

# Good Food Media Network

Economic Contribution of the Food Supply Chain  
2019

**Consulting Report by:**

Business Research Division  
Leeds School of Business  
University of Colorado Boulder

**Final Report**

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## 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 .....	15
Qualitative Responses.....	16
Conclusion.....	19
Bibliography .....	19
Appendix 1: Participating Restaurants and Ratings .....	20
Appendix 2: State Good Food Economic Impacts.....	23

## EXECUTIVE SUMMARY

In 2019, a total of 137 restaurants from around the United States participated in the third 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 137 Participating restaurants in the Good Food 100 reported being in operation an average of 10.6 years, with 36% operating five years or less. Over 53% of participating businesses reported being owned or co-owned by a female or minority, and 38% 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 (14%) and Fast Casual (10%). 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—30% of the total, with Colorado having the highest number of responding restaurants. Three regions—Rocky Mountain, Southeast, and the Far West—represented 63% of the responses.

Participating restaurants reported spending \$105.1 million on food in 2018. Of these food purchases, restaurants reported spending 67%, or \$69.9 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 \$66.3 million spent by participating restaurants, had a \$213.5 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 Specialty Grocer/Lunch Counter and Other (Catering, Quick Service, and Meal Delivery Service) restaurants with 95% each, followed by Fine Dining restaurants (88%) and Fast Casual (86%). Nationally, restaurants reported the greatest percentage of good food purchases in the Fish and Seafood (85%) and the Meat and Poultry (83%) segments.

Participating restaurants were provided a detailed definition for each category of purchases. A random third-party audit 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 rating of 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 137 participating restaurant brands. This study updates the inaugural GFMN study completed in 2017 and subsequent 2018 study. Approximately 64% of the restaurants that participated in 2018 also participated in the 2019 study. 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 audit 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

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<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 2019 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 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. A ranking of restaurants by good food purchasing intensiveness was created nationally and regionally.

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).

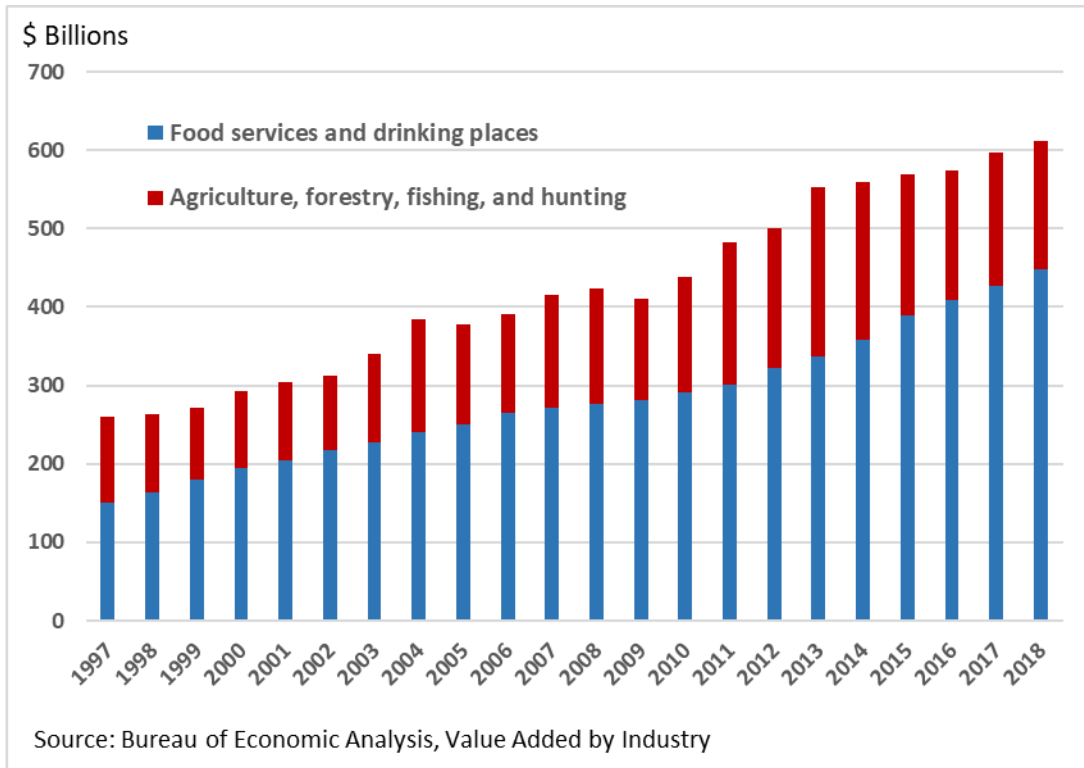
*Value Added:* The contribution of an industry or region to total GDP, value added equals gross output, net of intermediate input costs.

## FOOD INDUSTRY ECONOMIC OVERVIEW

The food services and drinking places sector contributed 2.2%, or \$448.1 billion, to U.S. GDP in 2018, growing 4.8% year-over-year and increasing 62.3% from 2008–2018 (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 2018, nominal value added from this industry totaled \$164.2 billion, a 3% decrease from 2017, but an 11.5% increase from 2008.

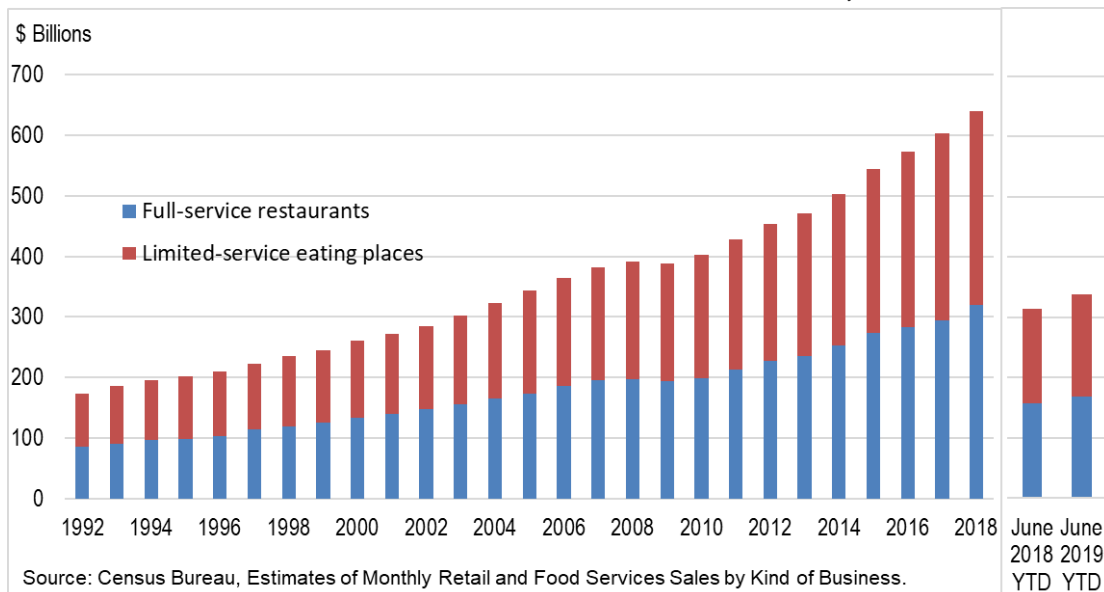


**FIGURE 1: U.S. VALUE ADDED, FOOD SERVICES AND AGRICULTURE, 1997–2018**



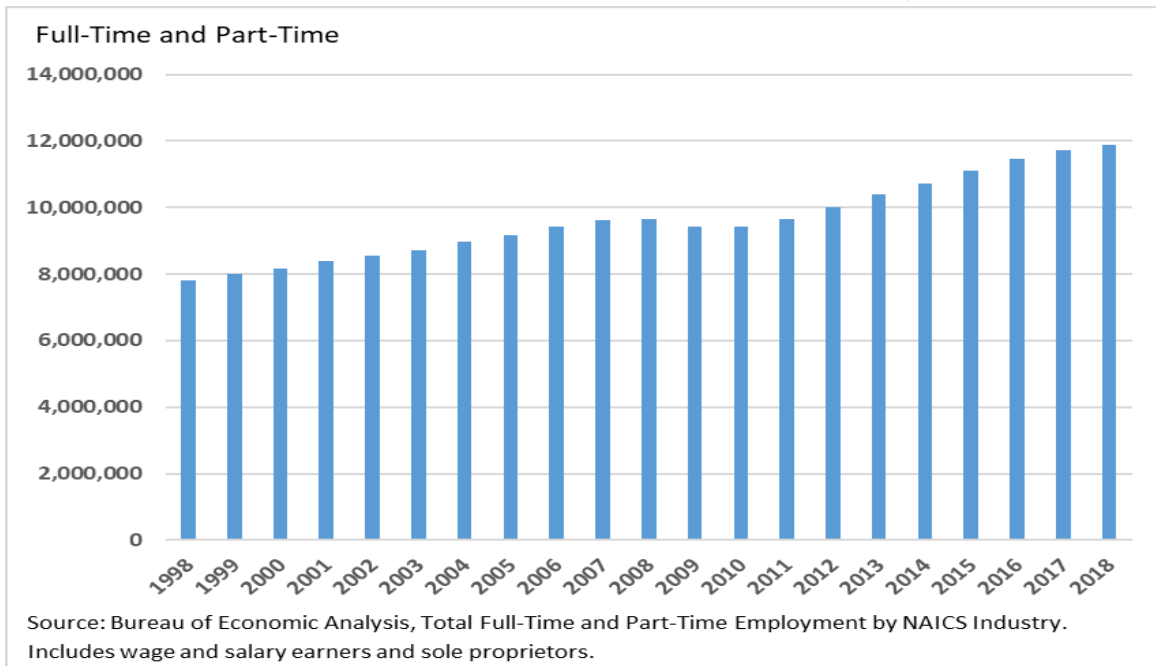
In terms of retail sales, full-service restaurants and limited-service restaurants recorded sales of \$640 billion in 2018, an increase of 6.1% year-over-year and 63.7% over the past 10 years (Figure 2). Year-to-date through June 2019, sales grew 4.5% over the same six-month period in 2018. Each segment (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, 1992–2019**



The food services sector represented 11.9 million workers nationally in 2018, or 7.8% of total employment (Figure 3).<sup>2</sup> Employment grew 1.5% in 2018.

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



## ABOUT THE PARTICIPATING RESTAURANTS

The 137 responding restaurants represented every region of the United States. The Rocky Mountain region garnered the most responses — 30% of the total (Table 1). Three regions represented over half (63%) of the responses—the Rocky Mountain region (30%), the Southeast region (20%), and the Far West region (13%). The majority of responses came from restaurants in three states—Colorado (29%), California (8%), and Minnesota (8%) (Table 3). The 137 respondents represented a total of 341 individual restaurant locations, with 129 in Colorado.

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

Region	Responding Restaurants	Percent of Total
Rocky Mountain	41	30%
Southeast	27	20%
Far West	18	13%
Plains	16	12%
Great Lakes	14	10%
Southwest	14	10%
Mideast	4	3%
New England	3	2%
<b>Total</b>	<b>137</b>	<b>100%</b>

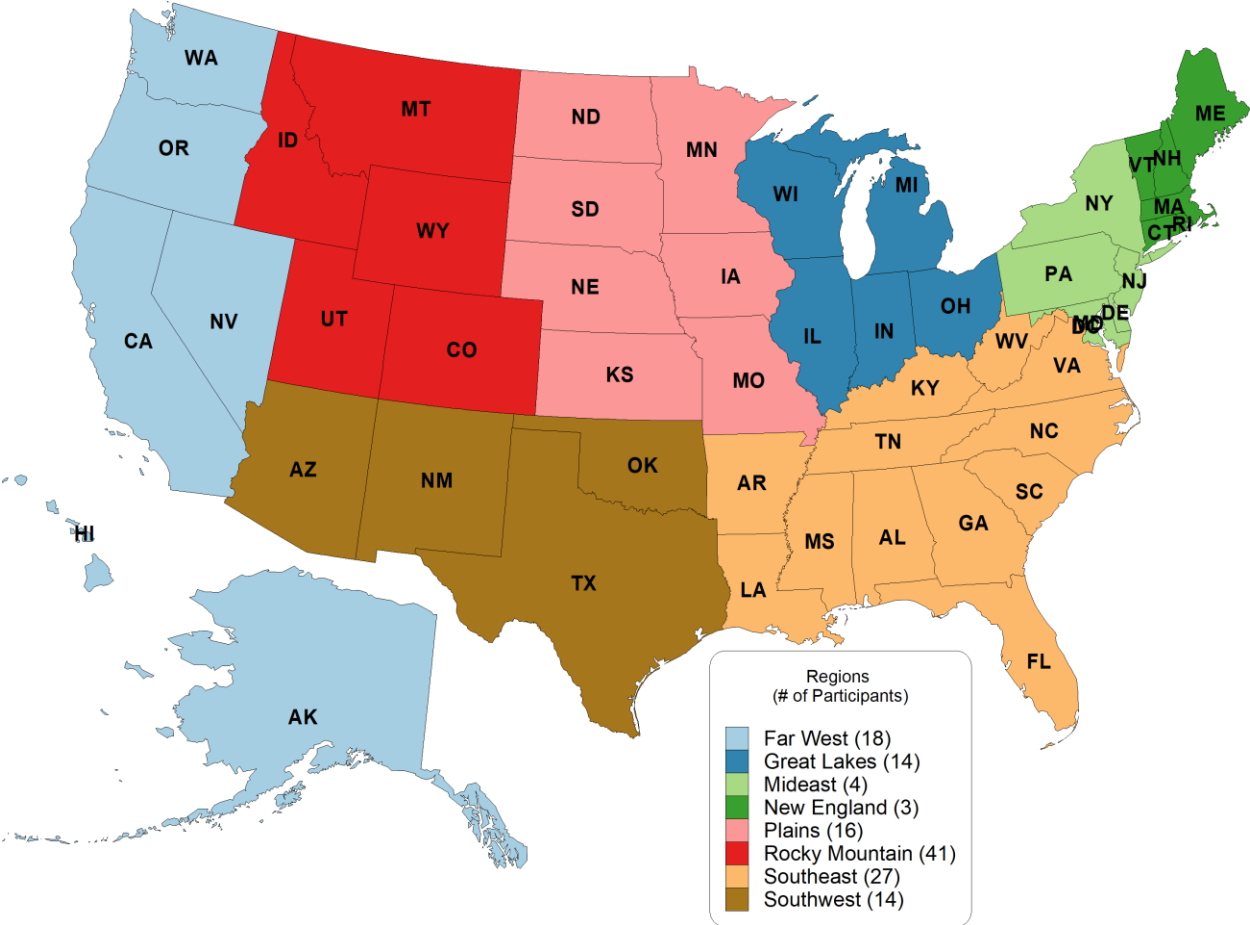
<sup>2</sup>Total employment from the Bureau of Economic Analysis includes covered workers, proprietors, and farm workers.

The 118 responding restaurants that provided employment data represented 7,184 employees, with the Rocky Mountain and Southeast regions representing nearly 63% of total employees (Table 2).

**TABLE 2: EMPLOYEES BY REGION**

Region	Employees	Percent of Total
Rocky Mountain	3,291	46%
Southeast	1,196	17%
Great Lakes	1,012	14%
Far West	655	9%
Plains	417	6%
Southwest	377	5%
Mideast	156	2%
New England	80	1%
<b>Total</b>	<b>7,184</b>	<b>100%</b>

**FIGURE 4: RESTAURANT PARTICIPATION BY REGION**



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

<b>State</b>	<b>Responding Restaurants</b>	<b>Percent of Total</b>
Colorado	40	29%
California	11	8%
Minnesota	11	8%
North Carolina	9	7%
Illinois	7	5%
Texas	7	5%
Florida	5	4%
Arizona	4	3%
Georgia	4	3%
Michigan	4	3%
Washington	4	3%
Indiana	3	2%
Nebraska	3	2%
New Mexico	3	2%
Kentucky	2	1%
Louisiana	2	1%
Maryland	2	1%
New York	2	1%
Oregon	2	1%
South Carolina	2	1%
Tennessee	2	1%
Hawaii	1	1%
Kansas	1	1%
Massachusetts	1	1%
Missouri	1	1%
New Hampshire	1	1%
Utah	1	1%
Vermont	1	1%
Virginia	1	1%
<b>Total</b>	<b>137</b>	<b>100%</b>



The 108 responding restaurants reported total 2018 revenue of \$405 million and average food costs of 35.9% of revenue (excluding beverage purchases).

The 137 participating restaurants reported that a weighted average of 67% of total food purchases were good food purchases (Table 5). The percentage was greatest for participating Specialty Grocer/Lunch Counter (95%) Other (95%), Fine Dining (88%), and Fast Casual restaurants (86%). Nationally, restaurants reported the greatest percentage of good food purchases in the Fish and Seafood (85%) and the Meat and Poultry (83%) segments.

**TABLE 5: 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	68%	61%	75%	93%	53%	56%	74%
Fast Casual	92%	91%	70%	95%	94%	76%	86%
Fine Dining	83%	85%	87%	91%	93%	77%	88%
Food Service	39%	47%	35%	64%	62%	10%	36%
Specialty Grocer/Lunch Counter	86%	93%	92%	100%	100%	97%	95%
Other	94%	87%	86%	99%	100%	89%	95%
<b>Total</b>	<b>68%</b>	<b>67%</b>	<b>67%</b>	<b>83%</b>	<b>85%</b>	<b>32%</b>	<b>67%</b>

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

Compared to total purchases, a greater percentage of *regional* purchases were good food purchases (89%), with all restaurant types, except for Food Service, reporting over 90% of total purchases as good food purchases (Table 6). Regionally, restaurants reported the greatest percentage of good food purchases in the Fish and Seafood (100%) and the Meat and Poultry (97%) segments.

**TABLE 6: 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	88%	97%	89%	99%	90%	83%	94%
Fast Casual	93%	96%	80%	95%	100%	80%	91%
Fine Dining	85%	86%	92%	97%	100%	86%	93%
Food Service	78%	56%	89%	95%	100%	36%	76%
Specialty Grocer/Lunch Counter	73%	92%	90%	100%	100%	94%	94%
Other	99%	87%	87%	100%	100%	94%	97%
<b>Total</b>	<b>86%</b>	<b>79%</b>	<b>90%</b>	<b>97%</b>	<b>100%</b>	<b>72%</b>	<b>89%</b>

Note: Total includes reported state and regional purchases.

Regions that reported the highest percentage of good food purchases included the Plains region (92%) and the New England region (88%), with the Great Lakes region reporting only 38% (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	89%	78%	88%	81%	92%	74%	83%
Great Lakes	9%	35%	40%	82%	69%	9%	38%
Mideast	32%	66%	98%	100%	100%	55%	84%
New England	86%	96%	83%	92%	99%	72%	88%
Plains	84%	84%	94%	97%	99%	81%	92%
Rocky Mountain	72%	73%	68%	78%	88%	42%	69%
Southeast	73%	76%	75%	93%	92%	65%	82%
Southwest	75%	63%	63%	91%	59%	51%	75%
<b>Total</b>	<b>68%</b>	<b>67%</b>	<b>67%</b>	<b>83%</b>	<b>85%</b>	<b>32%</b>	<b>67%</b>

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

Good food purchases within *region* were highest for the Rocky Mountain, Mideast, Great Lakes, Southwest, and Plains regions (each 90% or more) (Table 8). The regional results may be skewed by the types of restaurants reporting by region.

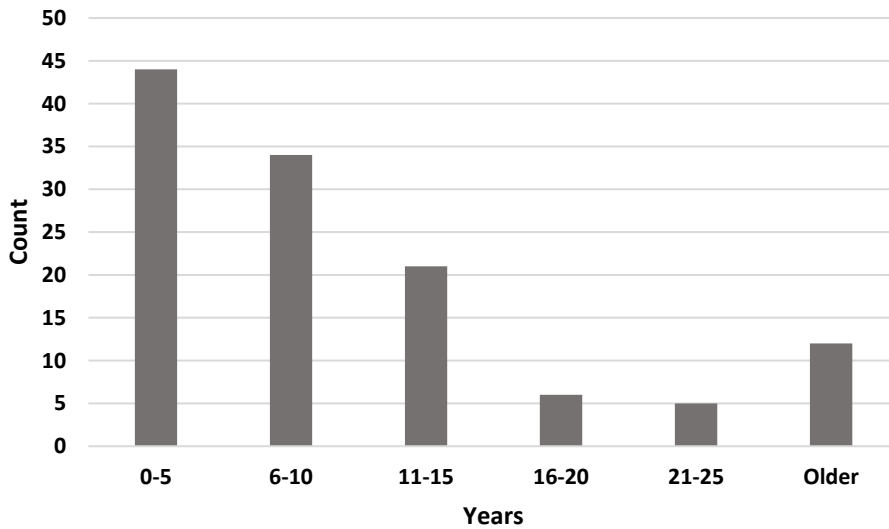
**TABLE 8: REGIONAL GOOD FOOD PURCHASES BY RESTAURANTS IN EACH REGION**

Region	Bread and Grain	Dairy and Eggs	Fruits and Vegetables	Meat and Poultry	Fish and Seafood	Other	Total
Far West	26%	66%	100%	100%	100%	40%	85%
Great Lakes	95%	91%	89%	97%	99%	83%	93%
Mideast	77%	96%	98%	95%	100%	98%	95%
New England	98%	97%	71%	96%	100%	56%	88%
Plains	87%	96%	84%	92%	100%	78%	90%
Rocky Mountain	94%	98%	93%	99%	100%	84%	96%
Southeast	29%	40%	84%	95%	100%	36%	68%
Southwest	82%	83%	94%	97%	96%	74%	91%
<b>Total</b>	<b>86%</b>	<b>79%</b>	<b>90%</b>	<b>97%</b>	<b>100%</b>	<b>72%</b>	<b>89%</b>

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

This cohort of restaurants has been in business an average of 10.6 years, with a median age of 8 years. Over 36% have been in business for 5 years or less and 64% for 10 years or less (Figure 6). By restaurant type, Food Service restaurants are the oldest and Specialty Grocer/Lunch Counter restaurants are the youngest. Participating restaurants from the Far West region have been in business the longest, with an average age of just over 15 years, while restaurants in the Mideast region are the youngest, with an average age of 7.5 years.

**FIGURE 6: YEARS IN BUSINESS**



Over 45% of participating restaurants reported being a female or minority owned business, and 8% reported being co-owned. By restaurant type, 4 out of 5 in the Other category and 3 out of 5 in the Specialty Grocer/Lunch category were female owned. Over 37% of respondents reported having a female Executive Chef, Culinary Director, CEO, or owner, and 91% reported being white, nonhispanic (Table 9). The majority of restaurants in the Other category also reported having a female Executive Chef, Culinary Director, CEO, or owner.

**TABLE 9: RACE/ETHNICITY OF EXECUTIVE CHEF/CULINARY DIRECTOR/CEO/OWNER**

Race/Ethnicity	Percentage
White	91%
Other	4%
Hispanic/Latino	3%
Asian	2%
Black/African-American	1%

Participating restaurants were asked about their awards and membership in various organizations. Almost half of participating restaurants reported being a Slow Food USA member, 33.6% are members of the Chefs Collaborative, and 32.8% are members of the James Beard Foundation SmartCatch Program (Table 10). Additionally, 19% of participating restaurants are James Beard Foundation award winners and 21.2% are alums of the James Beard Foundation Chefs Boot Camp for Policy and Change. Nearly one-fifth of restaurants are Women Chefs and Restaurateurs members. Additionally, 58.3% of restaurants in the Boulder and Denver metropolitan areas participate in EatDenver. Almost one-third of the respondents reported involvement elsewhere, ranging from local associations (e.g., Georgia Organics, Piedmont Culinary Guild) to national organizations (e.g., Les Dames d’Escoffier, Bread Baker’s Guild of America, Seafood Watch Blue Ribbon Task Force).



**TABLE 10: AWARDS AND MEMBERSHIP**

<b>Awards and Membership</b>	<b>Percentage</b>
James Beard Foundation Award Winner (not finalist or semi-finalist)	19.0%
JBF Chefs Boot Camp for Policy and Change Alumni	21.2%
JBF SmartCatch Program	32.8%
Chefs Collaborative Member	33.6%
Slow Food USA Member	48.2%
WCR - Women Chefs and Restaurateurs Member	19.7%

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 \$12.47 per hour from the 117 responding restaurants, while the lowest hourly starting pay for tipped employees (including the tip credit), averaged \$7.77 from the 112 responses (Table 11). Restaurants in the Other category paid above average wages for non-tipped and tipped employees, with wages of \$15.20 and \$16.50, respectively. For most businesses (80.7%), overtime pay begins at 40 hours per week, but some (9.2%) reported overtime pay after 8 hours per day (the remainder either reported a blend of overtime pay thresholds, or responded “not applicable”).

**TABLE 11: STARTING WAGES**

	<b>Non-tipped Employees Lowest Starting Wage</b>	<b>Tipped Employees Lowest Starting Wage</b>
Average	\$12.47	\$7.77
Median	\$12.00	\$8.08
Maximum	\$30.00	\$30.00
Minimum	\$7.25	\$0.00
Number of Responses	117	112

Responding restaurants reported 40% of employees (front of the house and back of the house) were part-time, 50% of restaurant employees were female, and 31% were people of color. Restaurants in the Casual Dining, Food Service, and Other categories employed more part-time workers than the average. Food Service, Specialty Grocer/Lunch Counter, and Other restaurants had more female employees than average, and Casual Dining, Food Service, and Fast Casual restaurants employed more people of color than average.

Over 78% of responding restaurants reported providing access to health insurance to employees, some of which exclusively offer benefits to management. Over two-thirds of responding restaurants reported a time-off policy 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 87% of the responding restaurants.

## ECONOMIC CONTRIBUTION

The 137 participating restaurants in the Good Food 100 reported spending \$105.1 million on bread and grains, dairy and eggs, fish and seafood, meat and poultry, fruits and vegetables, and other miscellaneous food items. This group of businesses reported total 2018 revenue of \$405 million. Restaurants reported food costs of 29.4% of total food sales (excluding beverage purchases).<sup>3</sup> Most (96%) of the food purchases were domestic, bringing the U.S. total to \$100.7 million. The \$100.7 million had a \$324.2 million economic impact on the nation, including the direct, indirect, and induced impact of the purchases (Table 12). This excludes the impact of overall business operations, ranging from the purchase of alcohol to labor and rent. Good food totaled an estimated \$69.9 million, most of which (\$66.3 million) is domestic direct purchases, resulting in economic benefits of \$213.5 million (including direct, indirect, and induced impacts) (Table 13).

**TABLE 12: ECONOMIC CONTRIBUTION OF DOMESTIC FOOD PURCHASES, 2018**

Impact Type	Employment	Labor Income (\$millions)	Value Added (\$millions)	Output (\$millions)
Direct Effect	484	\$19.8	\$28.1	\$100.7
Indirect Effect	659	\$36.1	\$57.7	\$140.6
Induced Effect	507	\$26.1	\$46.4	\$83.0
<b>Total Effect</b>	<b>1,650</b>	<b>\$81.9</b>	<b>\$132.2</b>	<b>\$324.2</b>

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

**TABLE 13: ECONOMIC CONTRIBUTION OF DOMESTIC GOOD FOOD PURCHASES, 2018**

Impact Type	Employment	Labor Income (\$millions)	Value Added (\$millions)	Output (\$millions)
Direct Effect	343	\$13.5	\$19.3	\$66.3
Indirect Effect	439	\$23.4	\$37.3	\$92.4
Induced Effect	335	\$17.3	\$30.7	\$54.8
<b>Total Effect</b>	<b>1,117</b>	<b>\$54.2</b>	<b>\$87.2</b>	<b>\$213.5</b>

By segment, the Fine Dining restaurants reported the greatest total domestic food purchases (\$37.5 million), and hence, had the greatest economic impact (\$116.4 million) (Table 14). This segment also reported the greatest total of domestic good food purchases—\$32.9 million, which translated to \$101.9 million in total economic benefits (Table 15).

<sup>3</sup>The 29.4% represents a weighted average based on total food purchases. The simple average of food costs totaled 35.9% of total food sales.

**TABLE 14: TOTAL ECONOMIC CONTRIBUTION OF FOOD PURCHASES BY RESTAURANT TYPE, 2018**

Type	Direct Output (\$Millions)	Total Output (\$Millions)
Fine Dining	\$37.5	\$116.4
Casual Dining	\$15.9	\$53.1
Fast Casual	\$8.3	\$27.2
Other	\$39.0	\$127.5
<b>Total</b>	<b>\$100.7</b>	<b>\$324.2</b>

**TABLE 15: TOTAL ECONOMIC CONTRIBUTION OF GOOD FOOD PURCHASES BY RESTAURANT TYPE, 2018**

Type	Direct Output (\$Millions)	Total Output (\$Millions)
Fine Dining	\$32.9	\$101.9
Casual Dining	\$11.7	\$39.7
Fast Casual	\$7.2	\$23.6
Other	\$14.5	\$48.2
<b>Total</b>	<b>\$66.3</b>	<b>\$213.5</b>

**TABLE 16: REGIONAL ECONOMIC CONTRIBUTION OF FOOD PURCHASES, 2017**

Region	Regional Impact on Region		Regional Impact on Nation	
	Direct Output (Millions)	Total Output Millions	Direct Output (Millions)	Total Output Millions
Far West Region	\$9.3	\$19.9	\$11.1	\$35.3
Great Lakes Region	\$5.0	\$10.4	\$9.4	\$31.2
Mideast Region	\$1.4	\$2.7	\$1.6	\$5.0
New England Region	\$0.7	\$1.2	\$0.8	\$2.5
Plains Region	\$2.2	\$4.9	\$3.1	\$10.2
Rocky Mountain Region	\$16.8	\$34.3	\$26.2	\$84.4
Southeast Region	\$5.8	\$12.0	\$7.4	\$22.9
Southwest Region	\$2.5	\$5.7	\$6.8	\$22.1

## 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, challenges for their employees, and discussed the challenges of implementing sustainable practices.

Restaurants noted other sustainable practices within their businesses. Nearly every responding restaurant reported recycling (94%) and using eco-friendly paper products and carryout containers (93%) was part of their sustainable practices (Table 17). Around three out of four restaurants reported composting, using eco-friendly cleaning supplies, using CFL or LED lighting, and tracking food waste.

**TABLE 17: OTHER SUSTAINABLE PRACTICES**

Practice	Total
Recycling	93.8%
Eco-Friendly Paper Products and Carryout Containers	93.1%
Composting	78.5%
Eco-Friendly Cleaning Supplies	76.2%
CFL or LED Lighting	73.8%
Track Food Waste	69.2%
Plant-Forward or Plant-Based Menu	56.9%
Contracting with Other Sustainably Minded Businesses	54.6%
EPA Energy Star-Rated Refrigerators	48.5%
Low-Flush Toilets	47.7%
Reducing Meat on Menu or Meat Portions on the Plate	46.2%
Donate Leftover Food	34.6%
Renewable Energy	30.0%

**TABLE 18: OTHER SUSTAINABLE PRACTICES BY RESTAURANT TYPE**

Practice	Fine Dining	Casual Dining	Fast Casual	Food Service	Specialty Grocer/Lunch Counter	Other	Total
Recycling	92%	68%	100%	75%	100%	100%	94%
Eco-Friendly Paper Products and Carryout Containers	91%	74%	93%	100%	100%	80%	93%
Composting	78%	47%	93%	75%	40%	100%	78%
Eco-Friendly Cleaning Supplies	74%	58%	86%	75%	40%	100%	76%
CFL or LED Righting	71%	63%	86%	75%	40%	60%	74%
Track Food Waste	66%	63%	71%	75%	40%	80%	69%
Plant-Forward or Plant-Based Menu	48%	58%	79%	100%	40%	60%	57%
Contracting with Other Sustainably Minded Businesses	59%	42%	50%	25%	20%	40%	55%
EPA Energy Star-Rated Refrigerators	48%	37%	50%	25%	40%	60%	48%
Low-Flush Toilets	44%	47%	57%	50%	0%	60%	48%
Reducing Meat on Menu or Meat Portions on the Plate	46%	32%	43%	100%	0%	60%	46%
Donate Leftover Food	27%	32%	50%	100%	40%	40%	35%
Renewable Energy	31%	16%	29%	50%	0%	40%	30%
Other	24%	16%	29%	0%	0%	40%	24%

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

**TABLE 19: PRIORITIES**

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

In a subjective question, participants were asked how important good food is to their brand. All restaurant types rated good food at 9.1 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 9.8 (Table 20). Participants similarly ranked the brand importance of an ethical, sustainably minded supply chain.

**TABLE 20: IMPORTANCE TO BRAND (SCALE 1–10)**

Restaurant Type	Good Food	Purchasing from Sustainably Minded Companies
Casual Dining	9.1	9.4
Fast Casual	10.0	9.5
Fine Dining	9.5	9.4
Food Service	10.0	10.0
Specialty Grocer/Lunch Counter	10.0	10.0
Other	10.0	9.8
<b>Average</b>	<b>9.8</b>	<b>9.7</b>

Restaurants were asked about the greatest challenges facing their employees. The most commonly cited challenge for employees was finding affordable housing, with over 71% of responding restaurants (Table 21). Healthcare costs were the second most commonly cited challenge (60%), followed by transportation costs (35%), childcare costs (28%), and commuting time (16%).

**TABLE 21: BIGGEST CHALLENGES FOR EMPLOYEES**

Challenge	Companies	Percent
Affordable Housing	83	71.6%
Healthcare Costs	70	60.3%
Transportation Costs	41	35.3%
Childcare Costs	33	28.4%
Commuting Time	19	16.4%

Note: Number of responding restaurants is 116.

## CONCLUSION

In the third 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 137 participating restaurants totaled \$324.2 million in 2018, of which \$213.5 million in economic benefits was derived from good food purchases.

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## APPENDIX 1: PARTICIPATING RESTAURANTS AND RATINGS

The following 137 restaurants participated in the Good Food 100 by submitting data on food purchases. The list is sorted first by rating, then alphabetically by restaurant. The Good Food 100 Restaurants™ list and ratings are based on percentage of total good food purchases. Six links (as in links in the food chain) is the highest rating, two links is the lowest.

**TABLE 22: PARATICIPATING GOOD FOOD 100 RESTAURANTS™**

Restaurant	Region	Type	Ranking (Links)
Annette	Fine Dining	Rocky Mountain	6
Bar Sotano	Fine Dining	Great Lakes	6
Barbette	Fine Dining	Plains	6
Basta	Fine Dining	Rocky Mountain	6
beast + bottle	Fine Dining	Rocky Mountain	6
Bellina Alimentari	Fine Dining	Southeast	6
Billy D's Fried Chicken	Other	Southeast	6
Birchwood Café	Fast Casual	Plains	6
Bistro Vendome	Fine Dining	Rocky Mountain	6
Blackbelly	Fine Dining	Rocky Mountain	6
Book Club	Fine Dining	Plains	6
Boulder Valley School District School Food Project	Food Service	Rocky Mountain	6
Bouquet Restaurant	Fine Dining	Southeast	6
Bread & Pickle	Other	Plains	6
Bridges Craft Pizza and Wine Bar	Fine Dining	Great Lakes	6
Button & Co. Bagels	Fast Casual	Southeast	6
Campo at Los Poblanos	Fine Dining	Southwest	6
Cart-Driver	Casual Dining	Rocky Mountain	6
Cedar's Cafe	Casual Dining	Southeast	6
Chook Charcoal Chicken	Fast Casual	Rocky Mountain	6
Coohills	Fine Dining	Rocky Mountain	6
Coperta	Fine Dining	Rocky Mountain	6
Corrida Restaurant	Fine Dining	Rocky Mountain	6
Cress Restaurant	Fine Dining	Southeast	6
Crested Butte's Personal Chefs	Other	Rocky Mountain	6
Curate	Fine Dining	Southeast	6
Diane's Market Kitchen	Other	Far West	6
Eden East Farm & Restaurant	Fine Dining	Southwest	6
Egg	Casual Dining	Mideast	6
Euclid Hall Bar and Kitchen	Fine Dining	Rocky Mountain	6
EVOO	Fine Dining	New England	6
Farm Burger	Fast Casual	Southeast	6
Farm Runners Station	Specialty Grocer/Lunch Counter	Rocky Mountain	6
Farm Spirit	Fine Dining	Far West	6
FIG	Fine Dining	Southeast	6
FnB Restaurant	Fine Dining	Southwest	6
Folk	Casual Dining	Great Lakes	6
Fooducopia	Casual Dining	Rocky Mountain	6
Fortuna Chocolate	Specialty Grocer/Lunch Counter	Rocky Mountain	6
frenchish	Fine Dining	Southwest	6
Fresh Thymes Eatery	Fast Casual	Rocky Mountain	6
Frontera Grill	Fine Dining	Great Lakes	6
Fruition Restaurant	Fine Dining	Rocky Mountain	6
Gigi's Cafe	Fast Casual	Plains	6
grana wood fired foods	Fine Dining	Far West	6
Grand Central Bakery	Fast Casual	Far West	6
Grand Central Bakery	Fast Casual	Far West	6
GreenFare Organic Cafe	Fine Dining	Southeast	6
Haymaker Restaurant	Fine Dining	Southeast	6
Hedge Row American Bistro	Fine Dining	Great Lakes	6
Heitloom Restaurant	Fine Dining	Southeast	6
Hell's Backbone Grill & Farm	Fine Dining	Rocky Mountain	6
Hotel Vermont	Fine Dining	New England	6

Ida B's Table	Casual Dining	Mideast	6
Indigenous	Fine Dining	Southeast	6
K Restaurant	Fine Dining	Southeast	6
kitchen table	Fast Casual	Plains	6
Lantern	Fine Dining	Southeast	6
L'Oca d'Oro	Fine Dining	Southwest	6
LSG Culinary Inc dba Good Choice Kitchen	Fast Casual	Mideast	6
Maggie Cafe	Fine Dining	Far West	6
Mercantile dining & provision	Fine Dining	Rocky Mountain	6
Miller Union	Fine Dining	Southeast	6
Mosquito Supper Club	Fine Dining	Southeast	6
Mulvaney's B&L	Fine Dining	Far West	6
Next Door American Eatery	Casual Dining	Rocky Mountain	6
Next Door American Eatery	Casual Dining	Southeast	6
Nourish Charlotte	Other	Southeast	6
Novel Restaurant	Fine Dining	Plains	6
Pat's Tap	Casual Dining	Plains	6
Prairie Plate Restaurant	Fine Dining	Plains	6
Preux & Proper	Fine Dining	Far West	6
Red Stag Supperclub	Fine Dining	Plains	6
Reserve Wine & Food	Fine Dining	Great Lakes	6
Rioja	Fine Dining	Rocky Mountain	6
Ronin Farm & Restaurant	Fine Dining	Southwest	6
Root Down DIA	Fine Dining	Rocky Mountain	6
Saba Restaurant	Fine Dining	Southeast	6
Sabio On Main	Fine Dining	Far West	6
Salt & Time Butcher Shop and Salumeria	Fine Dining	Southwest	6
Santo	Fine Dining	Rocky Mountain	6
St. Kilian's Cheese Shop	Specialty Grocer/Lunch Counter	Rocky Mountain	6
Stoic & Genuine	Fine Dining	Rocky Mountain	6
Tables	Fine Dining	Rocky Mountain	6
The Bird	Fine Dining	Plains	6
The Breadfruit & Rum Bar	Fine Dining	Southwest	6
The Farmer's Hand	Specialty Grocer/Lunch Counter	Great Lakes	6
The Grey Plume	Fine Dining	Plains	6
The Herbfarm Restaurant	Fine Dining	Far West	6
The Kitchen Bistro - Chicago	Fine Dining	Great Lakes	6
The Kitchen Restaurant Group	Fine Dining	Rocky Mountain	6
The Market Place Restaurant	Fine Dining	Southeast	6
The Ordinary	Fine Dining	Southeast	6
The Regional	Fine Dining	Rocky Mountain	6
The Walrus and The Carpenter	Fine Dining	Far West	6
Thompson House Eatery	Fine Dining	New England	6
Tiny Diner	Casual Dining	Plains	6
Topolobampo	Fine Dining	Great Lakes	6
Trattoria No. 10	Fine Dining	Great Lakes	6
Ultreia	Fine Dining	Rocky Mountain	6
Vesta	Fine Dining	Rocky Mountain	6
Western Daughters Butcher Shop	Specialty Grocer/Lunch Counter	Rocky Mountain	6
XOCO	Fast Casual	Great Lakes	6
626 on Rood - Seasonal American Dining and Wine Bar	Fine Dining	Rocky Mountain	5
AOC	Fine Dining	Far West	5
Barolo Grill	Fine Dining	Rocky Mountain	5
Common Roots Cafe	Fast Casual	Plains	5
Flagstaff House Restaurant	Fine Dining	Rocky Mountain	5
Foreign & Domestic, Austin	Fine Dining	Southwest	5
Larder Baking Company	Fine Dining	Far West	5
Lucques	Fine Dining	Far West	5
Mattison's Restaurants	Fine Dining	Southeast	5
Next Door American Eatery	Casual Dining	Great Lakes	5
Safta Restaurant	Fine Dining	Rocky Mountain	5
Siena Tuscan Steakhouse	Fine Dining	Plains	5
Snooze an AM Eatery - Arizona	Casual Dining	Southwest	5
Snooze an AM Eatery - California	Casual Dining	Far West	5
Snooze an AM Eatery - Colorado	Casual Dining	Rocky Mountain	5
Snooze an AM Eatery - Texas	Casual Dining	Southwest	5



Tavern	Fine Dining	Far West	5
The Durham Hotel	Fine Dining	Southeast	5
The Grove Cafe & Market	Fast Casual	Southwest	5
Time Market	Fast Casual	Southwest	5
UC DAVIS HEALTH	Food Service	Far West	5
Woodberry Kitchen	Fine Dining	Mideast	5
Bin 707 Foodbar	Fine Dining	Rocky Mountain	4
Epiphany Farms Restaurant	Fine Dining	Great Lakes	4
Koko Head Cafe	Casual Dining	Far West	4
Tacoparty Grand Junction	Fast Casual	Rocky Mountain	4
Urban Farmer Restaurant Denver	Fine Dining	Rocky Mountain	4
Cured Restaurant	Fine Dining	Southwest	3
Gardens of Salonica; New Greek Cafe & Deli	Casual Dining	Plains	3
The 502 Bar & Bistro	Casual Dining	Southeast	3
University of Colorado Boulder Campus Dining Services	Food Service	Rocky Mountain	3
University of Michigan Dining	Food Service	Great Lakes	3
Red Pepper Taqueria	Casual Dining	Southeast	2
Saint Stephen*	Fine Dining	Southeast	NA

\*Saint Stephen was not yet operating at the time of the survey, but provided qualitative responses to the survey.

## 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 23: ARIZONA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY ARIZONA RESTAURANTS, 2018**

Impact Type	Employment	Labor Income (\$millions)	Value Added (\$millions)	Output (\$millions)
Direct Effect	4	\$0.1	\$0.1	\$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>5</b>	<b>\$0.2</b>	<b>\$0.2</b>	<b>\$0.5</b>

Note: Sum may differ from total due to rounding.

**TABLE 24: CALIFORNIA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY CALIFORNIA RESTAURANTS, 2018**

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>\$2.3</b>	<b>\$3.5</b>	<b>\$8.1</b>

Note: Sum may differ from total due to rounding.

**TABLE 25: COLORADO ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY COLORADO RESTAURANTS, 2018**

Impact Type	Employment	Labor Income (\$millions)	Value Added (\$millions)	Output (\$millions)
Direct Effect	65	\$3.0	\$3.8	\$14.7
Indirect Effect	57	\$2.8	\$4.1	\$9.3
Induced Effect	38	\$1.7	\$3.1	\$5.4
<b>Total Effect</b>	<b>159</b>	<b>\$7.6</b>	<b>\$10.9</b>	<b>\$29.4</b>

Note: Sum may differ from total due to rounding.

**TABLE 26: FLORIDA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY FLORIDA RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
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 27: GEORGIA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY GEORGIA RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
Direct Effect	3	\$0.2	\$0.2	\$0.8
Indirect Effect	2	\$0.1	\$0.2	\$0.4
Induced Effect	2	\$0.1	\$0.2	\$0.3
<b>Total Effect</b>	<b>7</b>	<b>\$0.4</b>	<b>\$0.5</b>	<b>\$1.5</b>

Note: Sum may differ from total due to rounding.

**TABLE 28: ILLINOIS ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY ILLINOIS RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
Direct Effect	11	\$0.3	\$0.7	\$2.1
Indirect Effect	0	\$0.0	\$0.0	\$0.1
Induced Effect	0	\$0.0	\$0.0	\$0.0
<b>Total Effect</b>	<b>11</b>	<b>\$0.3</b>	<b>\$0.7</b>	<b>\$2.2</b>

Note: Sum may differ from total due to rounding.

**TABLE 29: INDIANA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY INDIANA RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
Direct Effect	1	\$0.0	\$0.1	\$0.3
Indirect Effect	1	\$0.0	\$0.1	\$0.2
Induced Effect	1	\$0.0	\$0.0	\$0.1
<b>Total Effect</b>	<b>3</b>	<b>\$0.1</b>	<b>\$0.2</b>	<b>\$0.6</b>

Note: Sum may differ from total due to rounding.

**TABLE 30: MICHIGAN ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY MICHIGAN RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
Direct Effect	10	\$0.3	\$0.4	\$1.8
Indirect Effect	6	\$0.2	\$0.4	\$0.9
Induced Effect	3	\$0.1	\$0.3	\$0.4
<b>Total Effect</b>	<b>19</b>	<b>\$0.7</b>	<b>\$1.1</b>	<b>\$3.2</b>

Note: Sum may differ from total due to rounding.

**TABLE 31: MINNESOTA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY MINNESOTA RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
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 32: NEBRASKA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY NEBRASKA RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
Direct Effect	1	\$0.1	\$0.1	\$0.2
Indirect Effect	1	\$0.0	\$0.1	\$0.1
Induced Effect	1	\$0.0	\$0.0	\$0.1
<b>Total Effect</b>	<b>2</b>	<b>\$0.1</b>	<b>\$0.2</b>	<b>\$0.4</b>

Note: Sum may differ from total due to rounding.

**TABLE 33: NEW MEXICO ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY NEW MEXICO RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
Direct Effect	4	\$0.1	\$0.1	\$0.4
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>\$0.2</b>	<b>\$0.7</b>

Note: Sum may differ from total due to rounding.

**TABLE 34: NORTH CAROLINA ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY NORTH CAROLINA RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
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>\$0.6</b>	<b>\$1.0</b>	<b>\$2.6</b>

Note: Sum may differ from total due to rounding.

**TABLE 35: TEXAS ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY TEXAS RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
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 36: WASHINGTON ECONOMIC CONTRIBUTION OF IN-STATE GOOD FOOD PURCHASES BY WASHINGTON RESTAURANTS, 2018**

<b>Impact Type</b>	<b>Employment</b>	<b>Labor Income (\$millions)</b>	<b>Value Added (\$millions)</b>	<b>Output (\$millions)</b>
Direct Effect	4	\$0.2	\$0.3	\$0.8
Indirect Effect	2	\$0.1	\$0.2	\$0.4
Induced Effect	2	\$0.1	\$0.2	\$0.3
<b>Total Effect</b>	<b>8</b>	<b>\$0.5</b>	<b>\$0.7</b>	<b>\$1.5</b>

Note: Sum may differ from total due to rounding.