University of Nebraska - Lincoln

DigitalCommons@University of Nebraska - Lincoln

Reports from the Food Processing Center, University of Nebraska-Lincoln

Food Processing Center

June 2003

Approaching Foodservice Establishments With Locally Grown Products

Food Processing Center

Approaching Foodservice Establishments With Locally Grown Products

PREPARED FOR:

THE NORTH CENTRAL INITIATIVE FOR SMALL FARM PROFITABILITY

A USDA—FUNDED PROJECT

PREPARED BY:

FOOD PROCESSING CENTER

INSTITUTE OF AGRICULTURE AND NATURAL RESOURCES

UNIVERSITY OF NEBRASKA – LINCOLN

143 FILLEY HALL, EAST CAMPUS

LINCOLN, NE 68583-0928

PHONE: 402/472-2832

FAX: 402/472-8831

JUNE 2003

Table of Contents

Executive Summary

This report summarizes the initial findings of a survey of members of the Chefs Collaborative organization. The Chefs Collaborative is a national network of more than 1,000 members of the food community who promote sustainable cuisine by celebrating the joys of local, seasonal and artisanal ingredients[1]. Many of the Chefs Collaborative members have significant expertise in purchasing locally grown food products. The purpose of this research and the following report is to 1) use the expertise gained by members of the Chefs Collaborative organization in order to help producers market their products to the foodservice industry and 2) to examine the opportunities and obstacles producers may encounter when approaching a restaurant or institution with locally grown products.

The survey was targeted to Chefs Collaborative members who have the greatest buying authority for the foodservice establishment. Ninety-one percent of the foodservice establishments surveyed were independently owned restaurants, while 8% were chain restaurants. Nearly half (49%) of the establishments surveyed were upscale full-service restaurants with 75% of the respondents holding the position of Chef at the establishment. The following conclusions illustrate how producers can use the research findings in this report when marketing their products to restaurants and institutions.

1. <u>Purchasing locally grown food products *can* be profitable for foodservice establishments.</u>
   Seventy-three percent of the foodservice establishments agreed or strongly agreed with the statement "purchasing locally grown food has a positive impact on my foodservice establishment's bottom line profits." A producer can use this information to show that, based on a survey of a particular group of foodservice establishments, purchasing locally grown products can be profitable.

2. <u>Chef Collaborative members prefer to purchase direct from a farmer.</u>
   When given several alternatives from which to purchase products for their establishment, 57% of the respondents would prefer to purchase direct from a farmer by either receiving direct shipments from the farm or by picking up their products at the farm.

3. <u>Awareness of the attributes that foodservice establishments take into consideration when making food purchases will increase a producer's likelihood of success.</u>
   The attributes that foodservice establishments ranked as very to extremely important when making a purchasing decision were a product's quality, a product's taste, the knowledge of how a product is raised or grown, a product's freshness, the ability to guarantee consistent quality, strict adherence to food safety, a thorough knowledge of the producer's product and its uses, and the ability to deliver the quantity needed by the establishment. Producers must address these attributes when marketing their products to foodservice establishments.

4. <u>The Chefs Collaborative members identified specific reasons for purchasing locally grown food and the factors that motivate them to continue to purchase from local farmers and ranchers. Producers should use this data when approaching a foodservice establishment to make a sale.</u>
   Based upon their establishment's experiences with locally grown or produced food products, the Chefs Collaborative members' reasons for initially purchasing locally grown products and for continuing

[1] http://www.chefscollaborative.org/

to purchase local include:

- Locally grown foods have higher or better quality.
- Locally grown products are fresher.
- Positive relationships have developed with producers.
- Customer requests have been received for locally grown products, especially after carrying local foods for a period of time.
- The availability of unique or specialty products.

5. <u>Obstacles to purchasing locally grown food were identified by Chefs Collaborative Members.</u>
   While it is important to be aware of the advantages of purchasing locally grown food in order to help sell local products to foodservice establishments, producers need to be able to anticipate the obstacles that can and will be raised when marketing their products. Again, this group of establishments has a mission or belief that many foodservice establishments do not have. It is very important to take note of the obstacles that they see. A producer should anticipate potential obstacles before his or her first sales call on a restaurant or institution and know how to counter that obstacle. The most significant obstacles identified by the respondents include:

   A. Distribution and Delivery—getting the right product in the right quantity to the right place at the right time.
      - Consistent availability
      - Reliable supply
      - Availability and knowing what locally grown products are available in their area
      - Complicated ordering
      - Too many purveyors (establishments want fewer invoices to pay)

   B. Competitive Or Pricing Comparable To Other Purveyors

   Only 11% mentioned seasonality as an obstacle. One interpretation of this data could be that some of the establishments in the sample are featuring locally grown foods only when they are in season by featuring these products on a "seasonal menu". This promotional technique may influence their customers to frequent the restaurant while these items are "in season".

6. <u>Chefs Collaborative members have promoted the use of locally grown food.</u>
   Ninety percent of the foodservice establishments surveyed promote the use of locally grown food on their menu or in their promotional material at one time or another, and 49% of those who had promoted consider the promotion to be very effective.

7. <u>Foodservice establishments need to be able to easily source and purchase locally grown products.</u>
   As indicated above, members of the Chefs Collaborative cited product availability and/or knowing what locally grown products are available in their area as a product sourcing and purchasing challenge. In fact, four out of the five top ranked obstacles (see section 2.6) have to do with the ordering and delivery of products. In addition, 38% stated that they would increase locally grown purchases if a greater quantity or variety local products were available and one-third would increase their locally grown purchases if a larger variety of local products were available. Consequently, availability and delivery are *major* issues in increasing the amount of locally grown products purchased by foodservice (and most likely retail) establishments. These establishments

also need to be able to easily source the local products available in their area. This awareness will lead to more locally grown products purchased.

The data suggests that there is a real need for a clearinghouse or database of locally grown products to provide simple and easy access for interested foodservice (or retail) personnel. These clearinghouses will also help a restaurant or institution find backup sources for products they are buying when their current purveyor's supply is limited.

Although quantitative information is presented in this report, the data is projectable only to the members of the Chefs Collaborative organization with buying authority and is **not** projectable to the population as a whole. Producers should use the findings of this report when developing their marketing plan for product introductions and marketing products to foodservice buyers and as a guide to approaching independent restaurants and institutions with their product line.

The report begins with the results of an assessment of attributes and how the respondents rank the importance of these attributes when selecting the brands or products they purchase. The report then turns its focus to the foodservice establishment's experience in purchasing local products, including where and why they have purchased local ingredients, as well as the obstacles they have faced. The report also discusses how the establishments promote the use of locally grown food. Finally, the report identifies the locally grown products that have the greatest foodservice market potential.

Introduction

Members of the Chefs Collaborative were surveyed by a mail and online survey for their opinions on the opportunities and challenges associated with purchasing locally grown food products for their foodservice establishments. The Chefs Collaborative is a national network of more than 1,000 members of the food community who promote sustainable cuisine by celebrating the joys of local, seasonal and artisanal ingredients. Founded in 1993, the Chefs Collaborative is the only national culinary organization that provides its members with tools for running socially responsible food-service businesses and making environmentally sound purchasing decisions[2]. It was believed that many of the Chefs Collaborative members might have significant expertise in purchasing locally grown food products. This expertise could be used to help producers market their products to the foodservice market, which was the primary goal of this research.

Methodology

The members were provided a website where the survey could be completed online. However, a membership list was also obtained. The Chefs Collaborative membership list was separated into those with buying authority and those without buying authority. A mailing was targeted to the individuals at the foodservice establishment who would have the greatest buying authority for the restaurant or institution. A cover letter and survey was then sent to 383 foodservice establishments across the country. Only one survey per establishment was accepted. One hundred and thirteen responses were received by the cut off date including 39 online surveys and 74 mail surveys. Consequently, 32% of the Chefs Collaborative establishments with buying authority responded to this survey.

Objectives

The Chefs Collaborative survey had three central objectives:

(1) To identify attributes important to foodservice establishments. These attributes will help define how foodservice buyers make their purchasing decisions.

(2) To identify challenges and obstacles associated with purchasing locally grown food. Producers could then anticipate and confront these challenges and obstacles as they market their products.

(3) To identify locally grown food products (including specialty or unique products) with the greatest potential for success in the foodservice market.

Although quantitative information is presented in this report, the data is projectable only to the members of the Chefs Collaborative organization with buying authority and is **not** projectable to the population as a whole. Producers should use the findings of this report when developing their marketing plan for product introductions and marketing products to foodservice buyers and as a guide to approaching independent restaurants and institutions with their product line.

The FPC wishes thank Kelly Dunn of the Chefs Collaborative membership office for her help and involvement in the data collection for this survey.

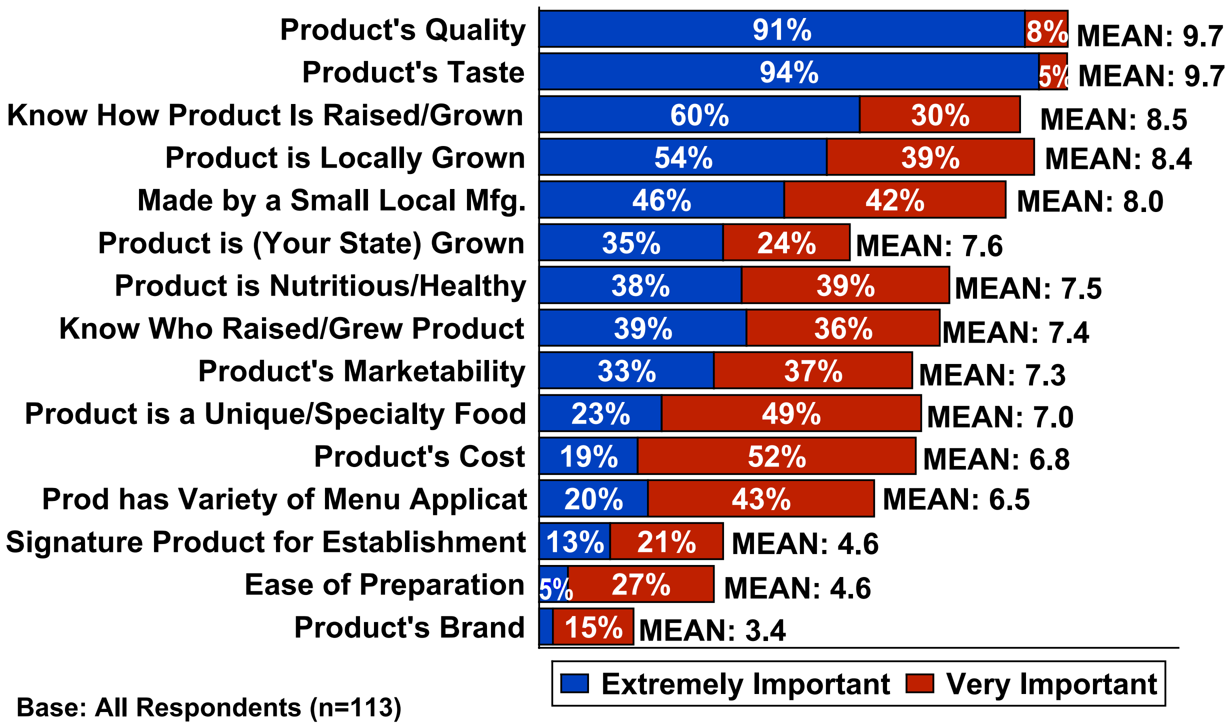
[2] http://www.chefscollaborative.org/

Approaching Foodservice Establishments With Locally Grown Products

Survey Results

1.0 Food Purchasing Behavior/Selection of Food Products

Q. How important are the following in selecting the food products that your establishment purchases? Rate on a scale of 1 to 10 with 1 being Not At All Important and 10 as Extremely Important.



All respondents were asked to rank the importance (on a scale of 1 to 10 with 1 as not at all important and 10 as extremely important) of fifteen attributes in *selecting* food products that their establishment purchases. The attributes of *Quality* and *Taste* were the top ranked characteristics with each receiving an average (mean) rating of 9.7 on a scale of 1 to 10 and over 90% of the foodservice operators ranking these attributes as extremely important. Based on this data, a product's quality and taste are critical attributes. Locally grown products that do not have these two attributes will have a very limited appeal to foodservice buyers.

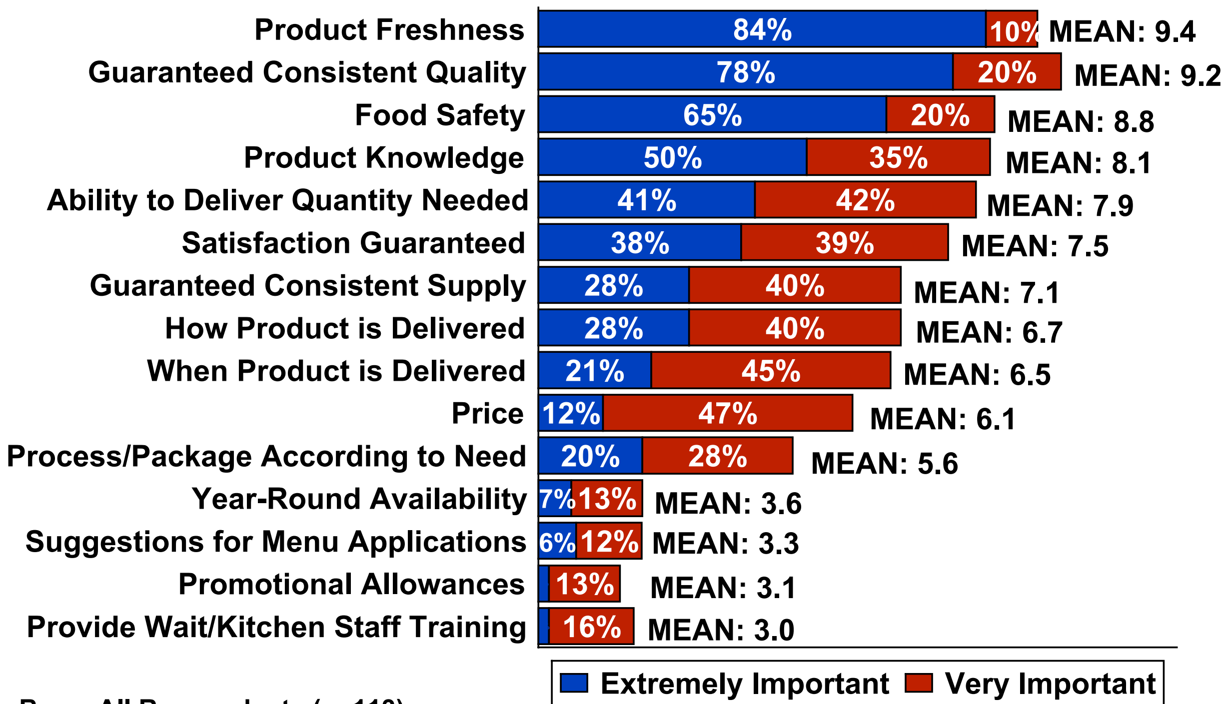
To a vast majority of the surveyed respondents, it was also very important to know *how a product is raised or grown*; *that a product is locally grown*; and *that a small local manufacturer makes a product*. Each of these attributes were very or extremely important to approximately 90% of the foodservice operators with each phrase receiving an average (mean) rating of at least 8.0. The story behind how a product is raised will enhance the locally grown or produced message because foodservice establishments are able to use this information in marketing local products to *their* customers.

It is interesting to note that only 19% of the respondents said that cost was extremely important, while 52% rated it as very important. This does not mean that price is unimportant. A locally grown product that offers quality, taste, and nutrition could still lose the sale because the product's price is more than the establishment is willing to pay.

More than 6 in 10 (63%) thought that it was very or extremely important that a product have a variety of menu applications. However, a lesser number of establishments thought it was important to have a signature product produced for their establishment and a product that was easy to prepare. This finding could be attributed to the experience level of the respondents and type of restaurant responding to the survey. Many chefs employed in upscale restaurants are responsible for (and take pride in) developing their own signature products, and for them, ease of preparation may not be a significant factor when purchasing a product. This finding, however, is not true of all restaurants and institutions. *A producer needs to ask some of the same questions posed in this survey when conducting his or her own market research.*

1.1 Making Purchasing Decisions

Q. If a farmer or a small manufacturer approached your establishment, how important are the following in making a decision to purchase their product(s). Rank on a scale of 1 to 10 with 1 as Not at all Important and 10 as Extremely Important.



Base: All Respondents (n=113)

All respondents were asked to rank the importance (on a scale of 1 to 10 with 1 as not at all important and 10 as extremely important) of fifteen attributes in making the decision to purchase products *from a farmer or a small manufacturer*. The attributes of *Product Freshness* and *Guaranteed Consistent Quality* were the top ranked characteristics with each receiving an average (mean) rating of more than 9 on a scale of 1 to 10. Over 90% of the foodservice operators ranked these attributes as very to extremely important. In addition, 77% of the restaurants and institutions said that *Satisfaction Guaranteed* was very or extremely important. Based on this data, a producer of locally grown products must deliver fresh products and have some way to guarantee consistent quality.

Product knowledge and strict adherence to food safety are also vital to successful penetration of the foodservice market. Sixty-five percent said that food safety was extremely important and this attribute received an average (mean) score of 8.8. Half (50%) of the respondents indicated that product knowledge was extremely important with the establishments giving this attribute an average rating of 8.1.

The ability to deliver the quantity needed or ordered by the foodservice establishment was also a highly ranked attribute. Eighty-three percent indicated that this attribute was very or extremely important and the group of respondents rated this attribute a 7.9 on a scale of 1 to 10. Sixty-eight percent thought that it was very or extremely important that a producer was able to guarantee a consistent supply of product. In addition, 68% thought the way or means that a product was delivered is very or extremely important, while 66% indicated *when* a product is delivered (time of day or day of the week) was very or extremely important. Evidently, it is crucial that a producer deliver the quantity to the customer as needed.

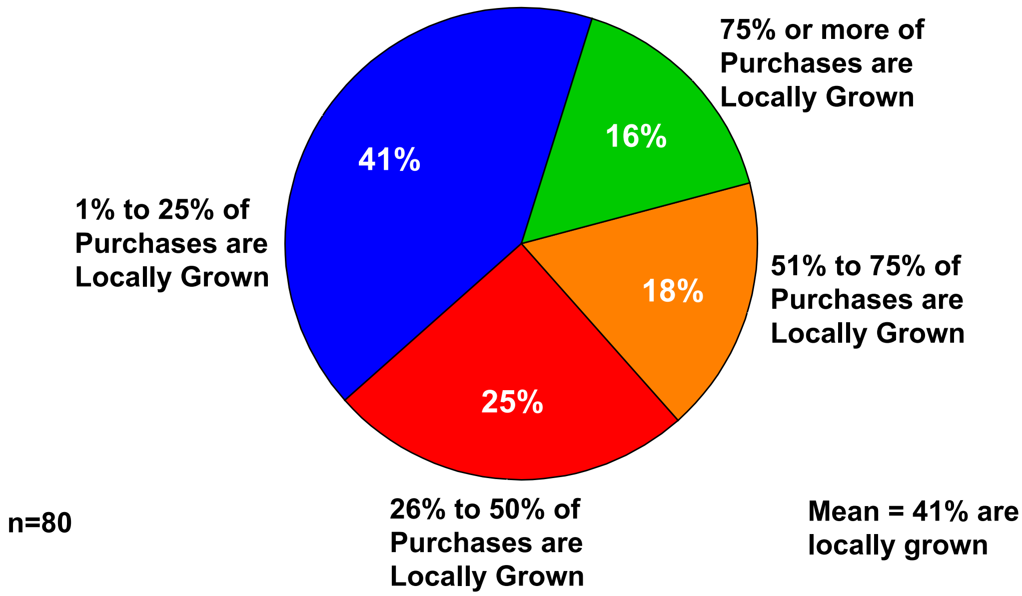
When grouped with the other attributes, price was less important to this group of respondents. Only 12% said that price was extremely important with another 47% saying that it was very important. This data shows (at least among this group of respondents) that product quality, freshness, safety, supply and delivery are more important than the product's price.

Surprisingly, *Year-Round Availability* was towards the bottom of the list of important attributes. Only 7% said that it was extremely important with another 13% reporting that it was very important, meaning that many establishments that purchase local have found a way around the problem of a seasonal supply, possibly by having a seasonal menu to attract patrons.

Only 18% thought that it was very or extremely important that they were provided menu applications. This finding could be attributed to the experience level of respondents (see demographics under section 5.0). This same reasoning may apply to the finding that only 17% thought that it was very or extremely important that they were provided wait or kitchen staff training.

2.0 Purchasing Local

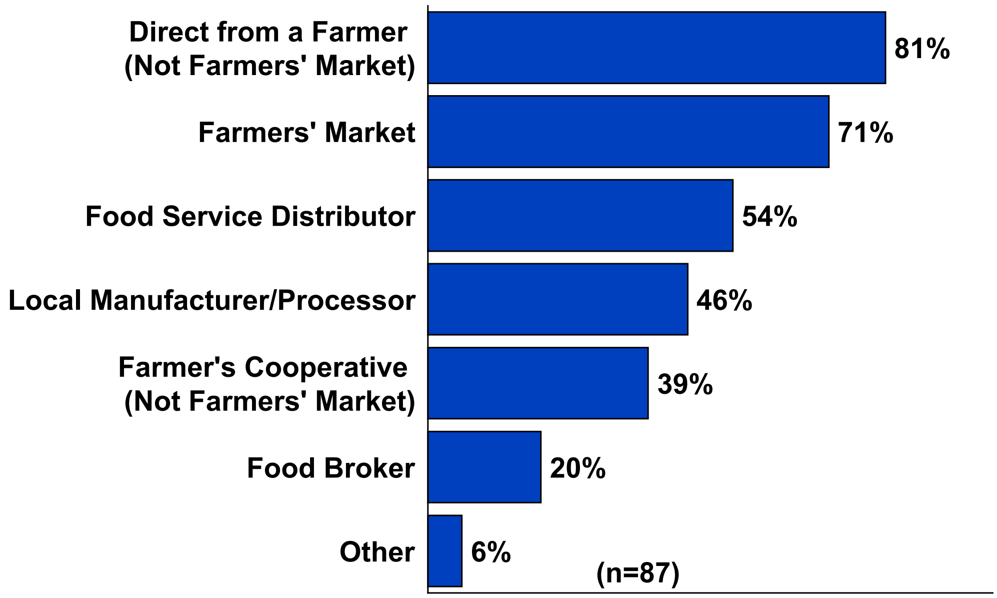
Q. What percent of your establishment's monthly food purchases are locally grown food products?



More than one-third (34%) of the respondents (n=80) reported that over half of their food purchases were locally grown products with 16% saying that at least 75% of their food purchases were local and 18% indicating that one-half to three-fourths of their purchases were local. The average (mean) percent of monthly purchases of locally grown food products was 41% between the foodservice establishments.

2.1 Locally Grown or Produced Food: Source of Purchase

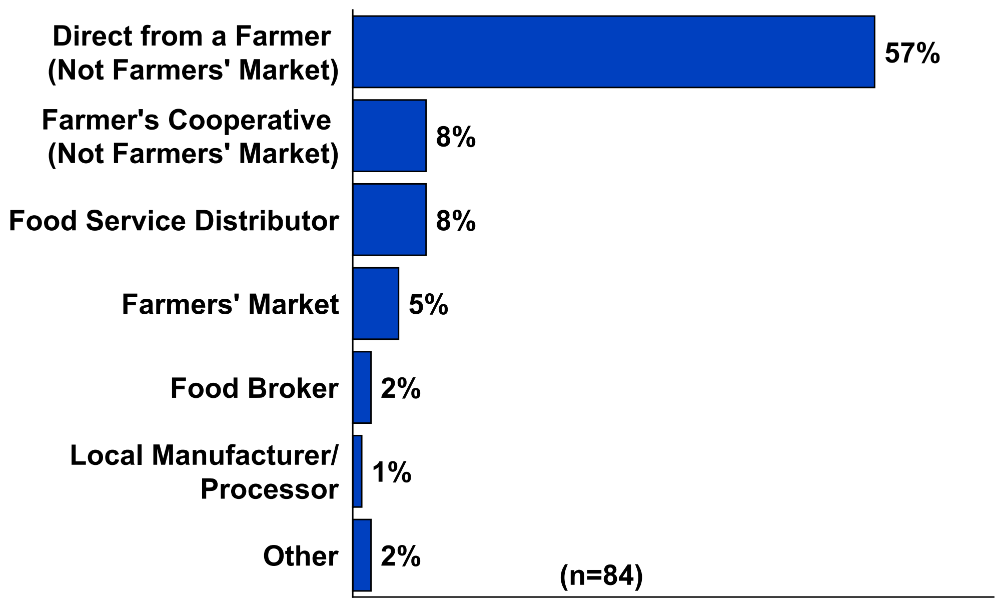
Q. Where has your establishment purchased locally grown food?
Multiple Answers Accepted



Where do these respondents purchase their locally grown food products? Eighty-one percent of the establishments (n=87) have purchased direct from a farmer. This purchase was either a direct shipment from the farm or a pick up at the farm. Seventy-one percent have purchased local food products from the farmers' market. Surprisingly, 54% of the establishments have purchased locally grown products from a foodservice distributor.

2.2 Locally Grown or Produced Food: Preferred Source of Purchase

Q. *If given a choice, what is your establishment's preferred source for locally grown food?*

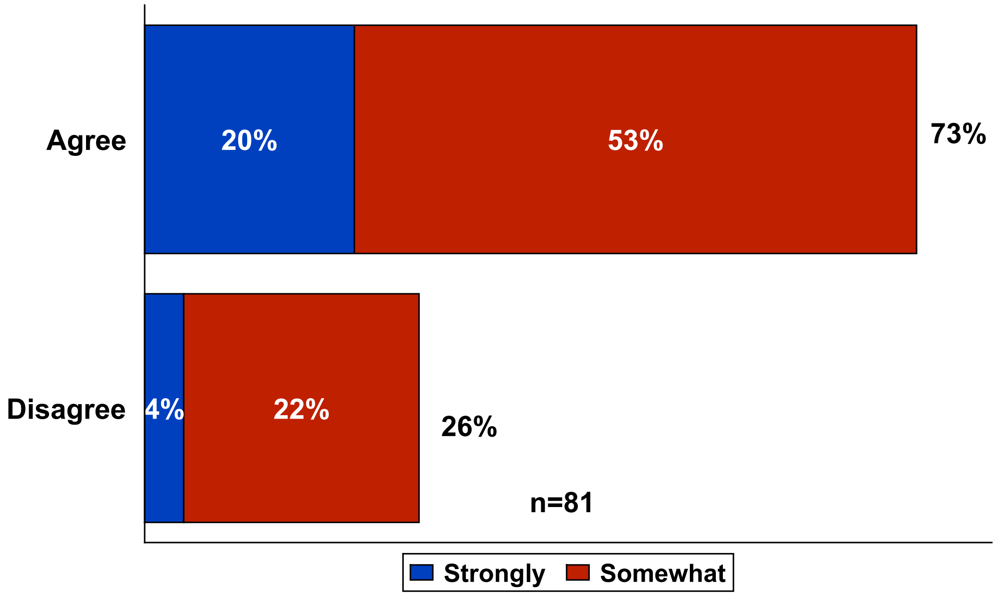


Restaurants and institutions have many choices or channels from whom they purchase products for their establishment. From the data in section 2.1, it was evident that the survey respondents have used multiple channels to purchase their locally grown food. For some, the easiest channel to use may be a foodservice distributor. A foodservice establishment can easily combine all of the products it needs on one delivery and be billed on one invoice. However, when asked to choose their *preferred* source for locally grown food, 57% of the respondents (n=84) would prefer to purchase direct from a farmer through either direct shipments from the farm or a pick up from the farm compared to 8% who prefer to purchase direct from a farmer's cooperative. Only 8% would prefer the "easy route" of a foodservice distributor.

Only 5% reported that they would prefer to purchase locally grown food from a farmers' market. This may be due to the inconvenient location and times of farmers' markets. However, as seen in section 2.1, 71% had purchased locally grown products from a farmers' market.

2.3 Is Purchasing Local Profitable?

Q. Purchasing locally grown food has had a positive impact on my foodservice establishment's bottom line profits (Strongly Agree/Somewhat Agree/Somewhat Disagree/Strongly Disagree).



Seventy-three percent of the foodservice establishments agreed or strongly agreed with the statement "purchasing locally grown food has a positive impact on my foodservice establishment's bottom line profits" with 20% strongly agreeing with this statement and only 4% strongly disagreeing with the statement. The data indicates that menuing locally grown food is a "profitable" business practice for approximately three-fourths of respondents (n=81). This research finding is significant because a producer can use this data as a ready-made selling point when contacting potential customers. Showing restaurants and institutions that buying locally grown food has been profitable for a group of renowned chefs is an excellent way for producers to get their "foot in the door" of a potential customer who may be skeptical or unwilling to bring in locally grown food.

2.4 Reasons for Purchasing Locally Grown Food

Q. Why did your establishment first decide to purchase locally grown food?

Q. Why does your establishment continue to purchase locally grown food?

Response	Why Establishment First Decided to Purchase Local % Mentioned Among Respondents (n=88)	Why Establishment Continued to Purchase Local % Mentioned Among Respondents (n=83)
Philosophy/Mission to Help/Support Local Producers	59%	70%
Quality/Better Quality	27%	39%
Fresher	23%	25%
Enjoy Contact w/Producers	3%	20%
Customer Request/Expectations	0%	13%
Taste Better	0%	12%
Unique/Specialty Products	3%	12%
Seasonal	0%	6%
More Availability	2%	4%
Better Products	8%	4%
Better Price	0%	4%

Those who have purchased locally grown food were asked what initially influenced their decision to purchase and why they continue to purchase local. These questions were asked as an open-ended question where the respondents could supply their own answers to the question.

Fifty-nine percent of the foodservice establishments (n=88) initially purchased because it was their philosophy or mission to help support a local producer. This mission mirrors the mission of the Chefs Collaborative organization[3]. It is important to note that the philosophy to help or support local producers may not be widespread among restaurants and institutions that are not members of the Chefs Collaborative.

Upon initially purchasing locally grown food, 27% indicated the food they purchased was high or better quality than previously purchased. This percentage increases to 39% as they continued to purchase local. About one-fourth of the establishments (n=83/88) said that the locally grown products were fresher than the products they had seen in the past. In addition, 12% continue to purchase locally grown food because they believe it tastes better compared to none (0%) who first decided to purchase for taste.

[3] The mission of the Chefs Collaborative is to promote sustainable cuisine by teaching children, supporting local farmers, educating food professionals, and inspiring customers to choose good, clean food.

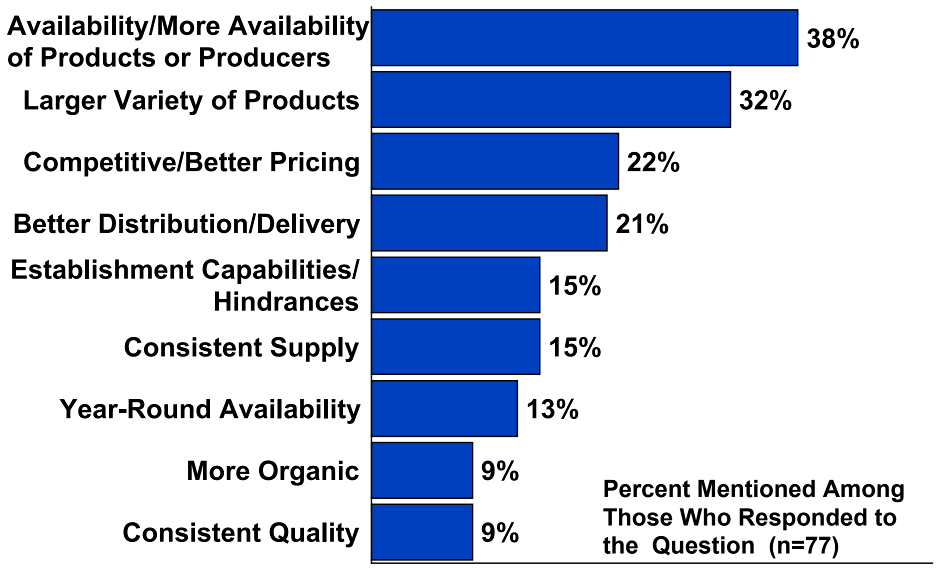
It is interesting to note that 3% of the establishments initially purchased local because they enjoyed the contact they had with the producers. However, one out of five (20%) *continued* to buy locally grown food because of the relationship they had built with the producers. This finding shows how important it is for a farmer or rancher to build a relationship with the foodservice establishment that he or she services. This relationship should not only include selling a high or better quality or fresher product but must include servicing the customer with outstanding customer service. The farmer or rancher should build this relationship with the restaurant or institutional manager, chef, cook, prep-personnel, wait staff, dishwasher etc. Indeed, each employee in the foodservice establishment should know the name and face of the producer in order for the producer to secure a solid working relationship with the establishment.

Another important finding is that none of the establishments listed *Customer Request* or *Expectations* as a reason for initially purchasing local. The frequency of this response rose to 13% as they continued to purchase indicating the approval of locally grown foods by the restaurant or institutional patrons.

Finally, while only 3% of the respondents mentioned *Unique or Specialty Products* as a reason for initially purchasing locally grown food, 12% listed it as a reason for continuing to purchase local. Some of the establishments discovered unique or specialty products they weren't using before they began purchasing locally grown food.

2.5 Increasing Local Purchases

Q. What would influence your establishment to increase the variety of locally grown food it purchases?



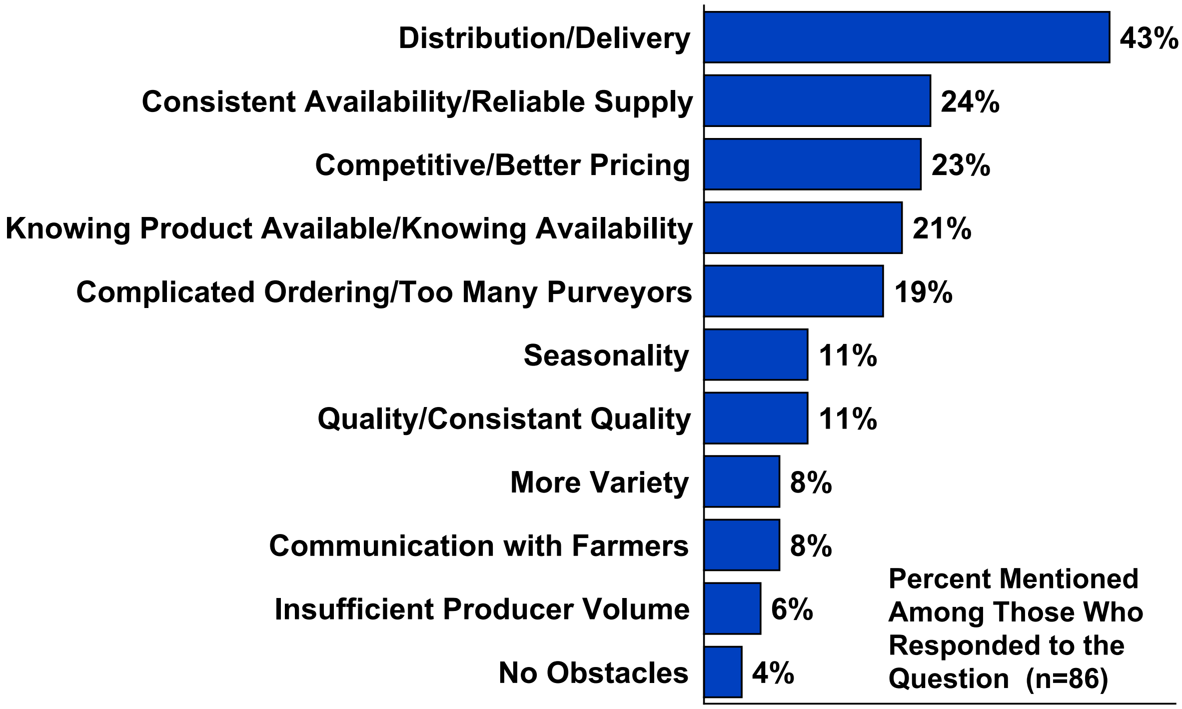
The survey respondents were asked to state what would influence them to buy more locally grown food. This question was asked as an open-ended question where the respondents could supply their own answers to the question. More than one-third (38%) would increase their locally grown purchases if more products were available in their area. Similar to this response, 32% would increase their locally grown purchases if a larger variety of products were available in their area. Consequently, with a larger variety of products and producers, the amount of locally grown products purchased by these establishments would increase.

It is also important to note that 22% of the respondents (n=77) said that competitive or better pricing would influence them to purchase more locally grown items. Better distribution and delivery, mentioned by 21% of this question's respondents, was also a major factor in increasing locally grown purchases.

Year-round availability is sometimes thought of as an obstacle for producers interested in direct marketing their products, especially those in the Midwest and Northeast regions of the U.S. However, only 13% of this question's respondents said that year-round availability would influence them to purchase more locally grown products. One interpretation of this data could be that many restaurants in the sample are featuring locally grown foods only when they are in season on a "seasonal menu" as a promotional technique to attract customers while these items are "in season".

2.6 Obstacles Faced in Purchasing Local

Q. In your opinion, what challenges or obstacles are the most difficult to overcome in purchasing locally grown food?



Purchasing locally grown food isn't always easy for a restaurant or institution. There can be obstacles to purchasing direct from a farmer or rancher as opposed to the "easy route" of ordering from a foodservice distributor. This question was asked to determine obstacles encountered when purchasing products direct from producers. The information gathered will help producers anticipate and overcome these obstacles when they call on foodservice establishments. The question was asked as an open-ended question where the respondents could supply their own answers to the question. The most significant obstacles identified by the Chefs Collaborative members can be classified into two categories: 1) Distribution and Delivery and 2) Competitive or Better Pricing.

Distribution and Delivery Obstacles Faced by Foodservice Establishments
Forty-three percent of the respondents said that the distribution and/or delivery of locally grown food is one of the greatest obstacles they encounter when purchasing direct from producers. Distribution and Delivery is "getting the right product in the right quantity to the right place at the right time". One verbatim response that best described this obstacle was: "Small local farms are not always reliable for sourcing. They do not realize the impact on the restaurant if they do not show up with product they have promised." Other verbatim responses are included in the table on the next page.

Delivery and Distribution Obstacles--Verbatim Responses

Ability to deliver
Availability with produce purveyor
Consistent supply/delivery schedule
Deliveries so that our needs can closely match their picking schedules
Deliveries to restaurants
Delivery (Six mentions)
Delivery by independent farmers
Delivery challenges
Delivery or non-delivery
Delivery schedules (Four mentions)
Distribution/delivery-easy access
Distribution (Eight Mentions)
Distribution and having it delivered to back door
Distribution of products (delivery)
Distribution, delivery vs. pickup
Getting product to us
Getting the product to the restaurant
Hard to pin down delivery times
Means of distribution
Not enough variety of products
Small growers who can't deliver
Small local farms are not always reliable for sourcing.
The immediacy of picking and coordinating
Willingness of chef to try different food delivery systems
Working out time frame for orders of delivery

Three of the obstacles mentioned by the foodservice establishments are related to distribution and delivery and they include *Consistent Availability* and *Reliable Supply*, *Product Availability/Knowing Locally Grown Products that are Available*, and *Complicated Ordering* and *Too Many Purveyors*.

Consistent Availability and Reliable Supply was mentioned by 24% of the establishments (n=86). If a restaurant operator is going to feature a locally grown item on the menu, he or she needs a guarantee of a consistent or reliable supply of the item. Having to frequently explain that a menu item is not available because either the product (or the ingredient in the product) was not available has a tremendous effect on a restaurant patron's satisfaction with the restaurant and, consequently, with the foodservice establishment's satisfaction with their supplier.

Twenty-one percent of the establishments cited product availability and/or knowing what locally grown products are available in their area as an obstacle that was difficult to overcome. Again, when a restaurant or institution is currently menuing an item that does not have consistent availability, this is a major problem for the establishment. These establishments also need easily identified sources for locally grown products. It is important to note that foodservice establishments need to be aware of the *full range* of locally grown products available. This awareness leads to the purchase of more locally grown products. Complete lists of producers who direct market their products, as well as the quantities and types of products they have available is a tremendous asset to foodservice (or retail) establishments. The data suggests there is a real need for a clearinghouse of locally grown products that provides simple and easy access for the purchaser of foodservice (or retail) products. A busy chef or manager does not have the time to call numerous local purveyors to source product and determine the availability, shipping, and price of locally grown products. A clearinghouse also helps a restaurant or institution find backup sources for the products they are currently purchasing when the current purveyor's supply is limited.

Nineteen percent mentioned *Complicated Ordering* and T*oo Many Purveyors* as another obstacle. Many foodservice establishments prefer to have a limited number of purveyors to order from, limited invoices, and as few deliveries as possible. Successful foodservice distributors advertise the fact that they are a "one stop shop" with thousands of food, paper, and chemical supplies for restaurants at one location. Of course, this is difficult, if not impossible, for the single family farmer to achieve. However, groups of farmers can band together to provide a wide range of locally grown products to offer restaurants. They may also be able to combine with small local food (or non-food) manufacturers, so that they can also offer processed food and non-food items to restaurants and institutions.

Competitive or Better Pricing

Competitive or *Better Pricing* was mentioned by 23% of the establishments. High food costs lower the profit margins of restaurants and institutions or drive up menu costs making establishments less competitive in the market. As long as the foodservice establishment believes that it is getting value for its expenditures, it will continue to purchase from a purveyor. If a locally grown producer has higher prices than his or her competition, he or she needs to show that the product's quality and/or service given to the establishment justifies the higher price and realize that some price points are difficult for even the upscale foodservice establishments to absorb.

Seasonality is mentioned by only eleven percent of the respondents. This validates the findings discussed in section 2.6. Eleven percent also mentioned *Quality* or *Consistent Quality* which could be interpreted as the majority of establishments are having few quality problems with the producers or are able to work out the quality problems before it become an difficult obstacle.

3.0 Promoting Locally Grown Food to Restaurant Patrons

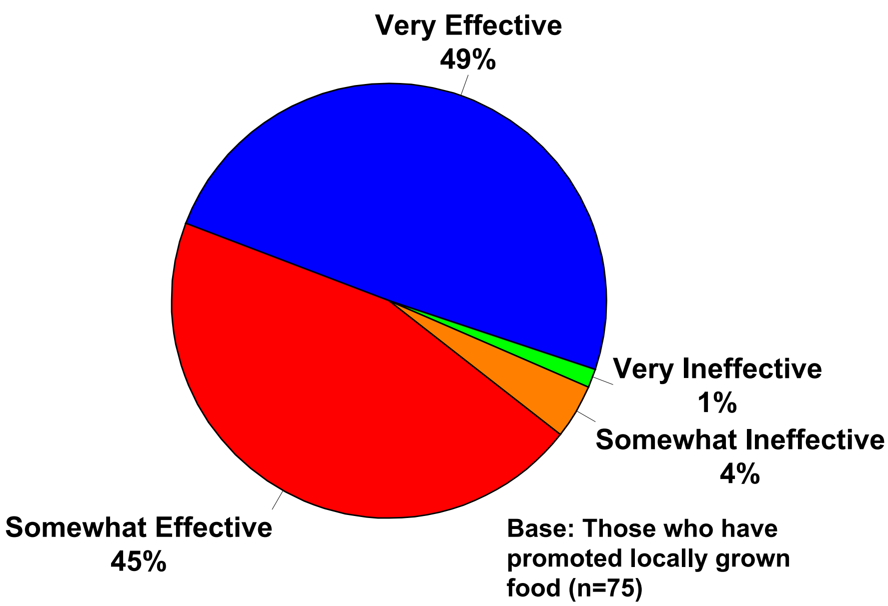
The respondents were asked if their establishment had promoted the use of locally grown food on their menu or promotion material. Those who promoted were also asked to rate the effectiveness of the promotional technique and to state which promotional channels were most effective ways to inform patrons.

Q. Has your establishment ever promoted the use of locally grown food on your menu or in your promotional material?

Q. How would you rate the effectiveness of this promotion?

90% of the Respondents Have Promoted the Locally Grown Food They Purchase

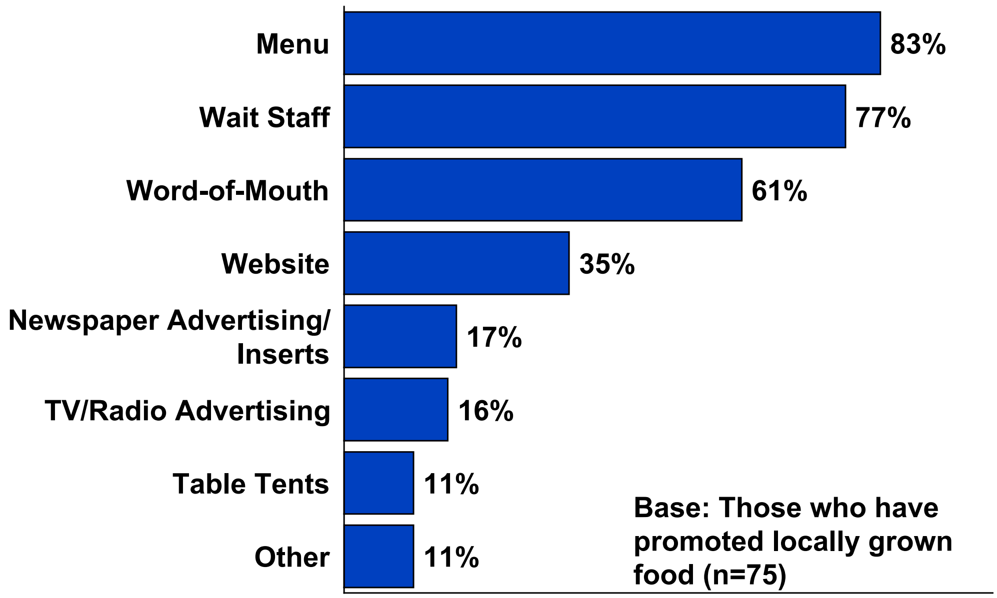
How Would They Rate The Effectiveness of this Promotion?



Nearly all (90%) of the foodservice establishments (n=87) promote the use of locally grown food on their menu or in their promotional materials at one time or another. Among those who promote (n=75), 49% consider this promotion very effective, while another 45% said that the promotion is somewhat effective. Only 5% found that promoting locally grown food is ineffective.

3.1 Most Effective Forms of Promotion

Q. What forms of advertisement do you feel are most effective in promoting locally grown food in foodservice establishments?
Multiple Responses Accepted

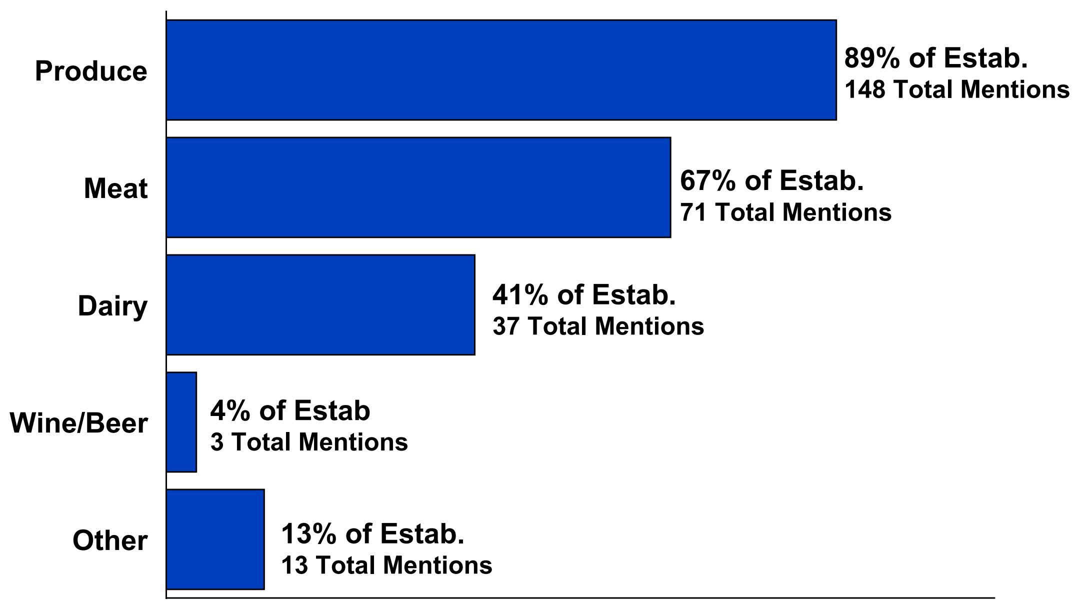


How do the surveyed establishments *effectively* promote the use of locally grown food? The establishment's menu, wait staff, and word of mouth advertising appear to be the most commonly used promotional activities for locally grown food. Eighty-three percent of the establishments who promote local foods (n=75) indicate that their menu is an effective tool to promote the use of locally grown food in their business. Seventy-seven percent indicate that the use of their wait staff is an effective promotional approach. Sixty-one percent use word-of-mouth advertising to promote the use of locally grown food, while 35% believe that websites are effective.

4.0 Locally Grown Food Products with the Greatest Foodservice Potential

This section presents the results of three open-ended questions. The first question asked the respondents to list the types of locally grown food products that have the greatest foodservice potential. The respondents were then asked to list the products that their establishment purchases from a small family farm, group of farmers, or small manufacturer that they cannot easily replace with a "mass-marketed" product. Finally, the establishments were asked to list the types of unique or specialty food products that have the greatest foodservice potential.

Q. Based upon your experience, what types of locally grown food products have the greatest foodservice potential?



Base: Those who responded to the question (n=75)

The graph above illustrates the types of locally grown food products that foodservice establishments believe have the greatest potential in the foodservice industry. The question was asked as an open-ended question where the respondents could supply their own answers to the question. There were 272 mentions received by the respondents. Each of these mentions was categorized into five food groupings: Produce, Meat[4], Dairy, Wine and Beer, and Other. The percent of establishments listing products in the categories listed above is shown, as is the number of mentions that fell into this grouping of products.

[4] Includes Beef, Chicken/Poultry, Pork, Fish/Seafood, and other meats.

Eighty-nine percent of the establishments said that locally grown produce items have foodservice potential (148 total mentions). The produce category included fruits and berries, vegetables, herbs and spices, and beans.

Two-thirds (67%) of the establishments indicated that locally grown meat products have foodservice potential (71 total mentions). This category includes beef, chicken, pork, poultry, fish, and seafood. It is important to note that there were only a few fish and seafood responses and these responses had little effect on the above percentage.

Forty-one percent of the establishments said that local dairy products including cheese, eggs, milk, and yogurt have foodservice potential, (37 total mentions). Four percent of the establishments (3 total mentions) said that locally produced wine and beer have foodservice potential. Thirteen percent of the establishments (13 total mentions) listed products that fell in the "other" category, which included locally grown and produced breads, grains, and flours.

Verbatim responses to this question are shown in the Appendix (see section 6.01). These responses show numerous mentions of free-range and all-natural meats, specialty cheese, heirloom and other specialty vegetables, as well as other unique and specialty foods that have foodservice potential.

4.1 Locally Grown Products That are Not Easily Replaced by Mass Marketed Products

Q. Please list the products that your establishment purchases from a small family farm, group of farmers, or small manufacturer (local or not local) that you cannot easily replace with a mass marketed product.

The respondents were asked to list the products they purchase from a small family farm, group of farmers or a small manufacturer that cannot easily replace a mass-marketed product. This question was asked as an open-ended question where the respondents could supply their own answers to the question. The question was asked in order to discover the unique or specialty products that are currently being sold to restaurants and institutions.

There were 427 mentions listed by the survey respondents. Each of these mentions was classified under the broad foodservice groupings mentioned in section 4.0 (meat, dairy, produce, and other[5]). A number of respondents listed organic, free-range and pastured meats, as well as specialty meats such as pheasants, quail, and rabbits. Artisan Cheese (25 mentions) and Eggs (14 mentions)—including farm fresh and farmstead eggs—were the most frequently mentioned items under the dairy category. Finally, numerous heirloom and specialty vegetables (including organic vegetables) were mentioned under the produce category. The Appendix (see section 6.02) lists (verbatim) some of products that could be classified as "unique or specialty" product mentions received in answer to this question.

[5] Includes wine and beer

4.2 Unique and Specialty Food Products with the Greatest *Future* Foodservice Potential

Q. *Looking to the future, what types of unique or specialty food products have the greatest foodservice potential?*

The respondents were asked to look into the future and predict the types of unique or specialty food products that have the greatest foodservice potential. This question was asked as an open-ended question where the respondents could supply their own answers to the question. The question was asked in order to determine the unique or specialty products that will have the greatest foodservice potential in the coming years.

There were 178 mentions listed. Each of these mentions was classified under the broad foodservice categories mentioned in section 4.0 (Meat, Dairy, Produce, and Other[6]) and are shown in the tables found in the Appendix (see section 6.03). Again organic, pastured, and all-natural meats were mentioned on a frequent basis. Local and artisan cheese was emphasized. Organic and heirloom vegetables were again frequently mentioned. Local breads, pasta, and spirits were mentioned and classified under the "Other" category.

[6] Includes wine and beer

5.0 Demographic Profile of Sample

Title/Position of Respondent	%
Chef Proprietor or Chef Owner	37
Executive Chef	23
Owner/Manager/President	17
Chef	15
Purchasing/Buyer	2
Other	5

Type of Establishment	%
Upscale Full Service Restaurant	49
Casual/Family Full Service Restaurant	14
Caterer	9
Hotel Restaurant	7
Cafeteria	4
Limited Service (Fast Food) Restaurant	3
School/University	3
Bakery	3
Wholesale/Distributor	2

Buying Authority	Mean
Level of Autonomy/Buying Authority	9.1
# of Years w/Level of Autonomy	8.4 yrs

Chain/Independent	%
Independently Owned Restaurant	91
Chain Restaurant	8

Base: All Respondents (n=113)

- One hundred and thirteen foodservice establishments responded to the survey.
- Ninety-one percent of the respondents were involved with independently owned restaurants, while 8% were employed by a chain restaurant.
- Sixty percent of the respondents had a single (one) restaurant or institution, which they were involved with through their employment or ownership.
- Nearly half (49%) of the foodservice establishments were Upscale Full-Service Restaurants, while 14% were classified as Casual or Family Full-Service Restaurants. Nine percent of the sample identified themselves as a Caterer, while 7% were Hotel Restaurants.
- Seventy-five percent of the respondents held the position of Chef at the establishment including 37% who were owners or proprietors and 23% who were Executive Chefs.
- All respondents were asked how much autonomy or freedom they have to select the suppliers they buy from. They were asked to rate this autonomy on as scale of 1 to 10 with 1 as no Autonomy and 10 as complete autonomy. The average (mean) level of autonomy was 9.1 with 79% indicating a 9 or 10 (complete autonomy).
- The average (mean) number of years with their level of autonomy was 8.4 years with 35% indicating that they had 10 years or more with their current level of autonomy.
- The next page shows the distribution of the sample by state.

Q. What state is your foodservice establishment located in?

State	**%**
AL	1.8
CA	11.5
CO	2.7
CT	0.9
DC	3.5
FL	0.9
GA	0.9
IL	3.5
MA	7.1
MD	1.8
MN	0.9
MO	0.9
MT	0.9
NC	0.9
NE	0.9
NJ	1.8
NY	7.1
OH	2.7
OR	13.3
PA	1.8
RI	0.9
SC	0.9
TX	1.8
VA	1.8
VT	3.5
WA	3.5
WI	0.9

6.0 Appendix--Verbatim Responses and Survey Instrument

This section of the report lists some of the verbatim responses to three of the open-ended questions posed in the survey. Following the verbatim responses is the survey instrument used in the research project.

6.01 Locally Grown Food Products with the Greatest Foodservice Potential

Q. Based upon your experience, what types of locally grown food products have the greatest foodservice potential?

The following tables list the responses to the above question by food category (meat, dairy, produce and other).

Meat	Frequency of Mention
Meat/Meats Unspecified	20
Chicken/Poultry	9
Fish/Seafood	6
Beef	5
Pork	3
Antibiotic Free-Beef	1
Beef, pork, lamb, veal	1
Buffalo (ribeye)	1
Chickens, ducks, rabbits, quails	1
Chinook Salmon	1
Farm shellfish	1
Fish, meat, and game	1
Free-Range Meat	1
Free-Range Meat & Poultry	1
Free-Range Chicken	1
Free-Range organic meat	1
Free-Range poultry	1

Meat	Frequency of Mention
Fryers	1
Game	1
Grass fed meat	1
Hormone/Antibiotic Free Meat & Poultry	1
Lamb	1
Lamb/Game	1
Livestock	1
Natural raised meats	1
Naturally raised meats	1
Organic and naturally raised meats	1
Organic beef	1
Proteins	1
Rabbit	1
Specialty meats	1
Veal	1
Wild game	1

Produce	Frequency of Mention	Produce	Frequency of Mention
Produce	19	Canned produce (ie. tomato chutney)	1
Tomatoes	15	Carrots & Root Veggies	1
Vegetables, all types	15	Chick peas	1
Herbs	12	Corn	1
Fruit	9	Fruits & Berries	1
Lettuce	8	Fruits and vegetables	1
Greens	7	Heirloom Potatoes	1
Berries	5	Heirloom Squashes	1
Apples	4	Legumes	1
Squash	4	Lettuce and Mixed Mesculuns	1
Potatoes	3	Lettuce/salad mix	1
Salad mix	3	Lettuces/greens	1
Heirloom tomatoes	2	Nuts and honey	1
Heirloom varieties of all kinds of veg	2	Organic and naturally raised vegetables	1
Heirloom fruits and vegetables	2	Organic Vegetables	1
Mesclun	2	Peaches	1
Onions	2	Peppers-Hot/sweet	1
Root Vegetables	2	Potatoes, fingerlings	1
Salad Greens	2	Salad Greens (Mesclun mix, Arugula, Morona	1
Tomatoes (Heirlooms)	2	Seasonal fruits/berries	1
All sustainable produced products	1	Seasonal Veggies and fruits	1
Asparagus	1	Specialty Herbs	1
Assorted Veggies	1	Specialty produce	1
Basic Vegetables	1	Tree fruit`	1
Beans	1	Unusual fruits and vegetables	1
Bell Peppers	1	Unusual vegetables	1
Braising Greens	1	Winter squash/Heirloom Squash--Summer	1

Dairy	Frequency of Mention	Other	Frequency of Mention
Dairy Unspecified	12	Breads and grains	6
Cheese	11	Flour	2
Eggs	7	Seasonal Products	1
Artisan Cheese/Dairy Products	4	Wheat Flour	1
Dairy including cheese	1	Beverages	1
Dairy/eggs	1	Fungus	1
Farmstead Cheese and Dairy	1	Foraged items	1

6.02 Locally Grown Products That are Not Easily Replaced by Mass Marketed Products

Q. Please list the products that your establishment purchases from a small family farm, group of farmers, or small manufacturer (local or not local) that you cannot easily replace with a mass-marketed product.

The following tables list (verbatim) the more "unique or specialty" product mentions received in answer to this question above. The responses are broken out by food category (meat, dairy, produce and other). Unless otherwise noted each response received one mention by the respondents.

Meat

Buffalo Meat (two mentions)
Farm raised elk
Farmstead/Artesian Bacon (two mentions)
Free range organic beef
Free range chicken livers
Free range chickens
Free range organic chicken
Free range pork/wild local salmon
Goat
Grass Fed Beef (three mentions)
Hormone/antibiotic free poultry, lamb, beef
Lamb (three mentions)
Locally substainabley harvested fish
Micro Beef
Milk fed only lamb
Natural Beef/Pork
Organic Lamb
Organic Beef (two mentions)
Organic Chicken (three mentions)
Organic chickens and ducks
Organic Grown Pork (three mentions)
Organic Lard
Organic Meats Unspecified (two mentions)
Pasture raised beef and lambs
Pasture raised birds
Pasture Raised Meats (two mentions)
Pastured chicken, beef, lamb, pork
Pastured meats (beef, chicken, lamb, hogs, bison)
Pasture-raised chicken (two mentions)
Pastured/Free Range Chicken
Pheasant
Quail
Rabbit
Sausage/sausage-home mix
Scottish red deer

Dairy

Artisan Cheese--25 mentions (6% of all mentions)
Artisan Goat Cheese
Artisan Gouda Cheese
Baby Swisschard
Blue Cheese
Eggs/Farm Fresh/Farmstead Eggs (14 mentions)
Farmstead Cheese (six mentions)
Free-Range Chicken and Rabbit Eggs
Glass-Bottled Milk Non-BGH
Goat Cheese (two mentions)
Grass Fed Milk
Heavy Cream
Hormone free dairy
Organic goat cheese
Organic Valley Dairy Products

Produce

Antique apples from local orchard
Baby Lettuces
Baby Pea tops
Bloomsdale spinach
Broccoli Diccicio
Chanterry Carrots
Chaterelle/Poreini mushrooms
Cultivated mushrooms
Custom Salad Mix/Greens (two mentions)
Dried Legumes
Ethnic produce not widely available (tuscan kale)
Exotic Fungus
Fingerling potatoes (rose fan, russan bwana, la bette)
Foraged mushrooms (two mentions)
Fresh herbs
Local/Fresh shelling beans (two mentions)
Garlic Greeos
Heirloom Apples (Esopus Spitzinberg, roxbury russet, blue pearmain)
Heirloom lettuces
Heirloom Squash (two mentions)
Heirloom Tomatoes (nine mentions)
Heirloom vegetables unspecified (six mentions)
Hydroponics Tomatoes
Japanese Eggplant
Local wild mushrooms
Macomber Turnip
Mesculn mix
Micro greens (three mentions)
Mixed greens w/ mizuna purple/cale
Ochici Kuri/rouge vie de tramp and li cheye pumpkin
Organic lettuces picked daily
Organic Carrots
Organic vegetables/produce
Organic Salad Greens
Organic seasonal produce
Organic tomatoes, corn and any seasonal produce
Paw Paws
Quinoa Greens
Russian Kale
Shallots
Special herbs (eg. Epazote, purslane)
Unusual Chilies
Unusual Radishes and Beets
Unusual root crops (celeriac, sunchokes, crosnes)
Vegetables specific to Mexican cuisine
Vidalia Onions
Wild harvested foods (mushrooms, berries, herbs, crabapples, plums)
Wild herbs
Wild Mushrooms/truffles (three mentions)

Other

Anabula
Artisan Bread/Fresh Bread (13 mentions)
Edible flowers
Flours-Organic
Flowers
Fole grass
Fresh pasta
Honey (five mentions)
Honey Organic
Ice cream
Living (unpasturized) vinegars
Local Beer and Wine (eight mentions)
Local pouissin
Micro Arugula
Oils and vinegars
Olive oil
Organic chocolate
Organic olive oil
Organic, fair-trade, shade grown coffee
Paw paw pulp
Potted plants
Rainwater brined olives
Seasonal decorations: flowers, gourds, cornstalk
Small batch artisan olive oil
Soysage-we make our own
Specialty Baked Goods
Specialty pastries
Specified size products(fava beans)

6.03 Unique and Specialty Food Products with the Greatest *Future* Foodservice Potential

Q. Looking to the future, what types of unique or specialty food products have the greatest foodservice potential?

The following tables list (verbatim) product mentions received in answer to this question above. The responses are broken out by food category (meat, dairy, produce and other). Unless otherwise noted each response received one mention by the respondents.

Meat

Beef
Dry aged grassfed beef
Farm raised elk
Fine quality cured meats
Free Range Animal Products unspecified
Game
Grass-fed beef
Hams and other charartene
Humainly Raised Meats (no hormones/antibiotics)
Hormone/antibiotic free poultry, game, beef
Lamb
Local Fish/Game
Meat/Poultry-Hormone/Antibiotic Free
Meats unspecified (10 mentions)
Natural Meats
Natural raised quail, rabbit duck
Naturally and humanely raised meats
Non-Farmed Fish
Organic Beef
Organic Chicken
Organic grass fed beef
Organic meats unspecified (two mentions)
Organic sausage
Pasture raised beef and lambs
Pastured meats
Poultry (six mentions)
Prosciutto
Quality Grass Fed Meats
Salami's
Fish/Seafood (two mentions)
Veal

Dairy

Artisan cheeses (three mentions)
Dairy unspecified (three mentions)
Dairy-butter (two mentions)
Eggs (three mentions)
Farmstead cheese (two mentions)
Farmstead/artisanal cheeses (two mentions)
Good eggs made from bug eating chickens
Local Cheese/Cheeses unspecified (seven mentions)
Mozzarella Cheese
Organic Eggs
Sheep milk yogurt

Produce

Antique apples from local orchard
Any and all heirloom vegetable and fruit varieties
Asparagus
Local Produce unspecified (five mentions)
Different Salad Greens
Different varieties of vegetables
Dried or frozen mushrooms
Fruit (three mentions)
Greens
Heirloom beans
Heirloom Tomatoes
Heirloom vegetables unspecified (three mentions)
Legumes
Lettuces
Local Fruit/Produce/Nuts
Micro herbs
Olives with marinades
Organic Fruit
Organic produce (three mentions)
Organic Vegetables
Paw paw pulp
Piquillo peppers
Produce grown specifically for our menu
Ripe, delicious fruit
Salad
Small Interesting Greens
Small Vegetables
Tomatoes (two mentions)
Unique berries i.e. Logan/Huckle
Unusual Vegetables
Year round good greens
Year round good tomatoes

Other

Argan oil
Artisan Baked Goods
Artisan Bread
Breads
Bresola
Charcuterie
Condiment quality oils
Cooking oils
Dips/spreads
Exotic Fungus
Flour
Fresh pasta
Grains
Jams/preserves
Juices
Local Wine/Beer/Cider (three mentions)
Local Vinegar/Oil
Local Wheat Flour/Grain
Oils
Olive Oil (two mentions)
Organic unspecified (seven mentions)
Organic cereals
Organic Grains & Flours
Relishes
Salad dressing
Teas
Value added bulk items (pesto, jam...)
Varietal Honeys
Vinegars (two mentions)
Wholegrain Blends

6.04 Survey Instrument

Chefs Collaborative Survey

1. What foodservice segment would your establishment most identify with (please select one)?
   a. Upscale Full Service Restaurant
   b. Casual/Family Full Service Restaurant
   c. Limited Service (Fast Food) Restaurant
   d. Hotel Restaurant
   e. Cafeteria
   f. Caterer
   g. Other____

2. Is your foodservice establishment a chain/franchise or independently owned?
   ☐ Chain/Franchise
   ☐ Independently Owned

3. How many units does your company operate? ____________ Units

4. What is your title/position? ________________________

5. How much autonomy or freedom do you have to select suppliers? Please rate autonomy on a scale of 1 to 10 with 1 as No Autonomy and 10 as Complete Autonomy.

No Autonomy			Complete Autonomy
1 2	3 4 5	6 7 8	9 10

6. How long have you had this level of autonomy? ____________ Years

7. How important are the following in *selecting* the food products that your establishment purchases? Rate on a scale of 1 to 10 with 1 being Not at all Important and 10 as Extremely Important.

Attribute	*Not Important*		*Somewhat Important*			*Very Important*			*Extremely Important*	
Product's Quality	1	2	3	4	5	6	7	8	9	10
Product's Taste	1	2	3	4	5	6	7	8	9	10
Product's Marketability	1	2	3	4	5	6	7	8	9	10
Product is Nutritious & Healthy	1	2	3	4	5	6	7	8	9	10
Product's Cost	1	2	3	4	5	6	7	8	9	10
Unique or Specialty Products	1	2	3	4	5	6	7	8	9	10
Signature product for my establishment only	1	2	3	4	5	6	7	8	9	10
Product has a variety of menu applications	1	2	3	4	5	6	7	8	9	10
Product is locally grown	1	2	3	4	5	6	7	8	9	10
Product is made by a small local manufacturer	1	2	3	4	5	6	7	8	9	10
Product is (Your State) Grown	1	2	3	4	5	6	7	8	9	10
Ease of preparation	1	2	3	4	5	6	7	8	9	10
Product's Brand	1	2	3	4	5	6	7	8	9	10
Personally know who raised/grew or processed product	1	2	3	4	5	6	7	8	9	10
Know how product was raised or grown	1	2	3	4	5	6	7	8	9	10

8. If a farmer or a small manufacturer approached your establishment, how important are the following in making a decision to purchase their product(s)? Please rank on a scale of 1 to 10 with 1 as Not at all Important and 10 as Extremely Important.

Attribute	*Not Important*		*Somewhat Important*			*Very Important*			*Extremely Important*	
Guaranteed consistent supply	1	2	3	4	5	6	7	8	9	10
Guaranteed consistent quality	1	2	3	4	5	6	7	8	9	10
Year-Round Availability	1	2	3	4	5	6	7	8	9	10
Price	1	2	3	4	5	6	7	8	9	10
When product is delivered	1	2	3	4	5	6	7	8	9	10
How product is delivered	1	2	3	4	5	6	7	8	9	10
Product Freshness	1	2	3	4	5	6	7	8	9	10
Suggestions for menu applications	1	2	3	4	5	6	7	8	9	10
Satisfaction Guaranteed	1	2	3	4	5	6	7	8	9	10
Ability to deliver the quantity needed	1	2	3	4	5	6	7	8	9	10
Food Safety	1	2	3	4	5	6	7	8	9	10
Ability to process and package product according to our needs	1	2	3	4	5	6	7	8	9	10
Provides wait/kitchen staff training	1	2	3	4	5	6	7	8	9	10
Promotional allowances	1	2	3	4	5	6	7	8	9	10
Product knowledge	1	2	3	4	5	6	7	8	9	10

9. Does your establishment purchase locally grown food?
   a. Yes, currently (Answer to Q10a, b, c and d then skip to Q11)
   b. Yes, in the past but not currently (Answer Q10b, e, and f)
   c. No (Answer to Q10e and f)

10a. How many years has your establishment been purchasing locally grown food? ____________ Years

10b. Why did your establishment *first* decide to purchase locally grown food?

1) ____

2) ____

10c. Why does your establishment continue to purchase locally grown food?

1) ____

2) ____

3) ____

10d. What would influence your establishment to **increase** the variety of locally grown food it purchases?

1) ____

2) ____

3) ____

10e. Why haven't you purchased or why have you discontinued purchasing locally grown food?

1) ____

2) ____

3) ____

10f. If these issues were adequately addressed by a potential vendor, would you purchase locally grown food?

- ☐ Yes (Skip to "Thank You")
- ☐ No (Answer 10g, then skip to "Thank You")

10g. Why not?

1) ____

2) ____

3) ____

11. In your opinion, what challenges or obstacles are the *most difficult* to overcome in purchasing locally grown food?

1) ____

2) ____

3) ____

12. What percent of your establishment's monthly food purchases are locally grown food products?
___________% (Please provide your best estimate)

13. Where has your establishment purchased **locally grown** food (select as many as apply)?
    a. Direct from a farmer (not from a farmers' market)
    b. Direct from a farmer's co-op (not from a farmers' market)
    c. From a Farmers' market
    d. From a local manufacturer or processor
    e. From a foodservice distributor
    f. From a food broker
    g. Other (please list)____

14. If given a choice, what is your establishment's **preferred** source for locally grown food (select only one)?
    a. Direct from a farmer (not from a farmers' market)
    b. Direct from a farmer's co-op (not from a farmers' market)
    c. From a Farmers' market
    d. From a local manufacturer or processor
    e. From a foodservice distributor
    f. From a food broker
    g. Other (please list)____

15. What would be your establishment's level of interest in having the ability to promote locally grown food on your menu or promotional material? (Please indicate your interest on a scale of 1 to 10 with 1 as Not At All Interested and 10 as Extremely Interested)

Not Interested		*Somewhat Interested*			*Very Interested*			*Extremely Interested*	
1	2	3	4	5	6	7	8	9	10

16. Has your establishment ever promoted the use of locally grown food on your menu or in your promotional material?
    - ☐ Yes
    - ☐ No (Skip to Q19)

17. How would you rate the effectiveness of this promotion?
    a. Very Effective
    b. Somewhat Effective
    c. Somewhat Ineffective
    d. Very Ineffective

18. What forms of advertisement do you feel are **most effective** in promoting locally grown food in foodservice establishments (select all that apply)?
    a. Menu
    b. Table Tents
    c. Wait Staff
    d. Word of Mouth
    e. TV/Radio advertising
    f. Newspaper Advertising/Inserts
    g. Website
    h. Other ______________________________________(Please List)

19. Purchasing locally grown food has had a positive impact on my foodservice establishment's bottom line profits.
    a. Strongly Agree
    b. Somewhat Agree
    c. Somewhat Disagree
    d. Strongly Disagree

20. Based upon your experience, what types of locally grown food products have the **greatest** foodservice potential?

_________________________ _________________________ _________________________

_________________________ _________________________ _________________________

21. Please list the products that your establishment purchases from a small family farm, group of farmers or small manufacturer (*local or not local*) that you cannot **easily** replace with a mass marketed product. Please be as specific as possible i.e. farmstead/artisan cheese and not "cheese".

__________________________ __________________________ __________________________

__________________________ __________________________ __________________________

__________________________ __________________________ __________________________

22. Looking to the future, what types of unique or specialty food products have the **greatest** foodservice potential?

__________________________ __________________________ __________________________

__________________________ __________________________ __________________________

23. What state is your foodservice establishment located in? __________________

24. Name of establishment (optional) ____