

# Good Food Media Network

## Economic Contribution of the Food Supply Chain 2020

### Consulting Report by:

Business Research Division  
Leeds School of Business  
University of Colorado Boulder

September 2020



**Leeds** School of Business  
UNIVERSITY OF COLORADO **BOULDER**

Page intentionally left blank.

## TABLE OF CONTENTS

Table of Contents .....	ii
Executive Summary.....	1
Purpose of the Study.....	2
Methodology.....	2
Definitions.....	5
Food Industry Economic Overview .....	5
About the Participating Restaurants.....	7
Economic Contribution .....	16
Qualitative Responses.....	18
Conclusion.....	20
Bibliography .....	21
Appendix 1: Participating Restaurants.....	22

## EXECUTIVE SUMMARY

In 2020, a total of 131 restaurants from around the United States participated in the fourth annual survey of Good Food 100 Restaurants™. A program of the Good Food Media Network, Inc. (GFMN), a 501(c)(3) nonprofit, the Good Food 100 provided a framework for collecting, verifying, and reporting on restaurants' good food purchases. GFMN contracted with the Business Research Division at the Leeds School of Business to survey and analyze restaurants' food purchase data.

According to GFMN, good food is good for every link in the food chain: the environment, plants and animals, farmers, ranchers and fishermen, restaurants, and eaters. While many restaurants exceed the minimum threshold for good food purchases, restaurant purchases in this study needed to meet at least the following *minimum* thresholds to be considered good food purchases:

- Bread, Flour, Grain, Bean & Legume Purchases: Produced using Certified Organic and/or sustainable agricultural practices
- Dairy & Egg Purchases: Raised without the use of sub-therapeutic antibiotics or added hormones, no cages or confinement
- Fish & Seafood Purchases: Wild and sustainably farmed fish & seafood. This includes fish & seafood on Monterey Bay Aquarium's Seafood Watch "Green" and "Yellow" list.
- Meat & Poultry Purchases: Raised without the use of sub-therapeutic antibiotics or added hormones, no cages or confinement
- Fruits & Vegetable Purchases: Grown using Certified Organic and/or sustainable agricultural practices
- All Other Food Purchases (e.g., oils, condiments, spices, etc.): Produced using Certified Organic and/or sustainable agricultural practices

The 131 Participating restaurants in the Good Food 100 reported being in operation an average of 12.5 years, with 24% in operation for five years or less. Over 49% of participating businesses reported being owned or co-owned by a female or minority, and over 41% reported having a female Executive Chef, Culinary Director, CEO, or owner. By restaurant type, 66% of responses came from Fine Dining restaurants, followed by Casual Dining (18%), and Fast Casual (9%). Food Service, Specialty Grocer/Lunch Counter, and Other recorded the lowest participation. Restaurants represented every region of the United States. The Rocky Mountain region garnered the most responses—31% of the total, with Colorado having the highest number of responding restaurants. Three regions—Rocky Mountain, Southeast, and the Far West—represented 65% of the responses.

Participating restaurants reported spending \$87.1 million on food in 2019. Of these food purchases, restaurants reported spending 78.6%, or \$68.5 million, on good food in the categories of bread and grains, dairy and eggs, fish and seafood, meat and poultry, fruits and vegetables, and other miscellaneous food items. *Domestic* good food purchases, which totaled \$64.5 million spent by participating restaurants, had a \$208.2 million economic impact on the nation, including the direct, indirect, and induced impact of the purchases. This excludes the impact of overall business operations, ranging from the purchase of alcohol to labor and rent. The percentage of good food purchases was greatest for participating Other (93%), followed by Specialty Grocer/Lunch Counter (88%), Fine Dining (86%), and Fast Casual restaurants (84%). Nationally, restaurants reported the greatest percentage of good food purchases in the Meat and Poultry (87.4%) and Fish and Seafood (86.5%) segments.

Participating restaurants were provided a detailed definition for each category of purchases. A random third-party review of purveyors by NSF checked for consistency between reported good food purchases and actual food purchases.

## **PURPOSE OF THE STUDY**

The Business Research Division (BRD) of the Leeds School of Business at the University of Colorado Boulder was contracted by GFMN to study the impact of sustainable supply chains on the economy. According to GFMN, the Good Food 100 Restaurants is “an annual list of U.S. restaurants designed to educate eaters and celebrate restaurants—fast casual to fine dining to food service—for being transparent with their purchasing practices, and supporting farmers, ranchers, and fisherman.” Survey results provided data for an economic contribution analysis, as well as for a rating of restaurants by their sustainable sourcing practices. (See Appendix 1 for the complete list of participating restaurants.) The purpose of the study was to educate consumers about the people and businesses that are impacting the economy through sustainable sourcing of goods.

There are many economic benefits of sustainable supply chains. For example, localizing food purchases decreases “leakage” (purchases from outside the local region), which increases the total local economic impact (i.e., a vertically integrated industry). Other economic impacts (positive or negative) result from changes in food prices, other components of the supply chain (e.g., transportation and warehousing), and substitutes. This study examines the location and types of food purchases by restaurants.

## **METHODOLOGY**

This study was conducted in cooperation with GFMN and the 131 participating restaurant brands. This study updates the inaugural GFMN study completed in 2017 and subsequent 2018 and 2019 studies. Approximately 70% of the restaurants that participated in 2019 also participated in the 2020 study, and 85% have participated at some point in the past three years. The research team collected data from restaurants about total food purchases and good food purchases by restaurant type, food segment, and region. According to GFMN, good food is good for every link in the food chain: the environment, plants and animals, farmers, ranchers and fishermen, restaurants, and eaters.

While many restaurants exceed the minimum threshold for good food purchases, restaurant purchases in this study needed to meet at least the minimum thresholds to be considered good food purchases. The detailed definitions for each food segment were provided to participating restaurants in the survey (see definitions on the following page). A random third-party review of purveyors by NSF verified consistency between reported good food purchases and actual food purchases.

Restaurants types identified in the study included Fine Dining, Casual Dining, Fast Casual, Food Service, Specialty Grocer/Lunch Counter, and Other. Restaurants in the Other category include Catering, Quick Service, and Meal Delivery Service. Data were collected by food segment: Bread, Flour, Grain, Bean, and Legume; Dairy and Eggs; Fish and Seafood; Meat and Poultry; Fruits and Vegetables; and Other. Data

were also gathered by geography, with restaurants providing mutually exclusive information on total purchases and good food purchases at the local, regional, national, and international level:<sup>1</sup>

- Local
  - State
- Regional (based on groupings from the Bureau of Economic Analysis)
  - Far West Region (Alaska, California, Hawaii, Nevada, Oregon, Washington)
  - Great Lakes Region (Illinois, Indiana, Michigan, Ohio, Wisconsin)
  - Mideast Region (Delaware, District of Columbia, New Jersey, New York, Maryland, Pennsylvania)
  - New England Region (Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont)
  - Plains Region (Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota)
  - Rocky Mountain Region (Colorado, Idaho, Montana, Utah, Wyoming)
  - Southeast Region (Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia)
  - Southwest Region (Arizona, New Mexico, Oklahoma, Texas)
- National
- International

To be considered a “good food” purchase, the producer must at least meet the minimum threshold of “good” as defined by the following definitions:

- Bread, Flour, Grain, Bean & Legume Purchases
  - Produced using Certified Organic and/or sustainable agricultural practices
- Dairy & Egg Purchases
  - Raised without the use of sub-therapeutic antibiotics or added hormones, no cages or confinement
- Fish & Seafood Purchases
  - Wild and sustainably farmed fish & seafood. This includes fish & seafood on Monterey Bay Aquarium's Seafood Watch "Green" and "Yellow" list.
- Meat & Poultry Purchases
  - Raised without the use of sub-therapeutic antibiotics or added hormones, no cages or confinement
- Fruits & Vegetable Purchases
  - Grown using Certified Organic and/or sustainable agricultural practices
- All Other Food Purchases (e.g., oils, condiments, spices, etc.)
  - Produced using Certified Organic and/or sustainable agricultural practices

---

<sup>1</sup>The survey instructions stated, “You will need to complete one (1) application for each of your brands/restaurant businesses by state.” <http://goodfood100restaurants.org/survey/>

The BRD and GFMN research team updated the 2020 survey with input from GFMN partners and participating restaurants. For the updated survey, the partners, which included chefs and restaurant owners, provided feedback on the available data, categories of data, and appropriate survey length in order to maximize survey participation among a broad group of restaurants. Qualitative questions were asked in order to obtain information about restaurant demographics, growth, and challenges facing the industry. The survey was hosted on the [www.GoodFood100Restaurants.org](http://www.GoodFood100Restaurants.org) website. A link was promoted nationally by GFMN (via email, Twitter, Instagram, and Facebook). A letter from GFMN in partnership with the James Beard Foundation promoted the survey in order to increase survey participation. The survey results allowed for the quantification of the total national economic contribution, national economic contribution by restaurant type, and total regional contributions.

GFMN distributed the survey and collected the data. The organization contracted with a separate firm, NSF ([nsf.org](http://nsf.org)), to verify a sample of submitted surveys.

Data were collected by food segment and were entered into the 536-sector IMPLAN input-output model with 2016 data, which quantified the economic contribution regionally and nationally.

This study only examined food purchases and did not examine other restaurant operations (e.g., rents, management, servers, etc.). It provides an economic contribution analysis, and not an analysis of *net* economic impacts. Additionally, there may be economic benefits associated with sustainability (e.g., recycling, composting, reduced energy use, employee retention, etc.), but these factors were outside the scope of study.

### **Overview of Economic Contribution Analysis**

Economic benefits refer to dollars generated and distributed throughout the economy due to the existence of an establishment. This study estimates the economic contribution using the IMPLAN input-output model. Results are disseminated in terms of direct, indirect, and induced impacts on employment, labor income, value added, and output.

Economic benefits refer to dollars generated and distributed throughout the economy. The sources of impacts that sum to economic benefits cover construction and operating expenditures, including the off-site spending by employees and the spending on goods and services within the supply chain.

The multiplier effect of spending within the supply chain, or the indirect impact, estimates the indirect employment and earnings generated in the study area due to the interindustry relationships between the facility and other industries. As an example, consider a restaurant operating in Denver, Colorado. The restaurant employs servers, cooks, managers, and support staff for its direct restaurant operations—the **direct impact**. In addition, the company spends on goods and services to support its restaurant operations, leading to auxiliary jobs in the community in transportation, accounting, utilities, retail goods,

and so on—the **indirect impact**. Furthermore, employees spend earnings on goods and services in the community, leading to jobs in retail, accounting, entertainment, and so on—the **induced impact**.

Conceptually, the multiplier effect quantifies the economic ripple effect of economic activity. This ripple effect can be positive or negative depending on whether a company or industry is expanding or contracting. Multipliers are static and do not account for disruptive shifts in infrastructure without specifically addressing infrastructure changes.

## DEFINITIONS

*Direct Impact:* Initial economic activity (e.g., sales, expenditures, employment, production, etc.) by a company or industry.

*Employment:* Full-time and part-time workers.

*Gross Domestic Product (GDP):* A measure of economic activity, GDP is the total value added by resident producers of final goods and services.

*Gross Output (Output):* The total value of production is gross output. Unlike GDP, gross output includes intermediate goods and services.

*Indirect Impact:* The upstream (backward) economic activity impacted by purchases along a company or industry supply chain.

*Induced Impact:* Economic activity derived from workers spending their earnings on goods and services in the economy.

*Labor Income:* Total compensation of employees (wages and benefits) and sole proprietors (profits).

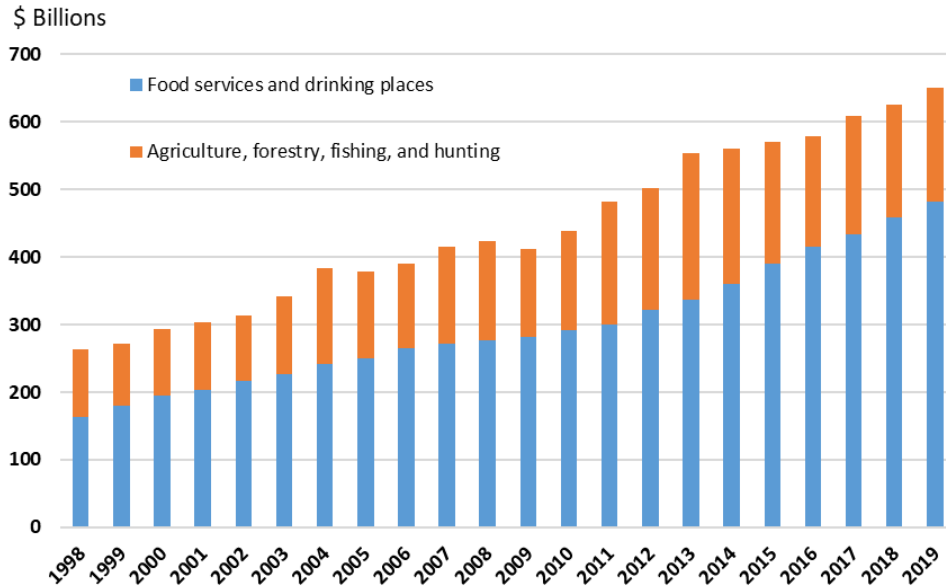
*Value Added:* The contribution of an industry or region to total GDP, value added equals gross output, net of intermediate input costs.

## FOOD INDUSTRY ECONOMIC OVERVIEW

The food services and drinking places sector contributed 2.2%, or \$481.4 billion, to U.S. GDP in 2019, growing 4.9% year-over-year and increasing 71.2% from 2009–2019 (Figure 1). One primary input to restaurants is food. Included in the agriculture, forestry, fishing, and hunting sector, the value of agriculture is volatile due to price changes. In 2019, nominal value added from this industry totaled \$169.2 billion, a 1.6% increase from 2018, and a 30.2% increase from 2009.



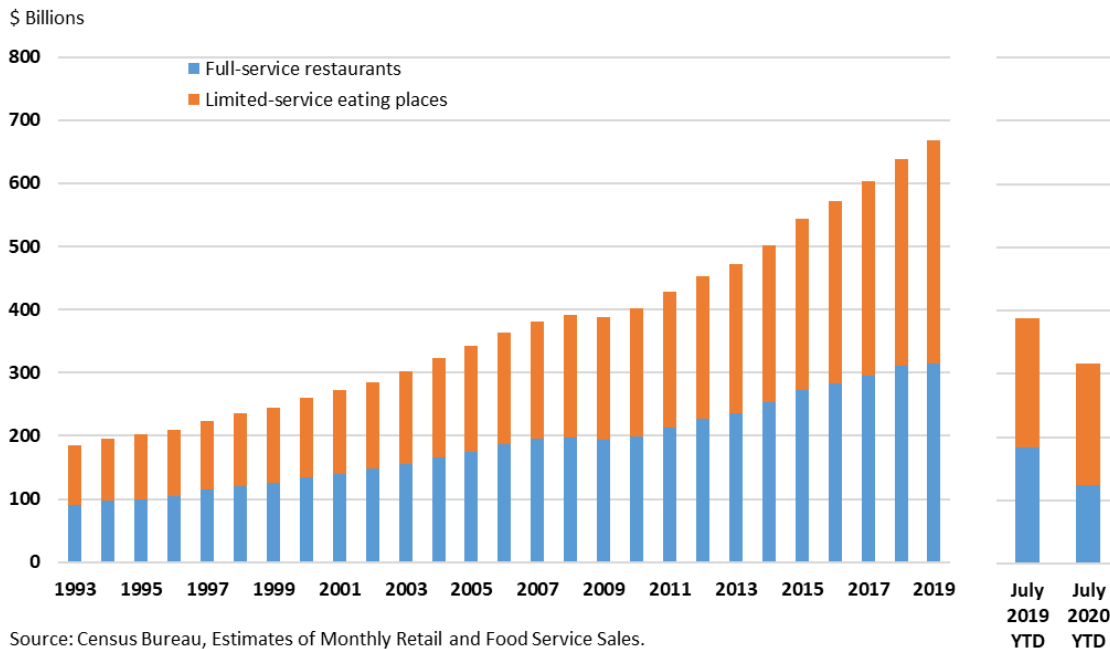
**FIGURE 1: U.S. VALUE ADDED, FOOD SERVICES AND AGRICULTURE, 1998–2019**



Source: Bureau of Economic Analysis, Value Added by Industry.

In terms of retail sales, full-service restaurants and limited-service restaurants recorded sales of \$668.9 billion in 2019, an increase of 4.7% year-over-year and 72.1% over the past 10 years (Figure 2). Year-to-date through July 2020, sales fell 18.7% over the same six-month period in 2019, due to the COVID-19 pandemic. Each segment (full-service and limited-service) represented about 50% of sales—a trend that has remained consistent over the past 25 years.

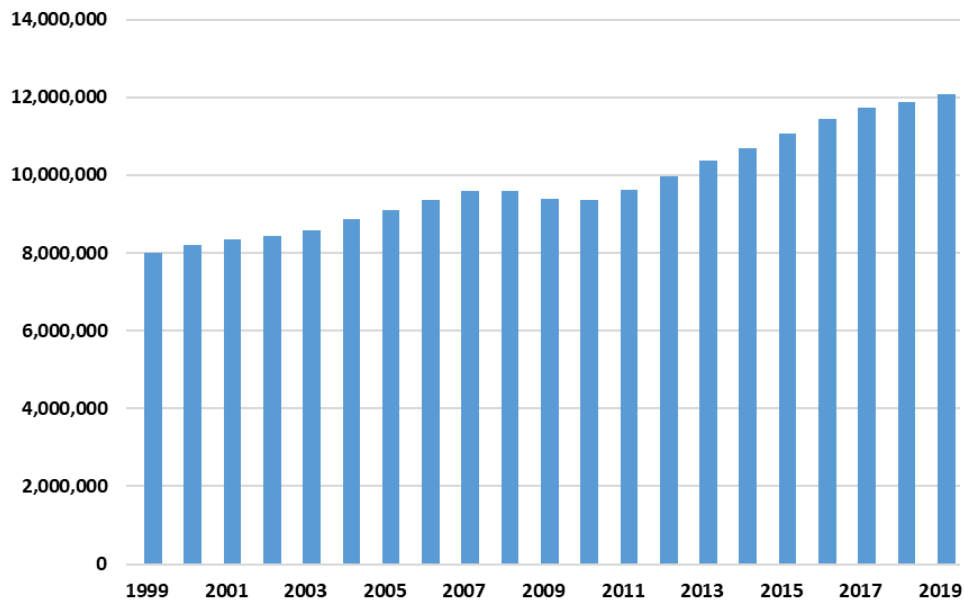
**FIGURE 2: FULL- AND LIMITED-SERVICE RESTAURANT SALES, 1993–2020**



Source: Census Bureau, Estimates of Monthly Retail and Food Service Sales.

The food services sector represented 12.1 million workers nationally in 2019, or 8% of total employment (Figure 3). Employment grew 1.6% in 2019.

**FIGURE 3: FOOD SERVICES AND DRINKING PLACES EMPLOYMENT, 1998–2018**



Source: Bureau of Labor Statistics, CES.

## ABOUT THE PARTICIPATING RESTAURANTS

The 131 responding restaurants represented every region of the United States. The Rocky Mountain region garnered the most responses — 31% of the total (Table 1). Three regions represented over half (65%) of the responses—the Rocky Mountain region (31%), the Southeast region (18%), and the Far West region (16%). A plurality of responses came from restaurants in three states—Colorado (29%), Minnesota (8%), and California (8%) (Table 3). The 131 respondents represented a total of 260 individual restaurant locations, with 110 (40.6%) in Colorado.

**TABLE 1: REGIONAL LOCATIONS OF PARTICIPATING RESTAURANTS**

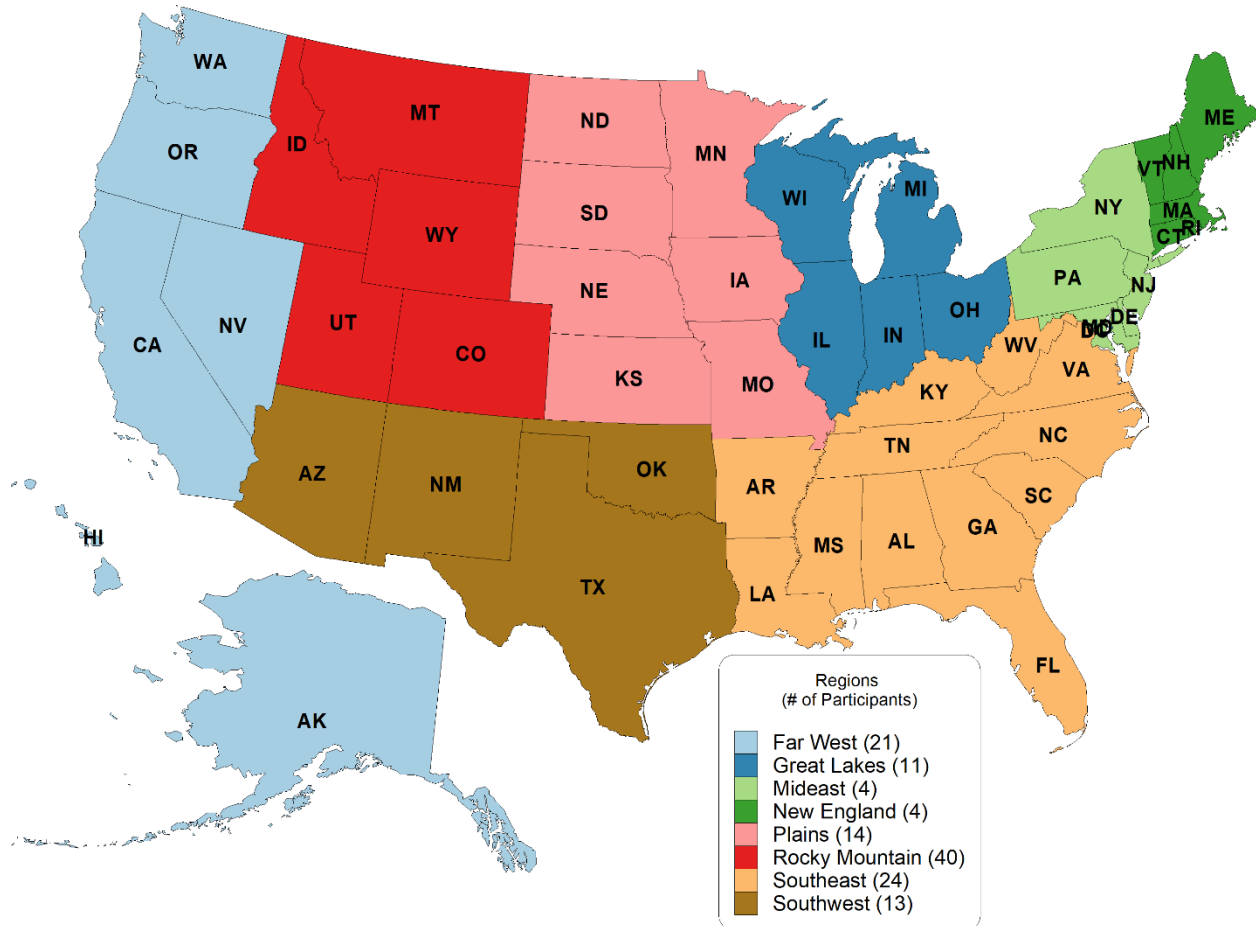
Region	Responding Restaurants	Percent of Total
Rocky Mountain	40	31%
Southeast	24	18%
Far West	21	16%
Plains	14	11%
Southwest	13	10%
Great Lakes	11	8%
New England	4	3%
Mideast	4	3%
<b>Total</b>	<b>131</b>	<b>100%</b>

The 110 responding restaurants that provided employment data represented 6,850 employees, with the Rocky Mountain and Far West regions representing 57% of total employees (Table 2).

**TABLE 2: EMPLOYEES BY REGION**

Region	Employees	Percent of Total
Rocky Mountain	2,334	34.1%
Far West	1,560	22.8%
Southwest	1,037	15.1%
Southeast	999	14.6%
Great Lakes	381	5.6%
Plains	330	4.8%
Mideast	132	1.9%
New England	77	1.1%
<b>Total</b>	<b>6,850</b>	<b>100%</b>

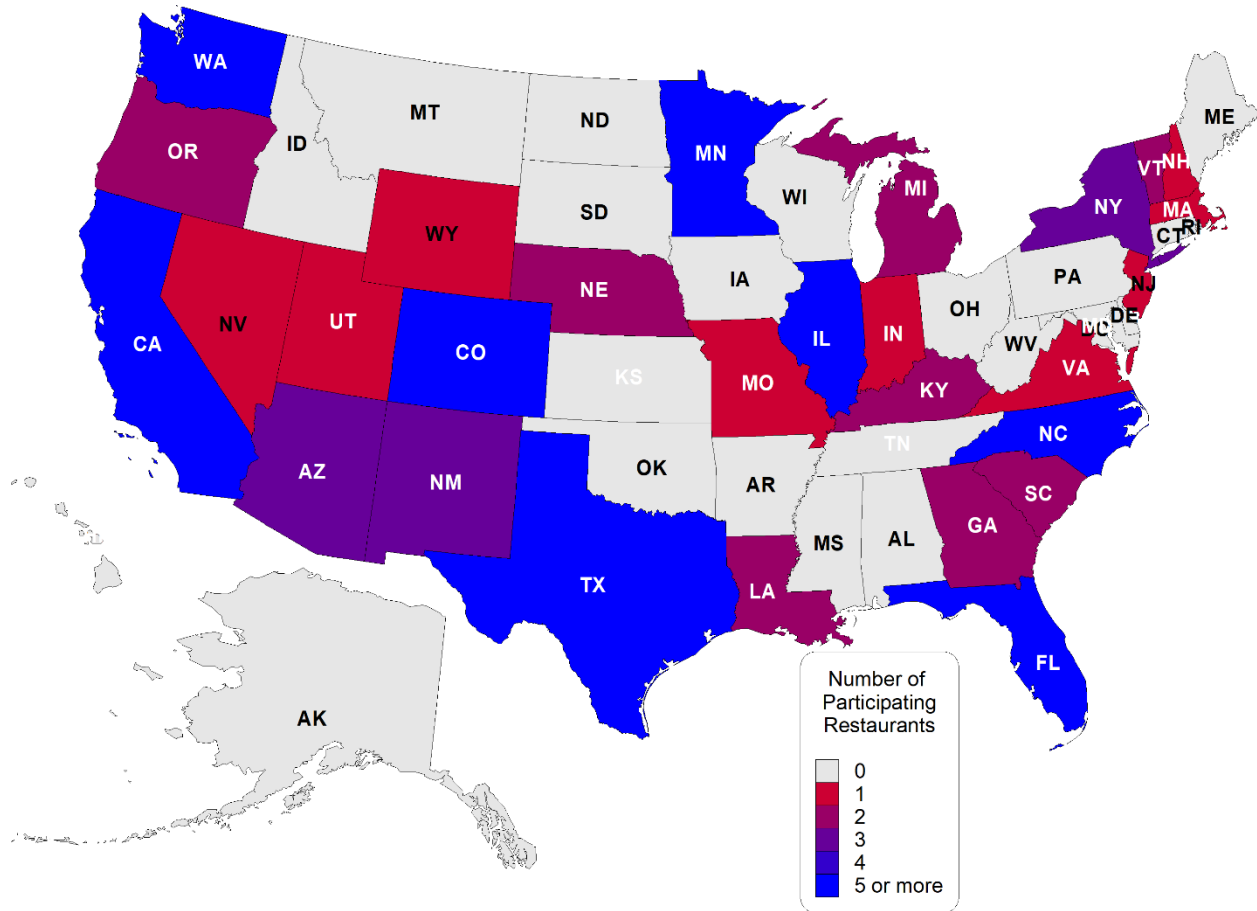
**FIGURE 4: RESTAURANT PARTICIPATION BY REGION**



**TABLE 3: STATE LOCATIONS OF PARTICIPATING RESTAURANTS**

State	Responding Restaurants	Percent of Total
Colorado	38	29%
Minnesota	10	8%
California	10	8%
North Carolina	9	7%
Washington	8	6%
Illinois	8	6%
Texas	7	5%
Florida	6	5%
Arizona	3	2%
New Mexico	3	2%
New York	3	2%
Georgia	2	2%
Kentucky	2	2%
Michigan	2	2%
Nebraska	2	2%
Oregon	2	2%
South Carolina	2	2%
Vermont	2	2%
Louisiana	2	2%
Indiana	1	1%
Iowa	1	1%
Massachusetts	1	1%
Missouri	1	1%
Nevada	1	1%
New Hampshire	1	1%
New Jersey	1	1%
Utah	1	1%
Virginia	1	1%
Wyoming	1	1%
<b>Total</b>	<b>131</b>	<b>100%</b>

**FIGURE 5: RESTAURANT PARTICIPATION BY STATE**



By restaurant type, 66% of responses were from Fine Dining restaurants, followed by Casual Dining (18%) and Fast Casual (9%) (Table 4). These three types of restaurants also represented the majority of employees, with 91% of the total. Food Service (2%), Specialty Grocer/Lunch Counter (1%), and Other (5%) restaurants recorded the lowest participation. Restaurants in the Other category include cooking oil distributors, food trucks, catering, and quick service.

**TABLE 4: TYPES OF PARTICIPATING RESTAURANTS**

Restaurant Type	Responding Restaurants	Percent of Total	Employees Represented	Percent
Fine Dining	86	66%	2,950	43%
Casual Dining	23	18%	2,256	33%
Fast Casual	12	9%	1,042	15%
Other	6	5%	127	2%
Food Service	3	2%	470	7%
Specialty Grocer/Lunch Counter	1	1%	5	0%
<b>Total</b>	<b>131</b>	<b>100%</b>	<b>6,850</b>	<b>100%</b>

The 110 responding restaurants reported total 2019 revenue of \$452 million and average food costs of 31.1% (simple average) of revenue (excluding beverage purchases); weighted average food costs were 19.3% of total food sales. Food costs as a percent of revenue ranged from 12% to a high of 63%.

Total food purchases for the 131 participating restaurants was \$87.1 million in 2019. Approximately 41% of total purchases were made in state, while 55% were made in the region (includes state and regional purchases). Good food purchases totaled \$68.5 million, with 47.6% made in state and 63.3% made in the region. The 131 participating restaurants make 39% of their total food purchases from national sources, 39% from local in-state sources, 14% from regional sources, and 8% from international sources (Table 5). The New England region sources the highest amount of food from in-state sources (71%), followed by the Mideast region (66%), and the Far West region (51%).

**TABLE 5: SOURCE OF FOOD PURCHASES BY REGION**

Region	In State	Regional	National	International
Far West	51%	25%	16%	7%
Great Lakes	29%	18%	48%	6%
Mideast	66%	9%	22%	2%
New England	71%	18%	8%	2%
Plains	38%	30%	28%	4%
Rocky Mountain	37%	6%	51%	5%
Southeast	44%	20%	26%	10%
Southwest	28%	8%	62%	1%
<b>Total</b>	<b>41%</b>	<b>14%</b>	<b>39%</b>	<b>6%</b>

The 131 participating restaurants reported that a weighted average of 78.6% (\$68.5 million) of total food purchases were good food purchases (

Table 6). The percentage was greatest for participating Other (93%), Specialty Grocer/Lunch Counter (88%), Fine Dining (86%), and Fast Casual restaurants (84%). Restaurants reported the greatest percentage of good food purchases in the Fish and Seafood (88%) and the Meat and Poultry (88%) segments. National purchases (includes state, regional, and national) totaled \$82.2 million, with restaurants reporting that a weighted average of 78.5% (\$64.5 million) were good food purchases. Nationally, restaurants reported the greatest percentage of good food purchases in the Meat and Poultry (87.4%) and Fish and Seafood (86.5%) segments. The 40 restaurants in the Rocky Mountain region represented the most food purchases (\$33.7 million) and good food purchases (\$23.9 million) nationally.

**TABLE 6: TOTAL GOOD FOOD PURCHASES BY RESTAURANT TYPE**

Type	Bread and Grain	Dairy and Eggs	Fruits and Vegetables	Meat and Poultry	Fish and Seafood	Other	Total
Casual Dining	72%	64%	70%	94%	69%	64%	77%
Fast Casual	87%	87%	63%	97%	100%	78%	84%
Fine Dining	80%	82%	85%	88%	91%	79%	86%
Food Service	62%	69%	51%	63%	86%	27%	55%
Specialty Grocer/Lunch Counter	93%	87%	86%	92%	-	86%	88%
Other	70%	99%	91%	98%	88%	81%	93%
<b>Total</b>	<b>76%</b>	<b>75%</b>	<b>74%</b>	<b>88%</b>	<b>88%</b>	<b>64%</b>	<b>79%</b>

Note: Total includes reported state, regional, national, and international purchases.

Regions that reported the highest percentage of total good food purchases included the Plains (94%) and the New England region (91%), with the Rocky Mountain region reporting 71% (Table 7).

**TABLE 7: TOTAL GOOD FOOD PURCHASES BY RESTAURANTS IN EACH REGION**

Region	Bread and Grain	Dairy and Eggs	Fruits and Vegetables	Meat and Poultry	Fish and Seafood	Other	Total
Far West	91%	86%	75%	87%	97%	80%	85%
Great Lakes	54%	85%	89%	87%	73%	63%	81%
Mideast	33%	98%	67%	91%	100%	75%	78%
New England	98%	95%	86%	95%	99%	67%	91%
Plains	86%	90%	97%	94%	98%	87%	94%
Rocky Mountain	67%	69%	67%	83%	84%	51%	71%
Southeast	65%	73%	74%	95%	96%	76%	85%
Southwest	77%	65%	67%	92%	66%	59%	77%
<b>Total</b>	<b>76%</b>	<b>75%</b>	<b>74%</b>	<b>88%</b>	<b>88%</b>	<b>64%</b>	<b>79%</b>

Note: Total includes reported state, regional, national, and international purchases.

Regional purchases totaled \$47.9 million, with a reported \$43.4 (90.6%) million in good food purchases. The 40 restaurants in the Rocky Mountain region represented the largest amount of regional purchases (\$15.5 million) and regional good food purchases (\$13.6 million). Compared to total purchases, a greater percentage of *regional* purchases were good food purchases (90.6%), with all restaurant types, except for Fast Casual and Other, reporting over 90% of total purchases as good food purchases (

Table 8). Regionally, restaurants reported the greatest percentage of good food purchases in the Fish and Seafood (98%) and the Meat and Poultry (96%) segments.

**TABLE 8: REGIONAL GOOD FOOD PURCHASES BY RESTAURANT TYPE**

Type	Bread and Grain	Dairy and Eggs	Fruits and Vegetables	Meat and Poultry	Fish and Seafood	Other	Total
Casual Dining	93%	95%	52%	98%	100%	81%	90%
Fast Casual	90%	95%	65%	96%	100%	86%	89%
Fine Dining	85%	84%	89%	94%	98%	91%	91%
Food Service	97%	88%	96%	96%	100%	74%	93%
Specialty Grocer/Lunch Counter	100%	83%	89%	91%	-	89%	91%
Other	70%	98%	95%	100%	100%	87%	88%
<b>Total</b>	<b>89%</b>	<b>89%</b>	<b>83%</b>	<b>96%</b>	<b>98%</b>	<b>87%</b>	<b>91%</b>

Note: Total includes reported state and regional purchases.

Good food purchases as a percent of total purchases within *region* were highest for the Plains, New England, Far West, and Southeast regions (each 90% or more) (Table 9). The regional results may be skewed by the types of restaurants reporting by region.

**TABLE 9: REGIONAL GOOD FOOD PURCHASES BY RESTAURANTS IN EACH REGION**

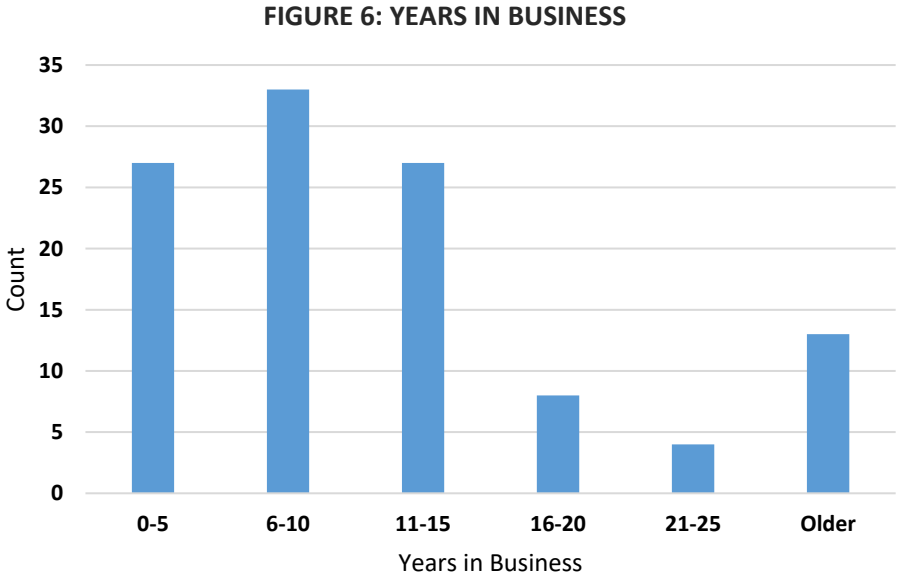
Region	Bread and Grain	Dairy and Eggs	Fruits and Vegetables	Meat and Poultry	Fish and Seafood	Other	Total
Far West	96%	95%	80%	99%	100%	85%	93%
Great Lakes	70%	90%	95%	98%	100%	86%	94%
Mideast	29%	100%	97%	90%	100%	100%	80%
New England	98%	95%	90%	94%	100%	83%	94%
Plains	85%	92%	96%	96%	94%	87%	94%
Rocky Mountain	89%	81%	82%	94%	90%	88%	88%
Southeast	60%	91%	88%	95%	100%	96%	92%
Southwest	99%	95%	63%	96%	98%	69%	88%
<b>Total</b>	<b>89%</b>	<b>89%</b>	<b>83%</b>	<b>96%</b>	<b>98%</b>	<b>87%</b>	<b>91%</b>

Note: Region includes the sum of local and regional purchases.

This cohort of restaurants has been in business an average of 12.5 years, with a median age of 10 years. Almost one-fourth (24.1%) have been in business for 5 years or less and 53.6% have been in business for 10 years or less (Figure 6). By restaurant type, Food Service restaurants had the highest average age (37.3 years) and Fine Dining restaurants had the lowest average age (11 years). Participating restaurants from



the Midwest region have been in business the longest, with an average age of 20.8 years, while restaurants in the Southwest region are the youngest, with an average age of 8.4 years.



Almost half (49.6%) of participating restaurants reported being a female or minority owned business, and 10.2% reported being co-owned (n=127). By restaurant type, 4 out of 6 in the Other category and 7 out of 12 in the Fast Casual category were female owned. Over 41% of the 131 respondents reported having a female Executive Chef, Culinary Director, CEO, or owner, and 82.4% reported being white, nonhispanic (Table 10). The majority of restaurants in the Other category also reported having a female Executive Chef, Culinary Director, CEO, or owner.

**TABLE 10: RACE/ETHNICITY OF EXECUTIVE CHEF/CULINARY DIRECTOR/CEO/OWNER**

Race/Ethnicity	Percentage
White	82%
Other/ Prefer not to answer	14%
Asian	2%
Hispanic/Latino	1%
Black/African-American	1%
Native Hawaiian/Other Pacific Islander	1%

Participating restaurants were asked about their awards and membership in various organizations. Approximately 61.1% of participating restaurants reported being a Slow Food USA member, 39.7% are members of the Chefs Collaborative, and 42.7% are members of the James Beard Foundation SmartCatch Program (Table 11). Additionally, 18.3% of participating restaurants are James Beard Foundation award winners (9.6% were finalists; 12.8% were semi-finalists) and 34.4% are alums of the James Beard

Foundation Chefs Boot Camp for Policy and Change. Over one-fourth of restaurants are Women Chefs and Restaurateurs members. Additionally, 71.4% of restaurants in the Boulder and Denver metropolitan areas participate in EatDenver. Almost one-fifth of the respondents reported involvement elsewhere, ranging from local associations (e.g., Good Work Austin, Missouri Restaurant Association) to national organizations (e.g., Les Dames d’Escoffier, JBF WEL Program, Seafood Watch Blue Ribbon Task Force).

**TABLE 11: AWARDS AND MEMBERSHIP**

Awards and Membership	Percentage
James Beard Foundation Award Winner (not finalist or semi-finalist)	18.3%
JBF Chefs Boot Camp for Policy and Change Alumni	34.4%
JBF SmartCatch Program	42.7%
Chefs Collaborative Member	39.7%
Slow Food USA Member	61.1%
WCR - Women Chefs and Restaurateurs Member	28.2%

Restaurants reported a wide range nationally in the hourly rate paid to both non-tipped employees and tipped employees. The lowest starting pay for non-tipped employees (e.g., dishwasher) averaged \$12.80 per hour from the 108 responding restaurants, while the lowest hourly starting pay for tipped employees (including the tip credit), averaged \$9.07 from the 100 responses (Table 12). Restaurants in the Other category paid above average wages for non-tipped and tipped employees, with wages of \$13.40 and \$12.50, respectively. For most businesses (79.8%), overtime pay begins at 40 hours per week, but some (10.1%) reported overtime pay after 8 hours per day (the remainder either reported a blend of overtime pay thresholds, or responded “not applicable”).

**TABLE 12: STARTING WAGES**

	Non-tipped Employees Lowest Starting Wage	Tipped Employees Lowest Starting Wage
Average	\$12.80	\$9.07
Median	\$12.00	\$9.00
Maximum	\$30.00	\$25.00
Minimum	\$8.00	\$2.13
Number of Responses	108	100

Across all responding restaurants, an average 40.2% of employees (front of the house and back of the house) were part-time, 50% of restaurant employees were female, and 31.5% were people of color. Restaurants in the Casual Dining category had the highest percent of part-time workers with 56.5%, while Fast Casual had the lowest at 34.5%. Food Service, Specialty Grocer/Lunch Counter, Other, Fast Casual, and Casual Dining restaurants had more female employees than average, and Casual Dining, Food Service, and Fast Casual, and Other restaurants employed more people of color than average.

Approximately 79% of responding restaurants reported providing access to health insurance to employees, some of which exclusively offer benefits to management. Approximately 67% of the 112 responding restaurants reported a time-off policy for all employees (full and part time) that can be used for sick time, also occasionally reserved for management. Restaurants also reported offering many other benefits to employees, including retirement plans, meals, discounts, and other perks. An official sexual harassment policy is in place for 92.9% of the 113 responding restaurants.

## ECONOMIC CONTRIBUTION

The 131 participating restaurants in the Good Food 100 reported spending \$87.1 million on bread and grains, dairy and eggs, fish and seafood, meat and poultry, fruits and vegetables, and other miscellaneous food items in 2019. This group of businesses reported total 2019 revenue of \$452 million. Restaurants reported food costs of 19.3% of total food sales (excluding beverage purchases).<sup>2</sup> Most (94%) of the food purchases were domestic, bringing the U.S. total to \$82.2 million. The \$82.2 million had a \$264.5 million economic impact on the nation, including the direct, indirect, and induced impact of the purchases (Table 13). This excludes the impact of overall business operations, ranging from the purchase of alcohol to labor and rent. Good food purchases totaled approximately \$68.5 million (78.6% of total purchases), most of which (\$64.5 million) were domestic direct purchases, resulting in economic benefits of \$208.2 million (including direct, indirect, and induced impacts) (Table 14).

**TABLE 13: ECONOMIC CONTRIBUTION OF DOMESTIC FOOD PURCHASES, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	416	\$16.7	\$23.8	\$82.2
Indirect Effect	537	\$29.1	\$46.5	\$114.3
Induced Effect	413	\$21.4	\$38.1	\$68.1
<b>Total Effect</b>	<b>1,366</b>	<b>\$67.3</b>	<b>\$108.3</b>	<b>\$264.5</b>

Note: Components may not sum exactly to the total due to rounding.

**TABLE 14: ECONOMIC CONTRIBUTION OF DOMESTIC GOOD FOOD PURCHASES, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	328	\$13.0	\$18.6	\$64.5
Indirect Effect	426	\$22.9	\$36.5	\$90.4
Induced Effect	324	\$16.8	\$29.8	\$53.3
<b>Total Effect</b>	<b>1,078</b>	<b>\$52.7</b>	<b>\$84.9</b>	<b>\$208.2</b>

<sup>2</sup>The 19.3% represents a weighted average based on total food purchases. The simple average of food costs totaled 31.1% of total food sales.

By segment, the Fine Dining restaurants reported the greatest total domestic food purchases (\$34.1 million), and hence, had the greatest economic impact (\$105.2 million) (Table 15). This segment also reported the greatest total of domestic good food purchases—\$29.2 million, which translated to \$89.8 million in total economic benefits (Table 16).

**TABLE 15: TOTAL ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY RESTAURANT TYPE, 2019**

Type	Direct Output (\$Millions)	Total Output (\$Millions)
Fine Dining	\$34.1	\$105.2
Casual Dining	\$18.2	\$60.9
Fast Casual	\$11.0	\$36.3
Other	\$18.9	\$62.1
<b>Total</b>	<b>\$82.2</b>	<b>\$264.5</b>

**TABLE 16: TOTAL ECONOMIC CONTRIBUTION OF GOOD FOOD PURCHASES BY RESTAURANT TYPE, 2019**

Type	Direct Output (\$Millions)	Total Output (\$Millions)
Fine Dining	\$29.2	\$89.8
Casual Dining	\$14.0	\$47.5
Fast Casual	\$9.3	\$31.1
Other	\$12.0	\$39.8
<b>Total</b>	<b>\$64.5</b>	<b>\$208.2</b>

**TABLE 17: REGIONAL ECONOMIC CONTRIBUTION OF GOOD FOOD PURCHASES, 2019**

Region	Regional Impact on Region		Regional Impact on Nation	
	Direct Output (Millions)	Total Output (Millions)	Direct Output (Millions)	Total Output (Millions)
Far West Region	\$13.5	\$29.1	\$15.3	\$49.0
Great Lakes Region	\$2.7	\$5.6	\$4.7	\$14.7
Midwest Region	\$0.9	\$1.8	\$1.2	\$4.0
New England Region	\$1.4	\$2.5	\$1.5	\$4.7
Plains Region	\$1.9	\$4.1	\$2.6	\$8.2
Rocky Mountain Region	\$13.6	\$27.7	\$23.9	\$77.9
Southeast Region	\$6.3	\$13.2	\$8.1	\$25.1
Southwest Region	\$3.0	\$6.8	\$7.2	\$24.6

## QUALITATIVE RESPONSES

This report quantifies the economic contribution of the food supply chain of restaurants participating in the Good Food 100. In addition to food purchases, restaurants also shared employment numbers, commented on the definition of good food, reported other sustainable practices that are a focus within their restaurants, and challenges for their employees.

Restaurants noted other sustainable practices within their businesses. Nearly every responding restaurant reported recycling (92.4%) and using eco-friendly paper products and carryout containers (92.4%) was part of their sustainable practices (Table 18). Around three out of four restaurants reported composting and using eco-friendly cleaning supplies, and over half reported using CFL or LED lighting, contracting with other sustainably minded businesses, offering a plant-forward or plant-based menu, tracking food waste, reducing meat on the menu, and low-flush toilets.

**TABLE 18: OTHER SUSTAINABLE PRACTICES**

Practice	Total
Recycling	92.4%
Eco-Friendly Paper Products and Carryout Containers	92.4%
Eco-Friendly Cleaning Supplies	76.3%
Composting	78.6%
CFL or LED Lighting	64.1%
Contracting with Other Sustainably Minded Businesses	55.7%
Plant-Forward or Plant-Based Menu	55.0%
Track Food Waste	64.1%
Reducing Meat on Menu or Meat Portions on the Plate	39.7%
Low-Flush Toilets	53.4%
EPA Energy Star-Rated Refrigerators	57.3%
Renewable Energy	35.9%
Donate Leftover Food	35.1%
Reducing Food Prep Waste	11.5%
Water-Saving Technology	6.9%

**TABLE 19: OTHER SUSTAINABLE PRACTICES BY RESTAURANT TYPE**

Practice	Fine Dining	Casual Dining	Fast Casual	Food Service	Specialty Grocer/ Lunch Counter	Other	Total
Recycling	89%	71%	100%	100%	100%	100%	<b>90%</b>
Eco-Friendly Paper Products and Carryout Containers	93%	79%	92%	100%	100%	88%	<b>90%</b>
Composting	82%	54%	92%	67%	0%	75%	<b>76%</b>
Eco-Friendly Cleaning Supplies	84%	58%	77%	100%	100%	75%	<b>78%</b>
CFL or LED Righting	64%	46%	69%	100%	100%	50%	<b>62%</b>
Track Food Waste	53%	67%	62%	100%	0%	50%	<b>57%</b>
Plant-Forward or Plant-Based Menu	55%	54%	77%	100%	0%	50%	<b>58%</b>
Contracting with Other Sustainably Minded Businesses	68%	46%	54%	33%	100%	50%	<b>61%</b>
EPA Energy Star-Rated Refrigerators	45%	33%	38%	33%	100%	38%	<b>42%</b>
Low-Flush Toilets	58%	46%	54%	67%	0%	25%	<b>53%</b>
Reducing Meat on Menu or Meat Portions on the Plate	62%	42%	31%	100%	0%	38%	<b>54%</b>
Donate Leftover Food	32%	13%	31%	100%	100%	50%	<b>31%</b>
Renewable Energy	29%	38%	31%	67%	0%	50%	<b>33%</b>
Reducing Food Prep Waste	13%	21%	0%	0%	0%	0%	<b>12%</b>
Water-Saving Technology	9%	8%	0%	0%	0%	0%	<b>7%</b>

Chefs were asked to rank priorities for their restaurant. Overall, worker welfare was the highest priority for chefs, followed by food quality and taste and supporting the local and regional economy.

**TABLE 20: PRIORITIES**

Topic	Rank
Worker Welfare	1
Food Quality/Taste	2
Supporting Local/Regional Economy	3
Environmental Sustainability	4
Animal Welfare	5
Food Cost	6

The majority (77%) of restaurants responded that they were interested in hosting a Good Food 100 Restaurants event in their restaurant or community.

In a subjective question, participants were asked how important good food is to their brand. All restaurant types rated good food at 9.2 or above (on a 10-point scale), while individual restaurants (regardless of type) rated Good Food’s brand importance between 5 and 10, with an average of 9.7 (Table 21). Participants similarly ranked the brand importance of an ethical, sustainably minded supply chain.

**TABLE 21: IMPORTANCE TO BRAND (SCALE 1–10)**

Restaurant Type	Good Food	Purchasing from Sustainably Minded Companies
Casual Dining	9.2	9.2
Fast Casual	10	9.8
Fine Dining	9.6	9.6
Food Service	10	10
Specialty Grocer/Lunch Counter	10	8
Other	9.8	9.8
<b>Average</b>	<b>9.6</b>	<b>9.6</b>

Restaurants were asked about the greatest challenges facing their employees. The most common challenge for employees was finding affordable housing, cited by 82% of responding restaurants (Table 22). Healthcare costs were the second most commonly cited challenge (71%), followed by transportation costs (47%), childcare costs (28%), and commuting time (21%).

**TABLE 22: BIGGEST CHALLENGES FOR EMPLOYEES**

Challenge	Companies	Percent
Affordable Housing	88	82.2%
Healthcare Costs	76	71.0%
Transportation Costs	50	46.7%
Childcare Costs	30	28.0%
Commuting Time	22	20.6%

Note: Number of responding restaurants is 107.

## CONCLUSION

In the fourth annual rating of good food restaurants, GFMN promoted a national survey of restaurants that collected food supply chain data. Data captured in the survey informed both the creation of the Good Food 100 rating and the estimation of the economic contribution from participating restaurants.

This study details the economic contribution of food purchases, including good food purchases, nationally and regionally, and by restaurant type. Overall, the economic contribution of food purchases by the 131 participating restaurants totaled \$264.5 million in 2019, of which \$208.2 million in economic benefits was derived from good food purchases.

## BIBLIOGRAPHY

U.S. Bureau of Economic Analysis. BEA Regions, <https://www.bea.gov/regional/docs/regions.cfm>, accessed August 14, 2020.

U.S. Bureau of Economic Analysis. Industry Data, [www.bea.gov](http://www.bea.gov), accessed August 14, 2020.

U.S. Bureau of Labor Statistics. Total Nonfarm Employment by Industry, [www.bls.gov](http://www.bls.gov), accessed August 14, 2020.

U.S. Census Bureau, Monthly & Annual Retail Trade, <https://www.census.gov/retail/index.html>, accessed September 19, 2020.



## APPENDIX 1: PARTICIPATING RESTAURANTS

The following 131 restaurants participated in the Good Food 100 by submitting data on food purchases.

**TABLE 23: PARTICIPATING GOOD FOOD 100 RESTAURANTS™**

Restaurant	Region	Type
626 on Rood	Rocky Mountain	Fine Dining
ALL DAY	Southeast	Casual Dining
Annette	Rocky Mountain	Fine Dining
AOC	Far West	Fine Dining
Bar Melusine	Far West	Fine Dining
Bar Santo	Great Lakes	Fine Dining
Barbette	Plains	Fine Dining
Bargello	Southeast	Fine Dining
Barolo Grill	Rocky Mountain	Fine Dining
Basta	Rocky Mountain	Fine Dining
Beast + Bottle	Rocky Mountain	Fine Dining
Billy D's Fried Chicken	Southeast	Other
Birchwood Cafe	Plains	Other
Bistro Shirlee	Far West	Fine Dining
Bistro Vendôme	Rocky Mountain	Fine Dining
Blackbelly	Rocky Mountain	Fine Dining
Book Club	Plains	Fine Dining
Border Grill Downtown	Far West	Casual Dining
Border Grill Mandalay Bay	Far West	Casual Dining
Boulder Valley School District School Food Project	Rocky Mountain	Food Service
Bouquet Restaurant	Southeast	Fine Dining
Bread & Pickle	Plains	Other
Brutø	Rocky Mountain	Fine Dining
Bubby's Pie Co Inc.	Mideast	Casual Dining
Button & Co. Bagels*	Southeast	Fast Casual
Campo at Los Poblanos	Southwest	Fine Dining
Cart-Driver	Rocky Mountain	Casual Dining
Cavalryman Steakhouse	Rocky Mountain	Casual Dining
Cedar's Cafe	Southeast	Casual Dining
Chattebox Brews	Plains	Casual Dining
Chook Charcoal Chicken	Rocky Mountain	Fast Casual
Clock Tower Grill	Mideast	Fine Dining
Coperta	Rocky Mountain	Fine Dining
Corinne's Place	Mideast	Other
Cress Restaurant	Southeast	Fine Dining
Crested Butte's Personal Chefs	Rocky Mountain	Other
Cúrate	Southeast	Fine Dining
Cured Restaurant	Southwest	Fine Dining

Decca	Southeast	Fine Dining
Deep Dive	Far West	Fine Dining
Dry Storage	Rocky Mountain	Fast Casual
Eden East Farm & Restaurant	Southwest	Other
Egg Restaurant	Mideast	Casual Dining
El Five	Rocky Mountain	Fine Dining
Epiphany Farms Restaurant	Great Lakes	Fine Dining
EVOO	New England	Fine Dining
Farm Burger	Southeast	Fast Casual
FIG	Southeast	Fine Dining
Floriole Bakery & Cafe	Great Lakes	Fast Casual
FnB Restaurant	Southwest	Fine Dining
Folk	Great Lakes	Casual Dining
Foreign & Domestic	Southwest	Fine Dining
Frasca Food and Wine	Rocky Mountain	Fine Dining
Frenchish	Southwest	Fine Dining
Fresh Thymes Eatery	Rocky Mountain	Fast Casual
Frontera Grill	Great Lakes	Fine Dining
Fruition Restaurant	Rocky Mountain	Fine Dining
Gardens of Salonica	Plains	Casual Dining
Gigi's Cafe	Plains	Fast Casual
Grana Wood Fired Foods	Far West	Fine Dining
Grand Central Bakery - Oregon	Far West	Fast Casual
Grand Central Bakery - Washington	Far West	Fast Casual
GreenFare Organic Cafe	Southeast	Fine Dining
Haymaker Restaurant	Southeast	Fine Dining
Hedge Row American Bistro	Great Lakes	Fine Dining
Hell's Backbone Grill & Farm	Rocky Mountain	Fine Dining
Hotel Vermont	New England	Fine Dining
Indigenous	Southeast	Fine Dining
Inn at Shelburne Farms	New England	Fine Dining
Lantern	Southeast	Fine Dining
Linger	Rocky Mountain	Fine Dining
L'Oca d'Oro	Southwest	Fine Dining
Lucques*	Far West	Fine Dining
Magpie Cafe	Far West	Fine Dining
Mattison's Forty-One Restaurant	Southeast	Fine Dining
Mercantile Dining & Provision	Rocky Mountain	Other
Milk & Honey	Plains	Fast Casual
Miller Union	Southeast	Fine Dining
Mosquito Supper Club	Southeast	Fine Dining
Mulvaney's B&L	Far West	Fine Dining
Next Door American Eatery - Colorado	Rocky Mountain	Casual Dining

Next Door American Eatery - Illinois	Great Lakes	Casual Dining
Nostrana	Far West	Fine Dining
Novel Restaurant	Plains	Fine Dining
Ophelia's Electric Soapbox	Rocky Mountain	Fine Dining
Pat's Tap	Plains	Casual Dining
Posana Restaurant	Southeast	Fine Dining
Prairie Plate Restaurant	Plains	Fine Dining
Red Stag Supperclub	Plains	Fine Dining
Reserve Wine & Food	Great Lakes	Fine Dining
Rioja	Rocky Mountain	Fine Dining
River and Woods	Rocky Mountain	Casual Dining
Ronin Farm & Restaurant	Southwest	Fine Dining
Root Down	Rocky Mountain	Fine Dining
Saba	Southeast	Fine Dining
Sabio On Main	Far West	Fine Dining
Safta Restaurant	Rocky Mountain	Fine Dining
Salt & Time Butcher Shop and Salumeria	Southwest	Casual Dining
Santo	Rocky Mountain	Fine Dining
Snooze an AM Eatery - Arizona	Southwest	Casual Dining
Snooze an AM Eatery - California	Far West	Casual Dining
Snooze an AM Eatery - Colorado	Rocky Mountain	Casual Dining
Snooze an AM Eatery - North Carolina	Southeast	Casual Dining
Snooze an AM Eatery - Texas	Southwest	Casual Dining
Spuntino	Rocky Mountain	Fine Dining
St. Kilian's Cheese Shop	Rocky Mountain	Specialty Grocer/Lunch Counter
Stoic & Genuine	Rocky Mountain	Fine Dining
The Bird	Plains	Fine Dining
The Breadfruit & Rum Bar	Southwest	Fine Dining
The Grove Cafe & Market	Southwest	Fast Casual
The Herbfarm Restaurant	Far West	Fine Dining
The Kitchen Bistro - Colorado	Rocky Mountain	Fine Dining
The Kitchen Bistro - Illinois	Great Lakes	Fine Dining
The Market Place Restaurant	Southeast	Fine Dining
The Ordinary	Southeast	Fine Dining
The Regional	Rocky Mountain	Fine Dining
The Walrus and the Carpenter	Far West	Fine Dining
The Whale Wins	Far West	Fine Dining
The Wolf's Tailor	Rocky Mountain	Fine Dining
Third Wave Cafe & Wine Bar	Southeast	Fine Dining
Thompson House Eatery	New England	Fine Dining
Tiny Diner	Plains	Casual Dining
Topolobampo	Great Lakes	Fine Dining
Twenty Five Lusk	Far West	Fine Dining

UC Davis Health	Far West	Food Service
Ultreia	Rocky Mountain	Fine Dining
University of Colorado Boulder Campus Dining Services	Rocky Mountain	Food Service
Vesta*	Rocky Mountain	Fine Dining
Vital Root	Rocky Mountain	Casual Dining
Willmott's Ghost	Far West	Fine Dining
XOCO	Great Lakes	Fine Dining
*Restaurant has closed.		

**APPENDIX 2: STATE GOOD FOOD ECONOMIC IMPACTS**

The state-level good food economic impacts are based on resident restaurants’ in-state purchases of good food (not total food purchases). The tables below only present the economic impact of good food purchases, and do not include the impact of restaurant operations. State impacts are presented if three or more restaurants (by separate brands) submitted data for the economic impact study.

**TABLE 24: ARIZONA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY ARIZONA RESTAURANTS, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	5	\$0.1	\$0.2	\$0.3
Indirect Effect	1	\$0.0	\$0.1	\$0.1
Induced Effect	1	\$0.0	\$0.1	\$0.1
<b>Total Effect</b>	<b>7</b>	<b>\$0.2</b>	<b>\$0.3</b>	<b>\$0.6</b>

Note: Sum may differ from total due to rounding.

**TABLE 25: CALIFORNIA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY CALIFORNIA RESTAURANTS, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	19	\$1.0	\$1.3	\$4.0
Indirect Effect	13	\$0.8	\$1.2	\$2.6
Induced Effect	10	\$0.5	\$1.0	\$1.6
<b>Total Effect</b>	<b>42</b>	<b>\$2.4</b>	<b>\$3.5</b>	<b>\$8.2</b>

Note: Sum may differ from total due to rounding.

**TABLE 26: COLORADO ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY COLORADO RESTAURANTS, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	51	\$2.4	\$3.0	\$11.5
Indirect Effect	44	\$2.2	\$3.2	\$7.1
Induced Effect	29	\$1.4	\$2.4	\$4.2
<b>Total Effect</b>	<b>124</b>	<b>\$6.0</b>	<b>\$8.6</b>	<b>\$22.8</b>

Note: Sum may differ from total due to rounding.

**TABLE 27: FLORIDA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY FLORIDA RESTAURANTS, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	4	\$0.1	\$0.2	\$0.5
Indirect Effect	2	\$0.1	\$0.1	\$0.2
Induced Effect	1	\$0.1	\$0.1	\$0.2
<b>Total Effect</b>	<b>7</b>	<b>\$0.2</b>	<b>\$0.4</b>	<b>\$1.0</b>

Note: Sum may differ from total due to rounding.

**TABLE 28: ILLINOIS ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY ILLINOIS RESTAURANTS, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	7	\$0.2	\$0.5	\$1.4
Indirect Effect	0	\$0.0	\$0.0	\$0.1
Induced Effect	-	\$0.0	\$0.0	\$0.0
<b>Total Effect</b>	<b>7</b>	<b>\$0.2</b>	<b>\$0.5</b>	<b>\$1.5</b>

Note: Sum may differ from total due to rounding.

**TABLE 29: MINNESOTA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY MINNESOTA RESTAURANTS, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	3	\$0.2	\$0.2	\$1.0
Indirect Effect	3	\$0.2	\$0.3	\$0.7
Induced Effect	2	\$0.1	\$0.2	\$0.3
<b>Total Effect</b>	<b>9</b>	<b>\$0.5</b>	<b>\$0.7</b>	<b>\$2.0</b>

Note: Sum may differ from total due to rounding.

**TABLE 30: NEW MEXICO ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY NEW MEXICO RESTAURANTS, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	7	\$0.2	\$0.2	\$0.7
Indirect Effect	2	\$0.1	\$0.1	\$0.2
Induced Effect	1	\$0.0	\$0.1	\$0.2
<b>Total Effect</b>	<b>11</b>	<b>\$0.3</b>	<b>\$0.4</b>	<b>\$1.1</b>

Note: Sum may differ from total due to rounding.

**TABLE 31: NORTH CAROLINA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY NORTH CAROLINA RESTAURANTS, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	8	\$0.3	\$0.4	\$1.4
Indirect Effect	4	\$0.2	\$0.3	\$0.7
Induced Effect	3	\$0.1	\$0.3	\$0.4
<b>Total Effect</b>	<b>16</b>	<b>\$0.7</b>	<b>\$1.0</b>	<b>\$2.6</b>

Note: Sum may differ from total due to rounding.

**TABLE 32: TEXAS ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY TEXAS RESTAURANTS, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	9	\$0.3	\$0.4	\$1.5
Indirect Effect	7	\$0.3	\$0.5	\$1.1
Induced Effect	4	\$0.2	\$0.3	\$0.5
<b>Total Effect</b>	<b>20</b>	<b>\$0.8</b>	<b>\$1.2</b>	<b>\$3.2</b>

Note: Sum may differ from total due to rounding.

**TABLE 33: WASHINGTON ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY WASHINGTON RESTAURANTS, 2019**

Impact Type	Employment	Labor Income (\$Millions)	Value Added (\$Millions)	Output (\$Millions)
Direct Effect	12	\$0.7	\$0.8	\$2.4
Indirect Effect	8	\$0.5	\$0.7	\$1.5
Induced Effect	6	\$0.3	\$0.5	\$0.9
<b>Total Effect</b>	<b>25</b>	<b>\$1.4</b>	<b>\$2.0</b>	<b>\$4.8</b>

Note: Sum may differ from total due to rounding.