

Restaurant Survey

The Economics of Tobacco Control Project at UCT (www.tobacconecon.org) is conducting research on restaurants' smoking and non-smoking sections and how the proposed amendments to the smoking laws will affect businesses.

This confidential survey won't take more than 10 minutes to complete and five respondents will win a R1000 Takealot voucher!

Please submit your responses by 31 December 2016 to be eligible to win.

1. Would you like to learn more about the academic background and purpose of the survey?

- a.** Yes
- b.** No

This survey will inform research conducted by the Economics of Tobacco Control Project, a research project of the Southern Africa Labour and Development Research Unit (SALDRU) at the University of Cape Town (www.tobaccoecon.org).

It will explore how the restaurant industry has responded to the smoke-free legislation of 2001 that allows for dedicated smoking areas, and what the industry views are on the likely impact of the proposed amendments that will enforce completely non-smoking establishments.

After the survey is complete, the report will be presented to government, submitted to academic journals and be available on our website.

The researchers will not try identify you with your answers to the questions, nor name you as a study participant, nor facilitate anyone else's doing so. This research has been approved by the Commerce Faculty Ethics in Research Committee.

Your name and contact details (should you wish to provide them) will only be used to contact you if you win the R1000 Takealot.com voucher. Your responses are confidential.

By continuing you acknowledge that you are participating in this study of your own free will and understand that you may refuse to participate or stop participating at any time without penalty.

For every question asked, you can choose not to answer.

2. Do you agree to continue with this survey?

- a. Yes
- b. No

3. Do you wish to be sent a copy of the academic info and consent form?

- a. Yes
- b. No

4. Please provide us with your preferred email address: _____

This will only be used to contact you if you win the voucher or if you wish to receive the academic info/consent form. If you do not wish to supply your email address, press NEXT

5. What is your restaurant type?

- a. Fast food/ Quick Service Restaurant
- b. Casual dining
- c. Fine dining
- d. Coffee shop, bakery, dessert only (with sit-down section)
- e. Caterer, take-away only, drive-through (no sit-down section)
- f. Only sell alcohol, no food
- g. Prefer not to answer

If answered Take-away only to the above question

Our research focuses on restaurants with a sit-down section, so we don't need to ask you any more questions. If you have a sit-down section, please press BACK and re-select the correct option, otherwise please press SUBMIT.

Thank you for your time!

Once our research is complete, the report will be available on the Economics of Tobacco Control project website at www.tobaccoecon.org. We will contact you in the next 3 months if you are one of the 5 winners of the voucher!

If you have any questions, please visit www.tobaccoecon.org

Thank you and goodbye.

Otherwise:

6. What is your job title at this restaurant?

- a. Owner
- b. Manager
- c. Other staff

7. How long have you been working at this restaurant?

- a. Less than a year
- b. 1-2 years
- c. 2-5 years
- d. More than 5 years

- e. Prefer not to answer
- 8. Do you approve of the current smoking laws in South Africa that restrict smokers to separate smoking sections in restaurants?**
- a. Yes
 - b. No
 - c. Don't know
 - d. Prefer not to answer
- 9. Are you aware that there is a proposed amendment to SA's Tobacco Products Control Act that will likely to enforce 100% smoke-free restaurants (making smoking-sections obsolete)?**
- a. Yes
 - b. No
 - c. Don't know
 - d. Prefer not to answer
- 10. Do you approve of this amendment?**
- a. Yes
 - b. No
 - c. Don't know
 - d. Prefer not to answer
- 11. What province is your restaurant in?**
- a. Eastern Cape
 - b. Free State
 - c. Gauteng
 - d. Kwa-Zulu Natal
 - e. Limpopo
 - f. Mpumalanga
 - g. Northern Cape
 - h. North West
 - i. Western Cape
- 12. What city/town is your restaurant in? _____**
- 13. Where is your restaurant located?**
- a. In a hotel
 - b. In a shopping centre/mall
 - c. In an separate building/on a street
 - d. Prefer not to answer
- 14. Is this restaurant part of a franchise/chain?**

(Franchising is the right to use a firm's business model and brand for a prescribed period of time)

- a. Yes, part of a franchise/chain
- b. No, independent business
- c. No, part of unfranchised group
- d. Don't know
- e. Prefer not to answer

15. Do you serve alcohol?

- a. Yes
- b. No
- c. Prefer not to answer

16. What are your restaurant trading hours? _____

(type answer in this format: 9:00-17:00 or 10:30-13:30)

17. What proportion of your turnover is from food (as opposed to beverages)?

- a. 0-20%
- b. 21-40%
- c. 41-60%
- d. 61-80%
- e. 81-100%
- f. Don't know
- g. Prefer not to answer

18. How many people that can be seated at one time in your restaurant?

- a. 1-30
- b. 31-60
- c. 61-100
- d. 101-200
- e. 201+
- f. Don't know
- g. Prefer not to answer

19. How many years has your restaurant been operating?

- a. Operating for under a year
- b. 1-5 years
- c. 5-15 years
- d. Operating since before 2001
- e. Don't know
- f. Prefer not to answer

20. What was the turnover of your business in 2015?

- a. Less than R500 000

- b. R500 000 - R1 million
- c. R1 million – R2 million
- d. R2 million – R5 million
- e. R5 million – R10 million
- f. R10 million – R20 million
- g. More than R20 million
- h. Don't know
- i. Prefer not to answer

21. Who are your main customers?

- a. Families with children
- b. Young people
- c. Mature adults (35 years +)
- d. Don't know
- e. Prefer not to answer

22. What is the average spend per customer (food and beverages)?

- a. Less than R50
- b. R51-R100
- c. R101-R150
- d. R151-R200
- e. R201+
- f. Don't know
- g. Prefer not to answer

23. Do you have a specific smoking area?

- a. Yes
- b. No, all non-smoking
- c. No, people can smoke anywhere
- d. Don't know
- e. Prefer not to answer

24. Is the smoking area inside or outside?

- a. Inside
- b. Outside
- c. Don't know
- d. Prefer not to answer

25. How many people can be seated in the smoking section?

- a. Less than 10
- b. 11-20
- c. 21-50
- d. 51-100
- e. 101-200

- f. More than 200
- g. Don't know
- h. Prefer not to answer

26. Is the smoking section generally busier or quieter than the non-smoking section?

- a. Busier
- b. The same
- c. Quieter
- d. Don't know
- e. Prefer not to answer

27. How happy are your staff to work in the smoking section?

- a. They don't mind which section they work
- b. Most don't like working in the smoking section
- c. Some have refused to work in the smoking section
- d. Don't know
- e. Prefer not to answer

28. Do you have to maintain the smoking section more or less often than the non-smoking section (e.g. additional cleaning, maintaining ventilation, special doors, signage)?

- a. More often
- b. Less often
- c. The same
- d. Don't know
- e. Prefer not to answer

29. How much more does it cost per year to maintain the smoking section than the non-smoking section?

- a. Less than R5 000
- b. R5 001-R20 000
- c. R20 001-R50 000
- d. R50 001-R100 000
- e. R100 001+
- f. Don't know
- g. Prefer not to answer

30. Have you ever had an authority check on your compliance with the smoking laws?

- a. Yes
- b. No
- c. Don't know
- d. Prefer not to answer

31. How many times has an authority checked on this?

- a. Once
- b. Multiple times
- c. Don't know
- d. Prefer not to answer

32. Were the visits pre-arranged or unannounced?

- a. Pre-arranged
- b. Unannounced
- c. Don't know
- d. Prefer not to answer

33. Have you changed your smoking area policy in the past 10 years?

(For instance removed the smoking section or made the existing one bigger)

- a. Yes
- b. No
- c. Not since I started working here
- d. Don't know
- e. Prefer not to answer

34. When did this change happen?

- a. In the last year
- b. 1-5 years ago
- c. Over 5 years ago
- d. Don't know
- e. Prefer not to answer

35. Pick the option(s) that best describes how your smoking area has changed?

Tick multiple where applicable

- a. Previously we allowed smoking in the whole restaurant
- b. Previously we were completely smoke-free
- c. Previously our smoking area was larger, and we reduced it
- d. Previously our smoking area was smaller, and we enlarged it
- e. Previously our smoking area was outdoors, and we brought it inside
- f. Previously our smoking area was indoors, and we put it outside
- g. Previously we had a smoking area, now we don't
- h. Don't know
- i. Prefer not to answer

36. Why did you make these changes

Tick multiple where applicable

- a. To lower maintenance/building costs
- b. To increase revenue
- c. In response to customer complaints
- d. In response to staff complaints

- e. No authorities ever came to check on compliance
- f. Don't know
- g. Prefer not to answer
- h. Other: _____

37. What are your customers' views on the changes?

- a. They disapprove
- b. They approve
- c. They are indifferent
- d. Don't know
- e. Prefer not to answer

38. In the next few years, proposed amendments to SA's Tobacco Products Control Act are likely to enforce 100% smoke-free restaurants (making smoking-sections obsolete). How do you think your restaurant will react to these proposed amendments?

- a. The smoking section will be physically adjusted/knocked down
- b. The smoking section won't be physically changed, but will become non-smoking
- c. No changes will be made, customers will continue to be allowed to smoke in the smoking section
- d. No changes will be made, we will remain a totally non-smoking restaurant
- e. The restaurant will be shut down
- f. Don't know
- g. Prefer not to answer

39. When do you think you are going to start making these changes?

- a. Immediately
- b. Within the next 2 years
- c. Only after the Amendment becomes law
- d. Don't know
- e. Prefer not to answer

40. What do you estimate these changes will cost?

- a. Nothing
- b. Less than R20 000
- c. R20 001- R50 000
- d. R50 001-R100 000
- e. R100 001-R200 000
- f. R200 001+
- g. Don't know
- h. Prefer not to answer

41. Do you think your profits will be affected by the proposed amendment?

- a. Yes, large increase
- b. Yes, small increase
- c. Yes, large decrease
- d. Yes, small decrease
- e. No, they will remain the same
- f. Don't know
- g. Prefer not to answer

42. Why do you think so? _____

43. Finally, are you a smoker, non-smoker or former smoker?

- a. Smoker
- b. Former smoker
- c. Non-smoker
- d. Prefer not to answer

Thank you for your time!

Once our research is complete, the report will be available on the Economics of Tobacco Control project website at www.tobaccoecon.org . We will contact you in the next 3 months if you are one of the 5 winners of the R1000 voucher!

If you have any questions please visit www.tobaccoecon.org

Press SUBMIT to finish the survey, or BACK to adjust your responses. Once submitted your responses cannot be adjusted.

Thank you for completing the Tobacco Restaurant Survey. Your response has been recorded

Franchisor Survey

The Economics of Tobacco Control Project at the University of Cape Town is conducting research on restaurants' smoking and non-smoking sections and how the proposed amendments to South Africa's smoking laws will affect businesses. This survey is still relevant if your chain does not have smoking sections.

This survey won't take more than 5 minutes of your time.

The results will help the industry understand smoking trends in terms of patronage, costs, earnings and perceptions. The research will be presented to government, submitted to academic journals and be available on our website, www.tobacconecon.org

The researchers in this study will not try identify you or your franchise with your answers to the questions, nor name you as a study participant, nor facilitate anyone else's doing so. This research has been approved by the Commerce Faculty Ethics in Research Committee.

By continuing you acknowledge that you are participating in this study of your own free will, and understand that you may refuse to participate or stop participating at any time. You can choose not to answer any question you don't want to.

44. Do you agree to continue?

- a. Yes
- b. No

45. Do you have a standard smoking policy for all your chains/franchises or can each choose independently?

- a. No, each restaurant can choose their own smoking policy
- b. Yes, no smoking areas allowed
- c. Yes, every restaurant must have a smoking area
- d. Don't know
- e. Prefer not to answer

46. Do any of your restaurants have a smoking section?

- a. Yes
- b. No
- c. Don't know
- d. Prefer not to answer

47. Are the smoking sections mostly inside/outside?

- a. All inside
- b. Mostly inside
- c. Mostly outside
- d. All outside
- e. Don't know

- f. Prefer not to answer

48. What has been the feedback from your franchises regarding their smoking areas over the past few years? (tick multiple if applicable)

- a. The smoking areas are generally quieter than the non-smoking areas
- b. The smoking areas are generally busier than the non-smoking areas
- c. Customers often complain about the smoking areas
- d. The smoking areas are generally costly to maintain
- e. Feedback varies by franchise
- f. Other: _____
- g. Don't know
- h. Prefer not to answer

49. What is the main rationale for having smoking sections?

- a. The smoking sections are busy
- b. Customers would complain if we removed the smoking sections
- c. Not many customers smoke, but it would be expensive to remove the smoking areas
- d. Other: _____
- e. Don't know
- f. Prefer not to answer

50. Do you feel the smoking sections contribute to profitability?

- a. Yes, without them we would have fewer customers
- b. No, they actually reduce profitability (smoking sections are mostly empty/non-smokers complain about the smoking areas)
- c. Profitability is unaffected by the smoking areas (if they were removed, profits would be unchanged)
- d. Other: _____
- e. Don't know
- f. Prefer not to answer

51. Have you changed your smoking area policy in the past 10 years (for instance enlarged the smoking areas or moved them outside)?

- a. Yes
- b. No
- c. Don't know
- d. Prefer not to answer

52. How did the policy change?

Tick multiple if applicable

- a. Previously we allowed smoking anywhere in the restaurants
- b. Previously we were completely smoke-free
- c. Previously smoking areas were larger, and we reduced them
- d. Previously smoking areas were smaller, and we enlarged them

- e. Previously smoking areas were outdoors, and we brought them inside
- f. Previously smoking areas were indoors, and we put them outside
- g. Don't know
- h. Prefer not to answer

53. When did you make this smoking policy change?

- a. In the last year
- b. 1-5 years ago
- c. Over 5 years ago
- d. Don't know
- e. Prefer not to answer

54. Why did you make this smoking policy change?

Tick multiple where applicable

- i. To lower maintenance/building costs
- j. To increase revenue
- k. Customer complaints
- l. Staff complaints
- m. No authorities ever came to check on compliance
- n. Don't know
- o. Prefer not to answer
- p. Other: _____

55. Have you seen a change in profitability as a result of the smoking policy change?

- a. Yes, large increase
- b. Yes, small increase
- c. No change
- d. Yes, small decrease
- e. Yes, large decrease
- f. Don't know
- g. Prefer not to answer

56. When did you (they) decide to go smoke-free?

- a. In the last year
- b. 1-5 years ago
- c. Over 5 years ago
- d. Don't know
- e. Prefer not to answer

57. What prompted the decision to be smoke-free?

Tick multiple if applicable

- a. We've been smoke-free since we launched the franchise
- b. The smoking sections weren't busy and so were reducing profitability

- c. The smoking sections were expensive to maintain (e.g. ventilation/cleaning costs) and so reduced profitability
- d. Customers complaints
- e. We anticipated the law and thus pre-emptively removed the smoking sections
- f. Other: _____
- g. Don't know
- h. Prefer not to answer

58. How have your customers reacted to the removal of the smoking areas?

- a. They approve
- b. They are indifferent
- c. They disapprove
- d. We never had smoking sections
- e. Don't know
- f. Prefer not to answer

59. In general has going smoke-free impacted how busy your restaurants are?

- a. Yes, we are busier
- b. No change
- c. Yes, we are less busy
- d. Varies by restaurant
- e. We never had smoking sections
- f. Don't know
- g. Prefer not to answer

60. Has going smoke-free impacted your profitability?

- a. Yes, large increase
- b. Yes, small increase
- c. No change
- d. Yes, small decrease
- e. Yes, large decrease
- f. Varies by restaurant
- g. We never had smoking sections
- h. Don't know
- i. Prefer not to answer

In the next few years, proposed amendments to SA's Tobacco Products Control Act are likely to enforce 100% smoke-free restaurants (making smoking-sections obsolete).

61. Do you approve of this amendment?

- a. Yes
- b. Indifferent
- c. No

- d. Don't know
- e. Prefer not to answer

62. Do you think your profits will be affected by the amendment

- a. Yes, decrease
- b. No impact
- c. Yes, increase
- d. Don't know
- e. Prefer not to answer

63. Why do you think so? _____

64. How do you think your chain/group will react to these proposed amendments?

Tick multiple if applicable

- a. Each restaurant will react differently
- b. Smoking sections will be physically adjusted/knocked down
- c. Smoking sections won't be physically changed, but will become non-smoking
- d. No changes will be made, customers will continue to be allowed to smoke in the smoking sections
- e. Some restaurants will be shut down
- f. Don't know
- g. Prefer not to answer

65. When do you think you are going to start making these changes?

- a. Immediately
- b. Within the next 2 years
- c. Only after the amendment becomes law
- d. Not applicable (we are not making any changes)
- e. Don't know
- f. Prefer not to answer

66. What do you estimate these changes will cost on average per franchise?

- a. Nothing
- b. Less than R20 000
- c. R20 001- R50 000
- d. R50 001-R100 000
- e. R100 001-R200 000
- f. R200 001+
- g. Don't know
- h. Prefer not to answer

67. Do you think your profits will be affected if all your restaurants become smoke-free?

- a. Yes, large increase
- b. Yes, small increase
- c. No change
- d. Yes, small decrease
- e. Yes, large decrease
- f. Don't know
- g. Prefer not to answer

68. Why do you think so? _____

69. In what way does your group/chain engage with government about policies that affect your profitability?

Tick multiple if applicable

- a. We don't
- b. Through the Restaurant Association of South Africa (RSA)
- c. Through the Federated Hospitality Association of South Africa (FEDHASA)
- d. Directly with government
- e. Other: _____
- f. Don't know
- g. Prefer not to answer

70. Finally, are you a smoker, former-smoker or non-smoker?

- e. Smoker
- f. Former smoker
- g. Non-smoker
- h. Prefer not to answer

71. Do you wish to be sent a copy of the academic info and consent form?

- c. Yes
- d. No

What is your email address? _____

Thank you for your time. Your responses are very helpful for our report. If you have any questions, please visit our website (www.tobaccoecon.org). The results will be finalised by early next year and will be available on our website.

If you have any additional comments, please note them here _____