-third indicate the same level of preparedness for reusable containers.
- There is support for the City of Toronto's Single-Use and Takeaway Items Reduction Strategy in the context of the COVID-19 pandemic as two-thirds (66%) of food service businesses surveyed support the Reduction Strategy in light of the current situation, with one-third (33%) acknowledging that it could be challenging to be compliant with any mandated on-site dining restrictions.

Key Findings (Cont'd)

- The vast majority of food service businesses say they will eventually be ready to accept reusables at some point, with as many as three in five (58%) indicating that they are now ready to accept reusable bags (58%). A little under half (46%) are ready to accept reusable cups, while only one in three (34%) are currently ready to accept reusable containers.
- Advertising and online resources are perceived as being the most useful, non-financial supports that the City of Toronto can offer in terms of helping food service businesses transition away from reliance on single-use items. While there are certainly limits to what the City of Toronto can do, the survey evidence suggests that investing in effective advertising campaigns to inform residents about building the necessary online infrastructure and tools to help facilitate this change would be beneficial.

Ask-First/By-Request BYLAW

Ask-First/By-Request Bylaw

Description Provided to Respondents:

The City of Toronto is proposing an Ask-First/By-Request bylaw that would require single-use items be distributed to a customer only after asking or upon request by the business. This would include items such as single-use straws, cutlery, napkins, stir sticks, condiment packages and so on.

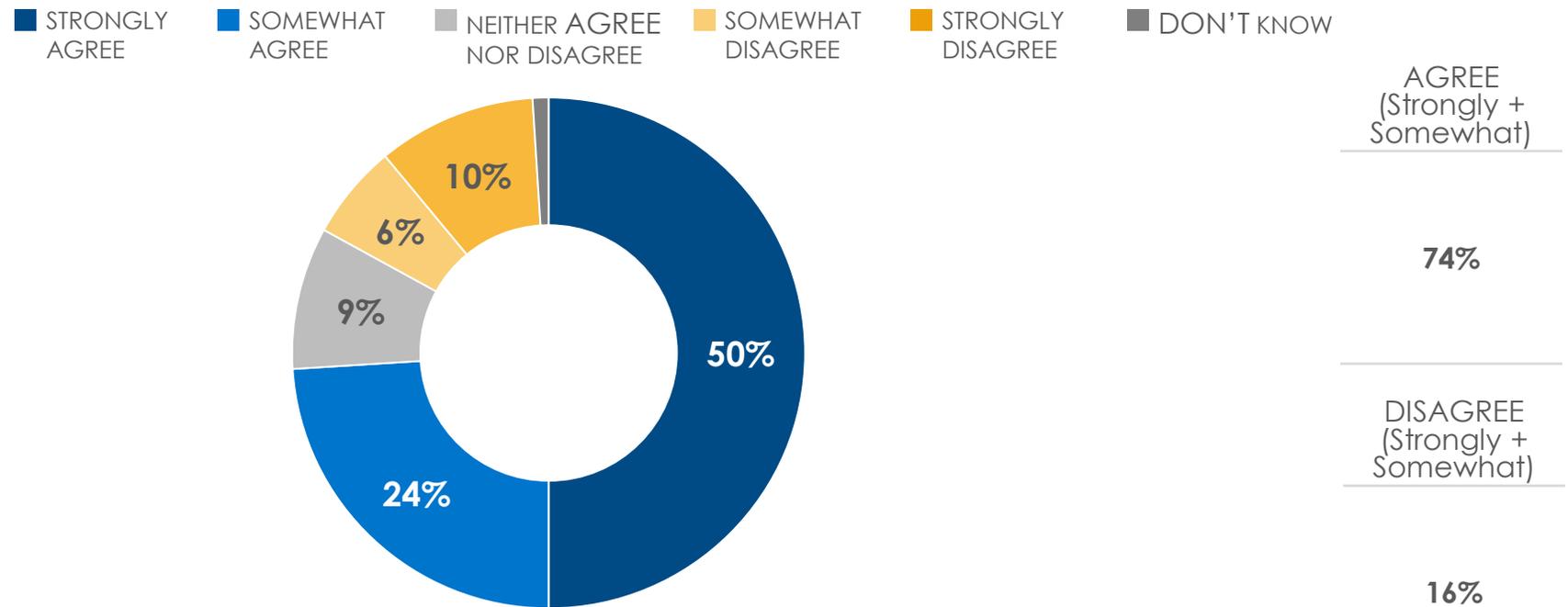
Some details include:

- Customers would ask for item or the employee would ask if the customer wants the item
- Businesses could be restricted to keeping items behind the counter or away from public access
- Delivery services would be required to include confirmation that the items are required for online and mobile food orders
- The bylaw would ensure no adverse effects for individuals who request single-use straws for accessibility/health reasons

Past consultation results indicated strong support among the general public for this as a way to reduce the use of single-use items.

Attitudes Towards Ask-First/By-Request Bylaw & Implementation Timeline

- There is strong support for the City of Toronto's proposal to implement the Ask-First/By-Request bylaw for single-use food utensils, straws, and other single-use accessory items effective September 2022, as nearly three-quarters (74%) of food service businesses agree with the proposed timeline.



Base: Food service business (n=250)
Q9. The City of Toronto is proposing implementation of the Ask-First/By-Request bylaw for single-use food utensils, single-use straws and other single-use accessory items to begin in September 2022. To what extent do you agree or disagree with this timeline?

Positive Comments about the Ask-First/By-Request Bylaw

- When asked about the bylaw timeline, positive feedback includes benefits to the environment (29%), including waste reduction (16%), being good for the environment (12%), and reducing plastic waste (3%). One in five (21%) food establishments feel the bylaw would have a positive impact on their business.

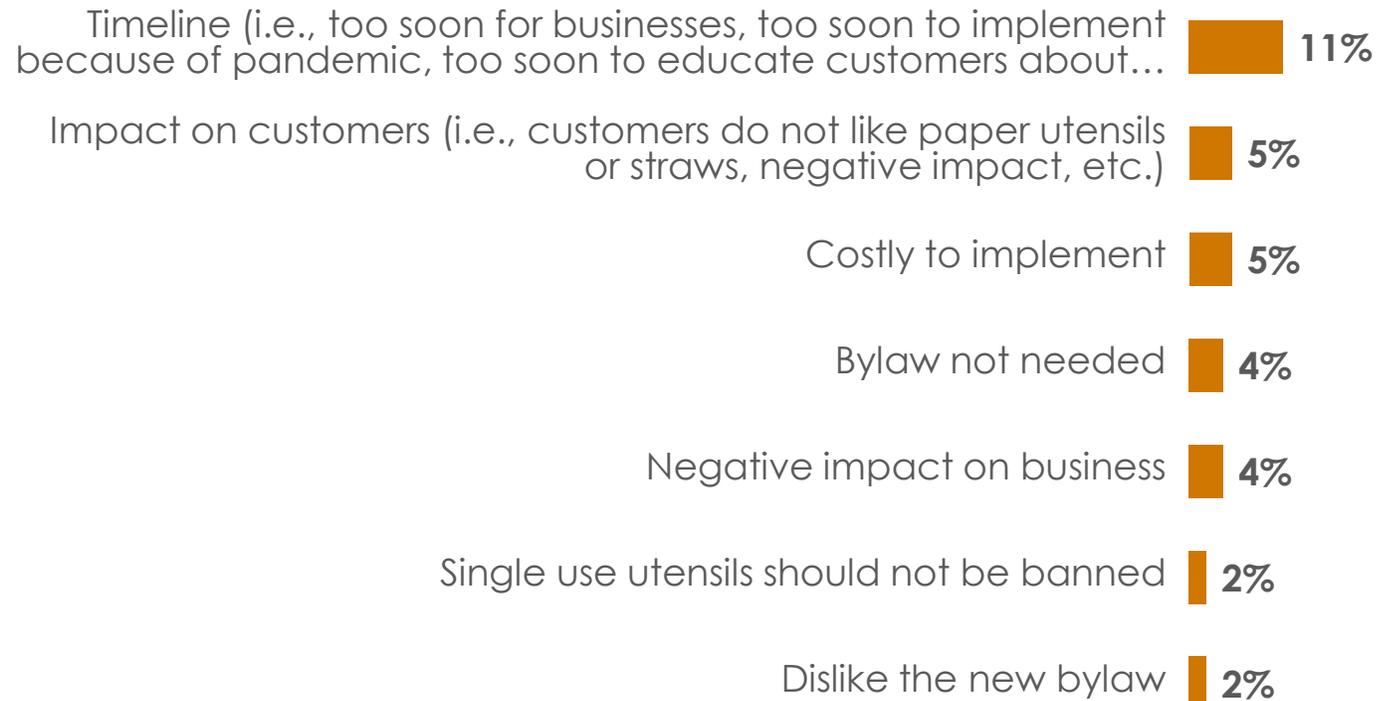


<4% values are not labeled

Base: Food service business (n=247)
Q10. Why do you [INSERT RESPONSE] with the implementation of the Ask-First/By-Request bylaw for single-use utensils, single-use straws and other single-use accessory items to begin in September 2022?

Negative Comments About the Ask-First/By-Request Bylaw

- When asked about the bylaw timeline, negative feedback from businesses include one in 10 (11%) who do not agree with the timeline to implement the bylaw because it is too soon to implement the changes for their business (5%), because it is too soon to implement because of the pandemic (3%), or because it is too soon to educate the public (3%) about the new bylaw.



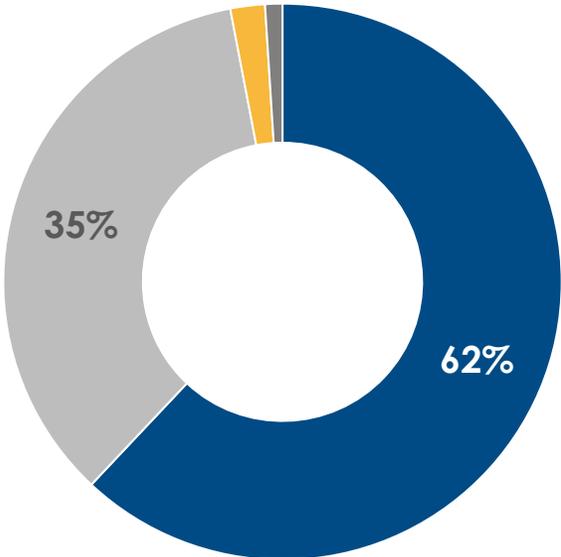
<5% values are not labeled

Base: Food service business (n=247)
Q10. Why do you [INSERT RESPONSE] with the implementation of the Ask-First/By-Request bylaw for single-use utensils, single-use straws and other single-use accessory items to begin in September 2022?

Currently Have An Ask-First/By-Request Policy In Effect

- Almost two-thirds (62%) of food service businesses in Toronto claim to already have a policy that requires staff to ask first or requires customers to request single-use accessories before they are handed out. Additionally, two per cent (2%) say they had this policy before the COVID-19 pandemic, but indicate that it had to be suspended due to the pandemic.

■ YES ■ NO ■ IN PLACE BEFORE, BUT SUSPENDED DUE TO THE COVID-19 PANDEMIC ■ DON'T KNOW

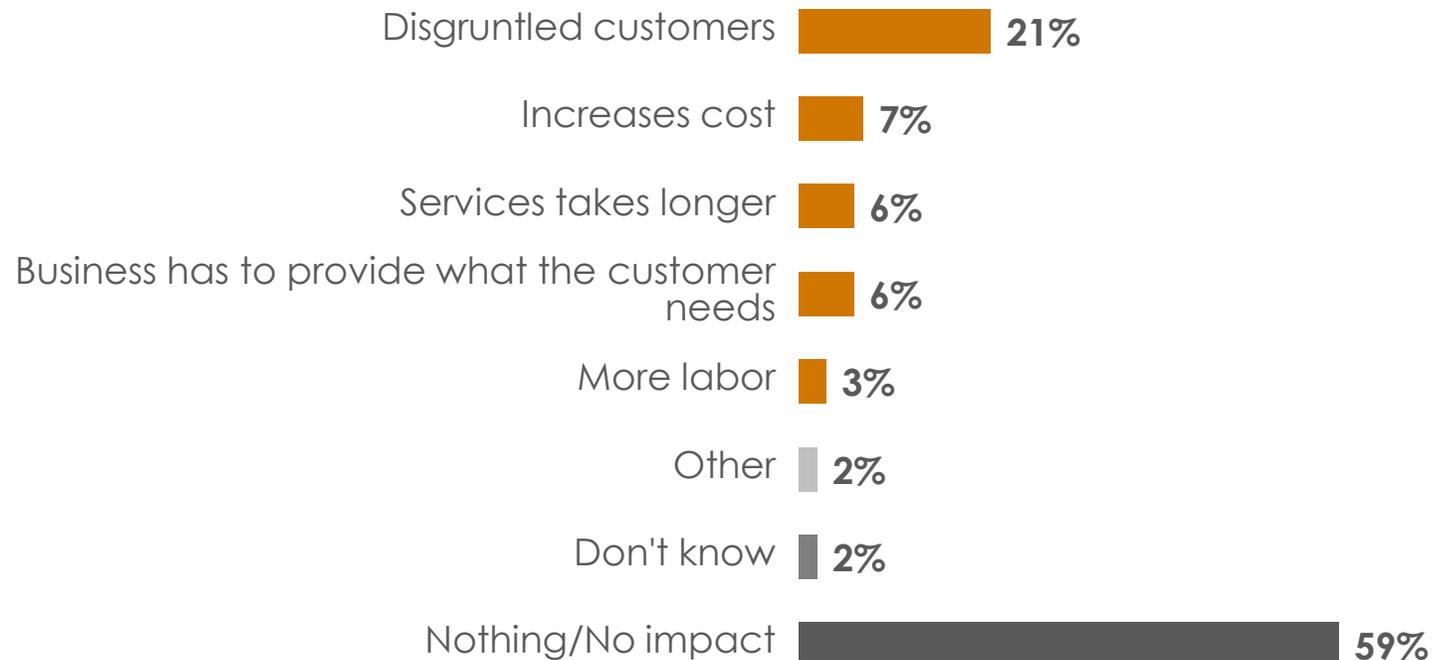


Data <3% not labelled

Base: Food service business (n=250)
Q8. Does your business currently have a policy that requires your staff to ask first or require customers to request single-use accessory (such as straws, utensils, napkins, stir sticks, beverage trays, condiment packets and other similar accessory items) before they are handed out?

Expected Negative Impacts of Ask-First/ By-Request Bylaw

- At nearly three in five (59%), a majority of food service businesses surveyed do not expect the Ask-First/By-Request bylaw to have any negative repercussions for their business. Disgruntled customers (21%) is by far the most commonly mentioned negative impact, by those who do feel there might be repercussions. Other negative impacts include increased costs (7%), delay in service (6%), or having businesses provide exactly what customers ask for (6%).



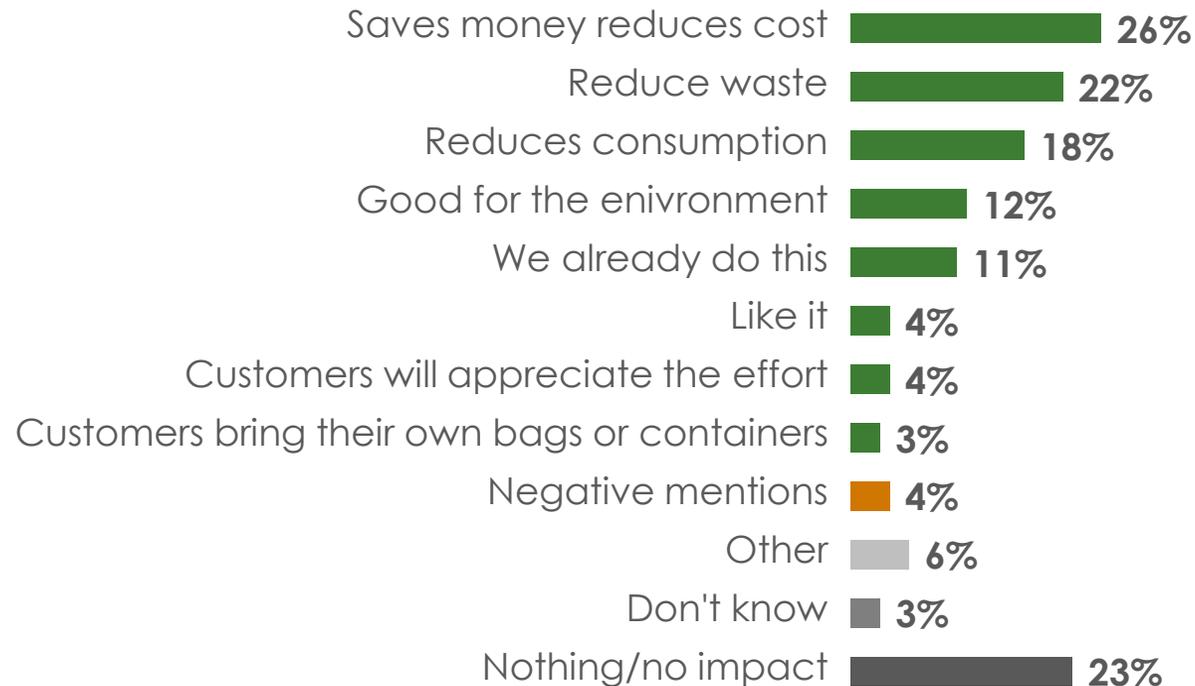
Data <3% not labelled

Base: Food service business (n=250)

Q6. What, if any, negative impacts do you anticipate that this proposed Ask-First/By-Request bylaw for single-use items could have on your business?

Expected Positive Impacts of Ask-First/By-Request Bylaw

- There is an expectation that the Ask-First/By-Request bylaw for single-use items will yield some positive benefits for food service businesses in Toronto as three-quarters of businesses name some positive impacts. Saving money (26%) and reducing waste (22%) are most commonly cited as positive impacts that can be expected to result from this new bylaw. Other positive mentions include reducing consumption (18%) and good for the environment (11%).



Data <3% not labelled

Base: Food service business (n=250)

Q7. What, if any, positive impacts do you anticipate that this proposed Ask-First/By-Request bylaw for single-use items could have on your business?

FEE BYLAW

Proposed Fee Bylaw

Description Provided to Respondents:

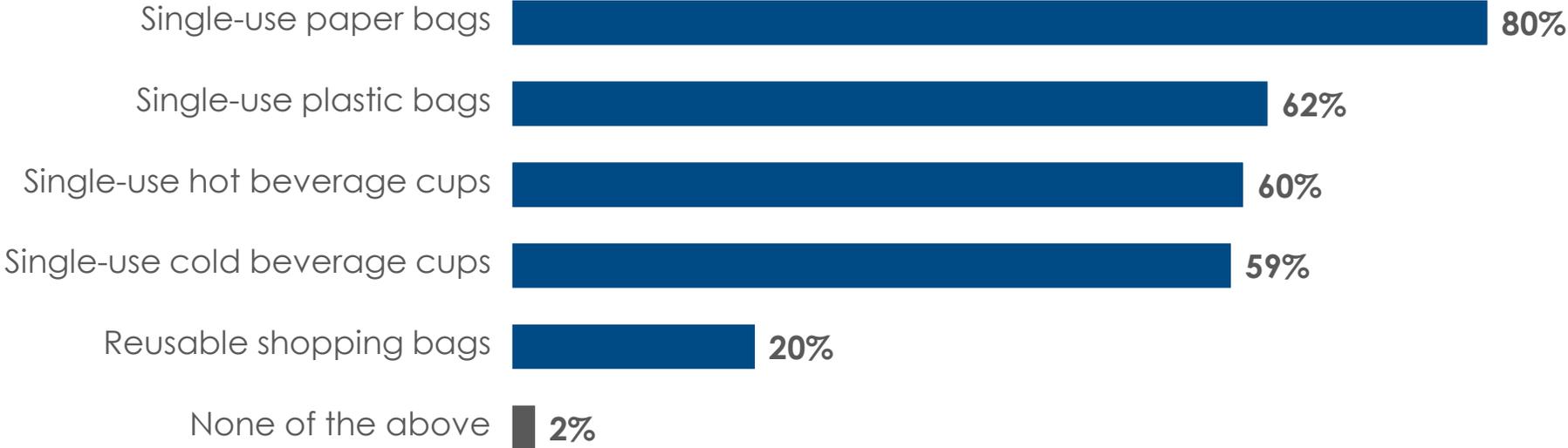
The City of Toronto is proposing a bylaw that would require businesses to charge customers a fee for select single-use and takeaway items, including single-use hot and cold beverage cups, single-use plastic and paper bags, and reusable shopping bags purchased at point of sale. These fees were supported in previous consultations.

Businesses will retain these fees, no fees will be given to the City of Toronto.

The City of Toronto recognizes that the COVID-19 pandemic may have caused economic hardship on many residents and businesses. As such, the City of Toronto is seeking input on the support for fees for these items.

Single-Use Items Currently Distributed to Customers

- Virtually all (98%) food service businesses surveyed indicate that they distribute at least one of the single-use items (paper bags, plastic bags, hot beverage cups or cold beverage cups) to customers, though only one in five (20%) also distribute (or plan to distribute) reusable shopping bags. All food service businesses that distribute reusable shopping bags also still offer single-use items.

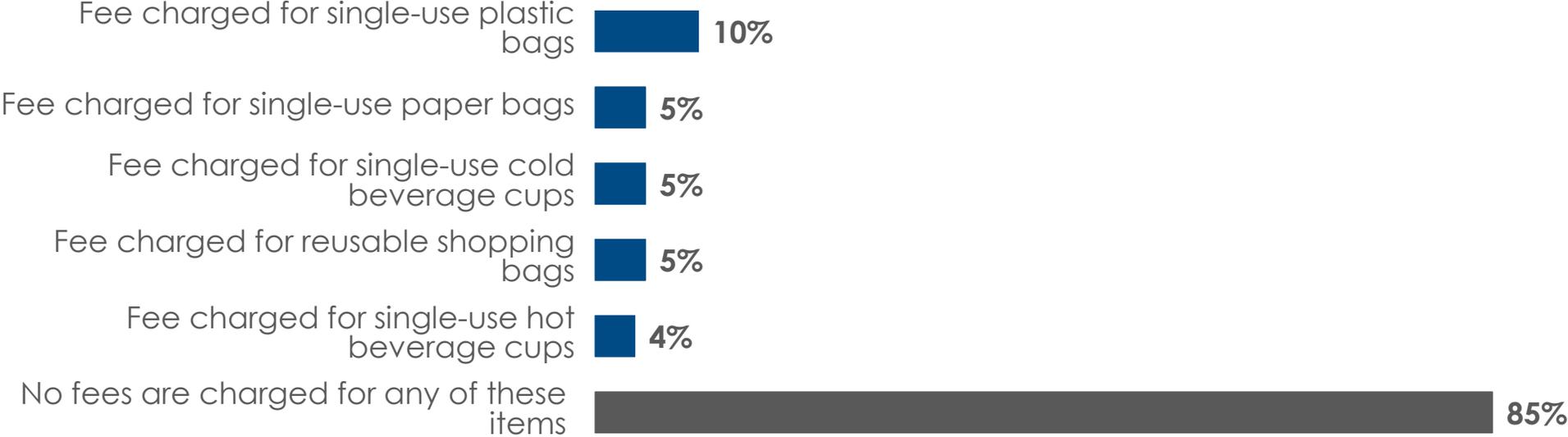


Base: Food service business (n=250)
Q11. Which items does your business currently or plan to distribute to customers? Select all that apply.



Single-Use Items Currently (or Plan) Charging a Fee

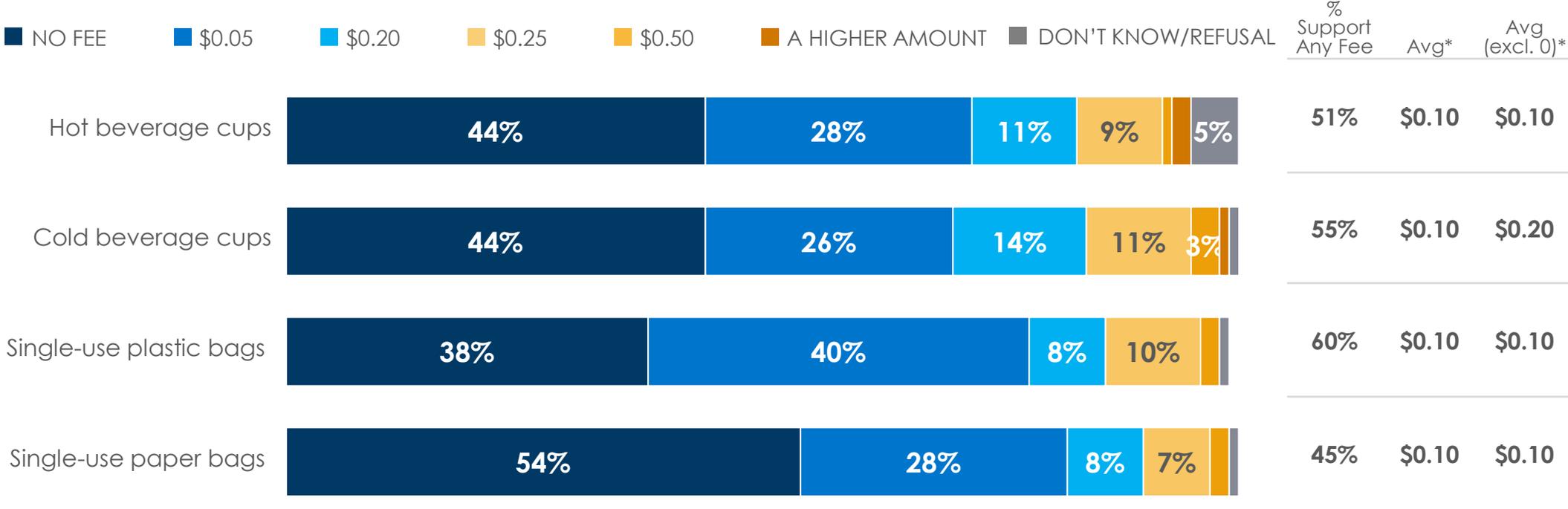
- The vast majority (85%) of food service businesses (who distribute single-use items and/or reusable shopping bags) do not currently charge or plan to charge customers a fee for single-use items. Only 13 per cent (13%) currently charge fees for at least one of the single-use items, including one in 10 (10%) who charge fees for single-use plastic bags.



Base: Distribute reusable shopping bags and/or other single use items (n=246)
Q12. Does your business currently or plan to charge customers a fee for any of the following items? Select all that apply

Support for Single-Use Fee Amount Beginning in January 2023

- A small majority of food service establishments (who distribute or plan to distribute single-use items) support a fee for single-use plastic bags (60%) and cold beverage cups (55%), while half (51%) support a fee for hot beverage cups, and fewer than half (45%) support a fee for single-use paper bags.
- Among those food service businesses that support a fee, most would not accept fees exceeding \$0.05 for each type of single-use item.



Base: Food service business (n=Base Varies)
 Q15. What, if any, fee do you support charging your customers for single-use hot beverage cups beginning in January 2023?
 Q16. What, if any, fee do you support charging your customers for single-use cold beverage cups beginning in January 2023?
 Q17. What, if any, fee do you support charging customers for single-use plastic bags beginning in January 2023?
 Q18. What, if any, fee do you support charging customers for single-use paper bags beginning in January 2023?
 *Note: Avg fee should be interpreted with caution. Price points on scale are fixed and "a higher amount" is assumed to be \$0.75.

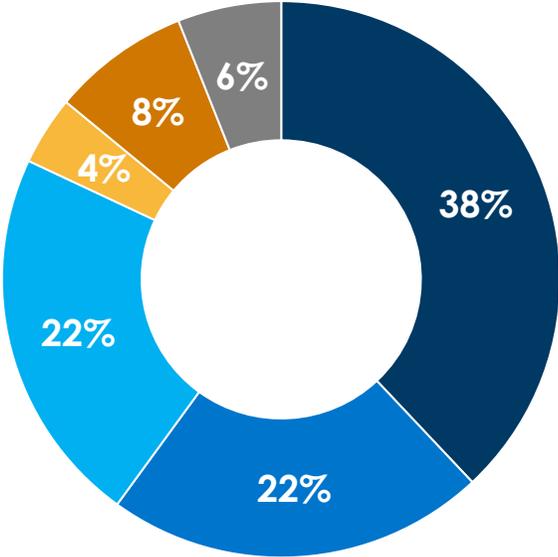
Data <3% not labelled



Support for New Reusable Bag Fee Amount Beginning in January 2023

- Three in five (60%) food service businesses surveyed support charging customers a fee of \$0.50 for reusable bags beginning in January 2023. Nearly four in ten (38%) say they do not want to charge customers anything, for such items.

■ NO FEE
 ■ \$0.50
 ■ \$1.00
 ■ \$2.00
 ■ A Higher Amount
 ■ Don't Know/Refusal



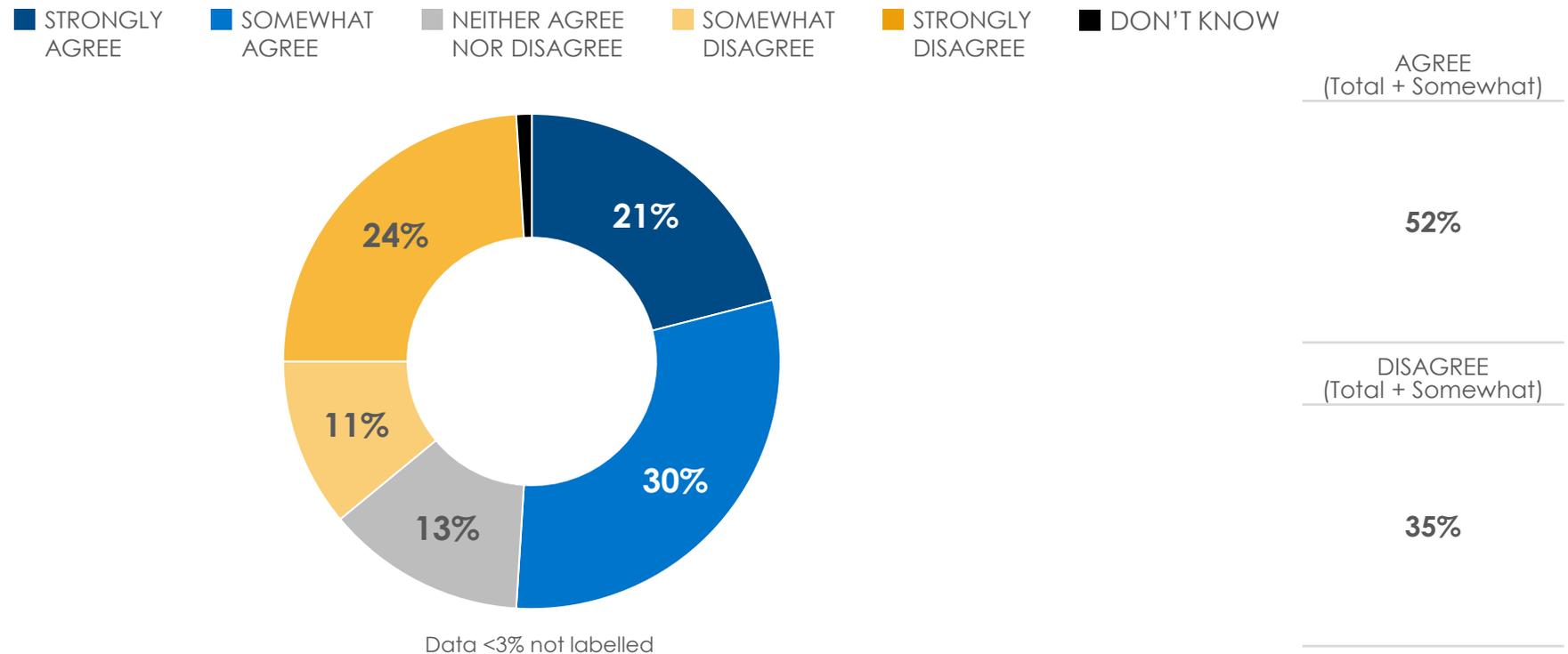
Support Any Fee	Avg*	Avg. (excl 0)*
56%	\$0.70	\$1.00

Base: Food service business (n=Base Varies)
 Q19. What, if any, fee do you support charging customers for new reusable bags beginning in January 2023?
 *Note: Avg fee should be interpreted with caution. Price points on scale are fixed and "a higher amount" is assumed to be \$3.00.



Attitudes Towards Fee for Single-Use Items Timeline

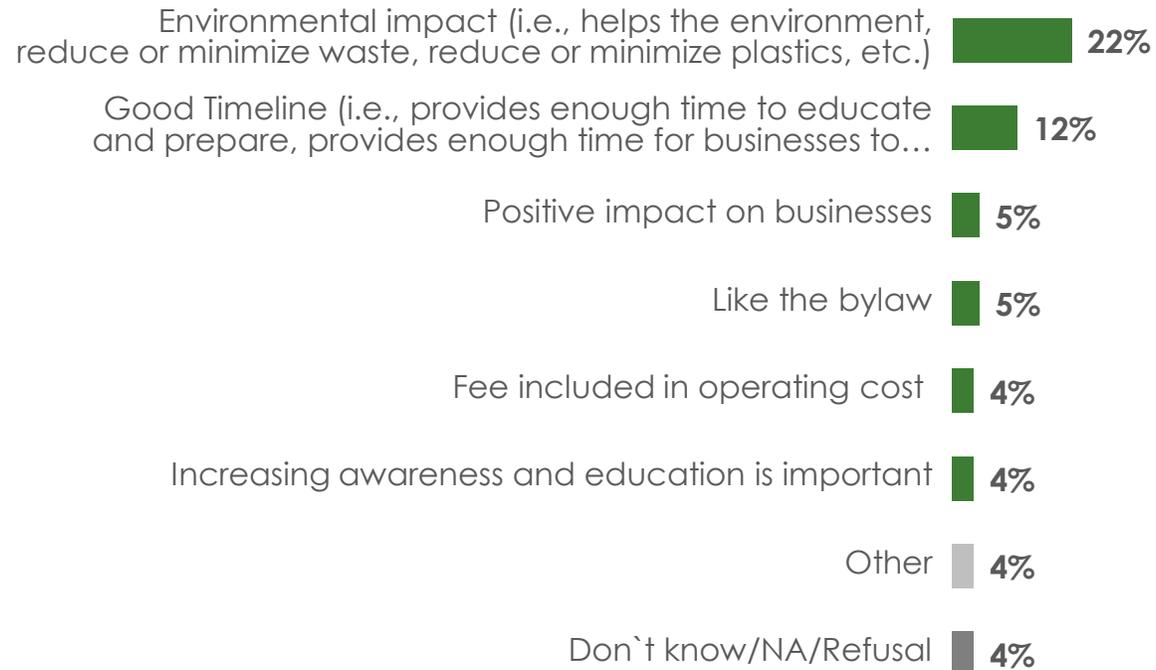
- Overall, more food service businesses surveyed agree (52%) than disagree (34%) with the timeline for the proposed bylaw to charge a fee for single-use bags, single-use beverage cups, and new reusable shopping bags starting in January 2023.
- Those food service establishments that receive waste collection services from the City of Toronto are more likely to agree than those who do not (59%, compared to 44%).



Base: Distribute reusable shopping bags and/or other single use items (n=246)
 Q21. The City of Toronto plans to propose that the mandate for all retail businesses to charge a fee for single-use bags (paper and plastic), single-use beverage cups (hot and cold) and reusable shopping bags start in January 2023. To what extent do you agree or disagree with this timeline?

Positive Comments about the Fee Bylaw

- When asked why they support/oppose the implementation of the fee bylaw for single-use beverage cups, single-use bags, and new reusable shopping bags, positive feedback provided by food service businesses includes environmental reasons (22%), including being good for the environment (12%), reducing waste (9%), and reducing plastic use (4%). Other positive mentions relate to the timeline (12%), with seven per cent (7%) of establishments indicating that the timeline provides enough time to educate and prepare.

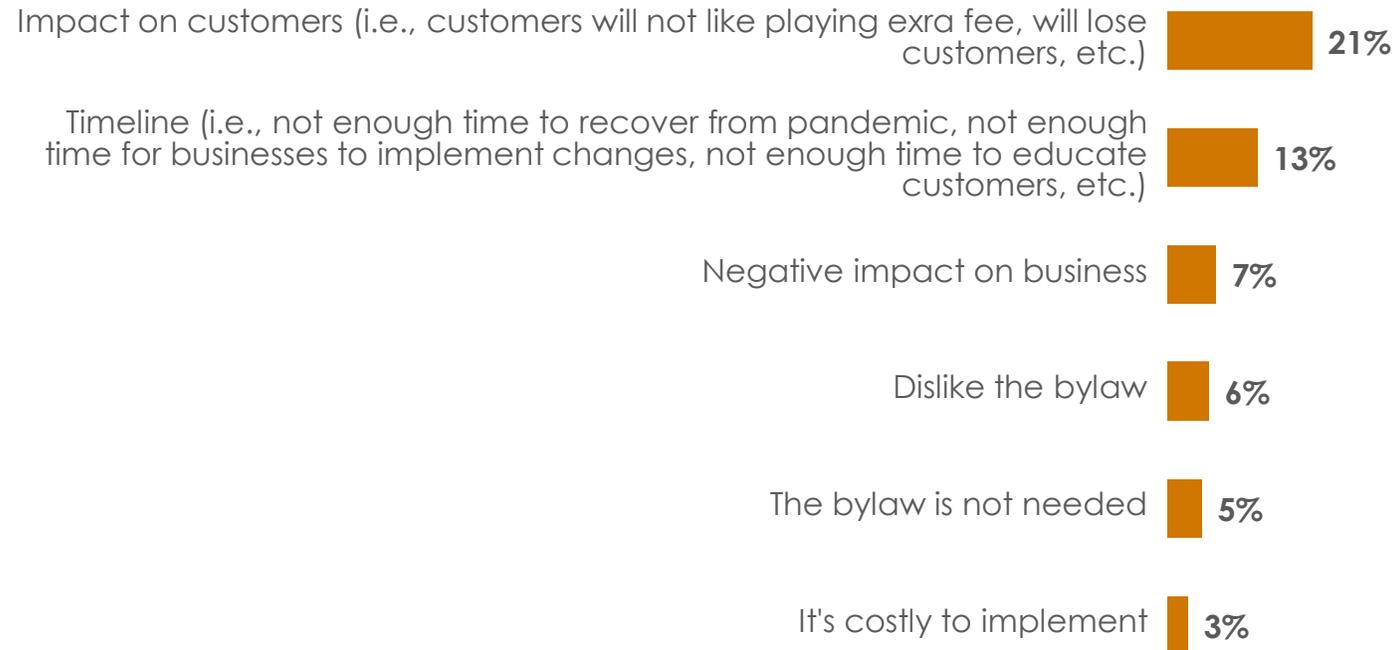


Base: Distribute reusable shopping bags and/or other single use items (n=243)
Q21B. Why do you [INSERT RESPONSE] with the implementation of the fee bylaw for single-use beverage cups (hot and cold), single-use bags (paper and plastic), and new reusable bags offered at the point of sale to begin in January 2023?

<2% values are not labeled

Negative Comments about the Fee Bylaw

- When asked why they support/oppose the implementation of the fee bylaw respondents provide some negative comments as well. Most often a negative impact on customers (21%) is cited, including that customers will not like paying the fee (14%), or that they will lose customers (2%). Other concerns relate to the timeline (13%), where a few establishments mentioned not having enough time to prepare as a result of the pandemic (5%)

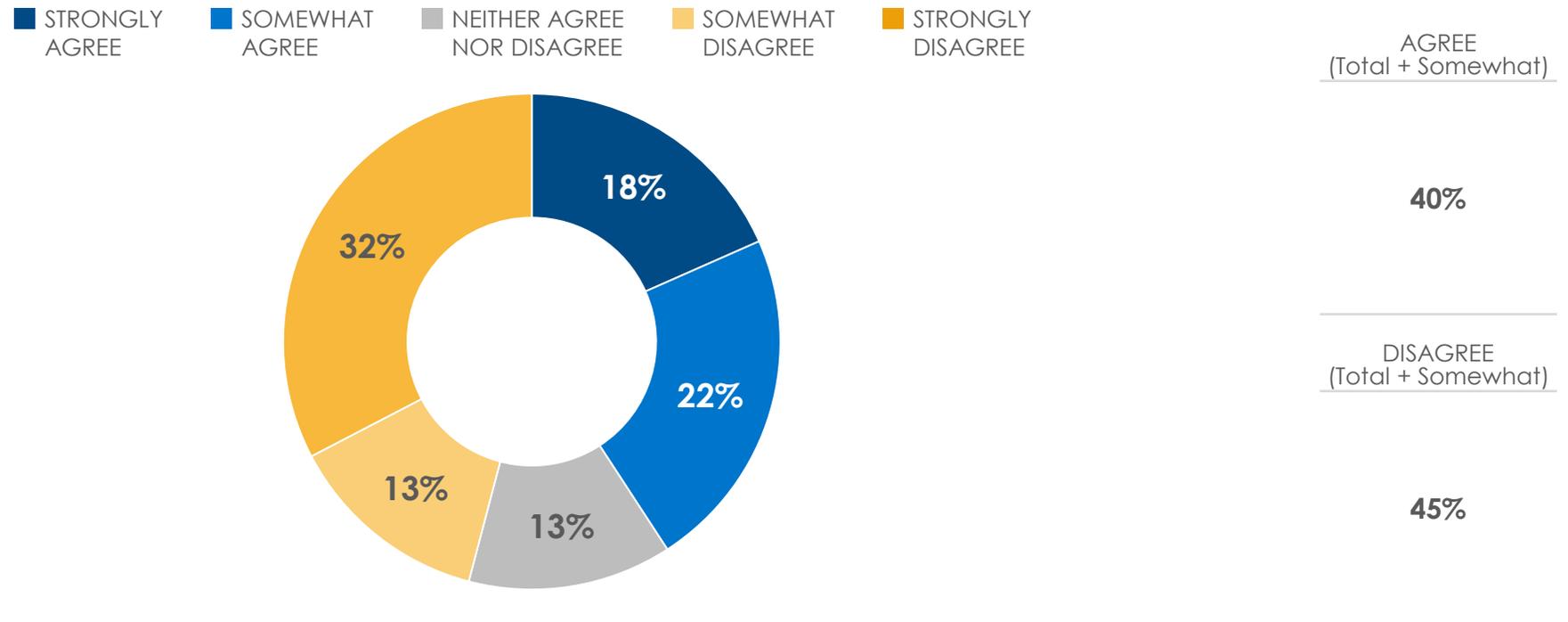


<2% values are not labeled

Base: Food service business (n=243)
Q21B. Why do you [INSERT RESPONSE] with the implementation of the fee bylaw for single-use beverage cups (hot and cold), single-use bags (paper and plastic), and new reusable bags offered at the point of sale to begin in January 2023?

Attitudes Toward Incremental Fee Increases

- Slightly more food service businesses surveyed (who distribute single-use items and/or new reusable shopping bags) disagree with the implementation of incremental fee increases over two years for single-use items compared to those that agree (45%, compared to 40%).
- Those establishments that already have implemented an Ask-First/By-Request bylaw are more likely to agree with an incremental increase to these fees (45%, compared to 30% who do not currently have an Ask-First/By-Request policy).



Base: Distribute reusable shopping bags and/or other single use items (n=246)
 Q20. The City of Toronto is also considering that the fees incrementally increase over two years. For example, the fee for single-use cups could be 10 cents in 2023 and then increase to 25 cents in 2024. To what extent do you agree or disagree with a phased-in approach to fees incrementally over a two-year period?

Expected Positive Impacts of Fee Bylaw

- Two-thirds (67%) of food service businesses (who distribute single-use items and/or new reusable shopping bags) expect there to be some positive impacts resulting from the proposed fee bylaw for single-use items, with environmental benefits (16%), cost savings (14%), and additional revenue (13%) most commonly cited.



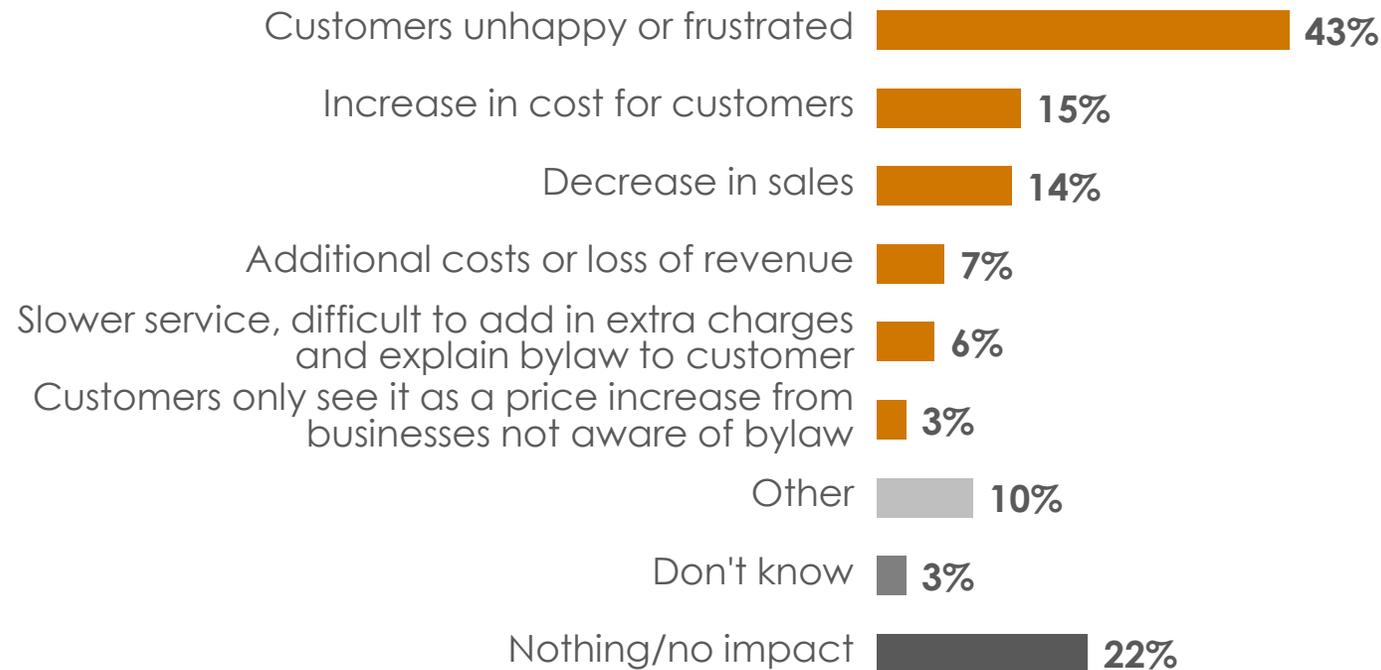
Data <3% not labelled

Base: Distribute reusable shopping bags and/or other single use items (n=246)

Q14. What, if any, positive impacts do you anticipate that this proposed fee bylaw for single-use bags and cups and reusable bags could have on your business?

Expected Negative Impacts of Fee Bylaw

- At over three-quarters (78%), most food service businesses surveyed (who distribute single-use items and/or new reusable shopping bags) expect there to be some negative impacts resulting from the proposed fee bylaw for single-use items. Nearly half (43%) cite unhappy customers as a potential negative impact of the proposed bylaw, followed by about one in seven establishments that mention an increased cost for consumers (15%), or a decrease in sales or customers as a result of the fee bylaw (14%).



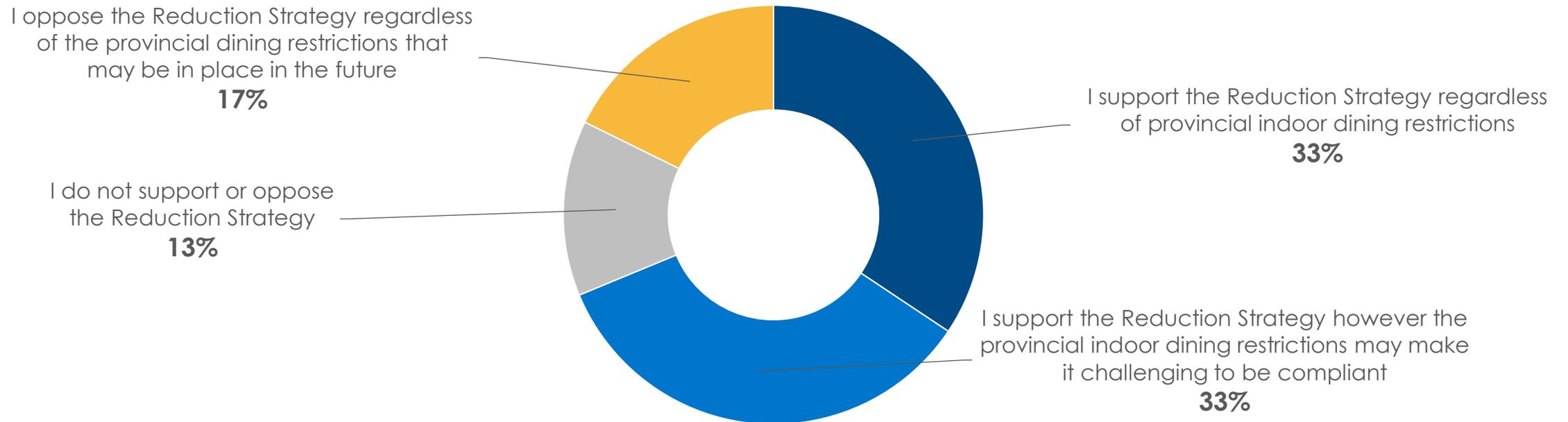
Data <3% not labelled

Base: Distribute reusable shopping bags and/or other single use items (n=246)

Q13. What, if any, negative impacts do you anticipate that this proposed fee bylaw for single-use bags and cups and reusable bags could have on your business?

Attitudes Toward Reduction Strategy in Context of COVID-19 Pandemic

- On balance, two-thirds (66%) of food service businesses support the City of Toronto's Single-Use and Takeaway Items Reduction Strategy in the context of the COVID-19 pandemic. One-third (33%) of food businesses acknowledge that indoor dining restrictions may make it challenging to be compliant. An equal proportion (33%) of establishments support the strategy regardless of any restrictions in place because of the pandemic. Only about one in six (17%) oppose the Reduction Strategy, regardless of the provincial dining restrictions that might be implemented in the future.



Base: Distribute reusable shopping bags and/or other single use items (n=246)

Q22. Given the challenges that businesses face resulting from provincial restriction to indoor dining due to the COVID-19 pandemic, which of the following statements are closest to your point of view on the City of Toronto's Single Use Reduction Strategy?

REUSABLE CONTAINERS

Reusable Containers

Description Provided to Respondents:

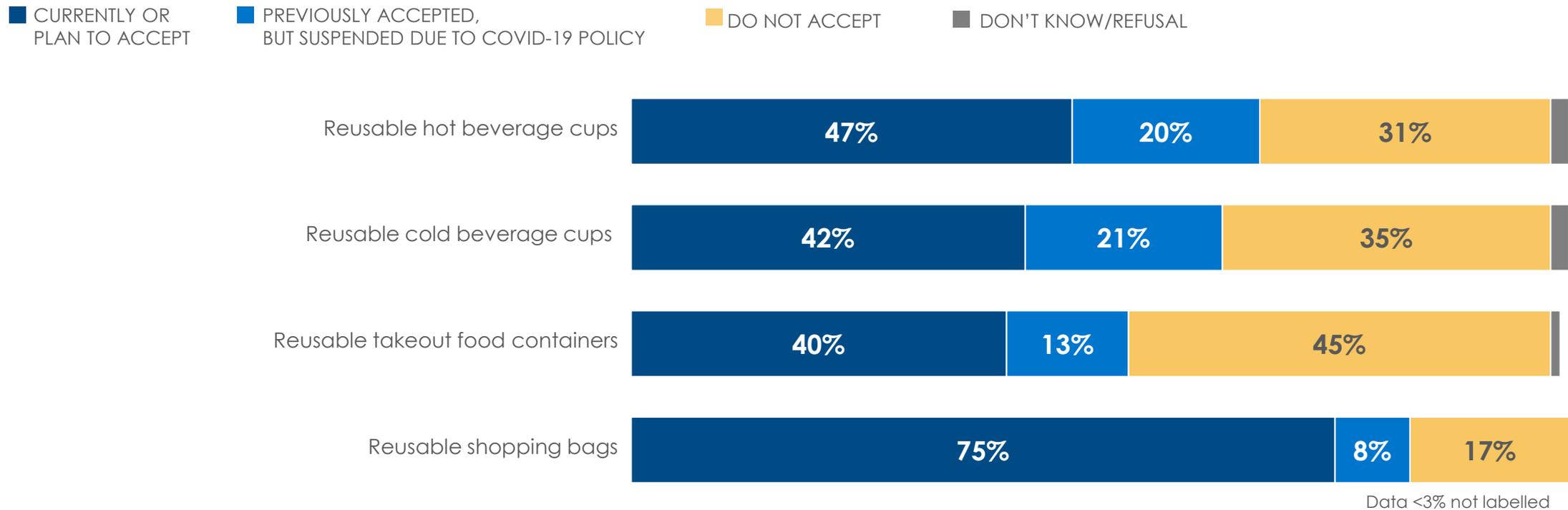
When businesses accept customer-provided reusable bags, cups and containers the amount of single-use and takeaway items are reduced, and less waste is generated.

During previous consultations some stakeholders shared their perspectives on health and safety considerations from businesses on acceptance of these items and ensuring that businesses can maintain compliance with Ministry of Health regulations regarding food safety.

The City of Toronto is seeking feedback on considering mandating food establishments to accept a customer's reusable cup or food container or re-usable shopping bag (which would also apply to any non-food service business that distributes single-use plastic or paper bags to customers) if presented with one. We'd like to hear feedback from businesses regarding this practice.

Reusable Items Accepted or Previously Accepted Prior to COVID-19

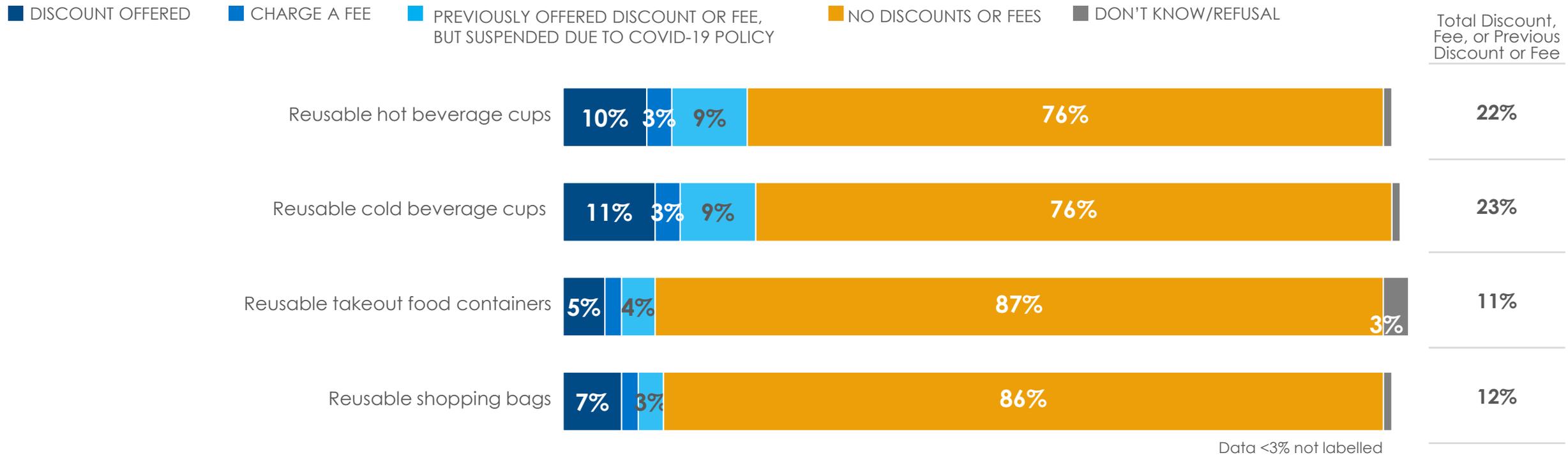
- Three-quarters (75%) of food service businesses surveyed indicate that reusable shopping bags are currently accepted or will be accepted by their business in the future. By comparison, considerably fewer accept or plan to accept reusable hot (47%) or cold (42%) beverage cups. About four in ten (40%) claim to accept reusable takeout food containers.



Base: Food service business, not applicable responses excluded (base sizes vary)
 Q23. Considering the following items, does your business currently or plan to accept, does not accept, or previously accepted but stopped due to COVID-19? Please indicate 'not applicable' if the item does not apply to your business or you do not offer the single-use type container. How about?

Incentives Offered to Customers for Reusable Containers

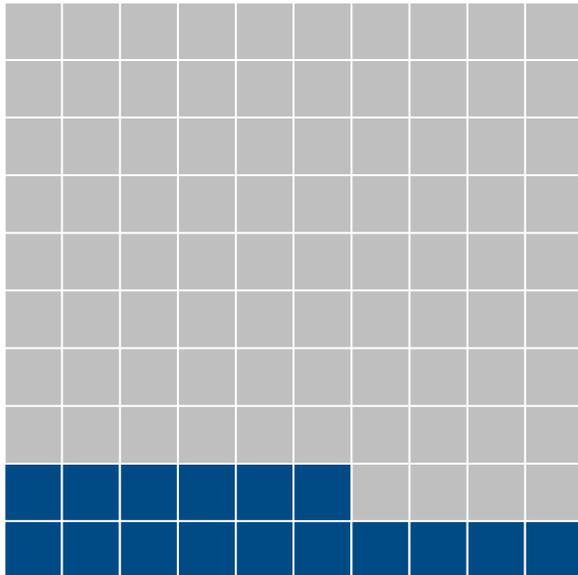
- Most food service businesses surveyed do not offer any discounts for reusable items. One in five offer discounts or charge a fee (for disposable alternative) or previously offered an incentive prior to the pandemic for hot and cold beverage cups.



Base: Food service business (Base Varies)
 Q24. Does your business currently or plan to offer customers a discount, charge a fee, or neither provide a discount or charge a fee for any of the following items. If you previously offered discount or fee, but suspended due to COVID-19 policy please say so? How about?

Reusable Container Program

- One in six (16%) businesses surveyed claim to currently participate in a reusable container program, or did prior to the COVID-19 pandemic. *Note that businesses may refer to a reusable container program as offering customers reusable containers or participation in a reusable container program.*



16%

Business currently participate in a reusable container program (or prior the COVID-19)

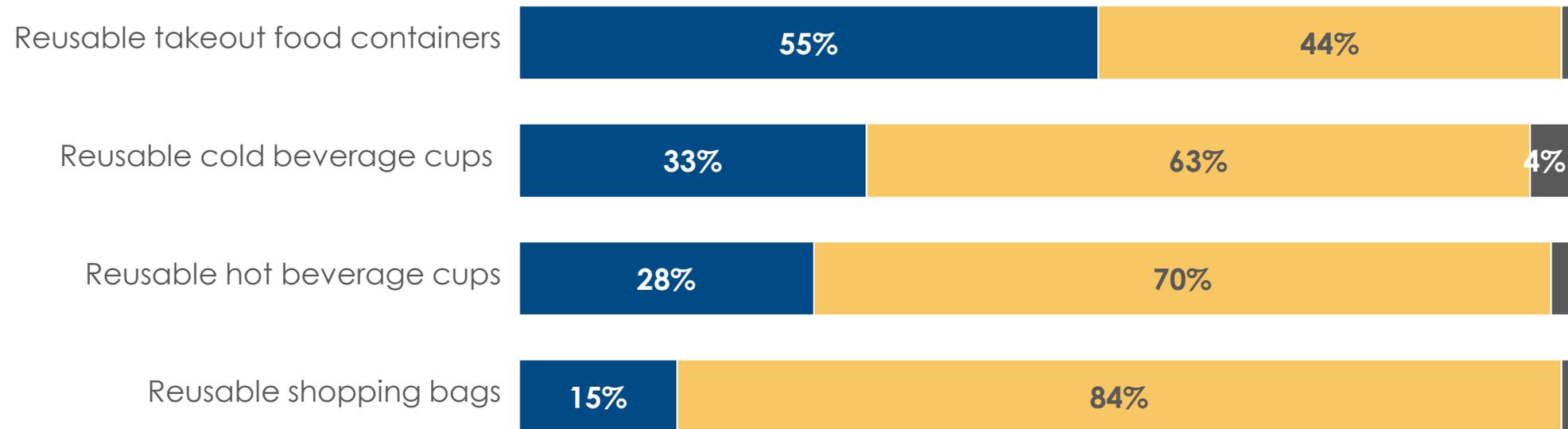
Base: Food service business (n=233)

Q25. Does your business currently participate in a reusable container program, or did your business participate in one prior to the COVID-19 pandemic?

Difficulty Accepting Reusable Items

- More than half (55%) of food service businesses indicate that they would have difficulty accepting reusable containers. While, the majority indicate that they would not have difficulty accepting reusable cold beverage cups (63%), reusable hot beverage cups (70%) or reusable shopping bags (84%).
- Franchises indicate that they would have the most difficulty in accepting reusable takeout food containers (66%), reusable hot beverage cups (41%), and reusable shopping bags (25%).

■ DIFFICULTY ACCEPTING ■ NO DIFFICULTY ACCEPTING ■ DON'T KNOW/REFUSAL



Data <3% not labelled

Base: Food service business (Base Varies)
Q26. Indicate if your business would have difficulty or no difficulty accepting the following items.

Impact on Business if Required to Accept Reusable Bags

- Half (50%) of food service businesses surveyed (who indicate that reusable shopping bags are applicable to their business) think the impact to their business will be negligible, if they were required to accept reusable bags. Notably, a higher proportion feel as though the impact to their business will be positive (27%) versus negative (19%).



<3% values are not labeled

Base: Reusable shopping bags applicable to business (n=204)

Q27. How, if at all, do you anticipate your business could be positively or negatively impacted if required to accept customer-provided reusable bags?

Impact on Business if Required to Accept Reusable Cups

- When asked what, if any, impact a requirement to accept reusable cups would have on their business, a large number of food service businesses surveyed (who indicate that reusable cups are applicable to their business) feel there would be no impact (42%). Among those who feel it would have an impact, opinions are split between positive (28%) and negative impacts (27%).



<3% values are not labeled

Base: Hot or cold beverage cups applicable to business (n=187)

Q28. How, if at all, do you anticipate your business could be positively or negatively impacted if required to accept customer-provided reusable cups?

Impact on Business if Required to Accept Reusable Takeout Containers

- Half (50%) of food service businesses indicate that the impact on their business would be negative if they were required to accept reusable containers. Most often establishments cite sanitary and health reasons (22%), the need for more staff to implement (14%), or issues with the size of the containers (6%). One in five (22%) mention some positive impacts including cost savings (9%), while about one-quarter (26%) of establishments feel this would have no impact on their business.



<3% values are not labeled

Base: Reusable takeout containers applicable to business (n=216)

Q29. How, if at all do you anticipate your business could be positively or negatively impacted if required to accept customer-provided reusable takeout containers?

Time Needed to Prepare for Bylaw

- The majority of food service businesses say that they are ready anytime to accept reusable bags (58%), while almost half (46%) say they are ready now to accept reusable cups. Only one-third (34%) of establishments say that they are ready anytime to accept reusable containers. However, a majority (59%) indicate that they would be ready to accept reusable containers in 12 months, while one in five (21%) say that their business will never be ready.



<3% values are not labeled

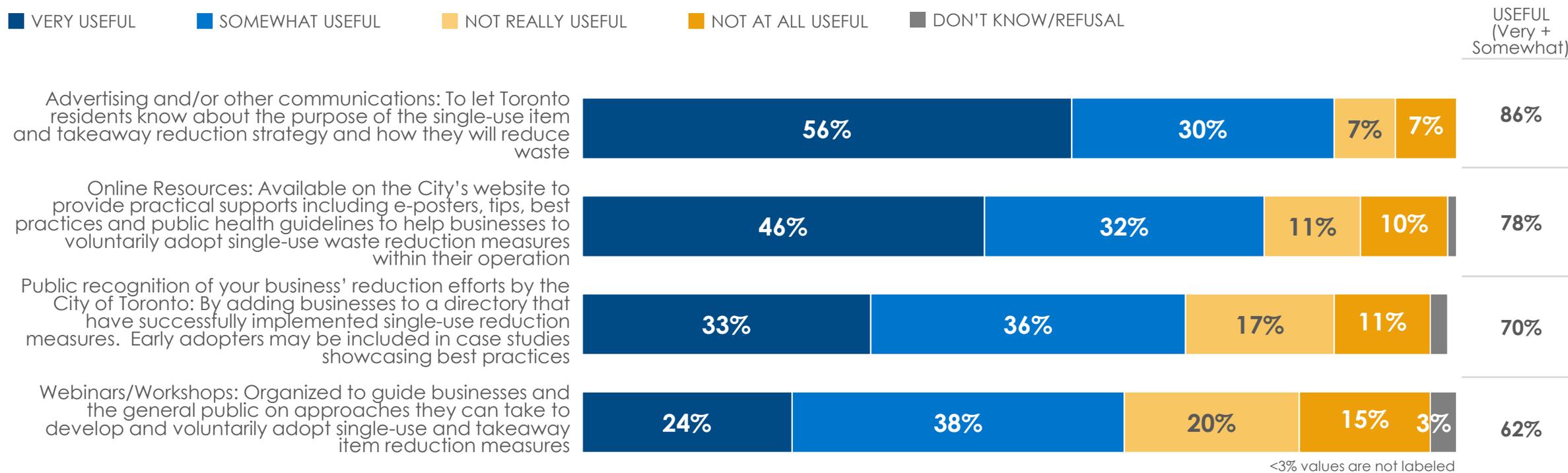
Base: Food service business (Base Varies)
 Q30. How long would you require to prepare for a mandatory bylaw requiring the acceptance of the following reusable items? Would you say ready anytime, ready in 3 to 6 months, ready in 6 to 12 months, in 1 to 2 years, 2 years or more, or you will never be ready.



CITY OF TORONTO SUPPORT

Usefulness of Non-Financial Support & Assistance Initiatives

- Most food service businesses surveyed would find any type of non-financial support and assistance initiatives that can be offered by the City of Toronto to be useful. Advertising communications are of particular utility, with over four in five (86%) thinking this would be a useful initiative, including a clear majority (56%) who say they would find it 'very useful'. Online resources are also thought to be useful by quite a strong majority (78%) of the food service businesses that were surveyed.

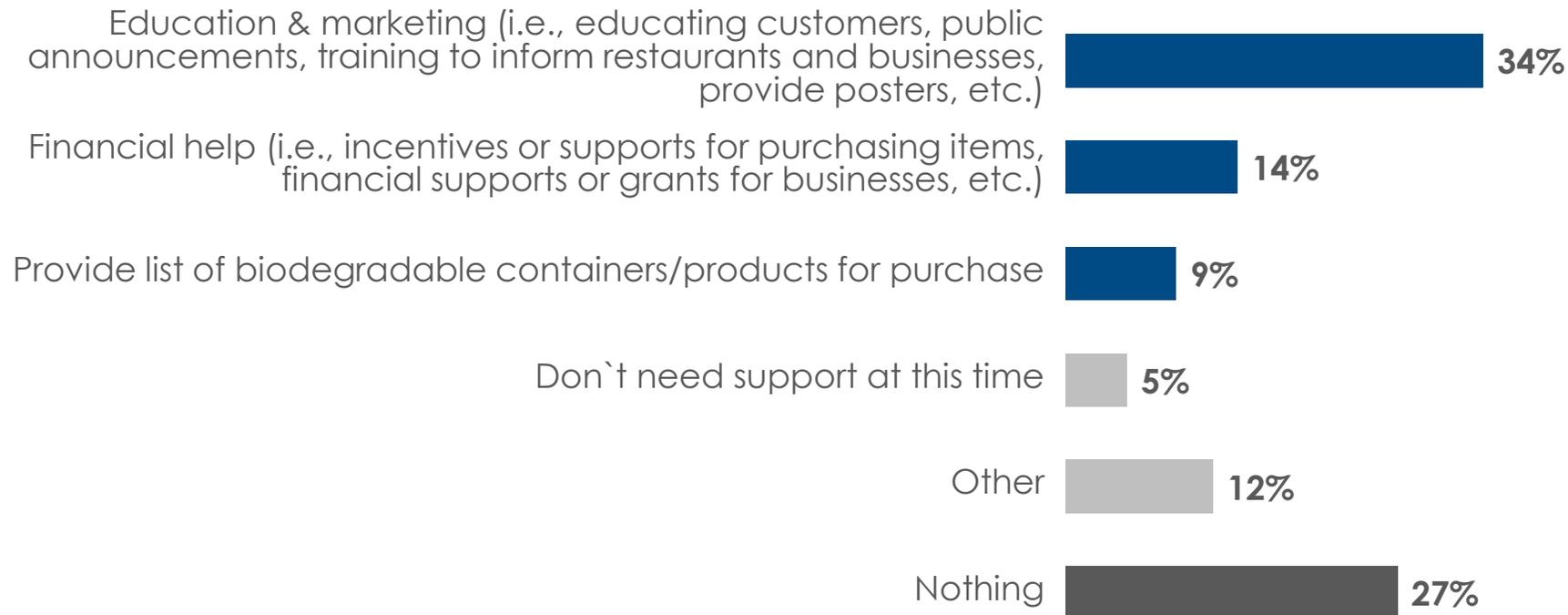


Base: Food service business (n=250)

Q32. Currently, the City of Toronto is considering a number of different non-financial support and assistance initiatives that can be provided to businesses in food services. To what extent would each of the following be useful for your business?

Additional Support Requested by Food Service Establishments

- When asked what the City of Toronto can do to provide educational supports, a variety of responses are offered, with general marketing events (34%) and financial supports (14%) most frequently mentioned by the food service businesses that were surveyed. More specifically, one in four (25%) cite public announcements as educational supports that can be offered, followed by offering biodegradable containers to businesses for purchase (9%).



<3% values are not labeled

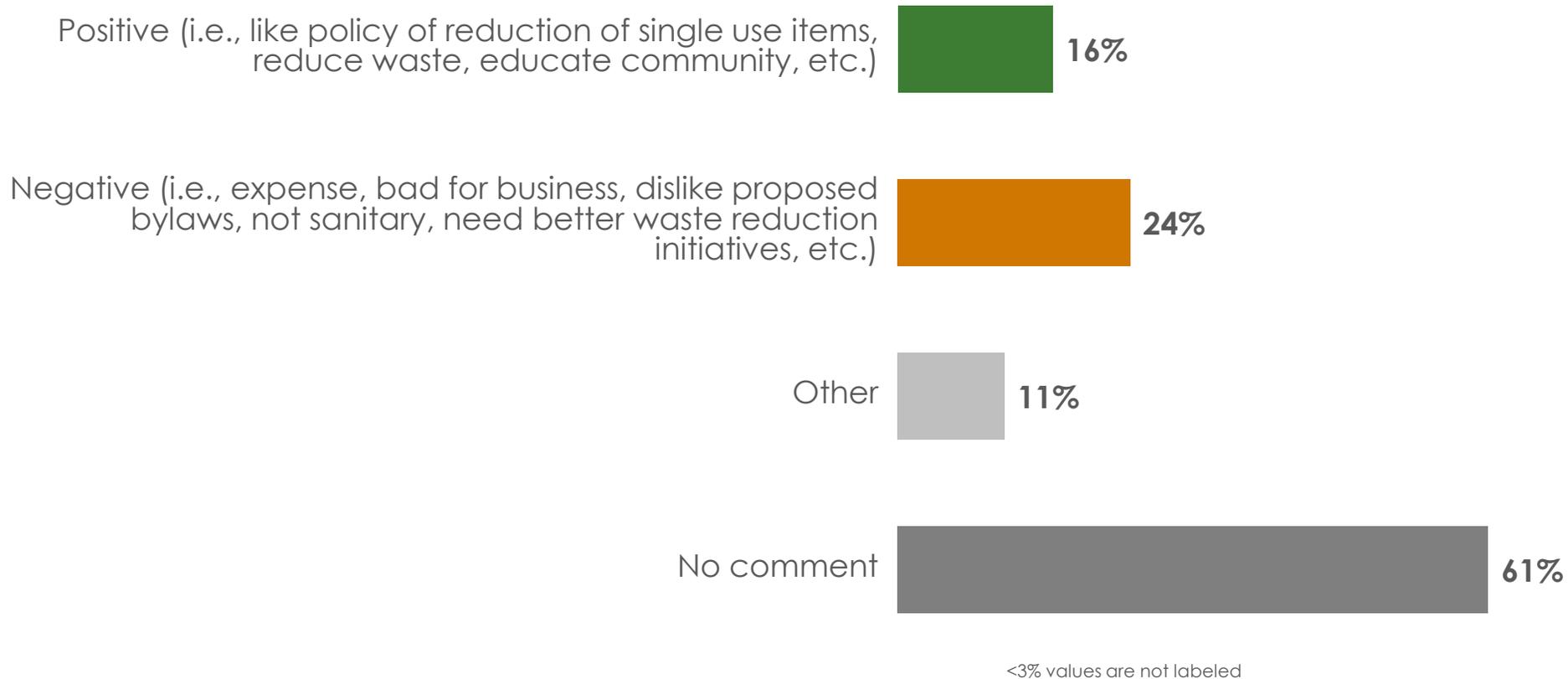
Base: Food service business (n=250)

Q31. The City of Toronto plans to offer educational and outreach supports and resources to help businesses that face difficulty with compliance for the proposed restrictions and bans.

What, if any, supports and or resources can the City of Toronto provide your business to assist with the reduction of single-use and takeaway items that will reduce waste generated in food services

General Comments from Food Service Establishments

- Just two-fifths (40%) of food service businesses surveyed offer general comments and feedback, with more negative (24%) than positive (16%) feedback received. Most positive comments relate to the viability of the strategy, while negative comments relate to additional expenses, being bad for business, dislike of the strategy, and the need for better waste reduction initiatives.



Base: Food service business (n=250)

Q33. Do you have any other comments regarding the City of Toronto's proposed Single-Use and Takeaway Items Reduction Strategy that you'd like to share?

Comments from Food Service Establishments – In Their Own Words

Please focus on finding solutions that are more sustainable. We need to focus more on solving problems instead of limiting behavior. It's hard to limit behaviors, actions, and responses. We want to incentivize positive responses. In this case, people using biodegradable products. The biggest challenge is the price. We should invest in technology that will reduce their overall cost so consumer behaviors don't have to change.

Cities should go hard on the big guys. They make a lot of waste. They would rather throw it in the garbage instead of giving it away. Cities should look at who makes the maximum waste.

This is helping us to reduce our garbage. I am very optimistic to participate. Even in my house, I don't like so much garbage. Also, people need to know the situation with advertising. If everyone is doing their job, this garbage issue is easy to solve.

If I have information from the City of Toronto, I will tell my customers right away.

On the last 2 questions, if there's just an online thing and no one knows about it, it won't be useful. It's helpful to send out a letter message, the owners aren't really familiar with online stuff, so if you send out a letter message that will be much more helpful.

I think they need to figure out where compostable single use items would fit in this equation.

We're a bit jaded. We're asked to recycle, but the trucks come along and dump it all together. Very little of plastics are recycled. We create a lot of waste with Styrofoam. They should be thinking about ways to recycle things like that, as they do in Japan. There are real health concerns with reusing packaging. They need to apply proper methodology. If you're going to ask people to reuse food containers, it's a little more complicated than just asking people to bring them in. What if someone brings in a contaminated food container, gets ill, and then points the finger at us?

I don't know if it makes much sense, so much in Toronto is already ridiculously expensive. I don't know if adding more fees will help.

If the government is serious about this, then give us instructions from a hygienic point of view. How is that going to be inspected? Do we have to wash them?

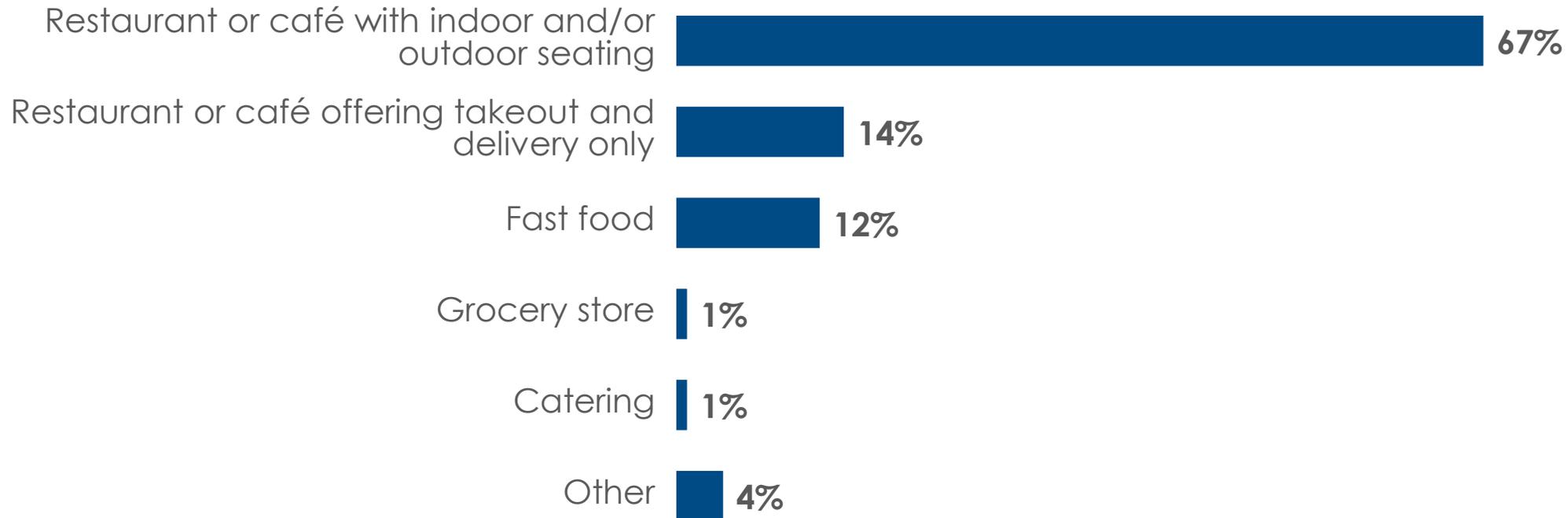
The City of Toronto should focus on take out containers costs the restaurants less than 5 cents, while foil containers trays that used to cost 50 cents now cost \$1.40 cents that is a significant cost increase to all restaurants in the GTA who use those trays, there should be policies that should not allow gouging on take out items.

Thinking of any change makes me nervous, due to what we've been going through the past couple years with COVID. And the customers do react, and we see it on both sides, those who appreciate and those who do not.

FIRMOGRAPHICS

Type of Food Service Business

- Two-thirds (67%) of the businesses surveyed indicate that they are restaurants/café's with indoor and/or outdoor seating.

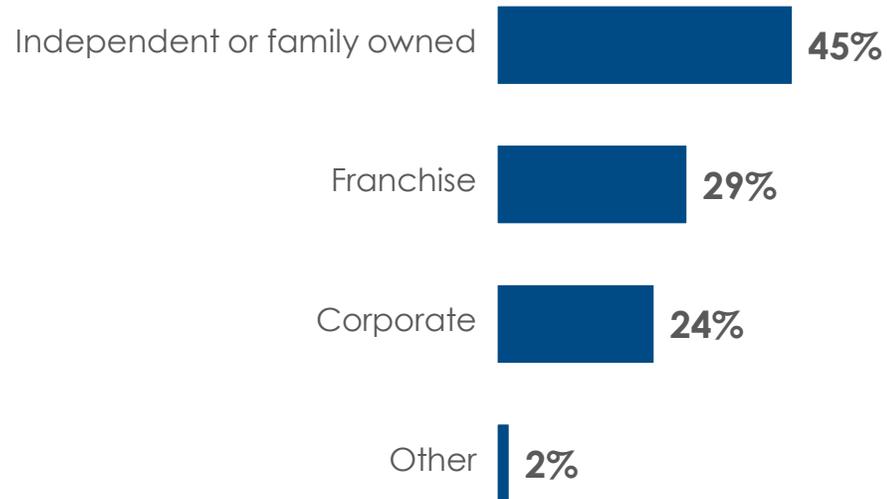


Base: Food service business (n=250)
Q3. What type of food or beverage business do you own or operate?

Ownership Type & Number of Employees

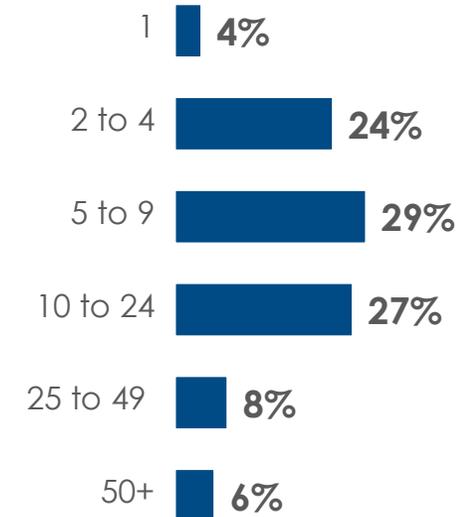
- A majority (57%) of the businesses surveyed report having fewer than 10 employees and nearly half (45%) claim to be independent or family owned.

Ownership Type



Base: Food service business (n=250)
Q4. What type of ownership is your business?

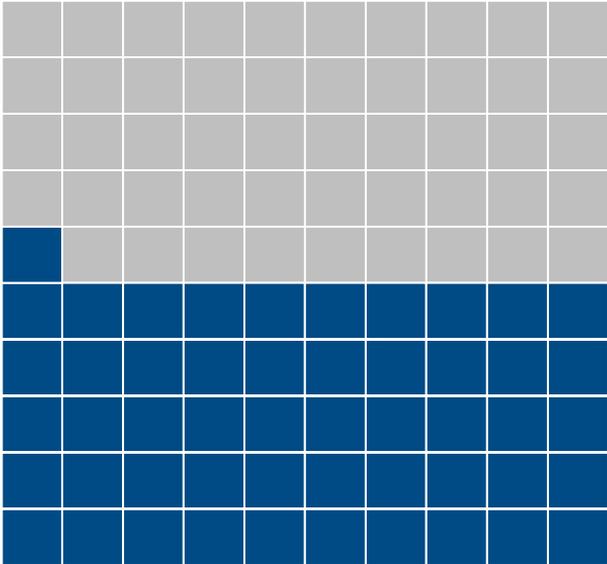
Number of Employees



Base: Food service business (n=250)
Q4a. Including yourself, how many employees do you currently have (including full-time and part-time)?

Waste Collection Services from the City of Toronto

- Only half (51%) of the businesses surveyed report receiving waste collection services from the City of Toronto.



51%

Waste collection services from the City of Toronto

Base: Food service business (n=250)
Q5. Does your business receive waste collection services (i.e., garbage, recycling and organics) from the City of Toronto?