

The Johns Hopkins Center For A Livable Future:
Sodexo Meatless Monday Survey Results

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Sodexo Meatless Monday Survey Results

Summary

Following a full year of implementation, Sodexo North America's Meatless Monday health and wellness initiative has been well received and successful in motivating customers to eat more plant-based meals. According to a survey of 245 food service sites, more than 40 percent saw an increase in vegetable sales and 24 percent noted a decrease in consumer selection of meat options.

Sodexo first launched Meatless Monday in January 2011. The global food service, facilities and energy management company, which serves more than 9.3 million meals a day, encouraged its sites to promote and add the option of plant-based entrées to their menus each week and to promote the importance of increasing the consumption of fruits and vegetables.

Nearly three quarters of those surveyed, 74 percent, offered the promotion at their client sites. **More than half of the participating providers, 65 percent, said they would continue to promote Meatless Monday.** An additional 24 percent said they might continue promoting the campaign at their facilities. The majority of sites found neither a decrease nor increase in sales, and one account found that customers were willing to pay as much for meatless options as for those containing meat proteins. This suggests that the Meatless Monday promotion, on average, maintains sales and may increase customer satisfaction.

The majority of the food service sites were split between corporate services (50 percent) and health care (47 percent) accounts, with the remaining three percent comprised of government accounts. There were important differences between these sectors. Overall, the health care accounts had a more positive response to the campaign and reported an almost 40 percent perceived positive customer response. Providers from both the corporate services and health care sectors noted that they perceived the campaign as a demonstration of Sodexo's commitment to health and wellness, and indicated this was a key benefit of the promotion.

Conclusion

Results from the Sodexo Meatless Monday survey of food service client sites indicate that it is being promoted and valued by providers, which suggests preliminary strong support for the program. While many account managers indicated that they noticed a significant increase in vegetable purchases and a decrease in meat sales during the

implementation of the campaign, further research is necessary to gauge the actual impacts of Sodexo's Meatless Monday promotion on purchases and consumer attitudes and behaviors. Important differences between corporate and health care accounts exist, particularly in the implementation and perceived consumer response of Meatless Monday. Surveys were voluntary and results are subject to response bias; there is no way to gauge the perceptions of those who did not respond to the survey.

Background

In 2000, U.S. Surgeon General David Satcher, MD, recommended in *Healthy People 2010*ⁱ that Americans reduce their consumption of saturated fat by 15 percent. According to Dr. Robert S. Lawrence, director of the Johns Hopkins Center for a Livable Future, this goal could be achieved by a simple change in diet: "Almost all saturated fat comes from meat and high-fat dairy. Cutting out meat one day a week can help Americans reach the reduction goal with little effort." The simple concept behind the modern-day "Meatless Monday" was born, and in 2003, the national non-profit Meatless Monday Campaign was established as a public health initiative to help reduce consumption of saturated fat. The Center for a Livable Future, which is based at the Johns Hopkins Bloomberg School of Public Health, serves as the national campaign's scientific advisor.

Meatless Monday focuses on reducing meat consumption and increasing the intake of whole grains, legumes, fruits and vegetables. Research has shown that diets rich in meat products may contribute to higher mortality risks.ⁱⁱ In one prospective cohort study, the highest intake of red and processed meats was associated with elevated rates of total mortality, including cancer and cardiovascular disease.ⁱⁱ Conversely, diets that are low in fat and high in fruits, vegetables and whole grains are linked to healthier outcomes.^{iii iv v vi} Studies demonstrate "a significant inverse association between fruit and vegetable intake and cardiovascular risk" especially in women.ⁱⁱⁱ As a result, the 2010 Dietary Guidelines Advisory Committee recommends a "shift in food intake patterns to a more plant-based diet."^{vii} Participating in Meatless Mondays is one way to adhere to this recommendation. Meatless Monday is geared towards improving health through change in diets, starting with one day a week. On a related note, the "Healthy Monday" campaign, the umbrella campaign of which Meatless Monday is one part, promotes weekly reminders about a range of healthy behaviors including physical activity, preventive screenings, smoking cessation, stress reduction, and nutrition education.

Implementation

Sodexo, a global food service, facilities and energy management company that serves more than 10 million North American customers a day, launched the Meatless Monday initiative in January 2011. As part of a larger “Better Tomorrow Plan,” Sodexo states that it is committed to sustainability and promoting healthier food options for all of their employees and clients. For the purposes of this paper, “client” is used interchangeably with “account” or “food service provider,” and refers to the institutions, organizations, and companies for which Sodexo provides food services. The Meatless Monday campaign toolkit was sent to all U.S. health care accounts in January 2011, as part of a trimester promotion kit. For corporate and most government accounts, Sodexo used a “pull” strategy, in which the Meatless Monday materials were posted on Sodexo’s intranet (SodexoNet) in March 2011, and interested food service directors could download and retrieve information from the website. This initiative sought to encourage health and wellness, by “promoting and adding the option of a plant-based entrée to its menus each week.”^{viii} Many accounts that participated in the initiative continued to offer meat products on Mondays, but also increased their availability of vegetarian options on these days. Implementation was voluntary, and no Sodexo incentives were given to food providers to promote Meatless Monday.

During the promotions in its health care, government and corporate settings, Sodexo also ran a parallel Meatless Monday campaign in eight K-12 school districts that involved a staged approach to promoting plant-based foods to students. In these schools, food service providers were instructed to follow a systematic rollout of promotional activities that used a variety of traditional promotion and enhanced social marketing as well as the Meatless Monday campaign materials. Behavioral economic techniques such as placing vegetarian entrées first in the cafeteria line and renaming meatless menu items to sound more appealing were also used. Following the initial implementation, providers conducted a review of student participation in the school meal program, with particular attention to how frequently students chose vegetarian options and plant-based sides. While the school-based campaign was not included in the survey of food service providers described in this study, insights from school food operators regarding the impact of the various promotional strategies on student awareness and acceptance of plant-based foods may provide key information that can be applied to future efforts in all sectors.

Survey Methods

Survey questions were designed in a collaborative manner with input from representatives across all Sodexo markets, including health care, education, corporate, and government accounts. Sodexo’s Office of Sustainability and Corporate Social Responsibility and experts in the metrics and measurements department reviewed survey design, and feedback was given by the national Meatless Monday Campaign organization and the Johns Hopkins Center for a Livable Future.

The survey was then distributed internally and electronically via email to the general managers in all of Sodexo’s U.S. food service accounts, who then either filled out the survey themselves or forwarded it to another food service manager to complete. Overall, 800 health care accounts and 1,000 corporate and government accounts were emailed. Surveys were sent out in June 2011, and clients were given three weeks to respond before the survey was closed.

Results

OVERALL

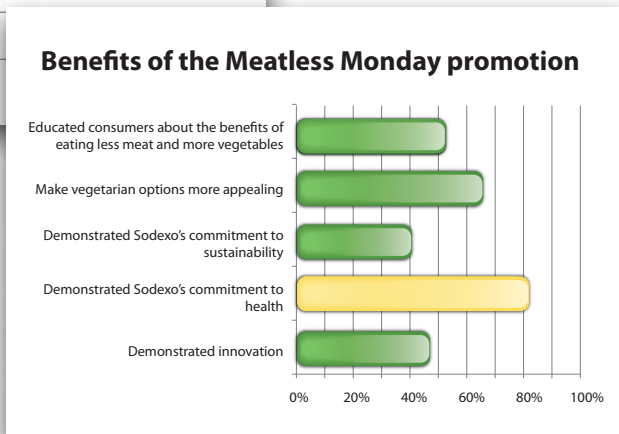
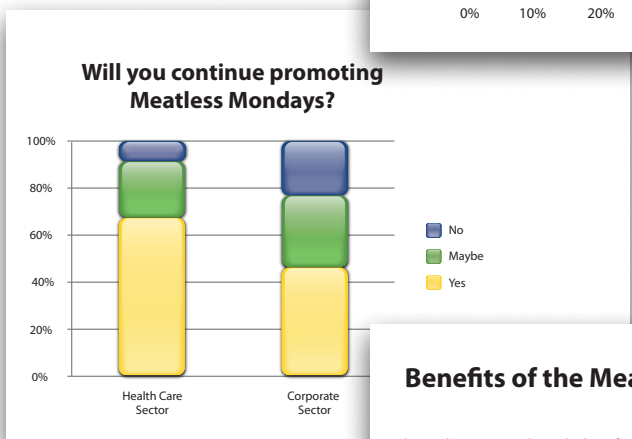
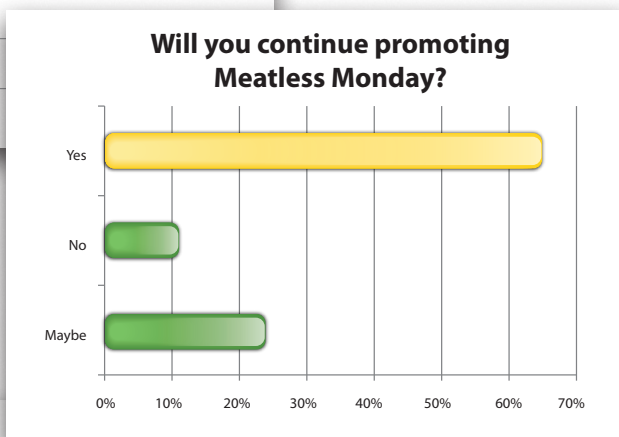
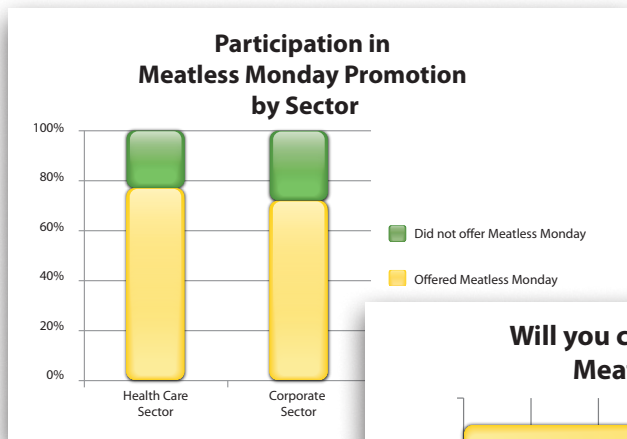
A total of 245 food service providers responded to the survey from 38 states and the District of Columbia. There was a roughly 15 percent response rate among health care accounts (119 out of 800 filled out surveys) and a 13 percent response rate for corporate and government accounts (126 responses out of 1,000). Of those 245 surveys received, responses were largely split between 119 corporate accounts and 119 health care accounts including hospitals and senior living facilities, with the remaining three percent comprising government accounts. More than 90 percent were aware of the national Meatless Monday campaign, and 96 percent were aware of Sodexo's Meatless Monday promotion.

Of those surveyed, almost 75 percent offered Meatless Monday in their units, increasing vegetarian options and encouraging healthier food choices. Comparing the two sectors, 77 percent of health care and 72 percent of corporate food providers offered the promotion. Reasons given by those who did not offer the promotion included belief

that consumers would not like vegetarian options; already providing meatless entrées, too many other promotions going on at the same time; and offering Meatless Fridays instead (particularly during Lent). Of the respondents who were reluctant to offer Meatless Monday, many believed that their clients were “meat-eaters” and would not appreciate vegetarian options.

Overall, however, there were positive responses and attitudes toward the campaign and the majority of providers, 65 percent, said they would continue promoting Meatless Monday. An additional 24 percent said they might continue. Many sites already offered vegetarian options daily, along with meat options. Survey respondents from both sectors saw as a major benefit of this campaign the demonstration of Sodexo's commitment to health.

Those from the health sector also more frequently highlighted the program's benefit in “educat(ing) customers about the benefits of eating less meat and more vegetables.” Not surprisingly, based on this information, there was a greater response from the health sector, 68 percent, than the corporate sector, 46 percent, in favor of continuing the promotion of Meatless Monday.



EASE OF IMPLEMENTATION

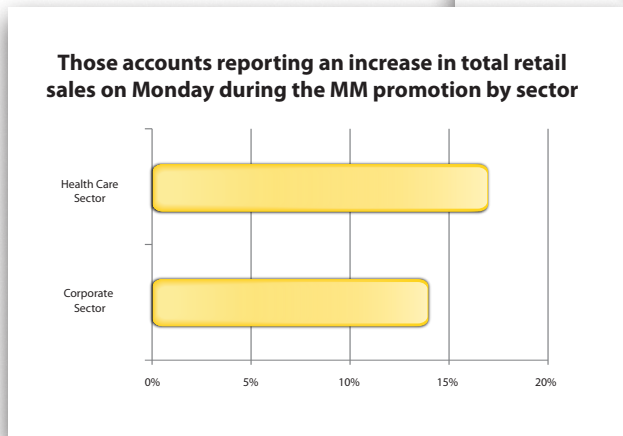
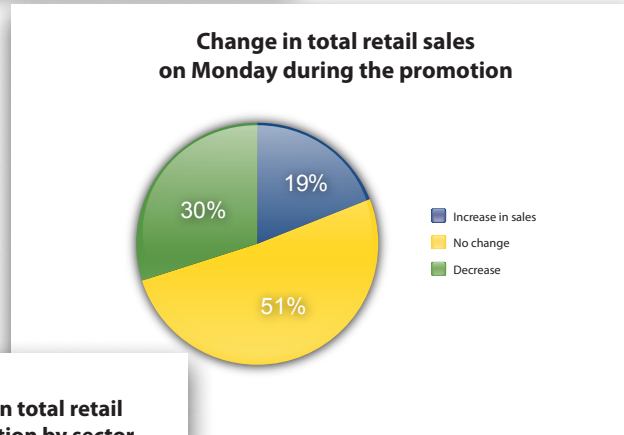
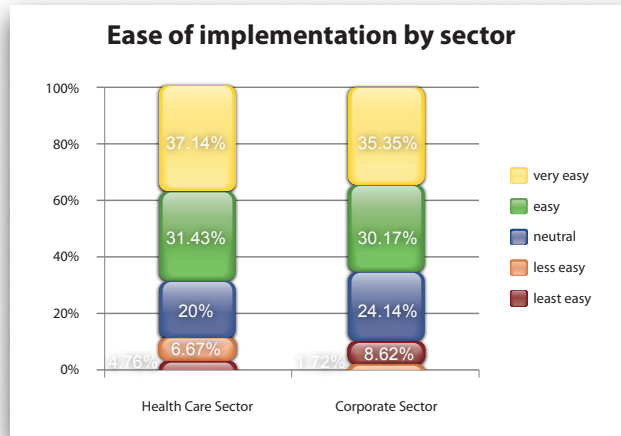
Of the participants who promoted the Meatless Monday campaign, 77 percent considered the promotion to be “easy” or “very easy” to implement. In other words, the majority of clients who adopted Meatless Monday found it feasible to execute. Interestingly, although the Meatless Monday promotion seemed to be more successful in the health care sector, it was also the health care sector that reported more difficulty with implementation. When asked, “Were there any challenges to implement the Meatless Monday campaign?,” there was an approximate 20 percent difference between health care and corporate accounts that reported “yes,” making it seem as if health care food units faced more challenges. Both types of food providers said they experienced a significant amount of pushback from some customers. They recommended improved recipe ideas to make meatless options more filling and appealing.

SALES

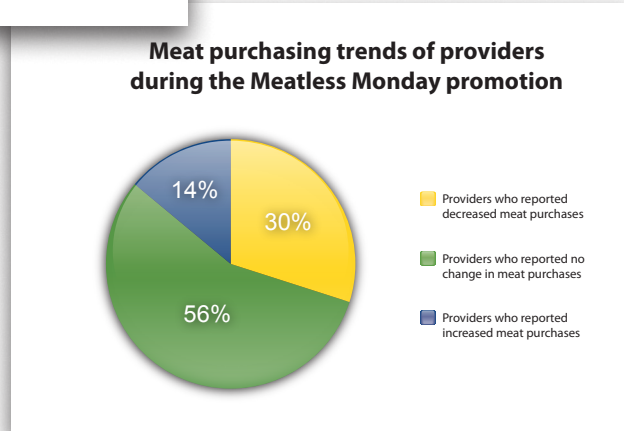
A majority of the providers, 51 percent, saw no change in retail sales on Monday; 19 percent reported an increase in sales, while 30 percent experienced a decrease in overall sales. Several of the participants were not sure of their sales records—further research is necessary to determine exact changes.

Meat and vegetable purchasing both shifted in desired directions during the program period. While 56 percent of food providers reported no change in meat purchasing, 30 percent decreased their

purchase of meat products, of which 20 percent saw a decrease of 6 percent or more. This decrease in purchasing might decrease their costs, and can also have significant environmental impacts. Vegetable purchasing increased at 49 percent of food providers surveyed, with more than one third reporting an increase of 6 percent or more; 46 percent reported no change in vegetable purchasing. Note: Many providers did not offer completely meatless options, but instead provided entrées with less meat and more vegetables. For example, one stated, “We added in more vegetable options but did not



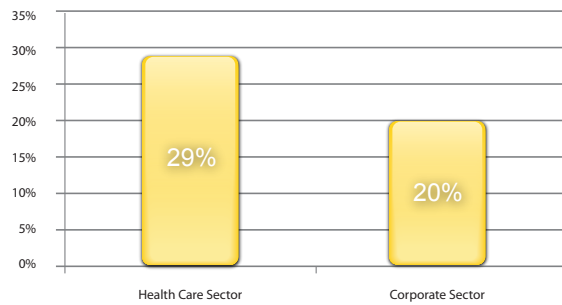
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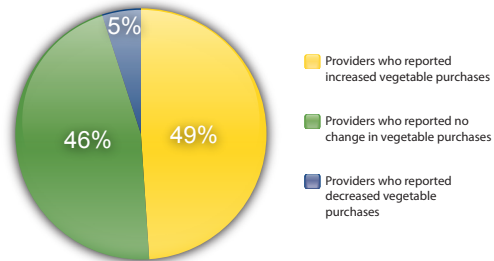
necessarily take away the meat.” Still others offered meatless entrées and gave customers the option to add meat for an additional cost.

When comparing sectors, 17 percent of health care accounts saw an increase in retail sales versus only 14 percent of corporate accounts. Among clients who reported decreased meat purchases, the health care clients reported a nine percentage point greater decrease than corporate clients reported. Similarly, among accounts that reported increased vegetable purchases, health care clients reported an eight percentage point greater increase than corporate accounts. When asked to provide feedback on how to improve the campaign, health care managers offered more suggestions for improving menus and recipe ideas, while corporate providers recommended more marketing materials. Again, there exists a noteworthy difference in how Meatless Monday was promoted to the two sectors. Whereas health care accounts were sent Meatless Monday toolkits, materials were only made available to corporate accounts via SodexoNet, and corporate account managers were responsible for downloading and printing their own materials.

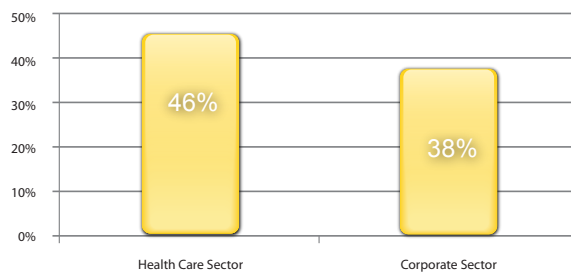
Those reporting a decrease in overall meat purchases during the promotion by sector



Vegetable purchasing trends of providers during the Meatless Monday promotion



Those reporting an increase in overall purchase of vegetables during the promotion by sector

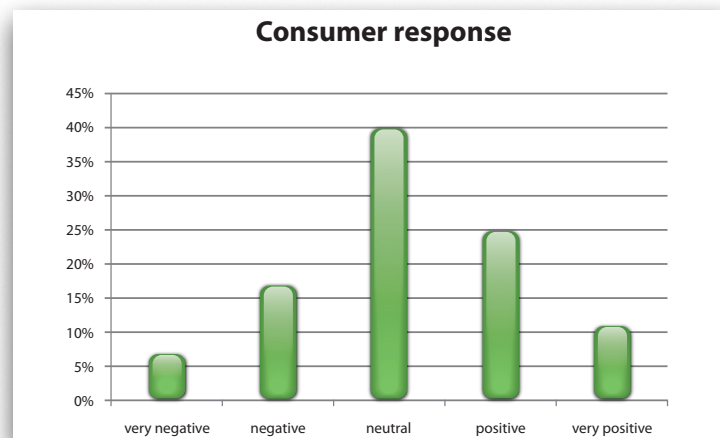


CONSUMER RESPONSE

Accounts were also asked to rate the consumer response to the Meatless Monday promotion. Thirty-six percent reported the consumer response as either “positive” or “very positive” and 40 percent reported the response as “neutral.” When segmented by sector, however, 37 percent of accounts in the health care sector reported positive consumer response, whereas only 21 percent in the corporate sector rated a positive consumer response. Both sectors reported roughly equal numbers of negative consumer response, about 26 percent, but more accounts in the corporate sector than the health care sector said that consumers were neutral about the promotion. It is important to note that these consumer response rates are based on perceived consumer attitudes; further research is necessary to obtain actual consumer responses.

One Sodexo client ran an independent customer survey and found strong support for the campaign. Its latest quarterly survey results showed that a 5 percent increase in consumer satisfaction was attributed to the Meatless Monday promotion. Customers listed availability of vegetarian options, promotion of healthier lifestyles, and education about environmental impacts as benefits to the campaign.

Several clients commented qualitatively on perceived consumer response, “We run this every Monday with very good success, but we need to keep it new and interesting.” Still others are positive about the potential impacts of the promotion: “Our Wellness Department loves the whole Healthy Monday Campaign and has implemented other non-food Mondays. Our Administration loves the program too and wants us to continue running it. We kicked off the program during National Nutrition Month and it is going strong. The Meatless Monday site is very good with bulk recipes and we are trying new items all the time.”



Discussion

A key finding from the results is that clients from all sectors view a major added value of the Meatless Monday initiative to be a demonstration of Sodexo's commitment to promoting health and wellness. This is reflected in some of the general comments, in which one client stated, "[The Meatless Monday promotion] shows clients Sodexo's commitment to their well being and creating a more healthy lifestyle."

On the whole, there seemed to be a positive response to the Meatless Monday promotion, with the majority of accounts committed to continuing the campaign. Most providers considered the promotion to be easy to implement, although several faced challenges. Many provided useful feedback on how to improve the program. Some suggestions included focusing more on "Healthy Monday" rather than "Meatless Monday." Other programs already had in place a "wellness" day during the week, and were either reluctant to embrace the Meatless Monday campaign, or wanted materials to promote their own wellness days. Many (if not most) sites already offered vegetarian options daily, along with meat options. A key finding is that not all food service providers of the Meatless Monday promotion may necessarily be reducing meat purchasing, but rather they are offering more vegetarian and reduced-meat menu options. This is in line with how Sodexo promoted the campaign as "promoting and adding the option of a plant-based entrée to its menus each week," thereby adding healthier options for customers to choose from.

Sales data show that, for the majority of providers, sales neither increased nor decreased during this time, and one account found that meat and meatless entrée sales were similar. A possible interpretation of this result is that consumers at this account are continuing to purchase Meatless Monday menu options at similar rates, and that customers are willing to pay as much for meatless options as for those with meat proteins. It also shows that, on average, offering Meatless Monday does not deter customers or harm account sales. On the contrary, customer satisfaction around Meatless Monday was quite high in the health care sector (almost 40 percent). According to feedback from one of Sodexo's clients, there has been a "tremendous increase in customer satisfaction." A recent customer survey there showed a five percent increase in customer satisfaction directly related to the Meatless Monday program. Furthermore, customers reported that benefits of Meatless Monday included enjoyment meatless options (especially

among vegetarians); promotion of healthier lifestyles; and education about the environmental benefits.

The survey respondents were largely split between health care and corporate accounts, and there are significant differences between these two sectors. Overall, the health care food providers and consumers responded more positively than the corporate providers. Among the health care clients, several were already running similar campaigns (or had some type of wellness program in place); their concerns were more about obtaining inventive, tastier meatless recipe ideas. For the corporate providers, on the other hand, it seems as if this was a newer concept and they were more interested in receiving campaign materials. Interestingly, despite these differences, health care providers reported bigger challenges in implementing the campaign and yet were still more willing to continue promoting Meatless Monday, whereas corporate providers reported fewer challenges but also less commitment to continued implementation of the campaign. It seems that health care accounts are more engaged in the campaign and see its benefits, whereas corporate providers might need more education about the health and/or environmental impacts of the promotion.

Additionally, in the K-12 school campaigns, strategic marketing and behavioral economic techniques appeared to positively impact student selection of food items. Food providers, when interviewed, empirically noted that students shifted to healthier food choices as the promotions became more engaging. An increased uptake in the variety of fruits and vegetables chosen, as well as vegetarian options, was also observed. Cafeteria workers reported that students, after being given taste tests, were more interested in and willing to try meatless entrées that had been previously overlooked; in many cases, students continued to request these items on the menus and in the cafeteria even after they sold out.

Limitations and Further Research

There exist a few limitations on this study and opportunities for further research. First, there was inconsistent implementation of the Meatless Monday promotion, and some clients were confused about the exact requirements. Some units incorrectly assumed that all menu options offered had to be meatless, whereas others continued to offer usual meal options, highlighting vegetarian choices. Still other accounts made available mostly vegetarian dishes, with the option of adding meat for extra charge. This variability may be reflected in the data collected. Moreover, the survey was based on self-reports and some of the measurements, particularly around sales and purchasing, may not be completely accurate. A small number of survey participants commented that actual meat and vegetable sales and purchasing trends were unknown, and thus the responses were an estimate (several answered “no change” but probably would have answered “do not know” if given the option). Importantly, response rate for the survey was low (roughly 14 percent), which may have biased the results reported. Those accounts who responded and completed the survey may be different from those who declined to fill out the survey. Further inquiry and research should be conducted to understand these differences.

Given these limitations, further in-depth research is necessary to reveal trends and impacts of the campaign. One suggestion is to obtain more specific information from a random selection of providers (across all sectors) who implemented Meatless Monday regarding their meat and vegetable sales and purchasing data (e.g., beef versus chicken, purchases in pounds, portion sizes, etc.). It would be important to explore what items are replacing the meat options; that data would help to provide insights into the program’s actual nutritional, cost and environmental impacts, and could also lead to improved selections of recipes and other program materials. While this report describes general findings, there exists a broad spectrum of responses from those who fully embraced the campaign to those who experienced major challenges. It would be beneficial to follow up with additional research to further analyze differences across providers, including an examination of factors such as geography, demographics, and industry. Finally, this survey examined only food service provider perceptions, but did not obtain information about consumer reactions to the program, its implementation, or impacts on consumer behavior. Further research on consumers in all sectors would also be beneficial, including an examination of the link between particular types of promotional activities and changes in consumption behaviors, ideally measuring food waste as a consumption indicator.

Discussion and Conclusions

As a whole, survey respondents overwhelmingly reported that the Meatless Monday promotion demonstrated Sodexo’s commitment to health. Beyond this finding, providers also said that Sodexo has the potential to be a forerunner in the field of healthy eating campaigns. As one survey respondent stated, “I think Sodexo can be a leader in this area.” Despite difficulties in implementation for some sites, there is overall strong support for the promotion and desire to continue on the part of the food service providers. Sodexo’s network of more than 1,800 accounts, in the corporate, health care and government sectors, has the ability to reach large numbers of individual consumers. With their support, the Meatless Monday campaign has the potential to further greatly reduce environmental and health impacts.

Endnotes

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