



GOOD FOOD
MEDIA NETWORK

**2021 INDUSTRY
IMPACT REPORT**
COVID-19 SPECIAL EDITION

CONSULTING REPORT BY:
BUSINESS RESEARCH DIVISION
LEEDS SCHOOL OF BUSINESS
UNIVERSITY OF COLORADO BOULDER



LETTER FROM OUR CO-FOUNDER AND PRESIDENT

**TO SAY THIS WAS A CHALLENGING
YEAR FOR RESTAURANTS WOULD BE
AN EXTREME UNDERSTATEMENT.**



The pandemic was devastating and draining financially, mentally, and physically for so many in the restaurant and hospitality sector, and really exposed the vulnerabilities of the industry.

While measuring the impact of good food is at the heart of what we do, this year we felt it was also critical to look at the pandemic's toll on restaurants, their workforce, and operations. Despite the setbacks of this distressing year, our new Good Food Confidence Index, which benchmarks attitudes and outlooks for the restaurant industry, found that there is resounding optimism for the future.

As the world reopens, restaurants will reprise their role as important community beacons, reminding us why they are the heart and soul of our communities and the backbone of our local, regional, and national economy.

Congratulations to all the chefs and restaurants who participated in this year's survey, and are continuing to lead the industry forward. A special thank you to our longtime supporter Niman Ranch for making this possible. It's clear that **#goodfoodforall** is here to stay.

SARA BRITO
CO-FOUNDER/PRESIDENT
GOOD FOOD MEDIA NETWORK, A 501(C)(3) NONPROFIT

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GOOD FOOD

MEDIA NETWORK

ABOUT

Founded in 2016 in Denver, Colorado, **GOOD FOOD MEDIA NETWORK** is a 501(c)(3) nonprofit organization dedicated to educating and inspiring eaters by cultivating a conversation around the people and businesses changing the food system in order to grow the community for good food for all. We believe that good food is about more than just taste. Truly good food is good for every link in the food chain: the environment; plants and animals; farmers, ranchers, and fishermen; purveyors; restaurant workers; and eaters. The organization's marquee programs include the Good Food 100 Restaurants™ annual list of restaurants and corresponding Industry Impact Report; Eat. Drink. Think. Events; Good Food Farmer & Purveyor of the Year Award™, Good Food Farmer & Purveyor Guide™ and H.U.G.S. (Hospitality United in Good Service). For more information, please visit goodfoodmedianetwork.org. Follow Good Food 100 Restaurants on [Facebook](#), [Twitter](#) and [Instagram](#).



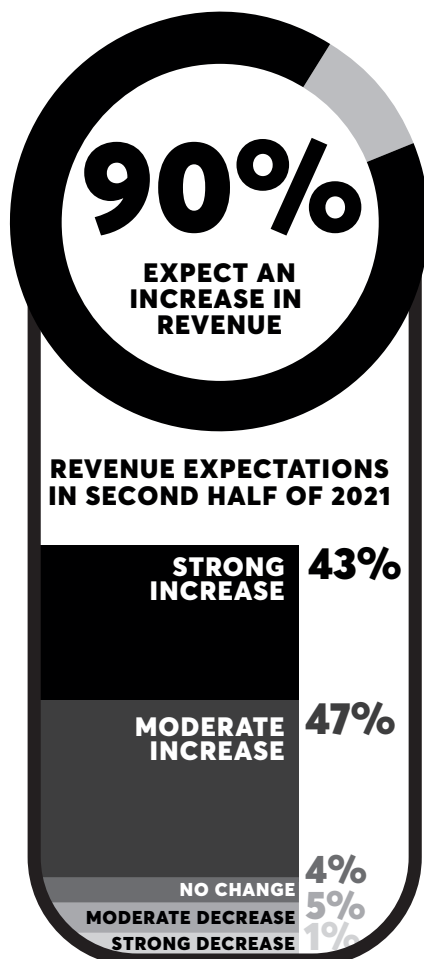
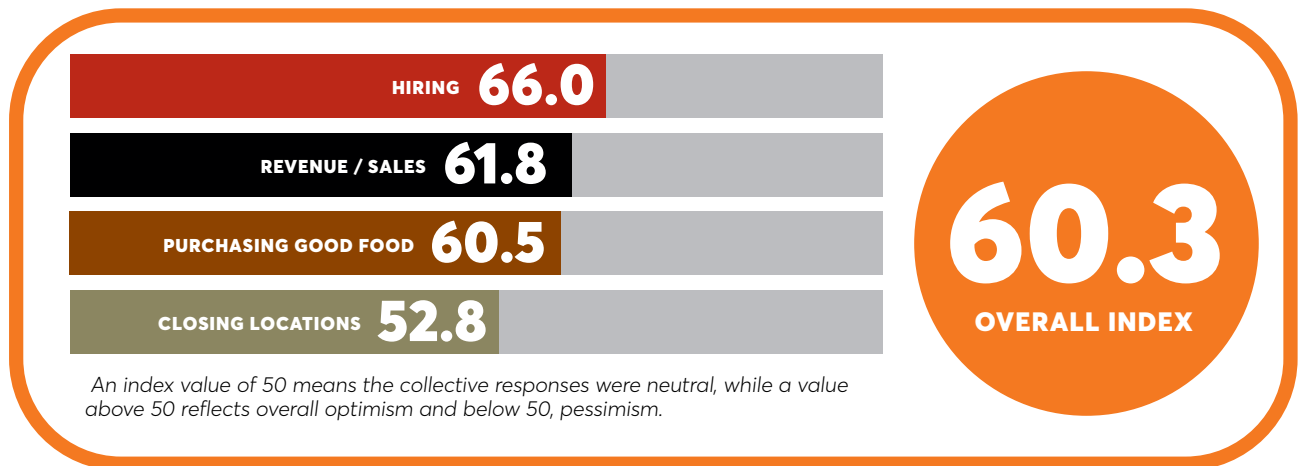
This year has shown how important all of our decisions are. We cannot have healthy businesses if we do not co-exist in a healthy community. How we treat our employees and where our food comes from are vital pieces of that puzzle.

— FIORE TEDESCO, L'OCA D'ORO
[SOUTHWEST REGION]



2021 GOOD FOOD CONFIDENCE INDEX

This year's survey measured the impact of COVID-19 on restaurants, their workforce and operations. Data captured resulted in the creation of the **GOOD FOOD CONFIDENCE INDEX** — a benchmark of attitudes and outlooks for the restaurant industry. **Numbers were rounded to the nearest percentage*





YEAR IN REVIEW

The Good Food Media Network was proud to host a series of virtual events featuring industry leaders including esteemed chefs, producers, purveyors and journalists focusing on discussions surrounding the culinary climate and the power of what's on our plates.

Thank you to all the featured speakers:

THE ECONOMICS OF GOOD FOOD: An inside look at the 2020 Good Food 100 Restaurants List

MODERATOR:

Sara Brito, Co-Founder, Good Food Media Network, Inc.

PANELISTS:

Katie Button, Cúrate, Asheville, NC

Steve Cockroft, Croft Family Farm, Kersey, CO

Brian Lewandowski, Executive Director, Business Research Division, Leeds School of Business, University of Colorado Boulder

Erika Polmar, COO, Independent Restaurant Coalition(IRC) - #SaveRestaurants

INCLUSION IN THE GOOD FOOD MOVEMENT: Why the Good Food movement cannot exist without diversity

MODERATOR:

Yorm Ackuaku, Host of Item 13: An African Food Podcast, Heritage Radio Network

PANELISTS:

Yemi Amu, Founder & Director, Oko Farms, NYC

Santana Diaz, Executive Chef, UC Davis Health

Eden Hagos, Founder, Black Foodie, Toronto, Canada

LEADING WITH LOVE: A conversation with Monty Moran, author, filmmaker, and former co-CEO of Chipotle

LIVE conversation about Monty's NEW book *Love is Free. Guac is Extra.: How Vulnerability, Empowerment, and Curiosity Built an Unstoppable Team.*

NAVIGATING THE NEW NORMAL: Good Food movement challenges and opportunities post COVID-19 and ways to address mental health issues in the restaurant industry

MODERATOR:

Kayla Stewart, Civil Eats

PANELISTS:

Rashad Armstead, Owner of the Black Food Collective, Winner of Chopped

Ron Mardesen, Farmer, Niman Ranch, Iowa

Patrick Mulvaney, Mulvaney's B&L, Sacramento, CA

Sicily Sierra, Co-Founder of Food + People, Former head chef of Colors

LOOKING AHEAD: 2021 Good Food trends and where does the movement go from here

MODERATOR:

Monica Burton, Editor of Eater

PANELISTS:

Francesca Chaney, Owner, Sol Sips (NYC)

Anne Cure, Cure Organic Farm (Boulder), 2020 Good Food Farmer & Purveyor of the Year - Rocky Mountain Region

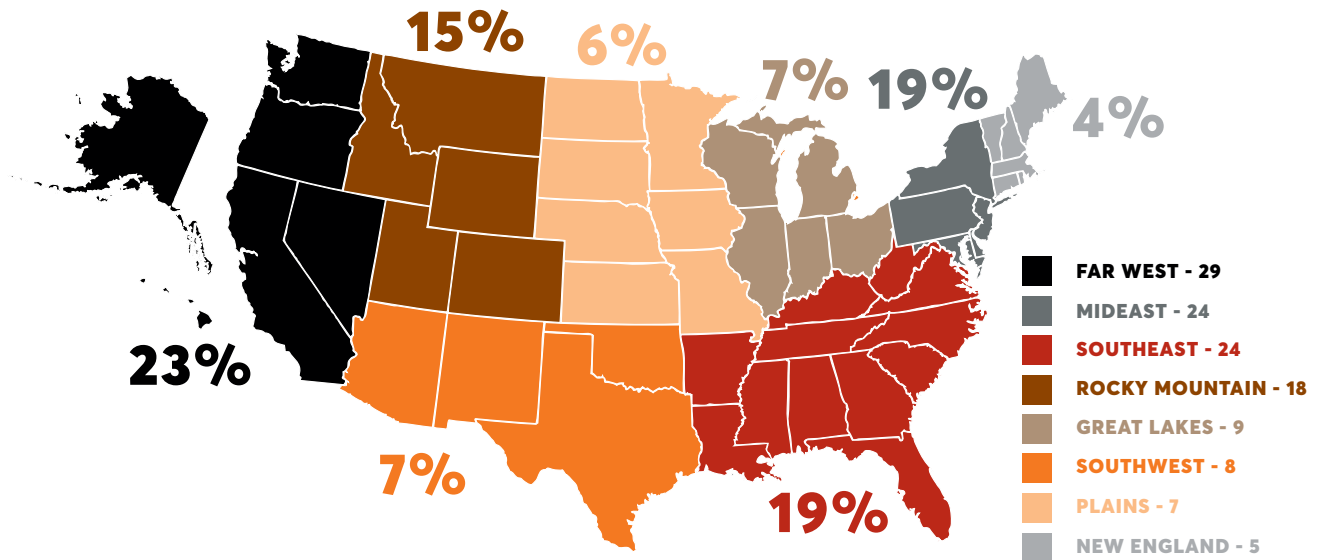
Rohani Foulkes, Owner, Folk Detroit (Detroit, MI)

Bobby Stuckey, Owner, Frasca Food and Wine (Boulder, CO)

PARTICIPANTS

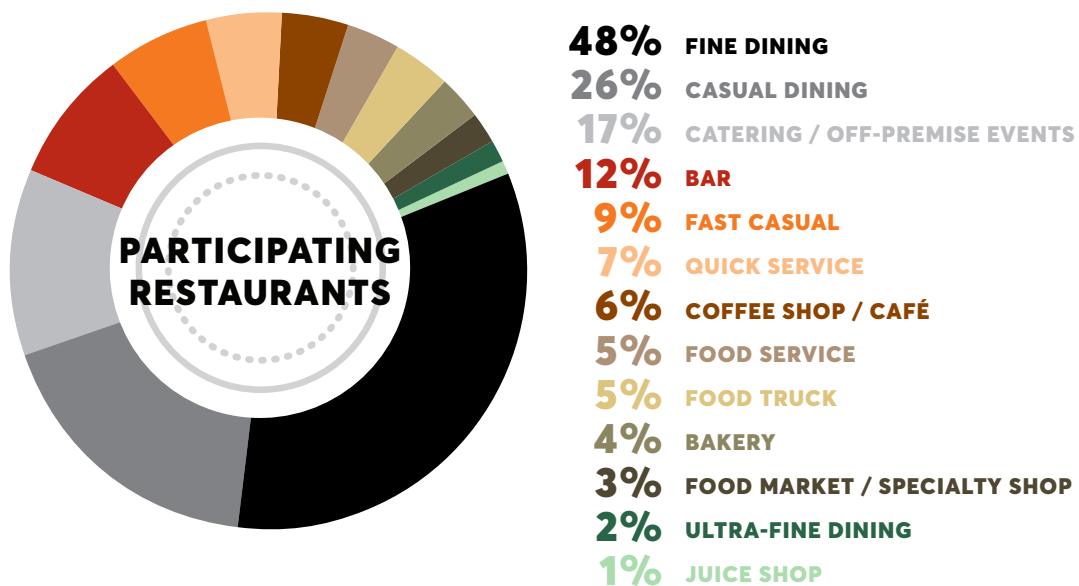
The 124 participating restaurants in the Good Food 100 List represented every region of the United States in 2021.

RESTAURANT PARTICIPATION BY REGION*



*Numbers were rounded to the nearest percentage

TYPES OF PARTICIPATING RESTAURANTS*



*Multiple responses could be chosen

BY THE NUMBERS



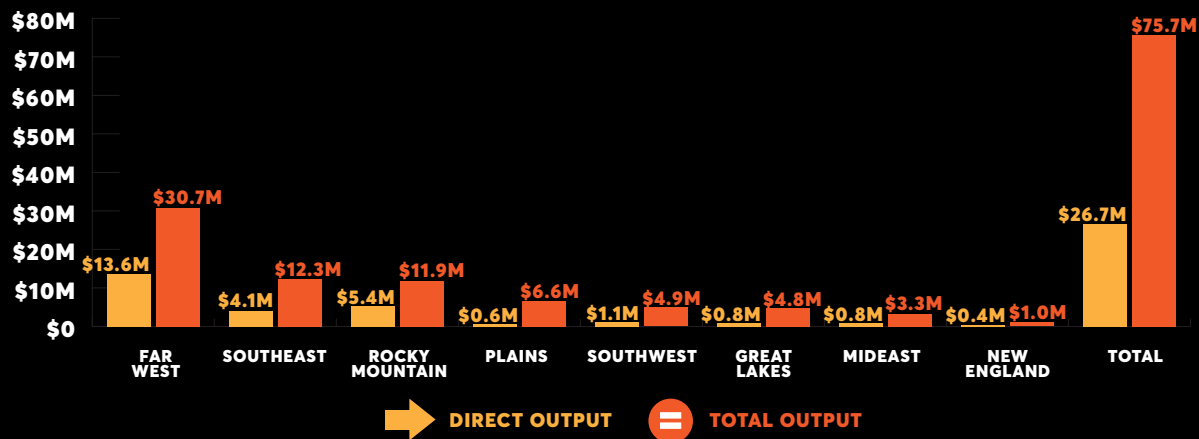
GOOD FOOD IS GOOD FOR EVERY LINK IN THE FOOD CHAIN: the environment; animals; farmers, ranchers and fishermen; purveyors; restaurants and eaters.

The 124 participating restaurant brands in the Good Food 100 represented 196 individual restaurant locations across 33 states. Participating restaurant brands reported spending \$26.7 million on food in 2020. Total food purchases had a \$75.7 million economic impact on the nation.

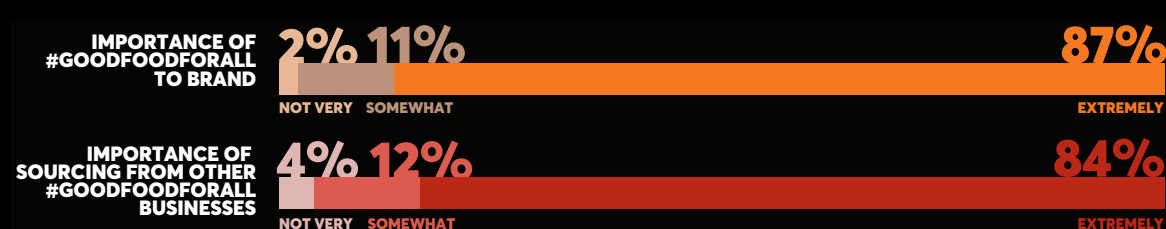
ECONOMIC CONTRIBUTION OF FOOD PURCHASES, 2020

IMPACT TYPE	EMPLOYMENT	LABOR INCOME (\$MILLIONS)	VALUE ADDED (\$MILLIONS)	OUTPUT (\$MILLIONS)
DIRECT EFFECT	107	\$4.8	\$7.9	\$26.7
INDIRECT EFFECT	156	\$8.7	\$14.4	\$34.3
INDUCED EFFECT	84	\$4.7	\$8.6	\$14.7
TOTAL EFFECT	347	\$18.3	\$30.9	\$75.7

TOTAL ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY REGION, 2020



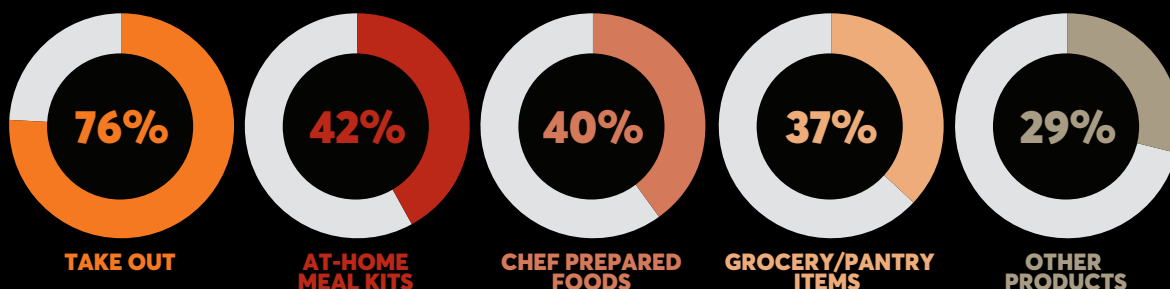
IMPORTANCE OF #GOODFOODFORALL TO BRAND



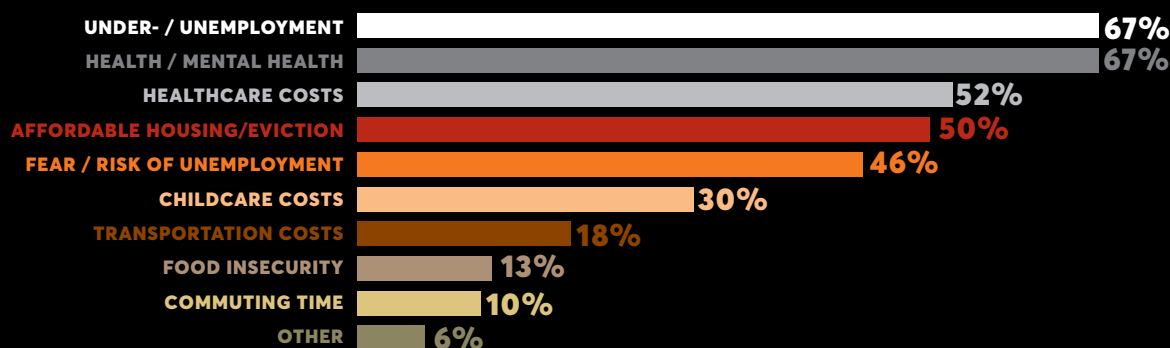
COVID-19 IMPACT

Despite ongoing adaptations, the pandemic caused revenues to decline precipitously, with average revenue per individual restaurant declining 50.4% in 2020 year-over-year to \$735,852, and average food purchases per brand falling in-kind. Total spending on Personal Protective Equipment (PPE) and other health and safety precautions totaled \$2.5 million in 2020 across 71 reporting restaurants.

CHANGES TO BUSINESS MODEL



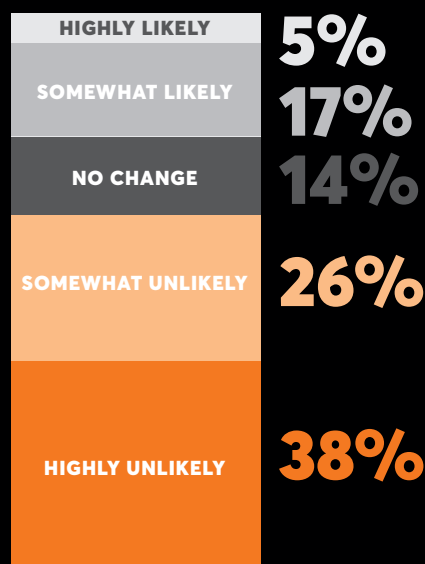
BIGGEST CHALLENGES FOR EMPLOYEES



PRIORITIES

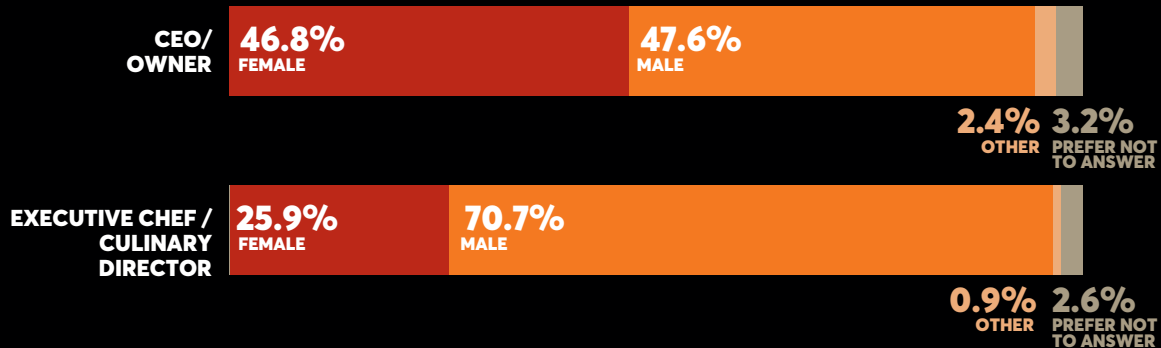
- 1 EMPLOYEE HEALTH AND WELFARE, INCLUDING MENTAL HEALTH
- 2 FOOD QUALITY / TASTE
- 3 SUPPORTING LOCAL/REGIONAL PRODUCERS & PURVEYORS
- 4 FOOD COST
- 5 ENVIRONMENTAL SUSTAINABILITY
- 6 ANIMAL WELFARE

EXPECTATIONS OF HAVING TO CLOSE LOCATIONS IN SECOND HALF OF 2021



OTHER DATA

GENDER OF CEO/OWNER AND EXECUTIVE CHEF/CULINARY DIRECTOR



RACE/ETHNICITY OF EXECUTIVE CHEF/CULINARY DIRECTOR/CEO/OWNER



WHAT #GOODFOODFORALL MEANS TO RESTAURANTS





2021 PARTICIPANTS

RESTAURANT	REGION	TYPE
158 MAIN	New England	Casual Dining
ANDY'S LATIN AMERICAN CUISINE	Southeast	Quick Service, Food Truck
ANZIE BLUE	Southeast	Casual Dining
AROMAS	Southeast	Fine Dining, Coffee Shop/Café
AROMAS DG	Southeast	Fine Dining, Coffee Shop/Café
AROMAS OP	Southeast	Fine Dining, Coffee Shop/Café
AROMAS SWEM	Southeast	Fine Dining, Coffee Shop/Café
ATOMIC RAMEN	Southeast	Foodservice
BAR SOTANO	Great Lakes	Fast Casual, Fine Dining, Ultra Fine Dining, Bar
BAR WEST	Far West	Casual Dining
BARBOSA'S BARBEQUE	Rocky Mountain	Food Truck, Catering/Off-Premise Events, Other
BARCHA	Far West	Fine Dining, Catering/Off-Premise Events
BBQ MEXICANA	Far West	Casual Dining, Fine Dining, Food Service, Food Truck, Catering/Off-Premise Events
BEAN BARLEY	Southeast	Fine Dining
BEAST + BOTTLE	Rocky Mountain	Fine Dining
BEFFA'S BAR & RESTAURANT	Plains	Casual Dining, Bar
BENIHANA	Great Lakes	Fine Dining
BITTERCREEK ALEHOUSE	Rocky Mountain	Fine Dining
BLACKBELLY	Rocky Mountain	Fine Dining, Catering/Off-Premise Events
BLD DINER	Southeast	Fine Dining
BORDER GRILL	Far West	Casual Dining, Fine Dining, Food Service, Food Truck, Catering/Off-Premise Events
BUKS LINCOLN STREET DINER	Midwest	Casual Dining, Other
BURGER BAR CHICAGO - SOUTH LOOP	Great Lakes	Casual Dining, Fine Dining
CAFE LA TAZITA	Far West	Coffee Shop/Café
CAMPO AT LOS POBLANOS	Southwest	Fine Dining
CAPE HOSPITALITY GROUP	Midwest	Casual Dining
CHARCOAL ZYKA INC	Southeast	Casual Dining
CHATTERBOX BREWS	Plains	Casual Dining
CHEF ROBERT CATERING INC	Far West	Catering/Off-Premise Events
CHOOK CHARCOAL CHICKEN	Rocky Mountain	Quick Service, Casual Dining
CHRIS COLEMAN CATERING	Midwest	Catering / Off-Premise Events
CLOCK TOWER GRILL	Midwest	Fine Dining
COAST AND VALLEY	Midwest	Casual Dining, Fine Dining, Bar
COPERTA	Rocky Mountain	Fine Dining

RESTAURANT	REGION	TYPE
CORK&OLIVE	Southeast	Fine Dining
CRESTED BUTTE'S PERSONAL CHEFS	Rocky Mountain	Food Market/Specialty Shop, Catering / Off-Premise Events
CURED RESTAURANT	Southwest	Fine Dining
CUSTOM CATERING	Southeast	Catering / Off-Premise Events
DIABLO & SONS SALOON	Rocky Mountain	Fine Dining
DIANE'S MARKET KITCHEN	Far West	Other
DOUG BOSTER GOURMET CATERING	Southwest	Catering / Off-Premise Events
EAST END FOOD INSTITUTE	Midwest	Other
EDDIE PAPAS AMERICAN HANGOUT	Far West	Casual Dining
EDEN WEST FOOD TRUCK	Southwest	Food Truck
EIGHTY ACRES KITCHEN & BAR	Midwest	Fine Dining
EL FIVE	Rocky Mountain	Fine Dining
ELDERSLIE FARM	Plains	Fine Dining, Ultra Fine Dining
END OF ELM	Midwest	Casual Dining, Fine Dining, Catering / Off-Premise Events, Bar, Other
FARM SPIRIT	Far West	Fast Casual
FARMERS MARKET RESTAURANT	Southeast	Casual Dining
FELINA RESTAURANT	Midwest	Fine Dining, Catering / Off-Premise Events, Bar
FLORIOLE BAKERY	Great Lakes	Bakery, Coffee Shop/Café
FOLK	Great Lakes	Quick Service, Casual Dining, Food Market/Specialty Shop, Catering / Off-Premise Events, Coffee Shop/Café
FORIZON CAFES	Far West	Quick Service, Foodservice, Catering / Off-Premise Events
FRASCA FOOD AND WINE	Far West	Quick Service, Casual Dining, Fine Dining, Catering / Off-Premise Events
FRESH & NATURAL CAFE	Far West	Quick Service, Foodservice, Catering / Off-Premise Events
FRONTERA COCINA	Great Lakes	Fast Casual, Fine Dining, Ultra Fine Dining, Bar
FRONTERA GRILL	Great Lakes	Fast Casual, Fine Dining, Ultra Fine Dining, Bar
FRUITION RESTAURANT	Rocky Mountain	Fine Dining
GARDENS OF SALONICA: NEW GREEK CAFE & DELI	Plains	Casual Dining
GOOD CHOICE KITCHEN	Midwest	Fast Casual, Casual Dining
GRANA	Southeast	Fine Dining
GRAND CENTRAL BAKERY	Far West	Quick Service, Fast Casual, Bakery
HARBOUR RESTAURANT	New England	Casual Dining, Bar
HILLSIDE FARMACY	Southwest	Casual Dining
INDIGENOUS	Southeast	Fine Dining
INDIGO RESTAURANT	Great Lakes	Fine Dining
INKY'S	Southeast	Fast Casual
JN RESTAURANTS	Rocky Mountain	Fine Dining
LARCHMONT TAVERN	Midwest	Casual Dining
LIBERTY TAVERN LTD	Midwest	Bar
LINGER	Rocky Mountain	Fine Dining
L'OCA D'ORO	Southwest	Fine Dining
LUCCA	Far West	Fine Dining
LULOU'S RESTAURANT AND LOUNGE	Far West	Fine Dining
MAGPIE CAFÉ	Far West	Casual Dining

RESTAURANT	REGION	TYPE
MATTELLIES LLC	Midwest	Fine Dining, Catering / Off-Premise Events
MATTISON'S CATERING COMPANY	Southeast	Fine Dining
MATTISON'S CITY GRILLE	Southeast	Fine Dining
MATTISON'S FORTY ONE	Southeast	Fine Dining
MATTISON'S RIVERWALK GRILLE	Southeast	Fine Dining
MAXIMILLIAN'S GRILL AND WINE BAR	Southeast	Fine Dining
MAX'S ON BROADWAY	Midwest	Bar
MAX'S TAPHOUSE	Midwest	Bar
MERCANTILE DINING & PROVISION	Rocky Mountain	Fine Dining
MIXTAPE	Midwest	Bar
MOR BAKERY & CAFÉ	Great Lakes	Bakery
MULVANEY'S B&L	Far West	Fine Dining
NOSTRANA	Far West	Fine Dining, Bar
NOVEL KC	Plains	Fine Dining
OFF MENU HOSPITALITY	Far West	Other
OPHELIA'S ELECTRIC SOAPBOX	Rocky Mountain	Fine Dining
O'RORKES	Midwest	Casual Dining, Bar
PARK HEIGHTS RESTAURANT	Southeast	Fine Dining
PEPITA CORP	Midwest	Fine Dining
PICKA RICO	Far West	Fast Casual
PLAZA DELI	New England	Catering / Off-Premise Events, Coffee Shop/Café
POSANA	Southeast	Fine Dining
RADCOL, INC	Midwest	Casual Dining
RED FEATHER LOUNGE	Rocky Mountain	Fine Dining
RESIDUAL SUGAR WINE BAR	Far West	Fine Dining
REVIVAL	Far West	Fine Dining
ROOT & STEM	Southeast	Catering / Off-Premise Events
ROOT DOWN	Rocky Mountain	Fine Dining
ROOTED CRAFT KITCHEN	Rocky Mountain	Fast Casual
SALDIVIA'S SOUTH AMERICAN GRILL	Southwest	Fine Dining
SAPPHIRE SUPPER CLUB, INC.	Far West	Fine Dining
SENS	Far West	Fine Dining, Catering/Off-Premise Events
SHELBURNE FARMS	New England	Casual Dining, Fine Dining, Food Truck
SOCALO	Far West	Casual Dining, Fine Dining, Food Service, Food Truck, Catering/Off-Premise Events
SOCIALE & CAFE PRESS CHICAGO	Great Lakes	Casual Dining, Fine Dining
SODA JERKS AT ACTION LUBE	Midwest	Fast Casual, Bakery
SPUNTINO	Rocky Mountain	Fine Dining
ST. KILIAN'S CHEESE SHOP	Rocky Mountain	Food Market/Specialty Shop
STARRY BAND INC.	Far West	Fine Dining, Catering / Off-Premise Events
STATE THEATRE & MICHIGAN THEATER	Far West	Quick Service
STORE HOUSE MARKET & EATERY	Southwest	Casual Dining
STRIPCHEZZE	Far West	Food Truck

RESTAURANT	REGION	TYPE
TABLES	Rocky Mountain	Fine Dining
TED'S RESTAURANT	Southeast	Fast Casual, Other
THE BEACH CLUB	Mideast	Casual Dining, Foodservice, Bar
THE BLENDED TABLE	Rocky Mountain	Catering / Off-Premise Events, Other
THE BREADFRUIT & RUM BAR	Southwest	Fine Dining, Bar
THE BRUNCH	Southeast	Casual Dining
THE GROVE CAFE & MARKET	Southwest	Quick Service, Fast Casual, Casual Dining, Coffee Shop/Café
THE HERBFARM RESTAURANT	Far West	Fine Dining
THE HERON RESTAURANT	Mideast	Fine Dining
THE HOUND'S TALE	Southeast	Fine Dining, Coffee Shop/Café
THE HOUND'S TALE CORNER BAKERY	Southeast	Fine Dining, Coffee Shop/Café
THE MARKET PLACE RESTAURANT	Southeast	Fine Dining
THE ORCHARD RESTAURANT & EVENTS BARN	Southeast	Fine Dining, Catering / Off-Premise Events
THE POMPADOUR	Great Lakes	Fine Dining
THE SILVERSPOON	Mideast	Fine Dining
THERESA & JOHNNY'S	Far West	Casual Dining
THIRDWAVE CAFE & WINE BAR	Southeast	Fine Dining
THOMPSON HOUSE EATERY	New England	Fine Dining
TOPOLOBAMPO	Great Lakes	Fast Casual, Fine Dining, Ultra Fine Dining, Bar
TRAILER PARK LOUNGE	Mideast	Casual Dining
TUTTI FRUTTI COFFEE SHOP	Great Lakes	Fast Casual, Casual Dining, Coffee Shop/Cafe, Juice Shop
UC DAVIS HEALTH	Far West	Foodservice
UCSF HEALTH	Far West	Foodservice
VITAL ROOT	Rocky Mountain	Fine Dining
WARREN TECH CENTRAL / WT CULINARY	Rocky Mountain	Other
WHITEBREAD LLC	Plains	Fine Dining
WILF'S RESTAURANT & JAZZ BAR	Far West	Fine Dining
WINE MERCHANTS WAREHOUSE	Southeast	Fine Dining, Food Market/Specialty Shop, Catering / Off-Premise Events, Other
XOCO	Great Lakes	Fast Casual, Fine Dining, Ultra Fine Dining, Bar



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Our mission is to support the growth and prosperity of our entire local food ecosystem from farmer to customer. We pride ourselves on our commitment to follow through on this ethos and are proud to be a Good Food 100 restaurant based on the actual data (aka putting our money where our mouth is) versus simply saying we do (aka lip service).

— ROHANI FOULKES, FOLK
[GREAT LAKES REGION]

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**FOR ANY QUESTIONS PLEASE EMAIL
INFO@GOODFOODMEDIANETWORK.ORG**

**FOR MORE INFORMATION VISIT
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