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National Online Survey of Consumers

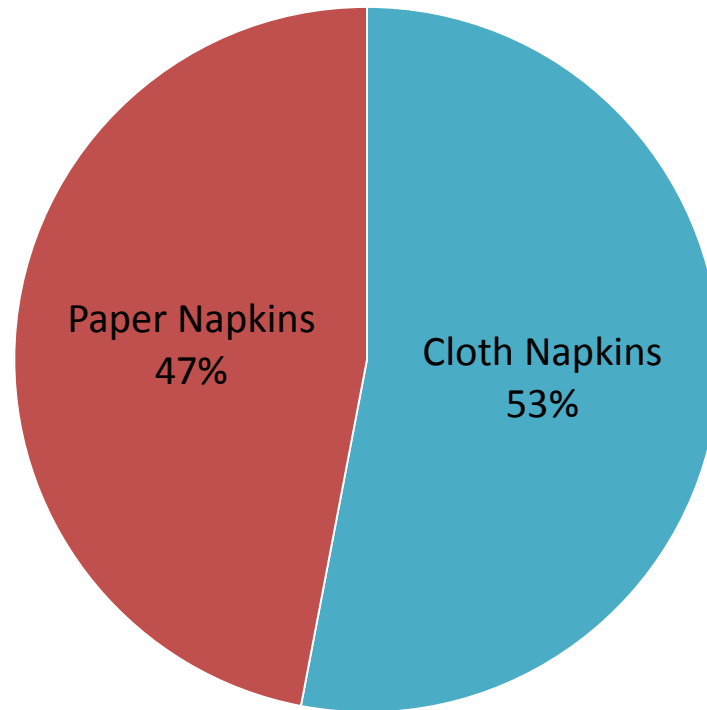
March 2015

Methodology

- National survey of consumers conducted online using an online sample panel.
- n=700 adults
- Conducted March 6-9, 2015
- Interviews were stratified into geographic units that reflect the national population.
- Gender, age, and race weighted to match Census demographics.

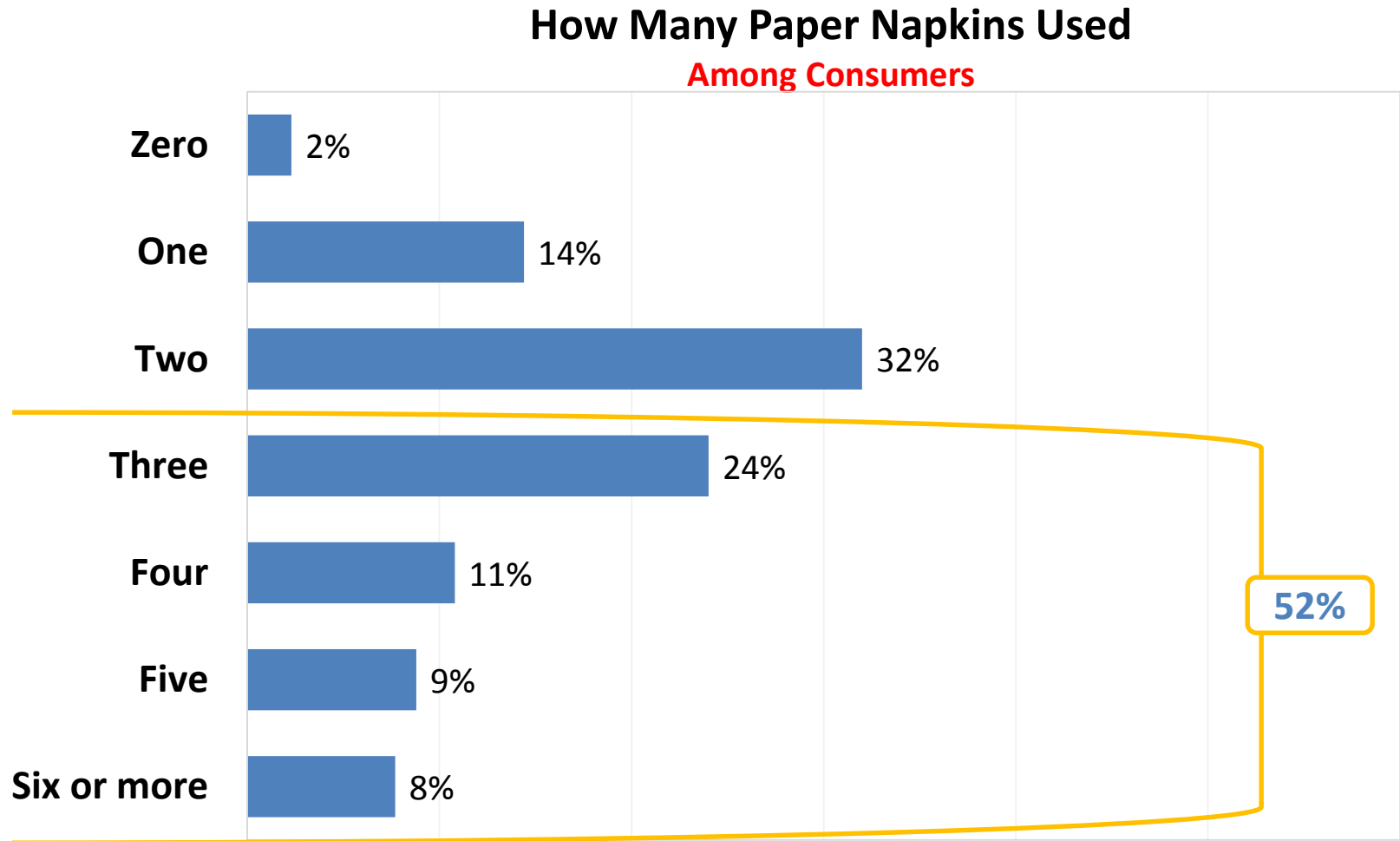
A majority of consumers believes cloth napkins are more environmentally friendly than paper napkins.

**More Environmentally Friendly:
Cloth Napkins Versus Paper Napkins**
Among Consumers



Q76. In your opinion, what is the more environmentally friendly napkin for a restaurant to use?

A majority of consumers used three or more paper napkins the last time they ate at a restaurant that offered paper napkins.



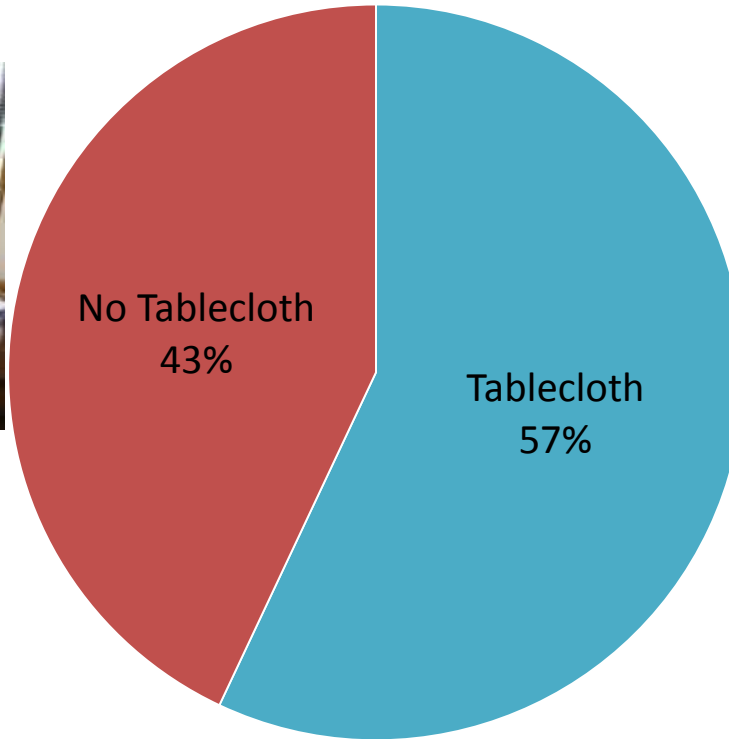
Q75. Now thinking back to the last time you ate a meal at a restaurant that used paper napkins. Making your best guess, how many paper napkins do you think you used at that meal?

A majority of consumers prefer eating at tables with tablecloths. The major distinction in preference for restaurants with and without tablecloths exists between age and income.

Table Preference Among Consumers



- HH income of <\$80K (47%)
- 18-34 year olds (49%)
- Dine out None/month (49%)



- HH income of \$80K+ (67%)
- 55+ year olds (64%)
- Dine out 5+/month (58%)

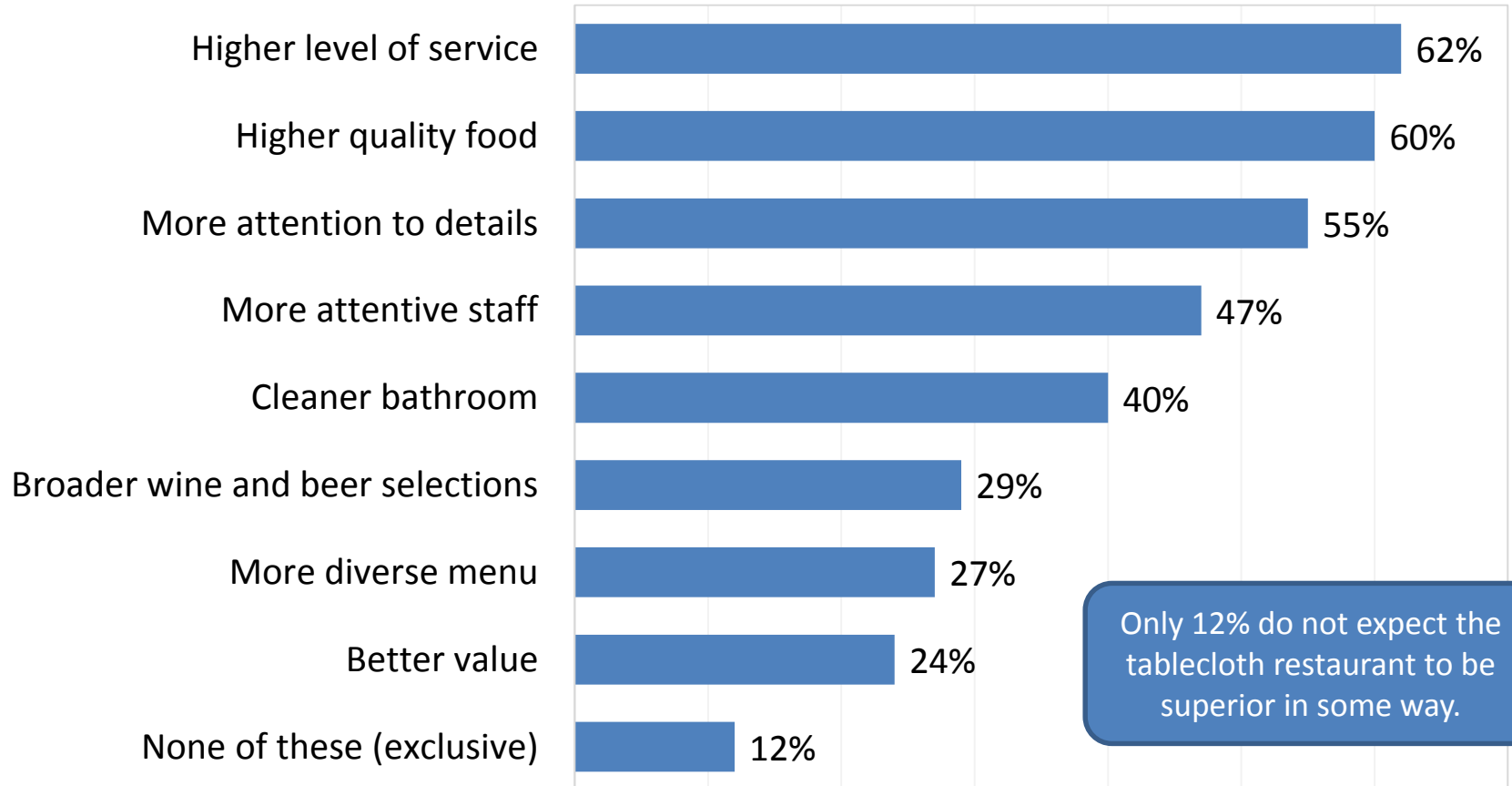
Q77. All other things being equal, when eating at a sit-down restaurant with a server, which of the following tables would you prefer to eat at?

Most consumers expect a better experience from a restaurant that uses tablecloths than one without.

Expectations of a Restaurant Using Tablecloths

Among Consumers

(Multiple Responses Allowed, Answers Add Up To More Than 100%)



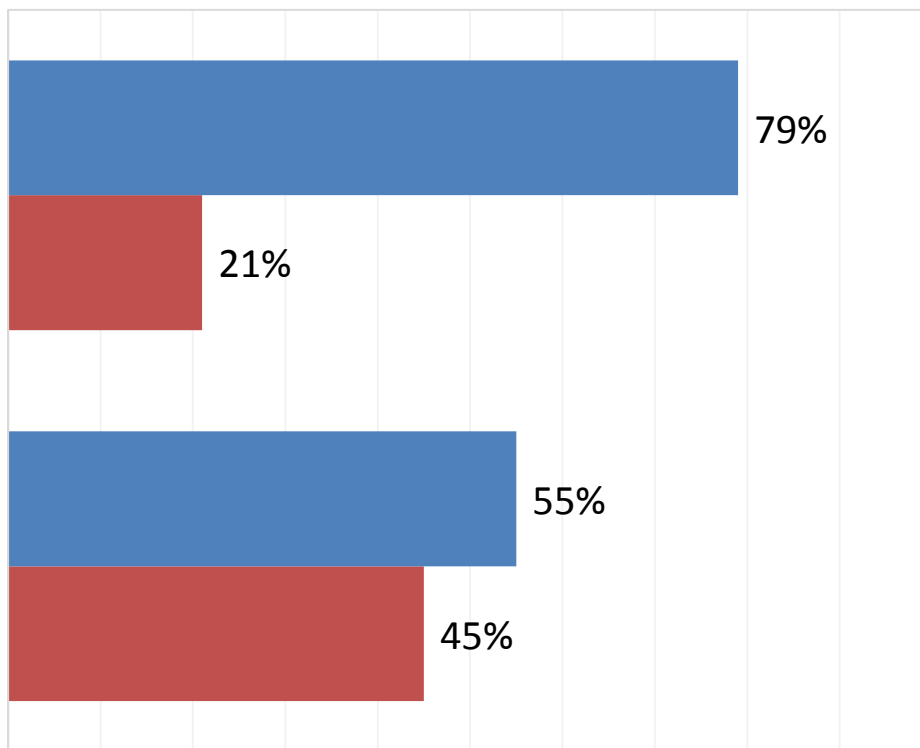
Q78. Generally speaking which, if any, would be your expectation in dining at a restaurant **WITH** tablecloths as previously pictured versus dining at the other restaurant pictured **without** tablecloths?

Among consumers with an opinion, four in five believe restaurants that use tablecloths and linens are more thoughtful, and a slight majority are willing to pay more at a restaurant using tablecloths and linens.

Statement Agreement

Among Consumers With An Opinion

Generally speaking, a restaurant that uses tablecloths and linens will provide an overall better experience than a restaurant that does not use tablecloths and linens, because they spend more time thinking about things like food quality, menu selection...



■ Agree ■ Disagree

Q79. Generally speaking, a restaurant that uses tablecloths and linens will provide an overall better experience than a restaurant that does not use tablecloths and linens, because they spend more time thinking about things like food quality, menu selection, employee training, etc.?

Q80 I am willing to pay more at a restaurant that uses tablecloths and linens.