



Flavor, Quality & American Menus 2009 Sustainability Survey Results

Background

In August 2009 The Culinary Institute of America (CIA) issued a 14-question survey to invited and confirmed operator attendees for the 2009 Flavor, Quality & American Menus leadership retreat. The goal of the survey was to elicit information on top sustainability issues affecting the volume foodservice industry in the U.S. The survey touched on three areas—(1) sustainable sourcing, (2) energy & water conservation, and (3) waste management—and focused most heavily on sustainable sourcing and waste management.

Response Rate

Forty-five (45) confirmed attendees were asked to complete the online survey, which was administered through www.surveymonkey.com. Twenty-six (26) operators completed the survey within the requested timeframe, representing a 58% response rate.

Respondent Demographics

Respondents from all sectors of the volume foodservice industry completed the survey.

- Quick Service 18.5%
- Casual Dining 14.8%
- Contract Foodservice 22.2%
- College/University 25.9%
- Hotel/Resort 3.7%
- Supermarket (Prepared Foods) 14.8%

Respondents from small, mid-size, and large volume foodservice operators completed the survey. The following depicts operation size based on number of units:

- <50 units 37.0%
- 50-100 units 14.8%
- 101-500 units 14.8%
- 501-1000 units 11.1%
- >1000 units 22.2%

Respondents differed greatly in terms of operation size based on annual food and beverage sales.

- <\$5 million 7.4%
- \$6-50 million 29.6%
- \$51-100 million 3.7%
- \$101-500 22.2%
- >\$500 million 37.0%

Addressing Major Sustainability Issues

The vast majority of respondents stated their organizations are addressing sustainable sourcing (92%), energy & water conservation (88%), and waste management (88%).

Sustainable Food Sourcing

We wanted to dig deeper into sustainable sourcing issues. Respondents were asked to indicate which of the following sustainable sourcing issues their organizations are addressing:

- Establishing sustainable food sourcing policies
- Sourcing more “local” products
- Sourcing more organic products
- Partnering with local growers
- Developing menus based on seasonal availability of produce
- Sourcing sustainable seafood products
- Sourcing grass-fed beef
- Sourcing free-range eggs
- Sourcing fair-trade coffee

What are the top sustainable sourcing issues being addressed?

The top three sustainable sourcing issues being addressed by respondents to this survey are establishing sustainable food sourcing policies (76%), sourcing sustainable seafood (72%), and sourcing more “local” products (68%).

What are the most important sustainable sourcing issues?

We also asked about the importance of these nine sustainable sourcing issues. The top three issues were establishing sustainable food sourcing policies (44%), sourcing fair trade coffee (40%), and sourcing sustainable seafood (36%). The differences between the “addressing” question and the “importance” question may relate to differences in corporate values versus the values of the individuals responding to the survey.

What are the least important sustainable sourcing issues?

The bottom three issues in terms of importance were sourcing free-range eggs, sourcing grass-fed/grass-finished beef, and sourcing more organic products.

How knowledgeable are operators about sustainable sourcing issues?

Our final question in this category related to the knowledge about the nine issues listed above. Respondents indicated that they feel most knowledgeable about developing menus

based on seasonal availability of produce and sourcing sustainable seafood products, and least knowledgeable about sourcing fair-trade coffee and sourcing free-range eggs.

“Local” Sourcing

The term “local” is used more and more often these days, but there is little agreement on its meaning.

How do volume foodservice operators define “local”?

We asked respondents to define “local”, and we discovered the definition of “local” varied greatly among respondents. Some operators define “local” in terms of mileage with definitions ranging from 100 to 500 miles from an operating unit. Others define “local” in terms of regional or state boundaries (e.g. products sourced within the Northeast).

What percentage of products are operators trying to source locally?

We also asked operators to tell us what percentage of products they are trying to source locally, and again, answers varied dramatically, from 15% to a “stretch goal” of 100%.

What are some other issues associated with local sourcing?

Some respondents noted that their ability to source locally changes as the seasons change, and that their menus reflect this. One respondent noted that adequate supply is a challenge with local sourcing stating, *“We try to source as many products as possible, but most farms just do not have enough for our demand.”* Another respondent noted that packaging is a big challenge with local sourcing. *“Many of the local growers don’t have consistent packaging. Some sell by the pound, some by the bushel. Case size and box sizes do not match each other.”*

Food Waste Management

As with sustainable sourcing, we drilled down a bit and asked respondents to tell us which of the following food waste management issues they are addressing:

- Reducing pre-consumer food waste
- Reducing post-consumer food waste
- Composting
- Reducing portion sizes to reduce food waste
- Donating food
- Waste-to-energy capture programs (e.g. fryer oil fuel generation)
- Installing food waste handling equipment (e.g., compactors, disposers, pulpers)

What are the top food waste management issues?

The top three issues being addressed by this group included composting (64%), reducing post-consumer food waste (60%), and reducing pre-consumer food waste (56%).

What are the most important food waster issues?

Respondents’ answers to the importance of these issues the issues being addressed. Reducing pre-consumer food waste is the most important issue followed by reducing post-

consumer food waste and composting (tied for second place), and installing food waste handling equipment. Least important issues are donating food and composting.

Is composting an issue of any interest?

Composting is an issue with a great split with respondents, likely due to the differences among operations represented in this survey. Colleges and university operators report composting is an important issue that is being addressed while chain operators participating in this survey are not addressing this issue, and issue that is not deemed an important issue.

How knowledgeable are operators about food waste issues?

Food waste management knowledge scores were lower than sustainable sourcing knowledge scores. Most operators responded that they have average knowledge of the issues addressed in this survey. The top three issues were donating food, reducing portion sizes, and reducing post-consumer food waste. The issue that received the lowest knowledge score was installing food waste handling equipment.

Marketing, Education & Outreach

More than two-thirds of respondents (68%) said they are working on initiatives to increase awareness of sustainability initiatives with their customers, as well as training staff to ensure buy-in and compliance with sustainability policies. One respondent summed this up by saying, *"We need to educate our clients and customers about the need for [farm-to-fork] solutions. Purchasing biodegradable disposables is not enough."*

Top Sustainability Challenges

The final survey question asked respondents to list the top three sustainability challenges their organizations are trying to address today. The top three responses were sustainable sourcing, local sourcing, and sourcing sustainable seafood, which confirmed earlier findings, but the open text-box response field also yielded some interesting information not addressed in other parts of the survey, including the financial implications of operating more sustainably.

Managing Cost and Measuring Impact Are Critical to Success

One respondent called out the financial challenges, stating that *"developing a portfolio of options that is cost-neutral to us and to our clients"* is the biggest challenge for that operation. That same respondent also noted that *"developing a real sustainability index to measure the impact of our decisions"* is an important issue.

A Graphic Depiction of the Top Sustainability Issues



This graphic was created using www.wordle.com.

For More Information

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