# Sustainability in the Restaurant Industry: A Cape Town Study

by

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Abstract

The main aims of this thesis were to focus on the restaurant system in Cape Town with a view to creating a support mechanism for a move to more sustainable practices. A review of the literature found that despite a growing global population, the pressure on resources and consumption has been driven by the global middle class. Over half the world lives in cities and dualistic urban systems reinforce access to resources by excluding the poor and favouring the wealthy. Resource flows and consumption have degraded ecosystems, created waste and emissions. We use resources faster than they can be replenished and have exceeded the earth's regenerative capacity.

Counter to this, there is evidence of decoupling resource use from economic growth. Similarly, the industrialised food system has been created on external inputs such as fertiliser and insecticides, largely derived from fossil fuels. Food produced in the system uses energy, produces waste, depletes the soil and thwarts biodiversity. The global food system counters local food economies. This thesis argues that a sustainable system would have the economy as a basis for a better and equitable environment for current and future generations within ecological and regenerative capacity. As a city Cape Town reflects the inequalities and unsustainability of the global system, with vast disparities in wealth and opportunity.

Restaurants can control flows of energy, food and waste, support people and the environment, as well as communicate and educate consumers. By collaborative efforts they can lay the basis for local food economies. Restaurants connect consumers to their food and make decisions about where the food comes from, how it will be prepared and disposed of and who will engage in that preparation. The restaurant sector can contribute to sustainability in its use of resources as well as its employment, community engagement and communication practices. This in turn supports local economies and impacts on the broader sustainability of the city.

Research into the restaurant system in Cape Town showed that there is consumer interest in sustainability. There is evidence of restaurants making efforts towards sustainable endeavours. Within Cape Town there is the opportunity to look for more sustainable energy, work around local and seasonal menus, support local food economies, and control wastage. Local food economies can be supported while staff can also be treated fairly and given

growth opportunities. Endeavours can be communicated as a way of shifting current unsustainable consumption patterns.

The conclusions drawn from the thesis suggest that like the Sustainable Restaurant Associations (SRA) and Dinegreen there is space for a support mechanism for the restaurant industry where individual restaurants can be helped to move to sustainability and collaborate with other stakeholders. The recommendations of the thesis are to create an organisation that can evolve into a co-operative that will bring restaurants together and map out the changes they make. They need to be supported with expertise and audits of their current practice so that they can set goals for the future with regard to their environmental and social actions.

Opsomming

Die hoof doel van hierdie dissertasie was om die restaurantstelsel in Kaapstad te ondersoek met die oog daarop om 'n ondersteuningsmeganisme vir meer volhoubare praktyke te skep. 'n Literatuuroorsig het getoon dat ten spyte van 'n groeiende wereldbevolking, die druk op natuurlike en ander hulpbronne deur die wereldwye middelklas uitgeoefen word. Meer as die helfte van die wereld woon in stede en dualistiese stedelike stelsels versterk toegang tot sulke hulpbronne deur die armes uit te sluit en voorkeur te gee aan die reikes. Die vloei en verbruik van hulpbronne het ekologiese stelsels gedegradeer en afskeidings en afval vergroot. Ons verbruik hierdie hulpbronne vinniger as wat hulle vervang kan word en het die aarde se herstelkapasiteit oorskry. Aan die ander hand is daar bewyse dat die verbruik van hulpbronne ontkoppel is van ekonomiese groei. Insgelyks is die industrieele voedselstelsel gegrond op externe inset soos kunsmis en insekdoders, wat grootendeels van fossiele brandstof bekom word. Voedsel wat in hierdie stelsel geproduseer word verbruik energie, skep afval, put die grond uit en werk biologiese verskeidenheid tee. Die globale voedselstelsel is in teenstand teenoor plaaslike voedselekonomiee. Hierdie dissertasie redeneer uit die oogpunt dat 'n onderhoudbare stelsel die ekonomie as 'n basis vir 'n beter en billike omgewing vir huidige en toekomstige geslagte, binne die ekologiese kapasiteit, sou he. Die stad Kaapstad weerkaats die ongelykhede en onvolhoubaarheid van die wereldwye stelsel, met sy ongelykhede in welstand en geleenthede.

Restaurante kan beheer uitoefen oor hulle vloei van energie, voedsel en afval, kan mense en die omgewing ondersteun, sowel as verbruikers inlig en oplei. Deur pogings om saam te werk kan hulle die grondslag le vir plaaslike voedselekonomiee. Restaurante kan verbruikers verbind tot hulle voedsel en kan besluite neem oor waarvandaan die voedsel verkry word, asook hoe dit berei en afgedoen sal word en wie dit sal berei. Die restaurantsektor kan bydra tot volhoubaarheid in sy gebruik van hulpbronne sowel as inwerkneming, gemeenskapsbetrokkenheid en kommunikasiepraktyke. Dit sal op sy beurt dan plaaslike ekonomiee ondersteun en 'n wyer impak he op die volhoubaarheid van die stad.

Navorsing oor die restaurantstelsel in Kaapstad het getoon dat die verbruiker belang stel in volhoubaarheid. Daar is tekens daarvan dat restaurante pogings aanwend in die rigting van beter volhoubaarheid. In Kaapstad bestaan die geleentheid om te soek na meer volhoubare energie, rondom seisoenaangepaste spyskaarte, die ondersteuning van plaaslike voedselekonomiee, en die beheer van afval. Plaaslike voedselekonomiee kan ondersteun word terwyl werknemers regverdig behandel word, en moontlikhede tot vooruitgang het.

Hierdie pogings kan oorgedra word as 'n manier om die huidige onvolhoubare verbruikspatrone te verander.

Die afleidings wat gemaak word in hierdie dissertasie stel voor dat daar plek is vir 'n ondersteuningsmeganisme vir die restaurantindustrie, soos die "Sustainable Restaurant Associations" (SRA) en "Dinegreen", waar die individuele restaurant gehelp kan word in rigting volhoubaarheid te beweeg en om saam te werk met ander belangstellendes. Hierdie dissertasie stel voor om 'n organisasie te skep wat kan ontwikkel tot 'n kooperatiewe wat restaurant saam kan bring en die veranderings wat hulle aanbring kan uiteensit. Hulle sal moet ondersteun word met kennis en ouditering van hulle huidige praktyke, sodat hulle doele kan stel vir die toekoms met betrekking tot hulle omgewings en sosiaal gerigte handeling.

Acknowledgements

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List of Acronyms and Abbreviations

BBBEE	Broad-Based Black Economic Empowerment
BWI	Biodiversity and Wine Initiative
CSA	Community Supported Agriculture
DEAT	Department of Environmental Affairs and Tourism
Fedhasa	Federated Hospitality Association of Southern Africa
FTTSA	Fair Trade Tourism South Africa
GM	Genetically Modified
GRA	Green Restaurant Association
HEI	High External Input
HVAC	Heating, Ventilation and Air-Conditioning
IAASTD	International Assessment of Agricultural Knowledge, Science & Technology for Development
ICLEI	International Council for Local Environmental Initiatives
IDP	Integrated Development Plan
IFOAM	Integrated Federation of Agricultural Movement
IMF	International Monetary Fund
IPCC	International Panel on Climate Change
ISAP	Index to SA Periodicals
LEI	Low External Input
MEA	Millennium Ecosystem Assessment
MFA	Material Flow Analysis
NGO	Non-Governmental Organisation
NRA	National Restaurant Association
NRN	Nation's Restaurant News
RASA	Restaurant Association of South Africa
SRA	Sustainable Restaurant Association
StatsSA	Statistics South Africa
SWOT	Strengths, Weaknesses, Opportunities, Threats
TNC	Transnational Corporation
UCLG	United Cities and Local Governments
UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme

UN-HABITAT	United Nations Programme of Human Settlements
U.S	United States
USB	University of Stellenbosch Business School
WBCSD	World Business Council on Sustainable Development
WTO	World Trade Organisation
WWF	World Wildlife Fund
WWI	Worldwatch Institute

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Chapter One: Introduction

If we want to change the world it helps to learn how to see systems and look for places in these systems where small strategic actions pay off in big results.

(Steffan, 81)

1.1 Research Background

Our current industrialised economic system is embedded within a social and natural system. The social system consists of people within society. We live in a consumer age where value is put on material possessions. The things we make and use depend on renewable and non-renewable resources. Some resources are inherently non-renewable such as fossil fuels and so will ultimately run out. Other resources such as wood and fish are dependent on our rate of usage and can be sustained if they are allowed to replenish themselves. However, the process of extracting and using resources to make things, creates waste, which in turn puts pressure on the social and natural system. Emissions of carbon dioxide and other greenhouse gases into the atmosphere contribute to climate change, requiring radical changes to our social and economic systems to reduce these emissions significantly. We are looking at reaching a population of nine billion by 2050 but only have one planet to live on. Over half the world's inhabitants live in cities, which use up seventy five percent of the earth's resources (Steel, 2008:x).

As consumers we depend on a food system which interconnects with this larger social and ecological system. We need to transform our current industrialised global food system, which depends on technology, economies of scale and chemical inputs. This system was designed to combat hunger, but has contributed to global pollution and climate change, loss of biodiversity, ecological degradation and ultimately food insecurity (Astyk & Newton, 2009:7; Stefan, 2008:17). By concentrating production in the hands of a few, modern urban consumers have often lost touch with how food got onto their plates. Other consumers are making choices that reflect an understanding of the limitations of the current system. With regard to food, these consumers are buying food locally, buying directly from producers, buying collectively and buying ethically (Steffan, 2008:53-5; Clark, 2006:145). These choices help reduce our dependence on the global food system.

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The restaurant, as we know it, can directly be traced back to nineteenth century post revolutionary Paris. Paris was a thriving commercial city catering to a flow of business travelers providing a steady demand for dining establishments. Restaurants evolved as a space where patrons could eat, drink and pay for what they wished, and restaurateurs could differentiate their offerings accordingly (Kiefer, 2002:59). In 1801 Antoine Roisy described how on entering a dining room "my surprise was at its greatest when I saw people enter without greeting each other and without seeming to know each other, seat themselves without looking at each other and eat separately without speaking to each other or even offering to share their food (Steel, 2008:235)." Today restaurants and dining out remain a feature of modern life in our urbanised world. Restaurants offer a range of global cuisines and at best, fill the needs of being "fun, entertaining or romantic allowing us to see friends on neutral territory...eat sublime food we would be unable to cook ourselves (Steel, 2008:240)." Restaurants have continued to survive by fulfilling a range of human needs from the physical to the social and psychological.

Restaurants, in all their forms, form part of a global food network that overlaps with issues of concern under present conditions: biodiversity, climate change and ecosystem degradation. The restaurant industry, as a key part of the food and beverage industry, has the ability to affect the food supply chain in a positive way with regard to sustainability.

There are a number of areas in which restaurants can move towards sustainability. Insofar as restaurants are involved in the purchasing, preparation and sale of food to consumers, by moving to sustainability they can play a role in enabling consumers to consume less and differently. This can be through a range of activities from local procurement to recycling or energy efficiency. With regard to production, restaurants can source ethical food and support local procurement, sustainable farming and fishing. They can monitor energy usage with regard to carbon emissions and the supply chain, and implement measures to use energy more efficiently. They can support ecosystems through water usage, waste disposal and concern for biodiversity. Restaurants that address these issues can move toward sustainability and sustainable restaurants can contribute to a sustainable hospitality industry.

They can be a conduit for communicating and imparting these issues to consumers and other stakeholders. Restaurants can influence consumers when they make decisions on a range of issues. Consumers are also shifting to restaurants that serve food that responds to these needs (Steffan, 2008:59).

These issues are complex and impact on each other and have economic implications. These interventions have the ability to impact on the entire food system .Each restaurant is unique in its impact, footprint and intent with regard to sustainability. There is no one size fits all solution for moving restaurants to sustainability.

1.2 Aim/Motivation of Study

Given the complexity of the issues of energy, water, waste and food it is proposed that restaurants need support in addressing these issues. The proposed research aims to (i) investigate the key sustainability issues relating to the restaurant industry and (ii) provide recommendations for a supportive model to guide South African restaurants towards sustainable practices. The study will focus on Cape Town initially, with a view to extending the findings to the greater Cape Town region and to other cities in South Africa.

The starting point is an assumption that there is scope for the restaurant industry to become more sustainable. This assumption was based on personal experience and preliminary research which showed minimal information on the sustainability of Cape Town restaurants.

Interest in the topic relates to my background and interests in the fields of restaurants, food and sustainability. I have come to appreciate that the global situation is critical and depends on intervention at various levels if sustainability is to be achieved. I have chosen a space that intrigues me, as it involves food, consumption and business and taps into larger ecological and social structures. The research and choice of topic was prompted by the assumption that there was scope to support the restaurant industry in Cape Town with regard to sustainability. My observations and preliminary research and conversations revealed minimal information around the general levels of sustainability within the industry in Cape Town. The work done by associations such as the SRA in London confirmed the challenges of adopting sustainability actions by the industry. My work was premised on an opportunity for sustainability oriented initiatives in Cape Town. [1]

 I began working in marketing in the health food industry which gave me insight into how much of the food we eat is lacking in nutrients. I studied further in the field of marketing and currently work as a lecturer in brand strategy. This involves my working with the theoretical aspects of brand and business strategy. I started to realise that marketers could not promote the endless consumption of goods and services and should use their skills of persuasion to create greener brands and help change consumer behaviour. This led to my studies at the

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[1] This initial assumption was supported by the research process.

Sustainability Institute where I completed my BPhil in Sustainable Development and Planning in 2009. I wanted to explore a field for my Masters topic that could make a difference in this sphere of marketing and consumption.

My interest in restaurants is primarily as a consumer who appreciates the enjoyment patrons derive from these spaces. I am motivated to create a framework to help restaurants in Cape Town, my home city, become more sustainable.

Research Aims

The research needs to address the following areas:

Sustainability with specific regard to restaurants

The status of the Cape Town restaurant sector

The promotion of sustainability through the restaurant system in Cape Town

1.3 Clarification of Concepts

Cape Town:

The geographic region that is serviced by the City of Cape Town municipality

Restaurant:

An enterprise that sells and provides meals and drinks, from a menu, that are consumed on the premises, with seating provided

Business Model:

A business tool that describes the rationale of how an organisation creates, delivers and captures value

Situation Analysis:

A business tool that analyses the macro and micro environment of a business with a view to identifying opportunities and threats

Sustainability:

Moving to a better quality of life equitably, for current and future generations, within the earth's ecological limits

SWOT Analysis:

A business tool that examines strengths and weaknesses of a business and opportunities and threats in the marketplace as a basis for objective setting

1.4 Overview of Research Methodology

The key methodologies are a business model supported by a literature review, case studies and interviews. The primary outcome of the thesis is the situation analysis leading into the business model. However as an academic piece of work, a literature review will establish adequate and rigorous grounding for the proposal. The literature review will identify and justify key issues (Mouton, 2001:87). Case studies of current best practice with regard to both existing restaurants and restaurant associations are incorporated as a reference point for the business model to illustrate the state of the industry (Mouton, 2001:149). Semi structured interviews with key people in the industry with regard to sustainability have been conducted (Mouton, 2001:162). A business model will provide a potential possible enactable solution to the question of how sustainability can be promoted through the restaurant industry.

Within the framework of the business model, research is needed at a number of different levels. Different methodologies have been required at each stage. The research underpinning the business model looks at the industry as a whole, in order to provide an overview of the markets, restaurants and customers, so as to assess how the industry can be moved toward sustainability.

1.5 Structure of Thesis

The framework of chapters for the thesis is as follows:

Chapter 1   Introduction

An overview of the research topic, objectives, motivation and methodology

Chapter 2   Methodology

Description of the research methodology

Chapter 3   Literature Review

Comprehensive investigation into sustainable issues in Cape Town
and the restaurant industry

Chapter 4   Research findings: Situation analysis

Results of research carried out to assess the business environment

Chapter 5   Research findings: Business Model

Results of research carried out to assess a viable business model

Chapter 6   Recommendations & Conclusions

Critical analysis of research findings followed by strategic conclusions

Chapter 2: Methodology

2.1 Research Methodology

This chapter will motivate for and expand on the various research methodologies used in this study. The starting point of the research as described in Chapter 1 is the idea that restaurants in Cape Town can be assisted in becoming more sustainable. This research problem led to the formulation of a progressive succession of research questions that could address the research problem. These questions are:

> What is the significance of restaurants with regard to sustainability?
>
> What is the status of the Cape Town restaurant sector?
>
> How can sustainability be promoted through the restaurant system in Cape Town?

The first question addresses the connection of restaurants to sustainability and requires an understanding of the issues underpinning the need for sustainability, which is then funnelled down to connect restaurants and sustainability issues. The second question locates the broad issue in a specific urban context, namely Cape Town, and provides background into the city and the sector. The third question looks to a solution to promoting sustainability within the specific Cape Town restaurant situation.

By following an exploratory process of relevant information, this study is designed to add value to existing knowledge and contribute value through interpreting the information available on these subject areas. The researched methodologies selected were geared around answering the research questions. The nature of the research is Applied Research insofar as the aim of the research is to contribute to solving particular issues with a social application (Terre Blanche, Durrheim & Painter, 2006:45). The defining goal of the research is primarily exploratory in nature, as exploratory studies employ an open, flexible and inductive approach to research, as they attempt to look for new insights into phenomena (Terre Blanche et al., 2006:44). As the topic is broad, the approach is to investigate the subject matter in a holistic way with the goal of making recommendations about sustainable restaurants within Cape Town.

2.2 Research Design

The challenge was to create a research design that would provide the relevant answers to the three research questions (Mouton, 2001:49). The intent from the outset was to create a viable business model to address the question of how to promote sustainability through the restaurant system in Cape Town. However, this model needed to be grounded in an understanding of the first two questions. The answer to these questions was addressed from a theoretical and practical approach. The literature review and business model were developed in tandem. The literature review is the tool that gave theoretical substance to the business model, while the business model raised issues that needed factual underpinnings. The complexity of the subject opened the way for a range of research approaches.

There is an overlap in content between the business model and literature review as the theoretical principles of the review largely informed the findings of the business model. Both primary and secondary data was collected. Although secondary research employed quantitative data the primary research conducted is qualitative in nature. Empirical research, based on existing secondary data is used to profile restaurants and customers. Non-empirical research is conducted via the literature review (Mouton, 2001:57). Secondary research guides and directs the thinking of the business model. Secondary data is used in the literature review and the business model from academic papers, internet sources, restaurant guides, magazines and social media. Primary research was conducted through semi-structured interviews, and observational research. Empirical research was conducted through interviews that formed the basis for case studies.

The diagram below illustrates the research tools that were used.

Figure 1: Research Map
Source: Based on Mouton, 2001:144

The tools used needed to be the most optimal way of answering the research questions. The diagram depicts the connection between the research question and the combination of research tools that was used in order to understand and answer each question. This breakdown is depicted below.

Question	Research Framework	Research tools
What is the significance of restaurants with regard to sustainability?	Literature Review	International and Local Reports Books Journals Interviews
What is the status of the Cape Town restaurant sector?	Literature Review Situation Analysis	International and Local Reports Books Journals Interviews Restaurant Visits Interviews Clusterplus Analysis Dining- out guide - database Eat Out guide 2010 - database StatsSA: Food and Beverage Report State of the Food Industry Cape town Map Ogilvyearth survey Participator Research - Starlings NRA trend report SRA GRA: Secondary Data Restaurant websites: Secondary data Twitter Analysis
How can sustainability be promoted through the restaurant system in Cape Town?	Literature Review Situation Analysis Business Model	International and Local Reports Books Journals Interviews Twitter analysis Restaurant visits Initiatives: Web research Database: segmentation Cooperative Act: Secondary data

Figure 2: Breakdown of Research Tools

Source: Author

2.3 Literature Review Methodology

The literature review creates the context for the need for sustainable social ecological and economic systems in the wake of our current global polycrisis (section 3.2). The focus is particularly on the characteristics of modern food system as restaurants fall within that scope (section 3.3). A systems approach to sustainability is introduced as a response to these global challenges (section 3.4). Cape Town (section 3.5) is introduced as the city under study and then restaurants (section 3.7) are examined for their contribution to sustainability.

The structure of this thesis differs from a generic format which places the literature review before the research methodology (Mouton, 2001:123). Many of the research findings have been embedded within the literature review to give the theory practical application and context. The literature review is needed in order to identify and analyse information relevant to the research questions (Terreblanche et al., 2006:19). The literature review is primarily based on secondary research. This refers to the practice of reviewing a collection of data or findings that have been produced by other researchers, such as academics, with a different purpose in mind (Mouton, 2001:97; Visocky O'Grady & Visocky O'Grady, 2006:19). The literature review has to uncover and establish the scholarship that has already been done in this field. This is in order to build a solid argument and prevent needless duplication. Secondary research for the review is also based on previous research and related readings done on topics around sustainability, cities, globalisation, corporate citizenship and biodiversity. The problem with secondary research is that by relying on research done for another purpose, it may not be completely valid for the purpose at hand. This means expanding the scope of research by using additional readings to do so.

To find these readings, I consulted the online databases of the University of Stellenbosch. I made an appointment with the librarians for my department in the J. Gericke Library who helped me in searching for the topics I needed. They helped me in identifying the relevant databases, using specific search terms and applying Boolean operators to the search terms (Mouton, 2001:88; Terre Blanche et al., 2006:27). The database that was most relevant for my field of study was Ebscohost. I explored a range of search terms to find relevant journal and magazine articles. In particular I looked for "restaurant" in the title of the article and narrowed down the search with words such as "Cape Town", "green", "environment" and "sustainability". I returned to this database for specific queries around urban agriculture, Cape Town, biodiversity, resource decoupling, ecological footprint, food, energy, water and waste. I used the Sabinet databases to search through journals and research reports that are indexed by South African organisations. I focused on ISAP, which is a collection of South African articles from over 600 periodicals. It was also important to look for academic

research that had been published on these topics. I used the library search for e-theses and dissertations, sun scholar, and nexus. The D Database Pro Quest-Dissertations and Theses were used for international theses. I also used conventional web searches to locate information on Cape Town and specific restaurants. This led me to sites such as www.capetown.gov.za and www.statssa.com. I also found it useful to visit the University of Stellenbosch Business School (USB) library and browse the relevant subject categories for pertinent books. I kept a journal to record quotations and my progression of thinking on the subject.

Information available was weighted towards the more generic topics, but there was less literature as the topics became more specific. Given the number and range of topics that were covered by the research questions, the challenge lay in creating a workable framework. Information that was not directly relevant to the argument flow had to be discarded. I had to continually rework this framework with the help of my supervisor, into a structured, logical argument. Given the large amount of literature available on the subject of the polycrisis, and sustainability, the challenge lay in providing a focused view of the subject matter (Terre Blanche et al., 2006:21). This required continually editing the review to remove extraneous content and retain direction and structure. Given the qualitative, applied, and immersive nature of much of the research in sections of the motivation (section 1.2) and methodology I have spoken in the first person to bring myself into the research journey and process with a view to activating the findings into a real world situation. (Caulley, 2008:443). However, in the literature review, situation analysis, business plan and conclusion I have stepped back into the third person, allowing for a more objective presentation of the data.

The literature on the global polycrisis was based on internationally recognised reports spanning environmental, economic and social issues. The findings of these reports collectively point to a global polycrisis. The United Nations Environmental Programme (UNEP) Global Environmental Outlook 4 (GEO 4) of 2007 (UNEP, 2007) and Keeping Track of our Global Environment Report (UNEP, 2012) addressed issues around population growth. The United Nation's Development Programme's (UNDP) Human Development Report of 1998 showed the imbalance of resource usage between rich and poor (UNDP, 2008). The World Watch Institute (WWI) State of the World 2010 report addressed global consumption of resources (WWI, 2010). The United Nations Human Settlement Programme (UN-Habitat) Report on the Challenge of Slums of 2003 (UN-Habitat, 2003) and State of The World's Cities of 2006 (UN-Habitat, 2006) looked at the inequitable patterns of urbanisation. The United Nations Environmental Programme (UNEP) produced a 2011 report on decoupling which informed the section of resource usage and decoupling (UNEP, 2011).

The Millennium Ecosystem Assessment (MEA) Report of 2005 addressed the degradation of ecosystems and their services (MEA, 2005). The World Wildlife Fund's (WWF) Living Planet Reports for 2006 and 2008 addressed the ideas around ecological limits (WWF, 2008; WWF, 2006). The Intergovernmental Panel on Climate Change (IPCC) produced findings on climate change in 2007 (IPPC, 2007). The International Assessment of Agricultural Knowledge, Science and Technology (IAASTD) of 2008 is a complex review of the state of the modern food system (IAASTD, 2008). The World Watch Institute (WWI) State of the World 2010 report addresses the global food crisis with innovative solutions (WWI, 2010).

2.4 Business Model Methodology

2.4.1 Rationale

I was inspired to create a Business Proposal because of the provision within the MPhil programme for a Project Proposal. I wanted a concrete outcome for the thesis that could be implemented in a real life business situation. The urgency around the issues discussed in the literature review demand real life practical solutions. In my research I was unable to find any references that spoke of a business proposal or model as a research methodology in its own right. This led me to rethink the validity of my research methodology.

From my experience as a lecturer in branding I realised that a situation analysis and a business model are recognised real life vehicles that contain numerous research tools, from secondary data analysis to qualitative and quantitative studies. A situation analysis requires scanning the environment for trends and patterns. A business model gives the opportunity to use information to create a workable solution to a situation. These vary in scope according to the resources, importance and time allocated to the model. The business model is essentially a framework that supports numerous forms of research. At the core of a business model is a strategy that involves the relevant aspects of a company such as marketing, finance and operations. I will unpack the elements of the business model and highlight the research that was used to gather this information.

The concept of a ''business model" has gained momentum since the advent of the internet in the mid nineties (Zott, Amit & Massa, 2011:4). Although there is no fixed consensus as to what a business model is, in their research on the subject, they (Zott et al., 2011:20) identified four interconnected themes emerging common to business model thinking, namely that a business model would offer a (i) systemic perspective on how to 'do business', which would encompass (ii) boundary-spanning activities, and focus on (iii) value creation as well

as on (iv) value capture. These four themes interconnect and mutually reinforce each other. This logic is useful due to its systemic thinking encompassing the business and its multiple stakeholders across boundaries in order to create and capture value in the system.

Instead of discrete marketing, finance and operations plans as would be found in a classic business plan (du Plessis, Jooste & Strydom, 2009:403), I chose to use an integrated business model to communicate the strategic direction I wanted to follow. As part of his PhD work Osterwalder (2004:156,7) proposed a characterisation of a business model [2] that is employed in this study. The value is that "a business model describes the rationale of how an organisation creates, delivers and captures value" (Osterwalder & Pigneur, 2010:14).

By embedding a business model in the thesis methodology the study occupies a space distinct from a detailed project proposal or a more conventional thesis. The business model serves as a methodology in its own right as well as a real life tool that can be activated to address the issues raised by the research. The business model is supported and informed by the research findings and enables the ideas and processes discussed within the thesis.

2.4.2 Outline of Model

I have proposed a format for a situation analysis and business model which addresses the key areas and flows that need to be addressed. The business model needs to be grounded in a situation analysis and objective setting process. The model provides a canvas to innovate thinking around meeting objectives given current and future realities. The business model needs to look at the industry as a whole in order to provide an overview of the markets, restaurants and customers so as to assess how the industry can be moved toward sustainability. The proposed structure begins with a situation analysis (chapter 4) culminating in a series of objectives. These are then addressed in an integrated business model (chapter 5). According to Osterwalder and Pigneur (2010:16) there are 9 building blocks of a business model: Customer Segments, Value Propositions, Channels, Customer Relationships, Revenue Streams, Key Resources, Key Activities, Key Partnership and Cost Structure. These building blocks are conceptualised as an integrated business model.

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[2] Osterwalder made his PhD work commercially available through a book that was written in collaboration with 470 practitioners (Osterwalder & Pigneur, 2010).

Situation Analysis

- Macro Environment

  Demographic

  Politico – Legal

  Socio – Cultural

  Environmental

  Technological

  Trends

- Market Situation

  Industry – Restaurant Associations

  Cape Town restaurants

  Customers

  Partners

SWOT Analysis

Strengths & Weaknesses

Opportunities & Threats

Key Objectives

Business model

Customer Segments

Value Propositions

Channels

Customer Relationships

Key Resources

Key Activities

Key Partnerships

Revenue Streams

Cost Structure

Figure 3: Situation Analysis and Business Model

Source: Based on Kotler & Keller, 2012:33, 99-103 and Osterwalder & Pigneur, 2010:16,201

2.5 Situation Analysis Methodology

The situation analysis is an assessment of environmental factors which will impact on strategic decisions (du Plessis et al., 2009:2; Kotler & Keller, 2012:76). A situation analysis can provide an understanding of current and future market conditions. A typical situation analysis will look at both macro environmental forces and micro environmental actors that impact on the business. This will provide an overview of the issues driving the formation of a mechanism to support restaurants. At a broad level this will look at sustainability and narrow down to a brief discussion of the issues of energy, water, waste and food as they apply to the restaurant industry. As the business plan will have an initial focus on the Cape Town restaurant industry, this section will provide an overview of these issues as they apply in the context of Cape Town. The situation analysis can be distilled into a SWOT[3] analysis (Kotler & Keller, 2012:70), which culminates in goals or objectives as a response to the findings of the analysis. The situation analysis can be found in Chapter 4.

2.5.1 Macro Environment

Business operates within a global space of non-controllable forces and trends that they need to monitor and respond to (du Plessis et al., 2009:2; Kotler & Keller, 2012:89). The following environmental elements need to be monitored in order to establish the viability of a business model. Interactions between these elements also create new opportunities and threats. These include demographic, economic, socio-cultural, natural, technological and politico-legal elements (Kotler & Keller, 2012:96). Demographic studies track statistics such as age, race, ethnicity and location. Changes in demographics will highlight shifts that impact on the needs of a community e.g. food supply (du Plessis et al., 2009:35). Changes in the economy reflect shifts in income, price, savings, currency, interest rates and consumer confidence that will impact on the economy (Kotler & Keller, 2012:99). Change in society and culture needed to be monitored for shifts in attitudes, lifestyles and values that will impact on an industry. As an example, consumers may become increasingly concerned about environmental issues. Environmental changes revolve around issues such as resources, energy, climate change and ecosystems. Technological changes relate to changes in product and operations technology that may impact on the industry e.g. energy saving, waste management. Political and legislative changes identify political developments and current and future legislation that will affect future strategies. These could include legislation around energy, water usage and waste (du Plessis et al., 2009:31-6; Kotler & Keller, 2012:106). A business strategy needs to take cognisance of these developments.

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[3] SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats

The environment needed to be analysed by scanning relevant information and identifying relevant issues. This can be done on an adhoc basis as in the creation of a business strategy or an on-going basis as part of a Marketing Information System (MIS). Secondary data in the form of reports, journals, newspapers and internet references are used (du Plessis et al., 2009:39). Expertise is then needed to evaluate impact, and formulate response strategies (du Plessis et al., 2009:37). In the case of this business plan the literature review was used as a basis for the information, providing reputable data to understand macro issues, in particular the global polycrisis. The macro analysis can be found in section 4.2.

2.5.2 Market Situation: Overview

The market situation looks at relevant stakeholders having an influence on the immediate marketplace, "the actors involved in producing, promoting and distributing the offer" (Kotler & Keller, 2012:33). The market environment mapped out the state of the restaurant industry in Cape Town as well as restaurant associations to support sustainability. For the purpose of this study, I decided to view existing restaurant associations in other countries as competition, insofar as their modus operandi would be analysed. As the key research question was to help restaurants move to sustainability, restaurants are viewed as primary customers. In turn their customers become secondary customers in the focus of this study. Other stakeholders are potential partners for restaurants – suppliers and middlemen. Additional stakeholders include publics, financial institutions and government whose influence is described in the macro analysis, but would warrant additional research. The market situation analysis is found in section 4.3.

The market analysis relied on both primary and secondary data. All relevant secondary data needed to be collated and supplemented with primary data where necessary. Primary data was gleaned from the visit to the SRA and individual restaurants. I looked to official data via Statistics South Africa, but also relied on industry information in the form of online restaurant guides and databases. The former is driven by the need to keep economic data of an industry, the latter to be commercially relevant

2.5.3 Market Situation: Competitors/Industry Associations

The industry competitors were essentially associations that were set up to help restaurants. The two analysed were the Sustainable Restaurant Association (SRA) of London and The Green Restaurant Association (GRA) of the USA. To understand the workings of the Sustainable Restaurant Association I met with Simon Heppner, the Managing Director of the

SRA at the London offices of Good Business (Heppner, 2009) in December 2009. At this stage I was still contemplating my research design and so this fell under the scope of Exploratory Research.

The SRA had not yet launched, but I was given information and the strategy around the association. This drove my motivation to find an appropriate vehicle for the Cape Town market. Later, when I used the SRA website to understand their business model, I had already been exposed to the people and thinking behind it. I relied on the Dine Out website and the SRA website, which both contained extensive information to understand their workings. I also followed both associations on twitter[4] for over a year, and did regular web searches to pick up other viewpoints on the associations. I chose these associations as The American GRA has been operational the longest, and the Sustainable Restaurant Association has an approach that I felt was applicable to Cape Town. Australia has a Green Table Association, but I felt it was adequate for the purpose of this study to compare two associations. I scanned the information available on the Green Table Association (2011) and felt that there was sufficient overlap between the associations described. The purpose of this thesis was to conceptualise a unique support mechanism for local conditions. The analysis of the industry associations can be found in section 4.3.1. which describes the value of these associations in the Cape Town context.

2.5.4. Market Situation: Understanding the Restaurant Market

The market analysis of Cape Town restaurants has been done in two parts. Secondary data has been used in both cases, but interpretation and modification has been done. The data has been limited insofar as it is not fit for purpose. Statistical data has been used to understand the size of the market. Online restaurant databases have been collated to arrive at a picture of individual restaurants. Statistics South Africa (StatsSA) produces a monthly national food and beverage report which can be used to understand the sector nationally, and give a rough indication of the size of the restaurant sector in Cape Town. There is no other data study that provides this information. In addition to the monthly Food and Beverages report, Stats SA (StatsSA, 2009) released a one off report in 2010 on the 2009 state of the Food and Beverages industry of which restaurants make up a part. The findings of this national survey for 2009 can be used to make deductions regarding the state of the industry as it provides an overview of costs and profitability.

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[4] Twitter is a micro blogging service where users can post 140 character messages called tweets. Twitter users can follow other users (friends) and other users can follow them (followers).

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Monthly Revenue

The monthly StatsSA food and beverages report (StatsSA, 2010) details revenue nationally for food and bar sales from restaurants and coffee shops. The food and beverages survey is "a monthly survey covering a sample of public and private enterprises involved in the preparation of meals and drinks for immediate consumption in South Africa" (StatsSA, 2010:8). The purpose of this survey is to monitor trends in the food and beverages industry. The results of this national survey are used to compile estimates of the gross domestic product (GDP) and used to analyse business and industry performance. The results of this monthly survey are published monthly in a statistical release P6420, food and beverages (StatsSA, 2010:6). As there is no specific data for the Cape Town market, this section will assess the market nationally and then make some assumptions about the Cape Town market.

Monthly reports from StatsSA can be used to track sales over a year and use this to get an indication of the amount of food and alcohol in monetary a term that is used by the Restaurant Industry. The data was re-collated to tabulate and compare yearly sales from July 2009 - June 2010 with July 2010 - June 2011. The data was broken up into national food sales, national bar sales and total sales. This is available data that is presented in a readable format and was a sample only extracted at national level. In the absence of actual data, estimations have been made to ascertain the revenue values of the market for food and beverages passing through the system. This estimation was done to provide a starting point to understand the magnitude of food and drink passing through the restaurant system in Cape Town, which in turn impacts on other resources needed. The value of this calculation is simply as a starting point to understand the impact of restaurants as a distributor of food and drink.

I met with Rey Franco, deputy chairman of Fedhasa (Federated Hospitality Association of Southern Africa) to get more detailed information on the restaurant market in Cape Town as well as the sustainability measures he was implementing as the food and beverages manager at 1800°, a Cape Town restaurant.

Restaurant Databases

More detailed information was needed on specific restaurants in the Cape Town area. In June 2010 I compiled a database using commercial information coupled with subjective judgements based on my knowledge of the restaurant industry in Cape Town. This became the basis of ongoing analysis of the industry. My sampling frame represented the list of

population members used to obtain my sample (Aaker, Kumar, Day & Leone, 2010:338). I used two guides, one reviewer based (Eat Out) and one subscription based (Dine Out). I conducted this review in June 2010 and while I was tempted to update the information according to restaurants opening and closing I realised that I had a significant sample with which to make various determinations. A problem with lists is currency; the list may lose its validity if it is outdated. However in both instances at the time of sampling the lists were up to date (Aaker et al., 2010:339). The intent was to use a combination of existing information and judgement sampling to provide a sample significant enough to analyse by region and type of restaurant in an attempt to identify patterns within the industry. It is hard to obtain a numerical guide to every restaurant in Cape Town as the landscape is shifting. I decided it would be, if they were adequate, sufficient to rely on comprehensive restaurant guides as they are used to point consumers to restaurants in Cape Town.

As the sample was used to collate basic information as opposed to interviews it could be large. I worked off a universe of 582 individual restaurants[5] and collated a sample representing 74 percent of this universe.

The starting point was to use the Eat Out guide of 2010. This guide is an annual directory of restaurants selected and reviewed by a panel of judges from the food industry. This guide is less comprehensive but geared towards more popular restaurants. The guide contained 183 restaurants. It is based on the reviews of a panel of 36 independent reviewers from the food industry, who anonymously review a selection of restaurants with the aim of creating a selection of restaurants "excellent in what they set out to achieve" (Donnelly, 2010:14). I chose this guide as a starting point, as I felt it represented the commercially popular restaurants and was continually updated. I also appreciated the fact that these restaurants did not pay for inclusion in the guide.

I wanted to add to this sample. The Restaurant Association of South Africa (RASA) links to the commercial database at dining-out.co.za (RASA, 2010). This website (as of June 2010) lists 582 restaurants for Cape Town (Dining-out, 2012). Restaurants who subscribe to the site get a detailed listing with links to their web pages, while non-subscribers get a one-line listing to make the site comprehensive. It is updated on a daily basis, as one of the issues around collecting restaurant data is the rapid rate of change, with restaurants constantly opening and closing. Franchises were assessed on the dining-out website and on a link on the RASA website which is a service to franchisors.

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[5] By June 2012 this was 702 restaurants

As a result a sample of 431 restaurants was built up. Of these 335 are unique restaurants, while the additional 96 are made up from the additional chains and franchised restaurants. For example, as a franchise primi piatti was included once in the sample of 335 but the number of branches reviewed contributed to the 96 restaurants. Restaurants with branches in other parts of the country as well as those with only two branches were viewed as chains for the purpose of the research. Although I could not reach the total number of restaurants using this bottom up approach, there is coverage of all the better known restaurants.

The sample represents a substantial portion of the industry and can be a basis for market evaluation. In terms of sample size I was aiming for coverage, while not being insistent about including every restaurant in Cape Town. I designated the population universe as represented by the most comprehensive of the guides, Dining Out. On the assumption that there is an overlap between the restaurants in the Eat Out and Dining Out guide, the sample of 431 individual restaurants represents 74 percent of the individual restaurants listed in the Dining Out online guide (Dining Out, 2010). There is the problem of bias within a judgment sample (Aaker et al., 2010: 335), which can weaken the evidence but in this case it was deliberately introduced to include applicable restaurants. There are also restaurants that are excluded from both guides. However for the purposes of the study it was sufficient to consider restaurants included by rating or listing services. The study is qualitative in its attempt to understand behaviour patterns and trends and not a quantitative assessment of the industry.

The typology of restaurants used was also derived from a synthesis of the StatsSA (2010:1) definition of restaurants as "enterprises involved in the sale and provision of meals and drinks, ordered from a menu, prepared on the premises for immediate consumption and with provided seating." Within this definition, categories such as street vendors or fast food establishments are excluded. Based on the restaurant databases used, restaurants were viewed as chains or independent restaurants. Restaurants range from casual to fine dining. Further categorisation divided restaurants according to the type of food or type of meal offered. These categorisations are Indian, Bistro, African, Grill, Asian, Contemporary, Seafood, Light meals or Italian. The database is used as a sample, and so exclusion from the database did not limit the significance of restaurants to the study. This refers to eateries such as Solms Delta in Franschhoek and Eight in Stellenbosch, as well as restaurants that opened after the database was finalised. These were not included in the database as they were in the Winelands but were referred to in the research as exemplars of sustainability.

In collating the restaurants the basic municipal map as depicted below was used to establish inclusion.
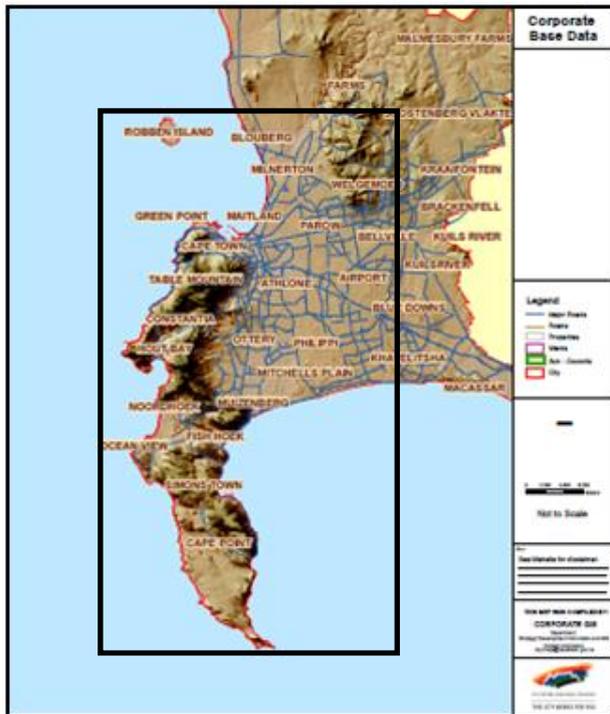
Figure 4: Map of Cape Town
Source: www.capetown.gov.za

The Rectangle within the municipal map designates the area chosen to be part of the study. The main excluded area that has a representation of restaurants, is the Strand, Somerset West and Gordon's Bay area. This was excluded on a judgement basis to limit the scope of the study. Although these areas fall under the municipality of Cape Town in the Eat Out Guide they fall under the Winelands region, not Cape Town. Geographically they are separated from Cape Town by the N2 which is a forty kilometre stretch of highway creating further discontinuity. However, it would be appropriate to extend the study at a later stage to this region as well as the surrounding Winelands regions.

Restaurants were selected up the West Coast to Big Bay. The Northern Suburbs of Bellville and Durbanville were included. Restaurants were selected southwards down to Cape Point.

The designations used for categorisation were

- City Bowl (including Green Point)
- Atlantic Seaboard
- Southern Suburbs (to Wynberg)
- South Peninsula (to Cape Point and including Hout Bay)
- Northern Suburbs (including Goodwood)
- West coast (including Milnerton)

Through observation, and creating and working through the database, it appeared that restaurants did cluster in popular commercial and tourist areas such as the City Bowl, Waterfront, Green Point, the Atlantic Seaboard, Constantia and Kalk Bay. It was also apparent that many of the chains have similar locations, many of these being mall based e.g. Waterfront, Cavendish, Blue Route. Although they are not all featured in the restaurant guides, there is a growing restaurant market in the townships of Langa, Gugulethu and Khayalitsha, catering for locals and tourists. Many of these, such as Mzolis in Gugulethu, are *shisa nyama* (burn the meat) establishments which consist of a butchery, a braai area for cooking meat, and an informal eating space (Township Eats, 2010).

Individual Restaurants: Best Practice

After mapping out the restaurants, I wanted to identify individual examples of best practice. The starting point was the Eat Out guide of 2010, from which I extracted specific examples. I layered those extracts through other secondary sources such as websites and food magazines. I added to these insights with restaurant visits and interviews with restaurateurs. Visits and secondary data laid the basis for the mini case study with Eight as a proponent of integrated sustainability. My involvement with one particular restaurant, Starlings as described in section 2.7.1 was immersive as I took control of their social media and spent a lot of time observing their practices. Depth of insight would be traded off against bias.

2.5.5 Market Situation: Understanding Restaurant Customers

I wanted to map the restaurants I had clustered against a pre-existing geo-demographic study in order to broadly match restaurant location with residence patterns. The Knowledge Factory[6] has a Geo-Demographic Study called ClusterPlus, which maps out Cape Town according to Socio-Economic rank (income, property, value, education, occupation); Life Stage (age, household and family structure) and Dwelling Type (size, type and age of

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[6] The knowledge factory is a research company that specialises in demographic information- knowledgefactory.co.za

structure) which collate as clusters (ClusterPlus, 2010:3). I mapped the restaurant locations against the geo-demographic clusters as they apply to Cape Town, to establish a correlation between the clusters and restaurant location. I used the restaurants I was able to match geographically, resulting in a representative judgement sample of 269 restaurants. The sample of restaurants corresponded to the top 4 categories of Cluster Plus. Furthermore the majority of restaurants fall into a less well-heeled category known as Community Nests (cosmopolitan). The second most dominant cluster is Silver Spoons (affluent). Given the fact that the restaurant database did not cover Somerset West and the Strand, while ClusterPlus does, there isn't an exact correlation, but it still points to a correlation of area and customer geo-demographics.

The information in the database of restaurants (Appendix A) was used to create basic groupings to understand the fundamentals of the restaurant market in Cape Town. It was used to indicate the split between single restaurants and chains. It has been used to group restaurants into four key areas. This gave some indication of where restaurants were clustered. The information in the restaurant database (Appendix A) was also used to group restaurants according to type of offering, which may be regional (e.g. Italian), or correspond to a style, such as contemporary. These designations are derived from the key guides used to compile the database (Donnelly, 2010). It was also used to understand average price/meal according to the Eat Out guide. Even though it is a constantly shifting landscape these splits are still relevant indicators of market factors of the region.

OgilvyEarth South Africa (OgilvyEarth, 2011) conducted an online sustainability survey in 2011, measuring the attitudes of South African consumers to sustainability. The online survey measured responses from 800 consumers, predominantly from Cape Town and Johannesburg. This survey is elaborated on in Section 4.2.4.This existing study was used to gauge whether within Cape Town, existing and potential customers would be interested in sustainable issues. A standalone study focusing on restaurant customers would be useful in this regard. However the existing research does provide a snapshot of urban attitudes.

2.6 Understanding the SWOT Analysis and Objectives

The SWOT analysis is a marketing tool that distils the research findings of the situation analysis into a coherent workable tool. The SWOT analysis involves interpretation of existing data to arrive at strengths, weaknesses, opportunities and threats (du Plessis et al., 2009:392; Kotler & Keller, 2012:70). Shifts evident in the macro environment can present opportunities or threats. An opportunity exists where there is customer need that a business has the ability to satisfy. Conversely a threat would provide a challenge to meeting the needs

of the consumer (Kotler & Keller, 2012:70,1). A business needs to capitalise on strengths and minimise weaknesses in order to take advantage of opportunities or withstand threats. (Kotler & Keller, 2012:71). Both the macro and market criteria need to be evaluated to create a SWOT analysis. These can relate to the market, industry, legislation or any aspect of the situation analysis. There is an element of subjectivity in ranking these criteria.

Once the SWOT analysis has been created, objectives can be set. These are derived from the findings of the SWOT and need to be specific and measurable. These objectives ideally need to be hierarchical, quantitative, realistic, and consistent (Kotler & Keller, 2009:71). Again these are subjective and based on key areas of the SWOT analysis. These form the basis of the business strategy.

2.7 Business Strategy – Business Model Canvas

A typical business plan would use the marketing mix or 4Ps (product, price, promotion and place) to describe the basic marketing strategy (du Plessis et al., 2009:362; Kotler & Armstrong, 2008:51). This would be supplemented with a financial and operations analysis. However, there has been a move to a more holistic approach to marketing, with Kotler & Keller (2012:47) proposing a shift to the 4Ps of people, processes, programmes and performance. The business model canvas by Osterwalder and Pigneur performs a similar function by dealing with the following integrated elements.

- Customer Segments - an organisation serves one or several customer segments
- Value Propositions - how to solve customer problems and satisfy customer needs
- Channels - communication, distribution and sales channels
- Customer Relationships - established with each segment
- Revenue Streams - result from value propositions
- Key Resources - assets requires to deliver the elements
- Key Activities - key activities needed to fulfil value proposition
- Key Partnerships - outsource activities
- Cost Structure - based on business model elements

Both primary and secondary data were used to assess these integrated aspects of the business model canvas. Some of the research employed was used across both the literature review and the business model. The research specific to the business model canvas described is covered below.

2.7.1 Understanding Consumer Segments, Channels and Partners

The database was revisited and segmentation criteria were used to group restaurants into clusters according to geography, restaurant type and rate of adoption of innovation (Kotler & Keller, 2006: 259; Kotler & Keller, 2012:612).

Moving away from quantitative data, I wanted to get the stories of restaurants in Cape Town and neighbouring regions that were moving towards sustainability. I started to appreciate that restaurants could not be seen in isolation, but formed a network with the people that supported them. I was motivated to organically understand these connections within the Cape Town setting. I had already used the information in the Eat Out guide reviews that detailed efforts around sustainability. I decided to create layers of evidence regarding restaurants. This developed over a year through conversations, interviews, tracking social media, personal visits, articles and immersive observation. Effectively this method was triangulation which "entails collecting material in as many different ways and from as many diverse sources as possible" (Terre Blanche et al., 2008:287). Although I had personal experience of restaurants in this field, I decided to create a sample of restaurants through contacts and references, snowball sampling (Terre Blanche et al., 2008:139). This led to a series of semi-structured interviews with bloggers, restaurant owners and chefs. I started by interviewing a well known food blogger, Dax Villanueva, who in turn recommended a number of establishments. He referred me to Liz Metcalfe, who is on the Slow Food Mother City committee. She had been working with the restaurants and recommended a number of restaurants. I then interviewed Cameron Munro of Superette (Munro, 2010), Emily Moya of Kwalapa (Moya, 2010), and Lorriane Heyns of Eight (Heyns, 2010). They all made recommendations of sustainable restaurants. I also had conversations with Peter Goffe-Wood of Wild Woods, Brad Armitage and Trish Kratz (Kratz, 2010). I used this information in my literature review and business plan, incorporating it into the relevant sections. I also wrote up a stand-alone mini case study on Eight, a restaurant at Spier in Stellenbosch. Although Eight is on the outskirts of Cape Town it showcases sustainability in a holistic way. It is included, although it does not fall into the sample, for its valuable insights from a restaurant in the nearby region.

From June 2010 I also started tracking restaurants in Cape Town via twitter. Twitter is a micro blogging tool where people talk to one another in real-time. Its use as a qualitative research tool is supportive, as "while social market research is not a replacement for more traditional research, it can serve as a valuable complement to other insight-gathering techniques" (Barber, 2010). It is a way of listening to individuals and brands in real time. One of the features of twitter is a search word facility. I used a constant search for Cape Town

and sustainable restaurants to pick up what was being said on these matters. As twitter has the facility to create links to websites, I was able to use this feature to access new information regarding specific restaurants. Twitter helped me to identify a community of people in Cape Town in food related industries who used the tool. In Appendix C I created a list of these people as of January 2011. Many of these become incorporated in the business plan as supporters, customers, or partners.

I then used the knowledge I had built up of the restaurant industry and stakeholders, to offer to manage social media for a restaurant I had been frequenting, that was interested in moving to sustainability. In June 2011 (Kratz, 2011) I spoke to the owner of Starlings, Trish Kratz, about running a twitter (@starlingscafe) and facebook account (starlings cafe) for the restaurant. They were on the verge of starting an urban farmers' market in their garden and needed to communicate this. I used the social media account to convey information and answer questions about sustainable issues in general and issues specific to the restaurant. We broadened the communication to an instagram[7] account (starlingscafe) which enabled photo sharing of restaurant activities. This gave me an opportunity to immerse myself in understanding the communication side of the business model. To fulfil the obligation I found it necessary to spend time at the restaurant. Doing this helped me to understand many of the issues and decisions involved in moving a restaurant to sustainability. These particularly revolve around cost, where ingredients may be more expensive, and therefore make pricing uncompetitive.

Restaurants I specifically visited during this period included:

- @ Union
- Birds' Boutique Cafe
- Babylonstoren
- Origin
- Ocean Basket
- Prime Patti
- Kwalapa
- Wild woods
- La Mouette
- Kirstenbosch Tea Room
- River Cafe
- Solms Delta
- Table 13

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[7] Instagram is a photo sharing programme and social network

- Dear Me
- Starlings
- Eight
- Organic at heart
- W Cafe

Visiting a range of restaurants helped me see different approaches to sustainability visible to restaurant patrons and led me to understand how changes have to be appropriate to the restaurant concerned. Eight, Babylonstoren and Solms Delta fell outside the Cape Town region but were visited as well-known examples in sustainable practice.

2.7.2 Understanding the Value Proposition, Activities, Costs and Revenues

In order to create a specific value proposition, I searched the internet for examples of initiatives that had been set up to collaboratively help restaurants, apart from restaurant associations. Two specific initiatives described in the plan are www.outinthefield.com and chefscollective.org. These gave me ideas for aspects of the business model. Activities were derived from an understanding of the elements above. One of the activities is the assessment tool. This was derived from an understanding of tools used by other institutions, but also from the insight gleaned in the literature review as to specific needs.

Costs and Revenues were derived directly from these activities. Brief research was done to roughly ascertain what these would be. I met with a business consultant to entrepreneurs (Sasman, 2011), who was able to help me understand what start up costs would be incurred.

2.8 Limitations of Research

The broadness of scope gave the research its necessary breadth and reach into aspects beyond just restaurants in Cape Town. However this strength becomes a weakness as each aspect of the research could be covered in greater depth.

One aspect that could be covered in depth is a detailed consumer study outlining attitudes to sustainable restaurants. The attitudes of other stakeholders could be examined. The aspect of tourism and sustainable restaurants could also be probed to ascertain the needs of tourists. A questionnaire could be used to establish in detail what a sample of restaurants is doing, instead of relying on experience, guides and interviews. It would be valuable to test the assessment tools in practice. Another limitation was the speed of change in the industry. Restaurants continually open and close. The criteria of the SRA evolved during the course of the study. It was challenging to decide when to update research or leave it unchanged as an illustrative example. As far as possible, information was updated to retain currency.

Chapter 3:   Literature Review

3.1 Introduction

The literature review aims to provide an understanding of the interrelated global issues that drive the need for sustainability and then narrows the focus to Cape Town, and specifically the sustainability of restaurants in the city. The theoretical structure looks at the broader societal forces that restaurants, as businesses in the food industry, operate within. A review of the global polycrisis (Swilling & Annecke, 2012:26) lays the basis for a discussion on sustainability as a response to this crisis. The starting point will be to look at global interconnected trends and forces that show a range of social, political, environmental and economic challenges. These conditions point to a critical juncture for the planet, and the need to move to environmental, economic and social sustainability to avert potential disaster. The unique context of Cape Town is elaborated on as a city in the developing world with peculiar challenges. Sustainability issues are contextualised with reference to restaurants, particularly with regard to issues around food and resources. The restaurant industry is examined to identify best practice and isolate key issues that need to be addressed.

3.2 A Global Polycrisis

3.2.1 Aspects of the Crisis

The global landscape needs to be understood as a complex system in a state of crisis, economically, environmentally and socially. The dimensions of this landscape will be described as a foundation of this argument. The global setting is predominantly urban as 2007 was the point at which half the global population became urbanised (UNEP, 2007B; UN-Habitat, 2006). The ecosystem services we are dependent on for our livelihood are being degraded and two thirds of these ecosystems are in decline (MEA, 2005). Globally our ecological footprint requires two planets at the current rate of consumption (Worldwatch Institute, 2010). Despite this, our consumption of resources such as fuel, energy and food escalate. This economic system functions on fossil fuels such as oil and coal as a key energy resource. Experts such as Colin Campbell (Apso International, 2012) predict that we have reached a point where we have used half the existing oil supply. This means that extraction of the remaining oil has a limit and will be costlier and more difficult to extract (Bardi, 2009:323; Lerch, 2007:1). Climate Change is another variable that threatens life as we know it and puts pressure on the environmental and economic systems (Stern, 2006:1). This scenario of an urbanised, globalised world, with its inhabitant's disproportionately

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consuming and emitting waste beyond the planet's capacity to regenerate, is the driving force behind imagining an alternative reality.

3.2.2 Consumption and Distribution of Resources

A growing population is a critical factor in the scenario described above, as "the accumulation of people, their consumption patterns, travel behaviour and their urban economic activities impact the environment in terms of resource consumption and waste discharges" (UNEP, 2002:10). The global population has now reached seven billion and is predicted to reach 9.3 billion by the middle of this century. The rate of growth is declining though, and expected to stabilise at 10 billion in 2100 (UNEP, 2007b:27; UNEP, 2012:1). The poorest places often have the highest population growth rates. Population growth can be a 'demographic trap' where poorer people have more children to help them, leading to further economic decline (Sachs, 2002:64-6). However, population growth is only part of the problem as we need to consider who is consuming the resources.

The UN Human Development Report of 1998 established that consumption of global resources has been unevenly distributed. Globally the richest 20 percent of the world in the highest-income countries account for 86 percent of total private consumption expenditures, while the poorest 20 percent account for merely 1.3 percent (UNDP, 1998:2). More specifically, the richest fifth of the world consume 45 percent of all meat and fish, while the poorest fifth consume 5 percent. The richest fifth consume 58 percent of total energy, the poorest fifth 1.1 percent. The richest fifth use 84 percent of the world's vehicles, the poorest fifth less than 1 percent (UNDP, 1998:2; Sachs, 2002:19). This top 20 percent persists today and is also referred to as the "global middle class", which cuts through typical North –South divides. According to the Joburg Memo (Sachs, 2002:19), around 80 percent of this consuming class is found in North America and Europe. The rest is dispersed through elites in the South, particularly in newly industrialising countries.

These patterns of consumption are reflected in the 2010 State of the World Report of the Worldwatch Institute. The report (2010:4) tracks an increase in global consumption of goods and services (in USD 2008) from 4.9 trillion in 1960 to 30.5 trillion in 2006. The consumption of resources has consequences for the environment and the livelihoods that are supported. The report describes the impact of our consumerist culture as "the average European uses 43kg of resources daily and the average American 88kg…The exploitation of these resources to maintain ever higher levels of consumption has put increasing pressure on earths system" (Worldwatch Institute, 2010:4). This again reflects the unequal use of resources.

Under the neo-liberal conditions of globalisation, poverty and inequality go hand in hand (Blowfield, 2008:77; Stiglitz, 2002:48). The 'Global Middle Class' in the North and South have the purchasing power to harness the network of resource flows via the power of Multinational Corporations (MNCs) to satisfy their patterns of resource intensive consumption of goods and services. Smaller elites in the South (Brazil, Mexico, India, China, Russia) can replicate the energy and material usage and tap into the consumer lifestyles of their Northern counterparts, despite their consumption being considerably higher than that of their countries average (Sachs, 2002:20). As the consumer class corners resources through the global reach of corporations, they contribute to the marginalization of that third of the world population, which derives their livelihood directly from free access to land, water, and forests. Poverty has worsened, the gap between rich and poor has widened, and we are heading for ecological collapse as the growth paradigm strains resources to their limits, albeit unevenly (Freemantle, 2008:4). The UN Human Development Report also noted that "ever expanding consumption puts strain on the environment - emissions and wastes that pollute the earth and destroy ecosystems and growing depletion and degradation of renewable resources that undermines livelihoods" (UNDP, 1998:02). Not only do the poor not enjoy the resources, but they pay for this disparity on a finite planet as livelihoods are threatened through a deprivation of basic needs.

3.2.3 Urbanisation, Inequality and Dualistic Systems

The increasing global population is predominately urban as a 'second wave of urbanisation' resulted in just over half the world's population living in urban areas by 2007 (UNEP, 2002:10; Worldwatch Institute, 2010: xxiii). It is predicted that this will be 65 percent by 2050 (UNEP 2002:10). Again poverty and inequality characterize many developing-world cities, and urban growth will become virtually synonymous with slum formation in some regions (UN Habitat, 2006:4). This disproportion is reflected in that, of the over three billion urban dwellers, one third lives in slums (Worldwatch Institute, 2007; UN Centre for Human Settlements, 2003; Lee, 2007: viii). In the next two decades it is predicted that cities of the developing world will account for 95 percent of urban growth. Despite the emergence of megacities, the majority of urban migrants will move to small towns and cities of less than one million inhabitants (Worldwatch Institute, 2007:xxiii). Slums do not automatically correlate with poverty, but their presence in a city can indicate urban inequality (UN-Habitat, 2006:12). The negative impacts of urbanisation affect the poor the most when it comes to competition for access to scarce resources or protection from harmful environmental conditions (UNEP, 2002:10). Although rich and poor may share city spaces, they access and navigate resources and flows differently.

The wave of urbanisation, coupled with consumption patterns, has resulted in many cities becoming spaces designed to reinforce disparities of growth and consumption. Social and technological infrastructure is also configured to exclude the poor and advantage the wealthy. Dualistic systems are being created in many of the worlds rich cities as "the physical fabric of many cities across the world is starting to fragment into giant cellular clusters - packaged landscapes made up of customised and carefully protected corporate, consumption, research, transit, exchange, domestic and even health care spaces" (Guy & Marvin, 2001:8). These dualistic systems at city level are networked through technology with other similarly connected cities in our globalised world, creating connections of influence and privilege. Although growing populations are predominantly city dwellers, the poor slum dwellers are largely excluded from the networked spaces that facilitate consumption and resource use.

3.2.4 Resource Flows

The material flow of cities (and individuals) can be analysed. An urban environment is characterised by fixed infrastructure such as buildings and networked infrastructures (roads, cables, pipes) which serve as conduits for socio-metabolic flows (vehicles, bodies, water, energy, food). These flows can be linear, with inputs becoming waste, or circular, with outputs becoming reused as inputs (Swilling & Annecke, 2012:121). The metabolic rate (tons of material/capita) of the city is dependent on the amount of resources drawn from outside the city. If there is an increase in GDP/capita the city is most likely increasing its metabolic rate.

To illustrate, "in total 60 billion tons of resources are now extracted annually...all in all the world extracts the equivalent of 112 Empire State Buildings from the earth every single day" (Worldwatch Institute, 2010:4). These resource flows in the global economy can be calculated by the methodology of Material Flow Analysis (MFA) which is used to calculate the quantity (in tons per capita) of upstream material flows used in the global economy. Population growth has driven the growth in biomass extraction and consumption, while GDP/ capita consumption has driven the growth in mineral and metal extraction (Swilling & Annecke, 2012:44,5). Pursuit of economic growth coupled with rising consumption has meant that "more fossil fuels, minerals and metals have been mined from the earth, more trees have been cut down, and more land has been ploughed to grow food" (Worldwatch Institute, 2010:4). The extent of resource extraction by category is illustrated below.
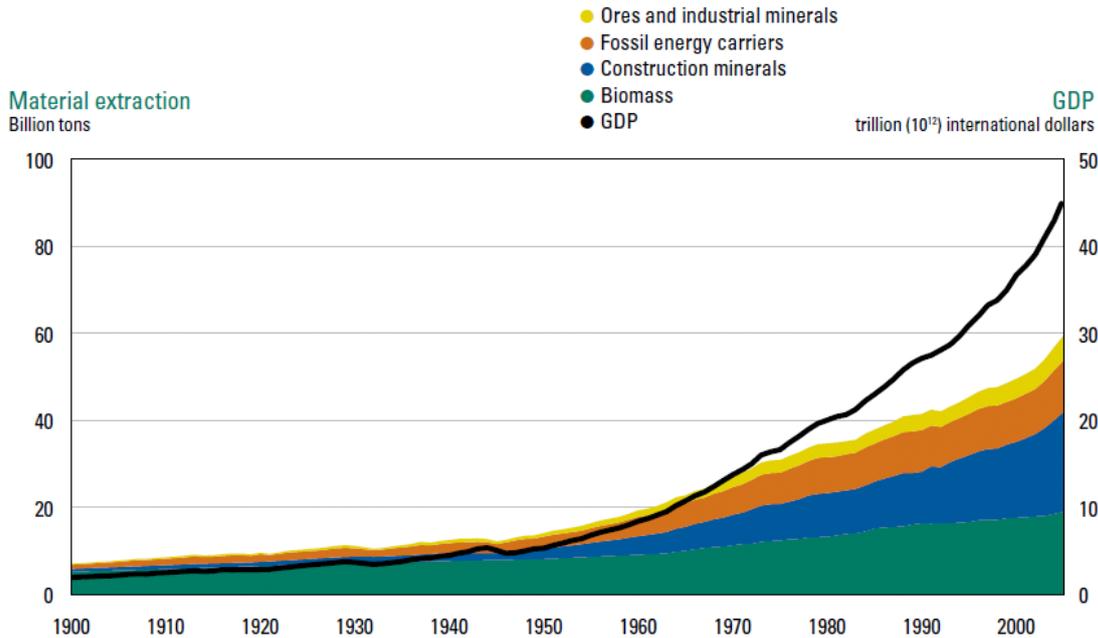
Figure 5: Extraction in Billion Tons

Source: UNEP, 2011:4

Counter to this, there is evidence of decoupling natural resource use and environmental impacts from economic growth. Figure 5 illustrates GDP growth at a rate greater than material extraction, which is evidence of resource decoupling. This "means reducing the rate of use of (primary) resources per unit of economic activity. This 'dematerialization' is based on using less material, energy, water and land resources for the same economic output" (UNEP, 2011:4). Impact decoupling can also occur through resource use efficiency "when negative environmental impacts decline while value is added in economic terms" (UNEP, 2011:4). Cities are the focal point for this emphasis on decoupling as they "drive the global unsustainable use of resources, but they are also where the greatest potential exists for sustainability-oriented innovation" (UNEP, 2011:44). Decoupling is an essential response, given the finite nature of resources, consumption in excess of regeneration potential and the damage done to the global ecosystems and their services.

3.2.5 Ecosystem Degradation

The pressure on global resources, particularly in the last fifty years, has contributed to the degradation of the environment and its ecosystems. The Millennium Ecosystem Assessment (MEA) of 2005 was a study conducted by 1360 scientists from 95 countries which focused on ecosystems and ecosystem services and their connection to human wellbeing. This

comprehensive study found that about 60 percent of the ecosystem services examined (e.g. fresh water, capture fisheries, climate regulation) are being degraded at a substantial cost (MEA, 2005:16). The impact of this degradation is nonlinear and is having a disproportionate effect on the poor contributing to poverty, inequity and social conflict (MEA, 2005:17). Their findings were that "human activity is putting so much strain on the natural functions of Earth that the ability of the planets ecosystem to sustain future generations can no longer be taken for granted" (MEA, 2005:2). This diagram from the MEA report illustrates the connections between ecosystem services and human well being.
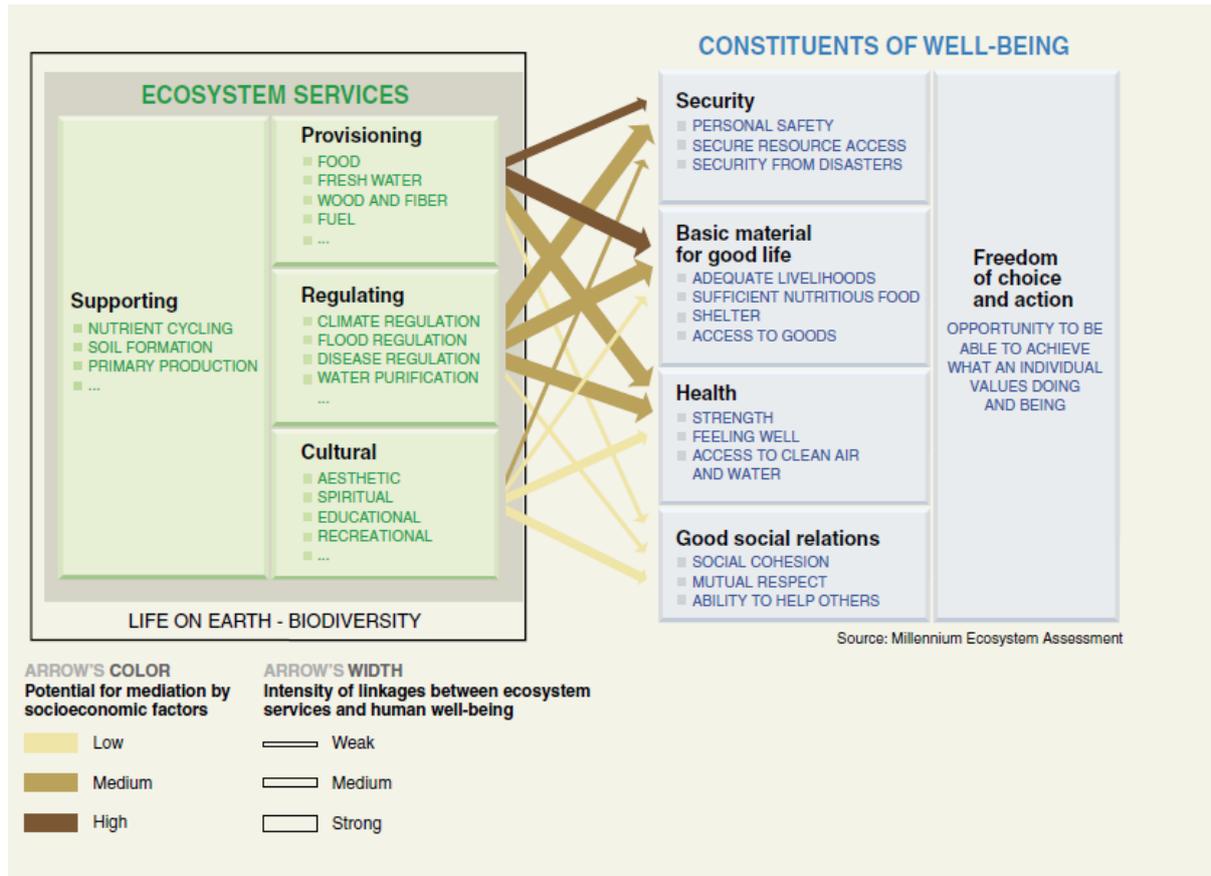
Figure 6: Ecosystem services and Constituents of Well-being

Source: MEA, 2005

Ecosystem services are the services that the ecosystems deliver e.g. food, water, nutrient cycling. As Figure 6 shows they can be categorized as supporting, provisioning, regulating or cultural. They are essential to life, and are so intricate and complex that most cannot be replaced by technology. For instance, farming communities and those dependent on them need ecosystem services for their water supply, pollination, supply of external inputs, microclimate, soil health, nutrient cycle and pest control (Daily, 1999). Again, consumption of resources creates widespread disproportionate degradation, impacting on the sustainability of life for future generations. The impact of this way of life is seen when we assess the

impact of our consumption, and compare the human ecological footprint to the earth's bio-capacity.

3.2.6 Limits to Growth: Ecological Footprint Analysis

Ecological footprint analysis enables us to assess the ecological gap by comparing the ecosphere's production with the economy's consumption (Wackernagel & Rees, 1996:222). In just over forty years our global ecological footprint has increased threefold.

This means overall we have exceeded the planets regenerative ability by 25 percent (WWF, 2006:14). Figure 7 below shows that when we compare our ecological impact with the land and sea that can supply these resources, we are using a third more of the earth's capacity than is available (Worldwatch Institute, 2010:4).
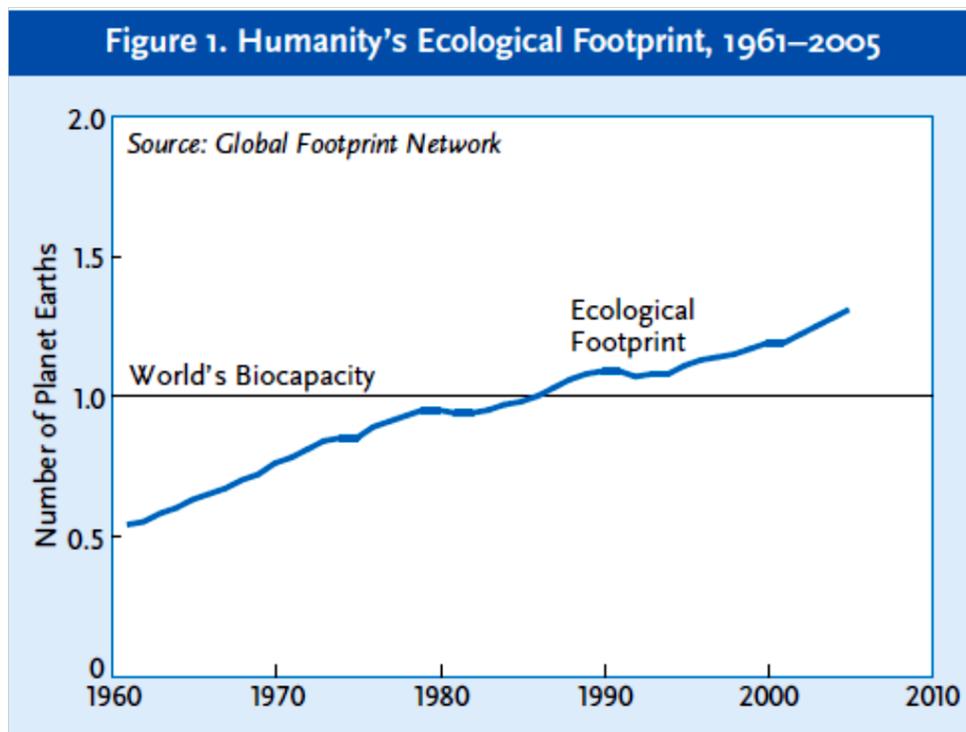
Figure 7: Human Ecological Footprint

Source: The Ecological Footprint Atlas, 2008 in Worldwatch Institute, 2010

Again, it is the wealthiest twenty five percent of humanity who occupy a footprint as large as the entire biologically productive surface area of the Earth (Wackernagel-Rees in Sachs, 2002:19). This ecological footprint is enabled by our current economic and financial globalised systems. Our present linear economy moves from extraction through production and consumption to waste disposal. These systems treat the environment as a substitutable resource.

3.2.7 Peak Oil, Waste and Climate Change

Our current global economic system is dependent on energy as a socio-metabolic flow for economic components such as food production, transport and housing. The system has been built on non renewable fossil fuels; oil, gas and coal. Oil has been a particularly cheap source of energy and has enabled the life we lead today. The world's transport system relies on oil for ninety percent of its energy (Behrens & Wilkinson, 2008:6). We use it not only to fuel our vehicles, but as an energy source, and component of a range of materials from plastics to fertilisers. The concept of peak oil (which can be applied to other finite resources) describes a bell curve of the growth, peak and gradual decline of crude oil production (Bardi, 2009:323). The concept was defined by Hubbert with his work in the US oilfields where oil production peaked thirty to forty years after the peak of oil discovery; discovery peaked in the 1930s, production peaked in the 1970s (Kunstler, 2005:43). The peak oil community believe we have already passed, or will soon experience the peak of global oil production. (Apso International, 2012).

It is predicted that oil production will start dropping and the price will increase due to oil not being as readily available and more costly to extract. It will mark the end of cheap and plentiful fuel. The remaining half of oil reserves are going to be harder and costlier to extract, as well as fiercely contested (Kunstler, 2005:65). It is unlikely that we are going to reach more than the current limit of eighty six million barrels a day (Behrens & Wilkinson, 2008:6). Increased oil prices will have widespread impact in a global economy dependent on cheap and plentiful fuel. Not only will transportation be affected but "most of the polymer that goes into the plastics we depend on are derived from oils, as are most antibiotics, the energy that is used to produce the cement that is used to build modern towns and cities, nearly all the fertilizers and herbicides that are used to grow our food on commercial farms around the world, and many countries burn oil to generate electricity'' (Swilling & Annecke, 2012:35,6).

The by-products of a linear economy result in waste. One of the waste products is emissions from the burning of fossil fuels. According to the definitive Intergovernmental Panel on Climate Change (IPCC) greenhouse gases are being released into the atmosphere and are contributing to climate change (Stern, 2006:iii). The Stern Review[8] demonstrated that not dealing with climate change will cost trillions in the future (Stern, 2006:2). The report also noted that the poorest and most vulnerable who have contributed least to the crisis would suffer first and most severely (Stern, 2006:vii). The review concluded that "climate change will affect the basic elements of life for people around the world - access to water, food

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[8] The first contribution to global warming debate by an economist, Sir Nicholas Stern

production, health, and the environment. Hundreds of millions of people could suffer hunger, water shortages and coastal flooding as the world warms. (Stern, 2006:vi).

There are a number of physical impacts predicted if trends continue and temperatures rise between 2-3 degrees in the next fifty years. These include the melting of glaciers which will increase flood risk and reduce water supplies. Crop yields will decline especially in Africa. Ecosystems will be vulnerable with the potential extinction of 15-40 percent of species (Stern, 2006:vi; UNEP, 2012:31-4). While half the world's population lives in cities, they are disproportionately responsible for 75 percent of emissions (Hodson & Marvin, 2009:195). Oil, energy prices and climate change impacts will influence everything a local government can do, from using ecological services to infrastructure and transport planning (Lerch, 2008:5). The story of peak oil and climate change again reinforces the idea of disproportionate consumption and its negative impacts particularly on the most vulnerable.

3.2.8 Conclusion

The discussion has centred on an interconnected set of global crises which reinforce one another. Population is growing in a globalised and predominantly urban world marked by poverty and inequality. This growth is limited by the carrying capacity of the earth which is exceeded by our ecological footprint. Given the poverty and inequality, this is largely a result of consumption by the top end of society. This consumption has put pressure on resources, exacerbated by the predominantly linear nature of global economies. Large scale ecosystem degradation, driven by consumption of resources, has taken place, further undermining the carrying capacity of the planet. Oil is a resource fundamental to the workings of our current economic system, which will become progressively harder and more expensive to extract. Emissions from our fossil-fuel driven economy are also contributing to climate change, which requires drastic shifts in behaviour and consumption to avoid its dire consequences. particularly on those least able to cope with these impacts (UNDP, 1998: UNEP, 2007B; MEA, 2005; Worldwatch Institute, 2010; Stern, 2006; Bardi, 2009).

3.3 The Modern Food System

3.3.1 Introduction

The section on the global polycrisis identified the following issues: Poverty and inequality, urbanisation, limits to growth, degradation of ecosystems, climate change and peak oil. Similarly, The International Assessment of Agricultural Knowledge, Science and Technology for Development (IAASTD) noted that we live in a time of a "rapidly changing world of urbanization, growing inequities, human migration, globalization, changing dietary

preferences, climate change, environmental degradation, a trend toward biofuels and an increasing population" (IAASTD, 2008:3). This section will consider how our dominant global food system intersects these issues with inequitable distribution of food, depletion of resources, degradation of the environment and a contribution to climate change.

3.3.2 Globalisation of the Food System

Over the last century farming has become concentrated in the hands of fewer people, while being organised on a larger scale by shifting from work done by farmers with a body of knowledge and skills acquired over thousands of years, to an automated, corporate driven global system. From the 1960s Green Revolution Agriculture (The Green Revolution) was a range of technological interventions to produce more food that resulted in the industrialisation of agriculture (Pfeiffer, 2006:7; Pretty, Guijt, Scoones & Thompson, 1995:129).

Agricultural scientists bred new varieties of cereals designed through specific modifications to produce better yields. These were bundled with "high-cost inputs including inorganic fertilisers, pesticides, machinery, credit and water regulation" to farmers with the best chance of success (Pretty et al., 1995:126). We are in a second phase of the Green Revolution as diminishing yields have led agribusiness corporations to look to technological innovations such as genetic modification to achieve profitability (Kunstler, 2005:240). Biotechnology in the form of genetic modification is in the hands of corporations such as Monsanto, Novartis, Du Pont and Aventis. They patent their genetic modifications and sell them in the form of seeds and other products for a profit (Korten in Roddick, 2001:144; Weber, 2009:79). With the industrialisation and globalisation of the food system we now have "food reduced to a commodity in a volatile market, farming is becoming ever more specialised capital intensive and technology-based and food marketing ever more globalised" (Norberg-Hodge, Merrifield & Gorelick, 2002:1). This scenario has inherent weaknesses that impact on the sustainability of the food system.

3.3.3 Characteristics of the Global Food System

Despite its apparent power and reach, the global food system "is fragile because of the size of its ecological footprint, the resources needed to sustain it and the exploitation it requires" (Patel, 2007: 294). These weaknesses correspond to the dimensions of the global polycrisis that has been outlined already.

Degradation of Land

The land that agriculture depends on is being degraded due to soil erosion, mineral depletion and urbanisation (Pfeiffer, 2006:11). Soil is one of the most important natural resources that are intricately tied up with a range of life supporting services. Earthworms act as soil regenerators, bees as pollinators, birds and mammals disperse wild fruits, wild plants and animals decompose waste and recycle nutrients (Diamond, 2005:489). But as a consequence of industrialised farming, soil erosion rates are higher than soil formation rates, leading to a net rate of loss in soil. Cultivated soil is also damaged by a range of problems related to current farming methods – salinisation, acidification and alkalisation (Diamond, 2005:489; Pfeiffer, 2006:11).

The degradation of soil depicted below is a direct result of agricultural practices, leading to the abandonment of 5-12 million hectares of productive land annually (Swilling & Swilling, 2008:25).

Global estimates of soil degradation
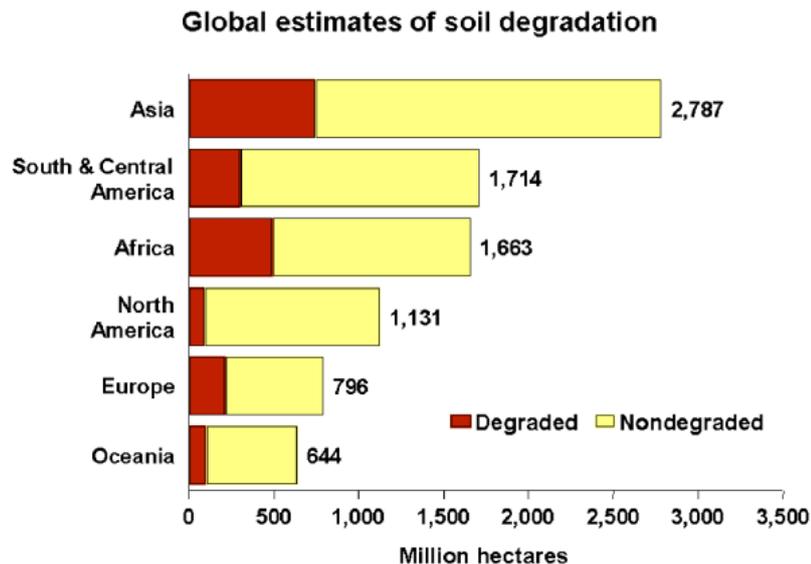
Source: S. Scherr, *Soil degradation: A threat to developing-country food security in 2020?* (Washington, D.C.: IFPRI, 1999).

Figure 8: Global Soil Degradation
Source: Based on Scherr, 1999:18

Dependence on Inputs

The modern food system is dependent on high external inputs, fertilisers and pesticides which are predominantly derived from fossil fuels. These fertilisers and pesticides have

displaced practices such as crop rotation; composting and fallowing that enhance the organism-rich soil as well as reducing the risk of erosion (Lampkin, 1999:14). Additionally, fertilisers have hidden costs as they can end up in ground water where they cause eutrophication, or cause salinisation of the soil. They are also implicated in air pollution and global warming (Altieri & Nicholls, 2005:16). A closed circular system in which nutrients (particularly nitrogen, potassium and phosphorus) flow from the physical environment through plants and animals, has been replaced by an open system where nutrients are brought into the system as fertiliser, and products shipped out and disposed of in landfills and as sewage (Altieri & Nicholls, 2005:16; Pfeiffer, 2006:69). Given the pressure on resources this system is illogical and unsustainable.

Loss of Diversity

Globalisation of the food system has also destroyed the diversity of local food cultures and local food economies (Shiva in Roddick, 2001:109). Fragility of the system is evident in our dependence on a smaller variety of crops. The crops grown now for food in developing countries are rice, maize, cassava, wheat, millet, potatoes and bananas. The chief crops grown for export are coffee, cocoa, sugar, cotton, rubber and tobacco (Madely, 2002:22-4). Planting one crop in a field as a monoculture may improve the individual yield of that particular crop. However planting multiple crops will yield greater biodiversity and a higher total output of food and nutrition (Shiva in Roddick, 2001:107). Diversity is also a protection against drought and desertification and outbreak of disease (Altieri & Nichols, 2005:16).

Access to Food

Proponents of the Green Revolution, such as Borlaug, stressed the necessity of feeding growing populations when it comes to the 10 billion tons of food needed by 2025 as "this increase cannot be accomplished unless farmers across the world have access to current high–yielding crop production methods as well as new biotechnological breakthroughs that can increase the yields, dependability and nutritional quality of our basic food crops" (Borlaug, 2000:490). However, the failing of the Green Revolution was not the lack of food but the lack of access to food (Pfeiffer, 2006:10) which leads us to understand the dynamics of the globalised food system. The system consists of producers (e.g. farmers), the distributors (e.g. retailers), and consumers. The current global system puts the power in the hands of corporations who through economies of scale control the flow of food from farmer to consumers. The diagram below shows an illustrative example of how power in a global system may be concentrated in the hands of manufacturers and distributors of the food, as

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opposed to farmers or consumers. This concentration of power helps explain the disconnect we see between farmers and consumers, despite their being in the majority numerically.

| Farmers/producers: 3 200 000 |
| Suppliers: 160 000 |
| Semi Manufacturers: 80 000 |
| Manufacturers: 8 600 |
| Buying Desks: 110 |
| Supermarket Formats: 600 |
| Outlets: 170 000 |
| Customers: 89 000 |
| Consumers: 160 000 000 |
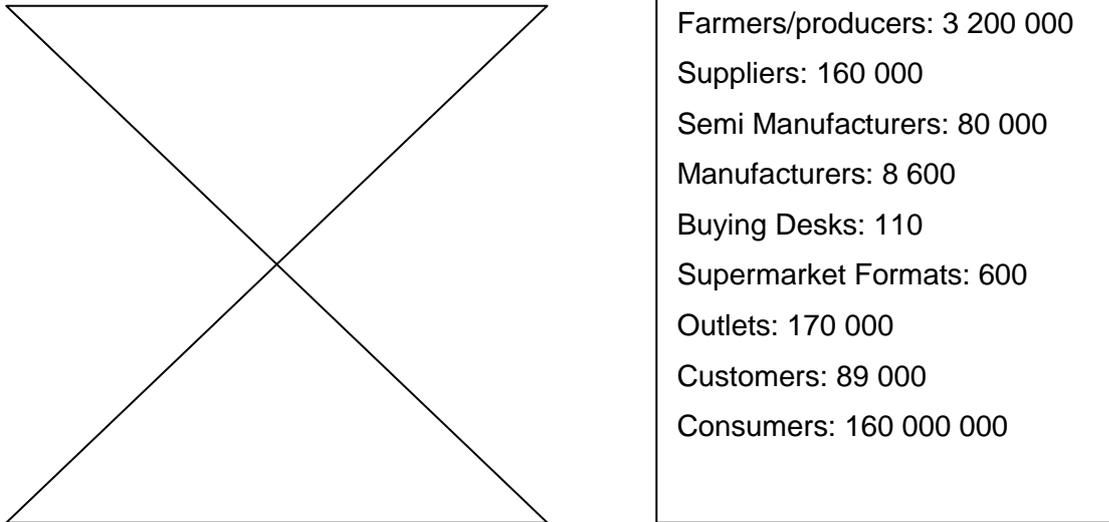
Netherlands, Germany, France, UK, Austria and Belgium

Figure 9: Concentration of Power in the Food System

Source: Adapted from Patel, 2007

The system requires food to travel long distances from farmer to consumer, creating a dependence on fossil fuels. In addition the emissions of the fossil fuels needed to produce and transport food are a significant contributor to climate change. Moving to an industrialised food system has produced food, but has incurred associated costs in terms of energy usage, loss of biodiversity and the breakdown of local food economies. In the light of the global polycrisis there needs to be a shift away from practices that impact negatively on environmental and social sustainability.

3.4. Sustainability

3.4.1 Introduction

This section will develop the argument that, as a response to the impacts of the global polycrisis and as specifically evidenced in the global food system and its characteristics, a case can be made for a more sustainable way of living. Issues around governance, economic, ecological and socio-cultural sustainability need to be addressed.

3.4.2 Background to Sustainable Discourse

Since 1972 we have had progressive discourse and the global popularisation regarding Sustainable Development through a progression of conferences and resolutions. From the 1972 Club of Rome Meeting through "Our Common Future" in the 1980s, sustainable development thinking has evolved to encompass equity as an integral condition of a sustainable world. The political underpinnings of sustainable development governance are rooted in the Brundtland commission of 1986 as "development that meets the needs of this generation without jeopardising the ability of future generations to meet their own needs" This marked a shift to addressing social and cultural needs as critical, with a focus on the South and the issues of the poor. It also raised the idea of environmental limitations (Allen & You, 2002:24; Mebratu, 1998:501). This laid the basis for the UN Conference on Environment and Development (UNCED) also known as Rio Summit in 1992 (Mebratu, 1998:502) and the World Summit in Sustainable Development (WSSD) in Johannesburg in 2002 (Sachs, 2002:17).[9]

3.4.3 Concept of Sustainability – Systems Approach

The concept of sustainability that will be addressed will look at sustainability as an ongoing process needing top down and bottom up action, and as an embedded process whereby social and economic sustainability is embedded in the natural systems and underpinned by governance. The only option that makes sense in the long-term is to seek the sustainability of the whole socio-ecological system, a human subsystem in interaction with an ecological system (Gallopin, 2003:15). The model below depicts that the economy exists and is embedded within the framework of society. The development, policies, growth and activities of our economy and society need to operate within ecological constraints. A
sustainable system needs to be underpinned by sustainable governance.

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[9] The Rio+20 conference took place at the time of final submission of the thesis and as such, no direct Rio+20 discourse is addressed. However the UNEP Publication prepared for Rio+20, Keeping Track, is referenced in the literature review.
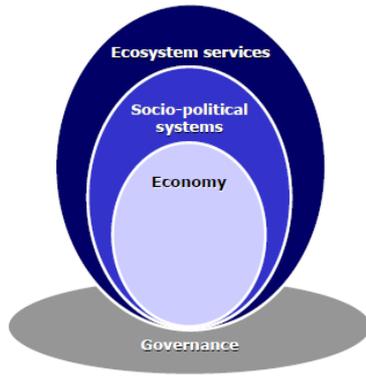
Figure 10: Embedded Approach to Sustainability

Source: DEAT, 2006

One of the pathways to a sustainable system, which meets current needs and those of future generations, means addressing overconsumption and seeking equity within the system. Reducing material over-consumption by the rich minority can be achieved by reducing individual material consumption levels and/or by increasing the overall material and energetic efficiency of the economy (Gallopin, 2003:28). Resource use can be cut and other avenues can be explored. To illustrate, Natural Capitalism is an economic system envisaged by Paul Hawken, Amory Lovins and Hunter Lovins that involves creating efficiencies of production related to natural resources. Resources can be used more productively as in renewable energy systems. The material basis of resource use can change through biomimicry. Living systems can be restored by implementing sustainable agriculture. Consumers can look to other avenues beyond consumption for satisfaction, such as relationships (Hawken, Lovins, & Lovins, 1999:10-19; Sachs, 2002:37).

However, just as "equity is a condition of sustainability, ecology is a condition of equity" (Sachs, 2002:36), which means that given environmental limits there isn't the space for catch-up to levels of the consuming minority. Those consuming less will not be able to catch up to the overconsumption of the consumers. The only path realistically appropriate for developing countries, if sustainable development is to be achieved, is the one that goes from underdevelopment or maldevelopment to development, initially with material economic growth, if needed, and then to development without material economic growth, which is sustainable development (Gallopin, 2003:28; UNEP, 2011:34). The diagram below depicts Gallopin's thinking on these options.

Source: Redrawn from Gallopin, 2003, p. 27
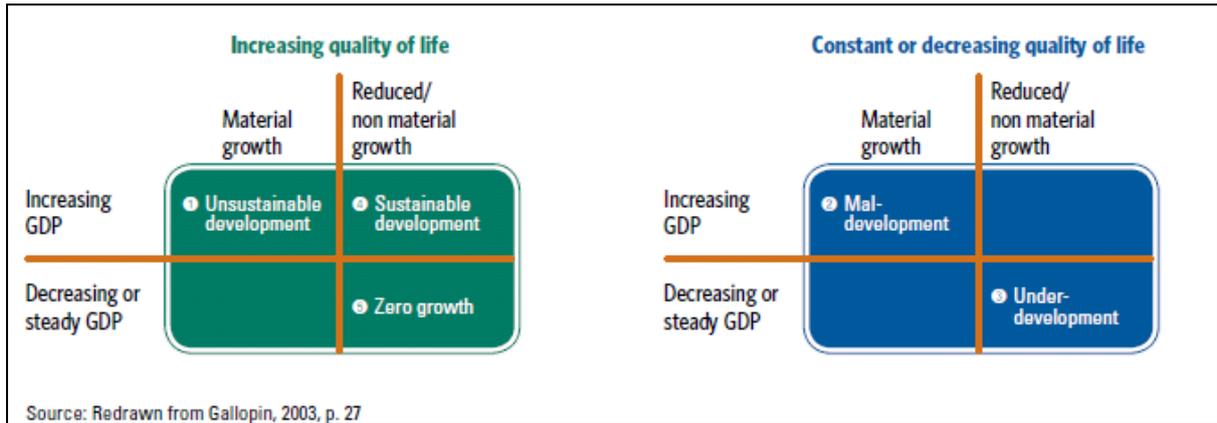
Figure 11: Gallopin on Sustainable Development

Source: UNEP, 2011:34

Sustainable Development is the path that increases quality of life through economic growth while reducing material growth through decoupling. Leapfrogging is the capacity to either skip or transition quickly from underdevelopment to sustainable development (Sachs, 2002:19; UNEP, 2011:35). Developing countries can take advantage of not being locked into industrialisation and move into a less resource dependent space as "investment in infrastructure such as light rail systems, decentralized energy production, public transport, grey-water sewage, locally adapted housing, regionalized food systems, transport-light urban settings etc, could set a country on the road towards cleaner, less costly, and more equitable development patterns" (Sachs, 2002:23). Many of these transitions occur at city level.

3.4.4 Sustainability at City Level

A city exists as a particular geographic space, but is a link in a bigger interconnected and complex system encompassing the physical, natural, social, cultural, economic and political. (Allen, 2002:18).There are conflicting views on achieving sustainability at city level. Cities are responsible for disproportionate levels of consumption of resources and greenhouse gas emissions. They have just over half the global population but consume seventy five percent of the energy and emit eighty percent of greenhouse gases (C40 in Hodson & Marvin, 2009:195). Although cities use resources and may have high metabolic rates they are the focus for sustainability as they have a concentration of expertise and financial and social resources (UNEP, 2011:73).   Given these resources, they can offer the ability to be the site for experimentation and demonstration of sustainable technologies in energy, water, waste food and transport.

Cities Networks moving to Sustainability

In 2008 the global economy went into recession and created an economic crisis on three related fronts – collapse of financial markets, rising fuel and food prices (Barbier, 2009:5). The collapsing of the financial economy drove speculation in oil and commodities pushing up prices of oil and food as money moved away from financial, and into oil and commodity markets (Gowan, 2009:6). A Global Green New Deal (GGND) proposed by UNEP is about "ensuring that the correct mix of economic policies, investments and incentives reduce carbon dependency, protect ecosystems and alleviate poverty while fostering economic recovery and creating jobs" (Barbier, 2009:8). The only way out of the crisis proposed by the GGND is to stimulate the economy by addressing issues around ecosystem degradation, climate change and poverty, by creating jobs and implementing change around 'green' issues.

These changes are already happening at a city level. There are global city networks such as the International Council for Local Environmental Initiatives (ICLEI), Local Governments for Sustainability, United Cities and Local Governments (UCLG), C40 Cities Climate Leadership Group and the Global league of Large Cities (UNEP, 2011:44). These groupings are in various ways involved in reducing the metabolic rate of cities with regards to issues around production, transportation, food, energy, waste, water, densification and the creation of working neighbourhoods (UNEP, 2010:74). Hodson and Marvin (2009:194) describe how global cities such as London and New York are trying, in the wake of the financial crisis of 2008, to regenerate economies by securing flows of ecological resources in the space of "Urban Ecological Security" (UES). These ecological and economic challenges are being tackled at a city level leading to new power relationships.

Circular, decentralised food, water and energy systems are being planned by these world cities. Infrastructure strategies are geared to achieve localised resource autonomy coupled with regional and national disengagement (Hodson & Marvin, 2009:203). In addition to protecting their own interests, cities are working collaboratively with each other, government and business to create new global urban agglomerations that will ensure continued mobility through new technologies. It is argued that these fixes can then be downscaled to other less dominant cities (Hodson & Marvin, 2009:204). Despite the economic and environmental logic underpinning these actions, other responses such as transition towns (Brangwyn & Hopkins, 2010) are localised responses to the ecological crisis. The need to secure food and other resources at city level drives the thinking behind these strategies.

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3.4.5 Sustainable Food Systems

Some of the key shortcomings of the globalised food system have already been outlined – soil degradation, dependence on fossil fuels, loss of biodiversity , energy and water usage and the breakdown of local food economies. Just as sustainability calls for the sustainability of socio-economic systems within environmental limits, the food system needs to be sustainable socially, economically and environmentally. Sustainable food is the basis of a sustainable food system. The UK Government Sustainable Development Commission has defined sustainable food as being safe, healthy and nutritious; able to provide viable livelihoods for farmers and middlemen; respectful of the biophysical and environmental limits; and emphasis on local produce to support rural communities and culture (in Chen, Legrand & Sloan, 2009:62). Similarly a sustainable food system would be one that "enhances the health and welfare of people and animals, improves the working and living environment, enriches society and culture and promotes equity" (Dalmeny & Reynolds, 2007:8). These definitions are useful insofar as they take a holistic view of sustainable food as embracing environmental, social and economic issues: sustaining local communities whilst working within environmental limits. There are about 16 names for farming that has similar principles and practices to the definition of sustainable agriculture – organic, biological farming, biodynamic, regenerative farming, low external input (LEI), sustainable farming (Lampkin, 1999:4).

Organic farming is a commonly practiced form of sustainable agriculture. Organic Farming is defined by the International Federation of Organic Agriculture Movements (IFOAM) as encompassing food production that is nutritional and sufficient in quantity. It involves working with natural systems as opposed to dominating them. The process behind sustainable agriculture is to move from a linear system, which needs inputs and creates waste, to a circular system where the waste products go back into the system as inputs (Pretty et al., 1995:133). Maintenance and long term fertility of soil is important. Renewable resources are used in locally organized systems. A closed system of organic matter and nutrients is created. Living conditions for livestock need to be looked after, with animals being reared without drugs and antibiotics, pollution must be avoided and genetic diversity maintained. A safe working environment, satisfaction and an adequate return for the producer are also encompassed, as is the wider social and ecological impact of the system (IFOAM in Lampkin, 1999:4; Soil Association, 2011). All aspects of the system from production to distribution are critical to sustain this approach.

Sustainable Production

A shift to sustainable agricultural production addresses the weaknesses of the global food system as sustainable agriculture uses natural goods and services within ecological limits. This is done by "integrating natural processes such as nutrient cycling, nitrogen fixation, soil regeneration, and natural enemies of pests into food production processes. It minimises the use of non-renewable inputs (pesticides and fertilisers) that damage the environment or harm the health of farmers and consumers. And it makes better use of the knowledge and skills of farmers, so improving their self-reliance and capacities" (Pretty & Hine in Swilling, 2008:25). This has a strengthening effect on the entire system, built up from practices and techniques.

These practices and techniques that have been employed are designed to optimise productivity in the long term, rather than maximize it in the short term (Madely, 2002:26). Soil is a living ecosystem and the living organisms, minerals, organic matter, water and air which comprise this system, all play a role in the health and nutrient balance of the crops (Lampkin, 1999:18). There are a range of techniques employed by sustainable agricultural practices that can counter soil degradation. These include no-till agriculture, contouring, cover cropping, crop rotation, contour strip cropping, contour buffer planting, terracing, grassed walkways, farm ponds, check dams and reforestation (Pheiffer, 2006:13; Lampkin, 1999:16). Earthworms mix organic matter into the soil, bring nutrients to the surface and create drainage channels, preserving the structure and permeability of the soil (Lampkin, 1999:25).

Sustainable agriculture eschews genetically modified seed and makes use of seeds produced by the farmer (Pretty et al., 1995:127). Unlike industrialised agriculture where the seed is the material for a privatised, patented commodity, the seed becomes the source of grain and of future seed – the 'means of production' and product (Shiva, 1995:54). Instead of planting one crop for efficiency, farmers use mixed crops to minimise risk. By planting diverse varieties of a crop and intercropping different crops farmers minimise the risk of crop failure (Pretty et al., 1995:129; Norberg-Hodge, 2002:55). By doing this, biodiversity is preserved.

Sustainable farming methods replace fertilisers with nitrogen fixing in soil organic matter. Manure from livestock and organic compost are used to replenish soil. Legume crops and plants with nitrogen fixing properties can be used to provide nitrogen (Pretty et al., 1995:133). Insects can be controlled with non synthetic methods of pest control – biological,

mechanical, cultural and locally available (Pretty et al., 1995:127). The system itself controls pests, as the more diverse the system and the longer the diversity is maintained, the stronger the natural stability of the pest control system is, with its rich complex of parasites and predators. (Altieri & Nicholls, 2005:120). This frees farmers from dependence on fossil fuels but also prevents damaging runoff from pesticides and fertilisers to the water system (Pfeiffer, 2006:18). Inappropriate fertilizer use has led to eutrophication, and inappropriate pesticide usage has caused groundwater pollution.

Large scale agriculture is dependent on centralised water systems on a large scale for irrigation, whereas sustainable agriculture can use localised water systems (Pretty et al., 1995:127). By using fewer fossil fuel and chemicals in production, sustainable farming can make a reliable contribution to conservation of resources such as water. Scarce water has been mined to grow cash crops instead of local water-saving crops (IAASTD, 2008:7). Water harvesting and conservation strategies can be used at a local level (Pretty et al., 1995:134).

Sustainable Distribution and Consumption of Food

Food needs to be part of a system that is produced, distributed and consumed sustainably. However an urban "food supply system is comprised of highly complex entrepreneurially organised logistical paraphernalia for managing the massive sociometabolic flows - and biochemical processes - involved in connecting foodstuffs to urban dwellers" (Swilling & Annecke, 2012:120). The globalisation of the food system has been enabled by cheap and plentiful fossil fuels. The food miles or distance that food travels from producer to consumer has increased accordingly (Pfeiffer, 2006:24). The average meal in the US travels on average 1 500 miles[10] before it reaches the table (Norberg-Hodge et al., 2002:17; Pfeiffer, 2006:24). An average breakfast in Sweden was found to have travelled the circumference of the Earth (Gunther in Pfeiffer, 2006:25). Local food may not be the most energy efficient way of getting food from producer to consumer when the whole value chain is taken into consideration (Chen et al., 2009:65). There may be economies of scale in transporting truckloads of food by one supplier. However, the bigger picture is to prepare for a time when fossil fuels are less abundant and more expensive.

The overall impacts of the food system also need to be considered. The cost of transport and energy infrastructures and resultant ecological impacts to prop up the current food system, paid for by the taxpayer, needs to be factored into the costs of the system (Norberg-

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[10] 2 414 kilometres.This figure may have changed since 2002 but is an indicator of the distance food travels in an industrialised system

Hodge et al., 2002:73). The power in the current food system is held by the retailers who can drive down the prices paid to farmers. This pressure on prices to remain competitive explains why large scale agribusinesses survive, and why food may be sourced globally at lower prices to remain competitive (Rodriguez in Weber, 2009:126). Farmers that produce a small and diverse crop can market their produce in their local community (Norberg-Hodge et al., 2002:9). Sustainable distribution methods shorten the link between producer and consumer.

Local Food Economies

Despite the prevalence of industrialised food systems, there is evidence that "thousands of new and alternative initiatives are now flowering across the world to promote ecological agriculture, preservation of the livelihoods of small farmers, production of healthy, safe and culturally diverse foods, and localization of distribution, trade and marketing" (Altieri & Nichols, 2005:10). Local food systems can provide food security and economic stability (Crane & Swilling, 2008:284; Norberg-Hodge & Gorelick, 2002,31). Although the global food system is not going to be changed overnight, local food economies do and can exist within the global food system. These local food economies can be defined as a "flow of resources within a network of community-based enterprises involved in the production and distribution of food at the local scale for the purposes of local consumption including, but not limited to, financial, human, social and environmental capital and refer to local food initiatives at a community level within the context of a predominantly modern food system globally" (Schulschenk, 2010:60). Some of the initiatives that would support local food economies include farmers markets, community supported agriculture, urban agriculture, cooperatives and ethical retailers (Shulschenk, 2010:60-3). These initiatives can support the move to a shift in the food economy.

Subsidies to farmers favour industrialised farming (Heinberg, 2003:245). There is considerable price pressure on local producers as industrialised farming production has driven prices down. For instance in the United Kingdom organic meat production is in danger (Soil Association in Chen et al., 2009) as the market prices paid for organic beef and lamb are below the cost of production. More stringent regulations (i.e. 100 percent organic feed) are also putting additional price pressure on these farmers. This meant that in 2006 it cost a farmer 3.32 pounds to produce a kilo of organic beef while they were paid 2.88/kilo. Unfortunately farmers who do try and produce sustainable food are often unable to compete economically against global food systems.

3.4.6 Conclusion

Our food system needs to move away from the current industrialised one to a system where food is produced, distributed and consumed sustainably. Local food economies can be built and supported by a range of stakeholders from farmers to restaurants to consumers.

3.5. Cape Town

3.5.1 Introduction

The study will focus on Cape Town, the third largest city in South Africa. This falls under the ambit of urban sustainability, which has already been mentioned as an economic force today. According to the City of Cape Town's Council Overview Report (2011:5) "in 2010, Cape Town's population was estimated to be 3,7 million and has enjoyed an annual growth rate of 3 percent. The population could increase to 4,3 million over the next 20 years. Half of the population of Cape Town are younger than 26 years. In 2010, the estimated number of households was 1,06 million. This is projected to increase to 1,45 million by 2019. 73 percent of households live in formal dwellings, 17 percent live in informal dwellings, and 10 percent are 'backyarders'." Of all households in Cape Town, 35 percent have a monthly income of less than R3 500 (Statistics SA, 2009 in Cape Town, 2011:7). Unemployment in Cape Town was at 26 percent in 2010, the highest rate since 2001 (City of Cape Town, 2011:7).

The economy of the city is becoming more service driven with growth in finance, banking and property and construction services. Manufacturing is still one of the biggest sectors. Tourism also fuels growth in the third largest sector which includes wholesale and retail trade as well as catering and accommodation. (City of Cape Town, 2011:5). According to Cape Town Tourism (2011:20) tourism is a significant business contributor for the city as it directly employs just less than 300 000 people and contributes about R14 billion a year (5%) to the city's GDP of R269 billion (2010) (SA Cities Networks, 2012) which in turn contributes 10.58 percent of South African GDP (City of Cape Town, 2011:5). Cape Town is a preferred destination for tourists and investors and hosts international and national events e.g. 2010 Fifa World Cup. Cape Town's natural environment and resources is a draw card for tourism and therefore it makes sense to position Cape Town as a global 'green city' to capitalise on tourism and foreign investment (IDP, 2012:30). This is beneficial to any initiative on a 'green' platform. Cape Town is also committed to responsible tourism (Responsible Tourism in Cape Town, 2011).

3.5.2 Current State of Cape Town Resources – Energy, Waste, Water and Food

The current state of Cape Town's resources needs to be understood as a benchmark for broad recommendations as well as laying the ground work for understanding the system restaurants are part of.

Energy

In South Africa, policy regarding energy is primarily driven at National level with the government owned Eskom being a primary supplier of electricity. Eskom has a total installed generating capacity of 42 000MW. Ninety three percent of its power production capacity is coal based (ten large plants), five percent nuclear (Koeberg) and two percent hydroelectric (Energy Security Master Plan, 2007:59). Table 1 shows the energy use profile of the Cape Town by source and sector. The major sources of energy are electricity and liquid fuel and these are predominantly used for transport, industry and commerce.

Energy Use Profile 2006 (compiled from SEA 2007;PGWC 2007B)				
Energy Use by Source		Energy Use by Sector		
	Cape Town (%)		Cape Town (%)	Western Cape (%)
Electricity	29	Transport	47	34
Petrol/Diesel	46	Industry/Commerce	38	48
Other oil-based products	17	Households	14	9
		Agriculture	0	5
Coal	7	Other	1	4
Wood	1			

Table 1: Cape Town Energy Use Profile

Source: Crane & Swilling, 2008:267

Local governments are responsible for the distribution of energy from which they derive income. In 2006 Cape Town consumed 3 090kWh per person for the year, which contributed 50-59 percent of the city's Carbon Dioxide Emissions. Current total consumption of electricity is 12 000Gwh (Spencer, 2010:140,150). The majority (95 percent) of Cape Town's electricity comes from the Eskom grid with a combination of coal, nuclear, hydro and gas power stations (Crane & Swilling, 2008:268; Spencer, 2010:139). Some electricity is supplied from the Steenbras pumped storage system, and the Darling wind farm produces green electricity fed into the grid (Crane et al., 2010:82). There are energy supply issues - both in terms of capacity with the reserve margin being below 15 percent and usage skewed in favour of high

income households (Crane et al., 2010:82), as well as the need to shift to more renewable sources of energy.

Liquid fuels (petrol, diesel jet fuel and paraffin) are used for transport, industrial heating and household cooking and heating, accounting for approximately 46 000 barrels a day. These produce 35 percent of the city's carbon dioxide emissions (Spencer, 2010:142).

The implications are that transport and electricity usage produce carbon emissions and contribute to climate change. In the future, oil will not be as readily available as discussed in section 3.2.7. As a result of current consumption patterns in this broader context of climate change and peak oil, "unless our current model of energy production and consumption changes significantly, the Cape Town functional region's economic growth potential will be undercut as peak electricity demand outstrips supply and the oil price continues to rise" (Crane & Swilling, 2008:269).

Some of the solutions recommended for Cape Town energy issues include land and sea based wind farms, solar and geothermal power stations, large scale investment in solar water heaters, retrofitting the entire central city." A feed-in tariff and integrated public transport system are also essential components of a move to renewable and energy effect scenarios (Crane et al., 2010:83). Energy production needs to shift through renewable energy usage and energy saving interventions via policy, production and consumption.

Water and Sanitation

In the Western Cape, urbanisation, industry, agriculture and tourism are fuelling increased demand for water. If demand for water grows at 3 percent/annum then supply will be exhausted by 2025 (Crane & Swilling, 2008). Between seventy to seventy five percent of water is obtained from dams outside Cape Town, such as the Berg River Water Scheme (Winter, 2010:104). Water is used wastefully insofar as potable water is used for all usage with only 7 percent being recycled. A large amount is lost to leakages (Winter, 2010:1109). There is opportunity to save this critical resource if "our linear systems were replaced by closed loop recycling based systems, including reuse of grey water to flush toilets, systematic capturing of rainwater from roofs and treating sewage on site for irrigation and food production" (Crane et al, 2010:87).

The city aims to reduce water demand by twenty percent from a projection of unconstrained demand. Water demand management through tools like service levels, improved technology,

pricing and leak detection is an important intervention in achieving this goal (Winter, 2010:107). Integration is needed between all aspects of water usage from supply, demand, sanitation, sewerage, grey and storm water for the city as a whole. Implementing this integrated approach relies on technologies but also on institutions and community relationships (Winter, 2010:110).
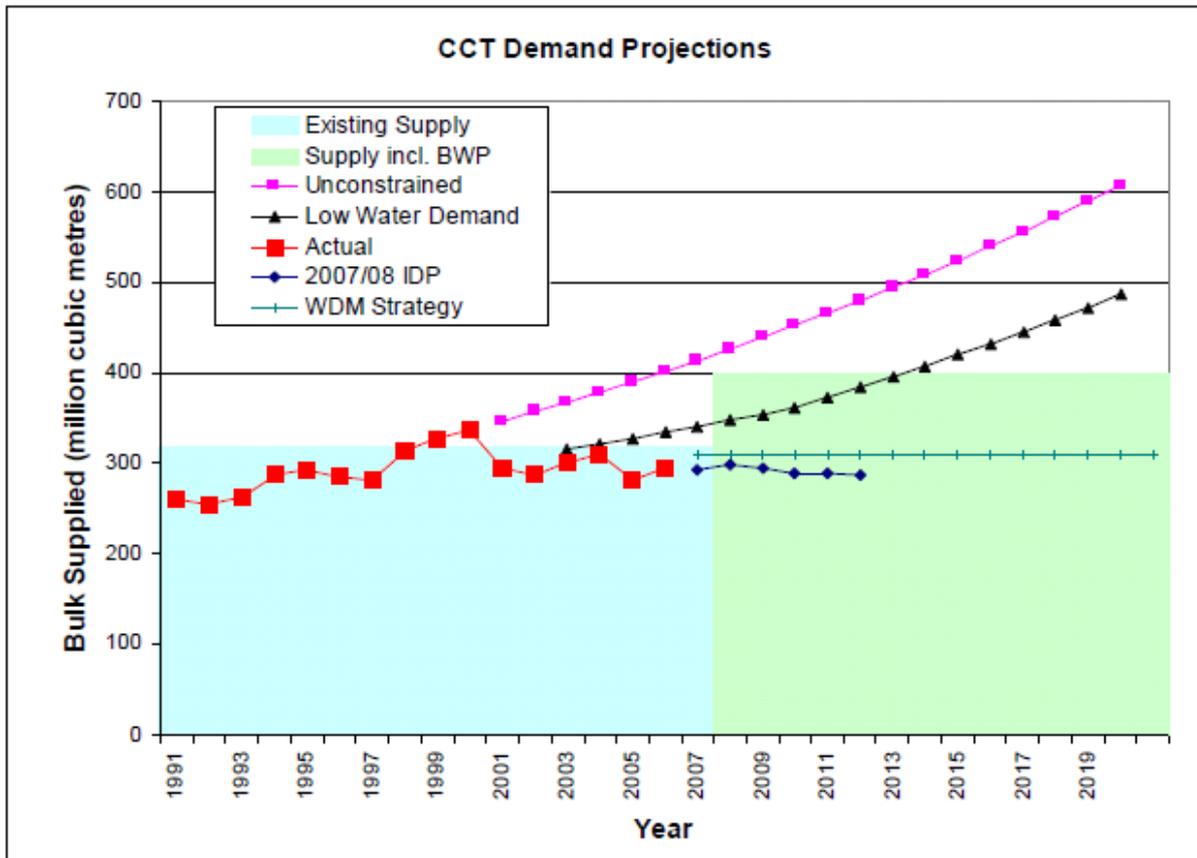
Figure 12: City of Cape Town Water Demand Projections
Source: Swilling, 2010

Waste

South African waste generation amounts to about 7,7 million tons a year, putting strain on resources and landfills which in turn contribute to greenhouse gas emissions by emitting methane. The City of Cape Town's waste management service covers 96 percent of households and businesses. There are only three landfill sites that will be filled in ten to fifteen years with new sites increasingly difficult to source. Despite initiatives to reduce waste only 14 percent of waste volumes were recycled in 2003 (Crane et al., 2010:82).

The diagrams below picture the increasing waste generation to levels nearly three million tons/annum, which has been explained by economic growth, with a subsequent drop after

2008, which has been explained by economic factors and waste minimisation interventions (Engeldow, 2010:164,166).
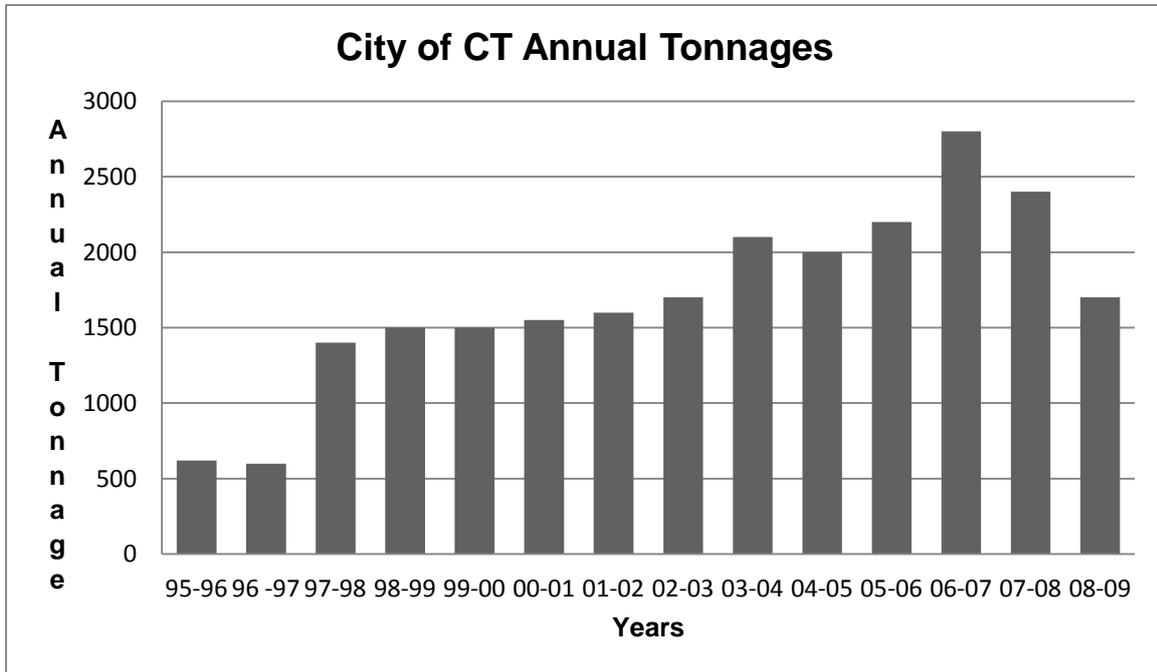
Figure 13: City of Cape Town Waste Tonnage

Source: Engeldow, 2010

By sector, household and commercial production of waste account for over 60 percent of waste in Cape Town.

Categorisation of Waste in Cape Town	
Sector	Percentage wasted
Household	38
Commercial (including restaurants)	26
Industrial	16
Garden Waste	5
Builders Rubble	15

Table 2: Categorisation of Waste

Source: Engeldow, 2010

Thus "a new model is needed that creates incentives to minimise waste and actively encourage recycling as a new major economic sector and job generator. A 'clean production' strategy should provide the basis for incentives, investments and legal

requirements for responsible waste management practices in private sector production systems" (Crane et al., 2010:85,6). The city's model is to reduce waste to landfills. There are initiatives in place, such as the pilot recycling *think twice* system which involves refuse collection of dry and wet waste. This will be rolled out to other areas. The Integrated Waste Management Bylaw (2009) also requires networked thinking regarding the waste cycle with collaboration by the stakeholders (Engeldow, 2010:180).

Food

The food supply situation in South Africa is limited by the quality of the soil. There is a predominance of shallow sandy soils with 14 million hectares (13 percent of land surface) considered arable. Only 3 percent of our land is considered high potential land. Land becomes over-exploited, as based on the 0.4 hectares of arable land needed (the international norm) to feed a person, South Africa's has the capacity to feed only 35 million people (Swilling & Swilling, 2008:25).

Cape Town has a significant food footprint and requires 1,48 million hectares to feed its population, equivalent to 10.52 percent of South Africa's arable land. This is based on the 2010 estimated population of 3 700 000 and international norm of 0.4 hectares of arable land to feed a person (Based on Haysom 2010:214; City of Cape Town, 2011:5). The food required to feed Cape Town means that "1,3 million tonnes of food are imported from a land area equivalent to 112 000 square kilometres that stretches across the whole of South Africa, and beyond. Middle and high-income households may be able to afford prices that include the cost of transporting all this food (fuel, cold storage, packaging, energy, etc.), but this is certainly not the case for poor households" (Swilling, 2006:37). The food footprint necessitates a look at the strategies around food production in order to create food security for the region.

The City of Cape Town (2007) has a policy of urban agriculture targeted at the poor to "focus on achieving household food security (poverty alleviation and improved nutrition) and on the other hand on the creation of income (economic development)" (City of Cape Town, 2007:2). A successful integrated urban food policy can address issues around food security in Cape Town as well as feed into broader ecological and social issues concerning energy, water, waste, poverty and inequality (Haysom, 2010:222). To illustrate "[i]magine the beneficial consequences for poor households if food could be made more affordable by re-using composted urban organic wastes in local urban agricultural undertakings and then selling the product at local neighbourhood retail markets" (Swilling, 2006:37). If the methods of

agriculture used have low external inputs this kind of intervention in the Western Cape could contribute to food security and address issues around global warming, soil quality and the availability of water.

3.5.3 Cape Town as a Sustainable City

Paradigm shifts in thinking and behaviour are needed to move Cape Town to sustainability. This section will look at the need to move from a linear to circular metabolism, the adoption of lifecycle thinking and the need for equitable service delivery (Pieterse, 2010:15). The first intervention is that Cape Town needs to move from a linear to a circular metabolism. Currently our consumption of energy, water, food and other environmental resources are disposed of as waste. Infrastructural, social and institutional systems need to be in place to move to an alternative closed circular system where resources can be reused. An alternative system would look to reusing by-products and output from every process (Pieterse, 2010:18). The resources of energy, water, waste and food in the context of Cape Town will be examined.

The second intervention needed by Cape Town is that the city and businesses within the city need to adopt lifecycle thinking and take responsibility for the entire lifecycle of their products and services. This means analysis of the full product lifecycle from the source of the product to the final disposal by the consumer (Pieterse, 2010:18). The diagram below depicts the philosophy behind lifecycle analysis, demonstrating how at every stage of the product lifecycle a strategy can be devised to work to a circular metabolism. As depicted "a product system, or life cycle can begin with extracting raw materials from natural resources in the ground and generating energy. Materials and energy are then part of production, packaging, distribution, use, maintenance, and eventually recycling, reuse, recovery or final disposal" (UNEP, 2007c:12).

Figure 14: Lifecycle Analysis

Source: UNEP, 2007c

The third issue critical in the Cape Town context is inequitable service delivery. The Cape Town rate paying middle class and urban poor enjoy two different realities. In Cape Town, 35 percent of the population are below the poverty line (Statistics SA, 2009 in Cape Town, 2011). These battle basic conditions of health, food water, energy and sanitation. Social capital needs be built up in these communities. Sustainable livelihoods need to be created for the urban poor.

Ideally, sustainability in Cape Town (based on a circular metabolism, lifestyle thinking and social delivery) would be evidenced at neighbourhood level with "areas that will enjoy a greater sense of community, be more diverse, and will generate more energy than they consume, produce no waste for the landfill, reduce water consumption to a minimum by recycling and re-using black and grey effluents, and be as self-sufficient as possible by promoting and supporting local urban agricultural products" (Swilling, 2004:19). These neighbourhoods become workable subsystems of the bigger system of the city.

3.6. Restaurants

This section of the literature review will look at restaurants in the context of the global polycrisis and explore ways in which restaurants can move toward sustainability. To identify how sustainability can be promoted through the restaurant system in Cape Town we need to understand the broader context of what it means for restaurants to move to sustainability before the information can be applied to Cape Town. Then, a Market Analysis will help us understand the status of the Cape Town restaurant sector. This will lay the groundwork for an understanding of the final question - how can sustainability be promoted through the restaurant system in Cape Town?

The first documented restaurant in the world was Le grand Taverne de Londres, founded in 1782 in Paris, "the first room with a menu that gave you a choice that was a destination for dinner" (Gill, 2010). Restaurants and Coffee Shops are defined as "enterprises involved in the sale and provision of meals and drinks, ordered from a menu, prepared on the premises for immediate consumption and with provided seating (StatsSA, 2010:10). Each restaurant is defined by its food offering, location, clientele and experience it offers. A restaurant becomes a space that satisfies a number of needs of its customers and potential customers. These include celebrations and rewards, pleasurable eating experiences, satisfying of food cravings, and convenience (Katsigris & Thomas, 2006:6). According to renowned critic A.A Gill (2010) restaurants are cultural signifiers, spaces where we go to for the food but also for one another, to be part of something. He describes restaurants as embodying "both meritocratic and snobbish, restaurants commemorate and enhance all the middle-class virtues: conviviality, manners, intellect, and bright conversation, modest flirtation, dressing up, largesse and measured extravagance." Strategic thinking about shifts in restaurants would have to take into account the social capital restaurants offer.

3.6.1 Sustainable Restaurants

Sustainable restaurants are the focal point of this review. The restaurant is a buffer between the consumer and the food they consume. The restaurant takes on responsibility for where the food comes from and how it is prepared. The restaurant sector is in a position to contribute towards sustainability as it is part of the food system and uses resources such as energy and water, as well as producing waste. The sector also employs people in a range of positions from dishwashers, cleaners, waiters and managers. It thereby creates employment opportunities in food supply, preparation and service and related services and industries. By moving to sustainability in resource usage and management; addressing social issues in

workers and community; and engaging with consumers, the sector can contribute to its own sustainability and impact on the broader sustainability of cities.

Collaboratively and individually the restaurant sector can move towards sustainability by addressing these issues. The key resource flows are food, energy, water and waste. Each restaurant (or cluster of restaurants) as a microcosm of the city metabolism can work towards creating circular as opposed to linear flows. Each restaurant can address its value chain so as to become more sustainable. Restaurants can collaborate to achieve buying power. Each restaurant can work towards sustainability at a neighbourhood level. Changes need to be communicated, so that customers can be engaged to respond positively. If the consumer is not making demands on the restaurant, it needs to take the initiative to help the environment, contribute to local food economies, and encourage a diversity of small businesses in their supply chains (Dalmeny & Reynolds, 2007:3; Chen et al., 2009:8). The business model proposed in Chapter 5 will attempt to address how restaurants in Cape Town can be helped to move to sustainability.

3.6.2 Restaurants as Businesses – Corporate Responsibility

These restaurants, whether small, medium or large, have to navigate their complex relationship with society. The concept of sustainable restaurants intersects with the field of corporate responsibility. Corporate responsibility is an umbrella term that "captures the various ways in which business' relationship with society is being defined, managed, and acted upon" (Blowfield and Murray, 2008:36). There are some points that can be made with regard to corporate responsibility with regard to restaurants, the rationale, scope and progressive nature of this responsibility.

It has been argued that the primary function of a business is to make profit and that they should be left alone to do this, allowing government to perform its function of caring for society. Involvement in society "will make people in general poorer by weakening the performance of business enterprises in their primary role" (Henderson, 2005:32). However, governments have their limitations in their ability to deal with the issues of the global polycrisis so that "the nation state appears caught in the middle: too small to make an impact on the big issues: too big to make an impact on the small issue" (Ridderstrale & Nordstrom, 2008:51). This puts the onus back on business to not act in isolation. Although the focus is primarily on multinational corporations (MNC's) in this field, the principles apply to all business. Many businesses across industries and systems have the power and capacity to address challenges around future sustainability. Under present global conditions,

sustainable businesses address "forms of progress that meet the needs of the present without compromising the ability of future generations to meet their needs. Given the scale of poverty today, the challenge of meeting present needs is urgent. Given the damage our past and present actions may visit upon our descendants, concern for future needs for environmental, human, social and other resources is also compelling" (World Business (WBCSD in Chen et al., 2009:4).

The scope of corporate responsibility has moved in the last century. "Business thinking has progressed from issues around compliance through citizenship, into a space of creative destruction and creative reconstruction" (Growing Opportunity, 2007; Blowfield, 2008:364). This thinking has given rise to models that look at the role of business in a completely different light. One of these is the Five Capitals Model from the Forum of the Future that challenges the profit driven model of business by contextualising the capitals business needs to consider. The ability to create financial capital is dependent on the reliance of business on other capitals - natural, material, human and social. The ability to make profit is reliant on manufactured capital, the fixed assets part of the production process. The functioning of the system is dependent on the health, skills and knowledge of the employees, human capital. They in turn are reliant on social capital as members of society dependent on community and social institutions. This interconnected system is bounded by natural capital, which both provides and limits the use of ecological resources and services. (Forum for the Future, 2011; Andriof & McIntosh, 2001:16). The model below depicts this relationship.
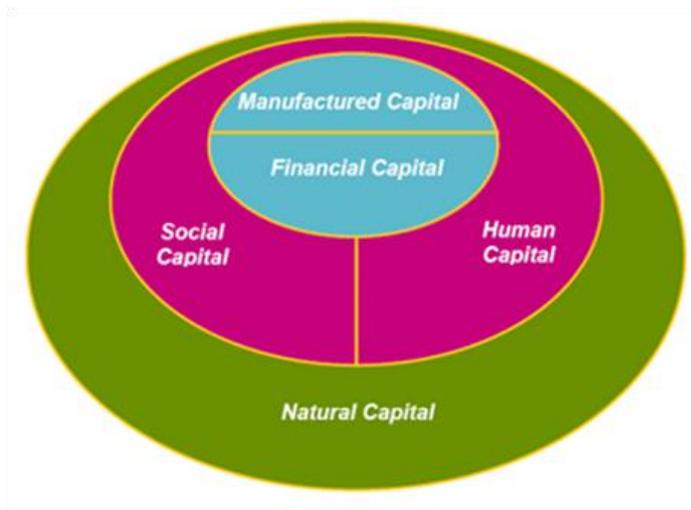
Figure 15: The Five Capitals
Source: Forum for the Future, 2010

For restaurants, this would mean working to build financial capital while recognising tradeoffs that may need to take place with material, human, social and natural capital. Businesses need to think around materiality, addressing issues that are of relevance to the social and ecological impacts of their business.

Restaurants are restricted by the ecological system insofar as they rely on resources such as food, water, and energy. They are also enmeshed with the social system as they require human resources such as labour, which impacts on society. Responsiveness to the Five Capitals would mean addressing issues around resource usage (energy, water, waste and food) through the value chain as well as building human and social capital via staff and the community.

Just as the field of corporate responsibility has evolved, individual businesses also transition in their progressive involvement in their response to societal issues. Mirvis and Googins (Blowfield, 2008:106) have identified five stages through which a business can transition – elementary, engaged, innovative, integrated and transforming. This illustrates how a restaurant may move from compliance based thinking through business integration to ultimately playing a transformative role. The progressive model of the Sustainable Restaurant Association allows for this growth.

3.6.3 Role of Consumers – Demand and Price

Restaurant trends often mirror consumer choices and preferences as their success is dependent on uptake. Restaurants are dependent on consumer demand for economic sustainability. Thus they are only likely to shift their offerings if they feel there is demand for the product. The issue that restaurants need to address with regard to sustainable food offerings for example organic, fair trade, is that they may come at a premium price that needs to be passed on to the consumer. Consumers would need to be willing to pay the premium for this. However, in a competitive environment businesses are often unwilling to take the risk for fear of being undercut by competitors.

On the other hand, consumers who are looking for sustainable offerings by restaurants will reward them with their custom. This will increasingly become a competitive advantage for a time for forward thinking businesses that can look beyond profit with a long term perspective. So "[i]f you do bother you will set an example for other people. If enough other people bother, each one influencing yet another in a chain reaction of behavioural change, markets for all manner of green products and alternative technologies will prosper and expand...and

those who did change the way they live would acquire the moral standing to demand change in behaviour of others - from other people, other corporations, even other countries." (Pollan in Weber, 2009:176).

3.7 Restaurant Associations: Helping Restaurants move to Sustainability

Two Sustainable Restaurant Associations were examined as a basis for this business model. The Green Restaurant Association (GRA) is an American model and the Sustainable Restaurant Association (SRA) serves the city of London.

3.7.1 The Green Restaurant Association (GRA)

The Green Restaurant Association was founded in 1990 with the mission to create an environmentally sustainable Restaurant Industry (Dinegreen, 2011). They help restaurants by providing environmental assessments, consulting and a transparent certification programme to help restaurants become more environmentally sustainable. (Dinegreen, 2011). In addition to working with restaurants the Association offers support to consumers, manufacturers and distributers within the industry. The Green Restaurant Association (Dinegreen, 2011) offers an ongoing certification model that is voluntary for restaurants. It is primarily based on detailed certification of restaurants. The current standards that restaurants are judged against are the GRA Green Restaurant 4.0 Standards. The restaurants need to provide verification of their claims in order to be formally certified by the association. They offer different types of certification options for existing restaurants, new builds and events (Dinegreen, 2011).

Certification works on a continuous point system that results in a star rating for the restaurant. The Restaurants have to achieve a minimum of 100 points to be certified as a two star restaurant, 175 points as a three star and 300 points as a four star. Restaurants need to produce documentation as verification to achieve these points. Recertification takes place every year. Each year thereafter the restaurant is expected to earn ten more points (with five points/year after the ninth year) to demonstrate continual growth as a Green Restaurant. They also need to meet Minimum Points in each Category, have a full-scale recycling programme in place and commit to yearly education.

The table below gives an indication of how points are allocated across the categories that are included in the standards. These relate to water, waste, food, energy, disposables and pollution. Additional points can be earned for furnishings and building material.

GRA points system[11]			
	Two stars	Three stars	Four stars
Water Efficiency	10 Points	10 Points	10 Points
Waste reduction and Recycling	10 Points	10 Points	10 Points
Sustainable Furnishings and Building Materials			
Sustainable Food	10 Points	10 Points	10 Points
Energy	10 Points	10 Points	10 Points
Disposables	10 Points	10 Points	10 Points
Chemical and Pollution Reduction	10 Points	10 Points	10 Points
Additional points from any above category	40 Points	115 Points	240 Points
Required Minimum	100 Points	175 points	300 points

Table 3: GRA Points System

Source: Dinegreen, 2011

3.7.2 The Sustainable Restaurant Association (SRA)

The Sustainable Restaurant Association (SRA) was established in London in 2010. It was an outgrowth of a lot of the work with restaurants done by Sustain (Dalmeny & Reynolds, 2007) which will be discussed in section 3.7.3 of the literature review. It recognises sustainability as a continuous and voluntary process.

Account managers recruit London restaurants to join the SRA. Membership of the Association by restaurants is voluntary. A potential member pledges to operate according to SRA values (successful businesses continuously manage social, environmental as well as financial impacts). They pledge to become increasingly sustainable in their business. To do this they commit to three actions from the SRA Charter of Actions. Restaurants have to commit to the signed pledge and three actions they are then acknowledged as members and given an "at the table" sticker to display. Membership can be renewed annually by committing to three further actions (SRA, 2010). Members can submit to a sustainability

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[11] More detailed references to the point system can be found on the Dinegreen website at http://dinegreen.com/standards/GRACompleteStandards.pdf

audit and be accredited by the SRA as a one, two or three star establishment based on criteria particularly related to sourcing, society and environment (SRA, 2010).

Both these associations provide a platform for restaurants to meet certain criteria related to sustainability. Research will need to establish and justify which of these areas are of highest impact in a Cape Town and ultimately South African context. Currently there is no specific association. Environmentalist Liz Metcalfe (Metcalfe, 2010) spent a year researching restaurants in Cape Town to ascertain where they need support. At the time of her research she found that many restaurants wanted to implement change but were reluctant to spend too much money doing so. As reflected in the table in section 4.3.3 most of the changes implemented by restaurants are related to a few key areas as opposed to being systemic.

Changes recommended may differ from the UK where environmental issues and climate change receive the most attention. In developing countries social sustainability may need to take precedence. For instance, in the hospitality industry, Fair Trade Tourism South Africa (FTTSA) has been adopted as a benchmark, and the first of its kind globally. Fair Trade in Tourism South Africa (FTTSA) is a "non profit initiative that promotes equitable and sustainable tourism in South Africa, primarily through facilitating a voluntary certification programme that awards a special Trademark (label) to businesses that comply with specific criteria, including fair wages and working conditions, fair operations, fair purchasing, fair distribution of benefits, ethical business practice, and respect for human rights, culture and environment." (Fair Tourism, 2011). Environmental issues are addressed through the global Green Globe certification which focuses on resource saving and the reduction of operation costs (Green Globe, 2011).

3.7.3 Precursor to SRA: Case study London

There are examples of restaurants that, with the broader support of city structures, are moving towards sustainability. The One Planet Dining Report (Dalmeny & Reynolds, 2007) is a study that looked at the restaurant and food service sector in London and describes the use of sustainable food and initiatives to improve sustainable business practices within the industry. Three key success factors were identified in the One Planet Dining Report which is the basis of a series of recommendations to promote sustainability in the restaurant industry. The first recommendation was the creation of s*ustainable food hubs to coordinate suppliers producing food.* This is to coordinate suppliers within the London vicinity with regard to food delivery, invoicing and marketing. As a focused unit these hubs promote organic and

sustainable food to the industry[12]. The second recommendation is the development of a '*local to London' brand*. This is to accredit food produced close to London and also to encompass environmental and animal welfare standards. The third recommendation is to stimulate *collaboration between restaurants*. This is through conducting sustainable audits on restaurants and establishing an association of restaurants. (Dalmeny & Reynolds, 2007:10)

The Mayor's London Food Strategy of 2006[13] called on all sectors to work on the sustainability of the London food and farming system (Dalmeny & Reynolds, 2007:19). Identified priorities to do this include ensuring commercial vibrancy, securing community engagement, leveraging procurement power, developing regional links and reducing related waste (Dalmeny & Reynolds, 2007:19). According to the study (2007:15) the successful stories around sustainable practice were driven by determined hardworking entrepreneurs. They had sourced farmers, local suppliers and environmental services in their move to sustainability.

The study recommends that any collaborative attempts to improve sustainability by the restaurant industry should often be driven by motivated entrepreneurs. (Dalmeny & Reynolds, 2007:16). This insight was based on their work with London restaurant entrepreneurs such as Caroline Bennett of Moshi Moshi, Henry Dimbleby of Leon and Cyrus Todiwala of Spice Namaste. Moshi Moshi works with fishing communities to promote sustainable fishing, Leon uses locally grown food and Spice Namaste organic and free range produce. (Dalmeny & Reynolds, 2007:16; London restaurant goers hungry for change, 2007)

Apart from Carluccios, which is a chain, many of the founder members of the SRA were individual members. However, the impact of larger brand moving to sustainability would be significant. Leo Dimbleby expressed the impact of change to the system.

> But change, from the inside out, is perfectly possible. Just imagine if KFC did join the association (as Carluccios - a pretty big chain - already has). It would soon have to make alterations to its supply chain that would trickle down through the food production system, with enormous consequences for the way we farm and eat. Rayner even mentions a case in point: McDonald's decision to use free range eggs transformed the market in this country. Where

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[12] The key players identified in the creation of these hubs are the Food Strategy Unit of London Development Agency, the London Food Link, the wholesale markets of London and the Department for the Environment, Food and Rural Affairs (UK Organic Action Plan).
[13] This strategy called on the public, voluntary and private sectors in London to work together to improve the sustainability of the food and farming system of London. (Dalmeny & Reynolds, 2007:190)

once British farmers produced three million free range eggs a year, now that figure is now a whopping 150m. That's a lot of miserable chickens released from the battery farms, and - thanks to economies of scale - a lot more of us eating affordable nutritious eggs (Dimbledy, 2010).

On a smaller scale, Cape Town's restaurant system can produce similar results by transforming supply chains and related actions.

3.8. Sustainability and the Restaurant System in Cape Town

As a city Cape Town needs to move towards sustainability. Restaurants operate within this context. While restaurants predominantly serve the consuming class, they may draw on the poor for their work force. The poor battle basic conditions of health, food, water, energy and sanitation. Social capital needs be built up in these communities. Sustainable livelihoods need to be created for the urban poor. The choices they make also impact on their consumers as part of the broader community. As businesses they need to recognize that they need to build capital beyond financial capital to be sustainable – material, social, human and natural.

To what extent can Cape Town restaurants mirror the issues of urban sustainability?

Such as:

- Support the local economy without damaging the natural resource base/increasing the ecological footprint of the city
- Contribute to quality of life and social equity
- Produce and consume within the restraints of bioregional ecological capacity

A restaurant can move toward sustainability if it reduces resource use and environmental impacts while building social capital with employees and communities and engage with consumers on these changes. Intervention points may include menus, transportation, energy usage, food sourcing, waste disposal, staff remuneration, Broad-Based Black Economic Empowerment (BBBEE) compliance, community engagement and communication.

In the light of the above, (i)food, (ii)resources, (iii)people and (iv)communication have been identified as areas which provide an underlying framework for restaurants moving to sustainability. These aspects have been gleaned from the foregoing information in the literature review and research analysis. These can be tested in practice in the unique contexts restaurants find themselves in, affordability, economic development, equity and fair trade.

3.8.1 Restaurants and Resources

Apart from food and labour, the primary resources a restaurant uses are connected to energy, water and waste, transport and materials.[14] Restaurants moving towards sustainability can approach their operations by endeavouring to reduce material flows through design, construction, energy consumption, food sourcing and transportation. In addition to reducing resource flows, restaurants can also move from linear to circular metabolisms (where waste can be reused). They can also look to switching from non-renewable fossil fuels to renewable resources such as solar energy.

Energy in Restaurants

Globally, the energy used in the hospitality industry is primarily based on fossil fuels or nuclear energy (Chen et al., 2009:14). Restaurants in varying degrees are dependent on fossil fuels for transport, food production, and resource use and energy. Restaurants use more energy/area than any other commercial building (Katsigris and Thomas, 2006:11), which makes them vulnerable to rises in energy cost, but also provides opportunities for saving.

A survey of seven restaurants (US) showed the energy breakdown as follows:

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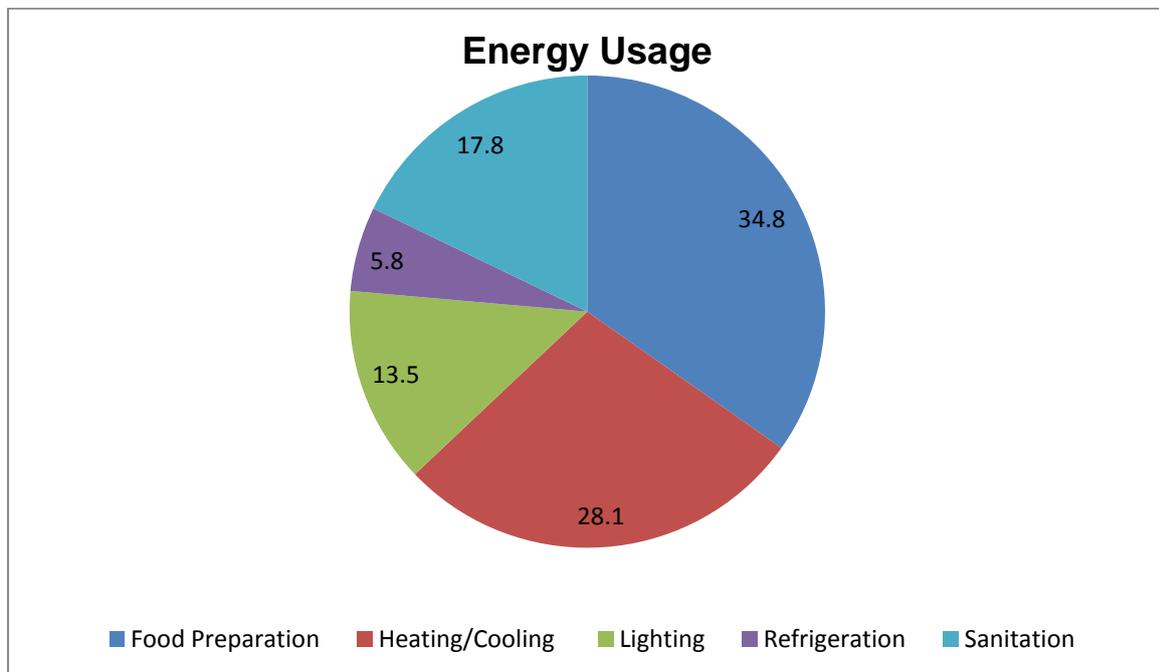
[14] Food is a resource, but will be discussed as a separate subject, as food use is so central to the core purpose of a restaurant

Figure 16: Energy Usage in Restaurants (US)

Source: Katsigris and Thomas, 2006:111

As a guideline, this illustrates that the most energy is used in the preparation of food and energy usage is spread over divergent areas such as food, Heating and Cooling (HVAC), sanitation, lighting and refrigeration. Each restaurant can conduct an energy audit to understand their energy usage profile. Energy usage can be reduced in systems design, operations, and production of food. To save energy each aspect may demand a unique approach, using technology and/or behaviour.

An energy management system (Katsigris & Thomas, 2006:111) can comprise an audit, accounting and tracking system and accommodate retrofits, capital investments, and behavioural interventions. There are many measures that can be employed to use energy efficiently through technology and behavioural interventions (Chen et al., 2009:79; Institute for Zero Waste, 2010).

As a benchmark the UNEP decoupling report recommended that South Africa increases its energy efficiency by 20 - 30 percent through demand side management. It also recommended increasing renewable supply to 30 percent via wind, solar, wave or biomass (UNEP, 2011:94). Restaurants can look at possibilities of using energy from renewable sources. This will enable them to reduce their carbon footprint and look at increasing their supply of renewable energy where possible through means such as green electricity and solar or wind energy. In this way fossil fuel usage can be reduced by restaurants in Cape Town directly from the grid.

Energy efficiencies can be achieved by measure such as using appliances fully loaded, recovering heat from equipment for reuse and cooking the biggest possible volume at a time (Katsigris & Thomas, 2006:135). Gas can be used instead of electricity where possible.

Energy is also used in transportation of supplies to the restaurant. This needs to be considered in food choices and choice of suppliers. Restaurants can make interventions in the food chain, and they can contribute to the formation of local food economies. The frequency of orders will also impact on energy used via transport. These decisions are described in section 3.8.2 in more detail.

Cumulatively, the impacts are wide ranging. The economic benefits are immediate financial savings due to efficiencies and longer terms saving through the use of renewable energy. Environmentally, energy reductions will reduce the ecological footprint of Cape Town, contributed to by coal and oil. Restaurant energy usage is correlated with consumption and so a reduction of energy in this sector is effectively contributing to equity of resource usage. Consumers benefit as the financial savings may be passed on to them and they have the opportunity to support a sustainable restaurant. Restaurants can use the opportunity to educate consumers.

Water in Restaurants

Restaurants can employ the principles of reduce, reuse and recycle to conserve water. Water can be conserved by fittings and efficiencies in the kitchen, restrooms and gardens. Some of the conservation methods that can be employed in the kitchen and service areas are: Grey water systems can be installed to reuse water. Grey water comes from bathrooms and kitchens while black water comes from toilets and contains harmful pathogens (Chen et al., 2009:45; Robinson, 2011:93). Rain water can be harvested and used for irrigation. (Robinson, 2011:84). Low flow heads on dishwashers can be installed. Taps can be installed with conserving devices such as aerators and timers. All pipes and taps can be in good repair to avoid leaking. In the restrooms water-saving toilets can be installed. Signs can be used to remind staff and customers not to waste water (Chen et al., 2009:42; Katsigris & Thomas, 2006:175). Food contamination is a problem and so it is of importance that use of water is offset by necessary hygienic standards.

Waste in Restaurants

In the restaurant industry, food and beverage involve pre-consumer (preparation), post-consumer (leftovers) and packaging waste (Chen et al., 2009:28,9). Strategies around reducing, reusing and recycling waste can be employed by restaurants e.g. composting, co-procurement, food donations (Chen et al., 2009:31). The priority is to reduce, then reuse and finally to recycle waste. There are a number of initiatives restaurants can use to reduce resource use which can be adapted depending on the nature of the restaurant or circumstances. One approach to source reduction is to buy less food to prevent waste from food needing to be thrown away. However as an overall sustainable system this needs to be offset against the energy costs of food transportation. Inventory can be computerised to plan ordering or control usage on a "first in-first out" approach (Katsigris & Thomas, 2006:234). Restaurants can buy products differently to save on packaging. Some of these are

- Buy in bulk where possible to save on packaging – food, condiments, cleaning supplies
- Look to procure supplies in reusable containers
- Avoid the use of single servings and use refillable containers and dispensers where possible – sugar, salt (This needs to be weighed up against contamination e.g. peppermints or wastage by consumers)
- Minimise the use of take away containers or use recyclable containers

(Katsigris & Thomas, 2006:235; Institute for Zero Waste, 2010)

There will be tradeoffs involved that need to be calculated e.g. the energy for hand dryers as opposed to the use of paper towels in restrooms. Or the energy for laundering as opposed to the use of paper napkins. Food that is prepared for one meal and unused can be reused in the next meal, but contamination is a real risk that must be considered. Restaurants should rather focus on food efficiencies by working to reduce waste in the whole value chain. Menus can be planned around using the entire product. Processed food products may have created waste in the production process.

Reuse of resources is also possible in the restaurant industry, particularly with regard to food. Composting is good for food no longer suitable for human consumption. Bacterial digestion breaks down organic material such as vegetable peelings, eggshells and coffee grounds and turns them into a nutritious product that can enhance the soil (Katsigris & Thomas, 2006:236). A successful alternative management method initiated by Wasteman and the company Full Cycle is the worm farm at one of Cape Town's leading hotels, the Mount Nelson. The worm farm was implemented as a way to reduce the amount of food wastes from restaurants requiring landfill disposal and to manufacture compost to be used in the hotel's gardens (Engeldow & Eichstadt, 2007:49; Robinson, 2011:116). The principle of reuse can also be applied to other resources such as restaurant equipment and fittings and furniture which can be bought second-hand where possible. "Recycling is collection and separation of specific refuse materials that can be processed and marketed as raw materials to manufacture new products" (Katsigris & Thomas, 2006:234). Recycling can be employed for waste that cannot be reduced or reused. Restaurants can recycle paper, cardboard, glass, aluminium, tin or plastic.

3.8.2 Restaurants and Food

Food is a critical focal point for restaurants moving to sustainability. In terms of the global polycrisis food can impact on poverty and inequality, resources, ecological degradation and

peak oil and climate change (IAASTD, 2008:3). Even if consumers are not concerned with the broad scope of sustainability they increasingly want to know more about the food they are being offered. Certain food choices are more sustainable. Ultimately and collectively, sustainable restaurants can play a role in transforming the food supply. This in turn can have a positive effect on the environment, wellbeing and social structures. Some of the restaurants that will be considered in the Cape Town region include Eight, Dear Me, Babylonstoren, Superette, Starlings and Organic at Heart.

Food Sourcing

Restaurants can supply food onsite as far as possible. This can be in the form of a kitchen garden or a more extensive garden that provides the restaurant with fresh produce.

Food sourced offsite can adhere to the following principles:

- The use of healthy quality food

- The support of local and low impact food production

- Boost local economy in a environmentally beneficial way

- Fish from sustainable sources

- Meals from a diverse range of crops

- Reduced meat consumption

- Animal products sourced by welfare and environmental standards

(Dalmeny & Reynolds, 2007; SASSI, 2010a)

Lifecycle Analysis

Restaurants need to take responsibility for the source of their food and resources. The value chain is the expression of stakeholder relationships covering the entire lifecycle of a product. It encompasses economic, social and environmental considerations and relationships with all stakeholders. The value chain can be used to systematically identify social and environmental impacts (Kotler & Keller, 2012:56). At a practical level restaurants do turn to local suppliers although they may need support in this endeavour. The challenge lies in the ability to secure a reliable and sufficient supply stream. For smaller restaurants this may be easier. Restaurants are traditionally used to working with a middleman and being able to order ingredients at short notice. With seasonality this may not be the case. Restaurants may change popular items on the menu if ingredients have to be imported e.g. avocado pears. This may create consumer dissatisfaction as other restaurants may continue to offer the item.

Restaurants also benefit from economies of scale and are able to order what suits them such as specific cuts of meat such as chicken breasts or fillet steak. This may prove disastrous for a smaller farmer who may not be able to dispose of the other cuts. Interestingly the trend is now to use the whole animal and cheaper cuts (National Restaurant Association, 2010).

Sustainable Food - Organic

Sustainable food choices – local, seasonal, organic – often overlap as restaurants make complex choices guided by a number of factors from cost, convenience, availability and demand. A food item may be local, organic and seasonal, yet in other cases tradeoffs may be required.

Some restaurants primarily focus on organic food e.g. Kwalapa. Organic food production has been described in section 3.4.5 as an aspect of a sustainable food system. Restaurants may choose to serve certified organic produce as far as possible or buying from a small producer who uses sustainable agriculture but doesn't have organic certification due to the cost of certification. The relationship between the farmer and the consumer will be the evidence of trust. The organic food market is heavily regulated and different certification schemes can be confusing for consumers. There is also confusion and suspicion around the term as it has been widely abused.

Some of the issues and tradeoffs around using organic ingredients are the higher costs of organic ingredients. Organic food, if not locally available, needs to be transported or imported, also incurring environmental damage. Restaurants need to have the buy-in of customers as to the advantages of using more expensive ingredients (Chen et al., 2009:66; Dalmeny & Reynolds, 2007:24). Local food may be more accessible than organic food, if transportation is needed. Restaurants can find a balance between these aspects of sustainable food production and communicate their choice to their consumers.

Restaurants may choose to focus on organic ingredients in core areas of their business. A restaurant that sources products from smaller suppliers is &Union in Bree Street, Cape Town. Coffee is one of their key offerings and it is certified organic from a single family owned farm in Nicaragua and served with organic milk and sugar (&Union, 2011).

Kwalapa is based on the Xhosa word for local. The concept behind Kwalapa is entirely organic or local. It needs to be based on trust of suppliers (Moya, 2010). The site includes a deli style restaurant together with a store that sells organic produce and an 'eco pod' with a range of books and DVDs. In that way Kwalapa positions itself as a learning centre where "Enjoying a good meal is a starting point, but at Kwalapa we're aiming to become a centre for learning, a place where, if you want to know about all things organic, we'll be providing the venue, knowledge and solutions for you" (Moya, 2010). Given the complexity of the issues this is a valuable aspect of sustainability.

The underlying principle is sourcing food locally and supporting urban agriculture. However the chef at Kwalapa, Emily Moya recognises how difficult it is for a restaurant to be totally local or seasonal as we need a variety of food (Moya, 2010). On Wednesdays they serve a raw food buffet using an industrial strength dehydrator to keep temperature below 40 degrees Celsius.

At the time of the interview (April 2010) some of their suppliers included:

- Meat from bloublommetjies – biodynamic
- Biodynamic Chicken from Spier
- Free-range Bacon from Joostenburg
- Fresh Produce from Organic Zone who verify organic suppliers
- Organic Flour from Sentra

This represents a range of suppliers and choices along the continuum of sustainable food. Restaurants such as Kwalapa have to constantly monitor shifts and opportunities in the supply arena. Food choices are made with an eye on the entire value chain. They try to get rid of all their waste but acknowledge that waste is hard to get rid of. They use milk from Camphill who take back bottles. They don't serve Coca-Cola and other carbonated drinks. Other bottles are taken to Oasis recycling. Kitchen waste gets taken to the garden centre at Montebello.

Local Food

Many restaurants begin their sustainability journey by sourcing local and seasonal food (Dalmeny & Reynolds, 2007:18). Restaurants can support local food economies with the attendant environmental, social and economic benefits. Some of the options open to restaurants supporting local food economies are: growing their own food, farmers markets,

Community Supported Agriculture (CSA), Fair Trade and smaller suppliers. The trade-off to address with these options is securing supply and passing on costs if they are higher.

Two local food initiatives that support local food economies are CSA's and farmers markets. The idea behind a CSA is shared risk and diversity. The farmer plants a wider range of crops to satisfy needs but if a crop fails everyone loses out or shares the risk. The farmer is given money upfront which can contribute to equipment or diversification of crops. Typically CSA farms pick fruits and vegetables the same day they distribute them, either at the farm, some central distribution point in a nearby city or through home delivery. (Schulschenk, 2010:47). A slow food CSA was started in Cape Town (Landman, 2010:132; Schrire, 2011) based on this American model where two organic farmers were given money upfront by members of the CSA to help them at the beginning of the growing season[15]. However obstacles were experienced as the farmers could not always meet consumer needs for variety and the farmers did not pass on crop failures to consumers but substituted other products.

Farmers' markets are a way of directly connecting farmers and consumers. The concept is simple, "[a] farmers' market is a market in which farmers, growers or producers from a defined local area are present in person to sell their own produce, direct to the public. All products sold should have been grown, reared, caught, brewed, pickled, baked, smoked or processed by the stallholder" (Farmers' Market, 2008). Farmers' markets can become a source of supply for restaurants as they can source a variety of produce and get to know the producers directly, establishing trade relationships. Farmers' markets enable producers to interact with restaurateurs and consumers on a regular basis. The advantage for the farmer is that he can command better prices. The advantage for the restaurant is that food miles are saved and they get to connect with their food suppliers. With a trust relationship building up, farmers can forgo expensive certification as their consumers will trust the veracity of their claims, saving restaurants costs.

Seasonality

Seasonal food on menus means using ingredients that are in season, and creating menus inspired by seasonal offerings. The perception of seasonality can range from soup in winter, salad in summer to an attempt to design menus around the availability of fresh, seasonal food. Some of the advantages of using seasonal foods include reducing the need to import

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[15] I found no evidence of CSA's in Cape Town engineered to support restaurants but these could in the future make a valuable contribution.

out of season foods e.g. avocados in summer. It also means that regional diversity of food can be encouraged to produce foods for consumers. This may lead to rediscovering local cooking traditions that came from a time before food was easily transported. (Chen et al., 2009:66). Incorporating seasonality may go as far as foraging for ingredients. Some of the challenges of seasonality and restaurant offerings occur at the time when food is scarce balanced against consumer demand and preferences. Consumers are used to expecting food availability all through the year. A seasonal food may be a key component of a type of cuisine – avocados in Mexican food, tomatoes in Italian food.

Initiatives

There are a number of initiatives around the sustainability of food accessibility in Cape Town. These include the South African Sustainable Seafood Initiative (SASSI) and Biodiversity Wine Initiative (BWI).

SASSI in South Africa is a response to the issue around fish sustainability which attracts global attention. A London restaurateur, Nicky Rohl, comments that "as much as possible people should be eating fish that is caught by a local fisherman. It's the big multinational companies that are doing the damage. These huge trawlers are going out there, huge drift-nets and they're harvesting the sea." (Dalmeny & Reynolds, 2007:22). The focus on fish sustainability is a result of fish stock depletion as a result of practices such as overfishing and the practice of discarding fish. Seventy percent of commercial marine fish stock is depleted while 18 - 40 tons of fish is killed inadvertently annually. Eight percent of total stock is discarded (Dalmeny & Reynolds, 2007:22). Globally the Marine Stewardship Council (MSC) endorses fisheries that maintain their environmental standards (Dalmeny & Reynolds, 2007:22). In South Africa SASSI is an awareness campaign and educational conservation strategy supported by the World Wildlife Fund and categorises fish species in terms of how endangered or sustainable they are. Fish are rated green if fit to eat, red if endangered and orange if in-between. Consumers and restaurants are encouraged to purchase and eat fish off the green list. Restaurant goers can SMS a number to see if a fish is on the red, orange or green list.

Restaurants and chains such as the Ocean Basket can join SASSI's participation scheme for training and guidelines in sustainable fishing (SASSI, 2010b). SASSI Restaurant Programme Supporters attend an annual SASSI training course and commit to providing consumers with more information about the sustainability of their seafood. They become SASSI restaurant supporters after completing a course, and are given a certificate for a year

(SASSI, 2010b). The objectives of the programme are to help restaurants stock sustainable seafood and use educated restaurant staff to help consumers make sustainable fish choices by communicating the value of these choices. This helps to shift demand towards sustainable seafood.

The Biodiversity and Wine initiative (BWI) is an initiative which supports wine farms that preserve regional biodiversity (Biodiversity and Wine Initiative, 2010). There are 174 members of the BWI of which 21 have champion status. The total area conserved by BWI members is 130633 ha (Biodiversity and Wine Initiative, 2010). Restaurants can stock wines endorsed by the BWI that are listed on the WWF website.

3.8.3 Restaurants and People

Contributing to sustainability means not only concerning oneself with the issues of food and resources but having consideration for the network of people affiliated to the restaurant. These include suppliers, staff, the community and also customers.

There is such diversity in the restaurant industry that movement toward sustainability is often driven by individuals and entrepreneurs within the system on a piecemeal basis. Economic considerations may override environmental concerns as essentially a restaurant is a business that needs to generate revenue for its shareholders (Dalmeny & Reynolds, 2007: 5). Social and human capital need to be built up within the industry. Restaurants can endeavour to build up human capital by looking after the individual health, knowledge and skills of their employees as far as viable. Employees need to be productive within optimal working conditions. (Forum for the Future, 2011; Andriof & Mcintosh, 2001:16). Social Capital is built up by supporting the surrounding communities.

Business functions well in a healthy community. For instance local food economies are able to spread wealth through local communities as "improving the economic welfare of farmers, farm workers, small producers and shopkeepers benefits entire local economies, providing in turn deep social benefits to communities as a whole" (Norberg-Hodge et al. 2002:31). Restaurants can also help people connect with their surroundings by contributing to a sense of place. It is "the assumption that older and smaller cultures should either draw near to or get out of the way of modern ones, that homogeneity is a desirable end state, is the unwritten code of globalisation" (Hawken, 2007:113). In the restaurant industry this is reflected in the proliferation of chains with mass produced offerings. Restaurants that are sensitive to community, history and heritage can buck this trend whether through staffing, menu, support of community or respect for heritage.

A global movement that promotes these values is slow food. It is not only concerned with producing sustainable food but also respecting cultural heritage and giving the producers food sovereignty. There are two convivia of the Slow Food movement in Cape Town – Slow Food Cape Town and Slow Food Mother City. Both uphold the principles of the Slow Food movement. They organise activities for their members to promote the values of Slow Food, food that is good, clean and fair. Good food is food that is part of a cultural heritage as well as delicious and natural. Clean food gives preference to food that is grown and produced sustainably and environmentally responsibly by small farmers and producers. Fair food is about being able to have food sovereignty as a producer and be adequately paid and respected for doing this (Slow Food Cape Town, 2011). The slow food movement makes a connection between the food that is produced and the people involved in its production and preparation.

3.8.4 Communication

Restaurants can communicate their efforts to consumers to encourage demand for sustainable food. SASSI and BWI are both examples of initiatives that restaurants can use to communicate sustainable choices to their consumers. A restaurant, the Coup & Meet (thecoup, 2010) in California puts the following statement on its website:

"We use as much organic and local food as is available. All of our cheeses are rennet free. We make everything from scratch and with love. All of our soy products and grains are organic. We recycle all that can be and compost all raw materials. The compost goes to our garden, which ends up producing some of the amazing vegetables on your plate. We purchase food from local farmers, and with minimal packaging. We donate a percent of income back into our local community. We purchase food with minimal packaging. We plant 36 trees a month to offset our waste and we are 100 percent wind powered and yes, we use filtered water. Every little bit helps, please bring in your own bag & container for tax-free take-out." (thecoup, 2010).

A menu is a good way to communicate sustainable values as it is one of the customer's first points of contact and may influence their ordering.

A Capetonian restaurant, The Societi Brasserie clearly states on its menu "Our chicken and eggs are free range, pork is sourced free range from Happy Hogs Farm whenever possible. Our fish is sustainable. Veggies are local and organic where we can" (Mack, 2011). This is a simple yet effective way of communicating sustainable initiatives.

3.8.5 Economic Sustainability

It may seem like an obvious point but it is important to recognise restaurants as businesses. A discussion around sustainability for a restaurant may primarily refer to the need to stay in businesses in hard economic times, economic sustainability. One of the restaurants surveyed for its sustainability initiatives for this study, Wild Woods, closed a few months after opening. The chef/owner Peter Goffe-Wood who is involved with the SASSI initiative commented on a blog post (Goffe-Wood, 2011) that he was forced to close.

> Staying open during winter is the biggest challenge facing Cape Town restaurants – we experience a huge seasonal dip between May and October - Capetonians just seem to hibernate. The frightening reality is that most restaurants are happy just to break even over this period and the main reason they do this is to retain staff for the busy summer season.
> Other restaurateurs strive to keep afloat because of the number of families dependent on their business.

Implementing these changes progressively has economic implications for a restaurant. It is pointless to implement sustainable measures and be forced to close down. However each restaurant needs to work out what is viable for them. In an interview with a restaurateur (Kratz, 2011) she mapped out the cost implications for a medium sized independent restaurant with limited resources upfront. Unless a restaurant has a lot of money to invest upfront, measures may need to be slowly implemented to ensure ongoing viability. There is no formula. Some of the factors a restaurant may need to consider and trade off are described here.

If the restaurant develops a reputation for sustainable food, it may attract a new customer base who appreciates the shift. For some food items, locally sourced produce may offer cost savings as there is a short value chain. Fresh fish can be bought at the harbour, saving costs of transport and retailing. However, other small producers may not be able to compete against the economies of scale of larger industrialised farming systems. In addition they may have to pay to get certification to be organic. Their produce may then need to be sold at a premium as they cannot achieve the economies of larger operations. Using free range meat, eggs and chicken also costs more. These increased costs cannot always be passed on to the consumer and so may have to be absorbed, impacting on profitability. Even if the restaurant can charge extra for free range produce, there are a number of hidden ingredients for which it is hard to pass on the costs e.g. olive oil. Again, it is tempting to use the cheaper version of the product.

By changing a menu to seasonal produce there are cost savings as seasonal produce is more readily available and does not need to be stored or imported. But customers may want to have specific menu items available around the year. So the restaurant may lose customers.

Food waste can be composted. The compost can be used to grow vegetables and herbs which can save money. But composting food takes time and energy and needs staff compliance to implement. Paper, metal and plastic can be recycled. Recycling is not part of the municipal waste system and so again takes time and effort to implement. Private companies may charge to remove waste. Unless waste is removed regularly or stored properly it can be unhygienic.

There are cost savings to introducing energy efficient measures. These savings can be used to implement other changes. However to achieve energy savings one may need to invest in energy efficient appliances, sensors and light bulbs. Equipment needs to be serviced regularly. Water efficiencies can also be created. However to do this will require an upfront investment in low flow taps, sensors, grey water systems and tanks for rainwater harvesting. However, if there is space to grow food, the water can be used to water crops as well as water a garden which enhances the customer experience. If indigenous plants are used they will require less water to maintain (Kratz, 2011).

The scenario will also change depending on the number of restaurants that introduce change. If more restaurants continue to support local producers demand can increase and prices can come down as competition ensures and manufacturers achieve economies of scale. But if becoming sustainable becomes mainstream restaurants may feel they have lost the unique advantage they had in the marketplace. They then won't be amenable to working with other restaurants to buy produce. There is an advantage to being an innovator in the field as you stand out and get noticed. But there is also an advantage to wait and let others innovate and then benefit by learning from their successes and mistakes. Looking after staff and community also adds an unseen cost to the restaurant. But the ability to attract good staff and retain them may have something to do with remuneration and working conditions. Communication of sustainable measures is also good to attract business. However communication often needs to be two sided. This means that the good and the bad need to be communicated to stop consumers feeling cheated. Sustainability is an ongoing process and mistakes will be made in choices to do with resources and other activities. Sustainability also requires scale and should not be sought after as a competitive advantage but rather as a way of doing the right thing. Consumer's expectations need to be managed through

communication. Ultimately brand reputation is built up by doing good, and in the long run this is good for the brand and business.

One operator, George Mckerrow, the CEO of Ted Montana grill, an Atlanta based chain known for its green initiatives commented "the restaurant industry is relatively fragmented so we have to continually have conversations internally and externally so that everyone will be open to things that ultimately will cause change to happen. Lots of small actions cause big reactions" (NRN, 2009). This is evident in the many avenues open to a restaurant moving to sustainability. Ideally these moves can be done in collaboration with other players in the industry.

3.9 Conclusion

The thesis aims to address the research problem through understanding

- the significance of restaurants with regard to sustainability
- the status of the Cape Town restaurant sector
- the promotion of sustainability through the restaurant system in Cape Town

The literature review has located the restaurant industry of Cape Town within the specifics of the city and the converging forces of the global polycrisis. Pathways to sustainability have been identified as a response to issues that impact on our current resource lifecycles.

These pathways have been looked at from the global scale, Cape Town and individual restaurants. People, food, water, energy, waste have been isolated as resources critical to the restaurant industry coupled with the need to communicate these resource flows. Restaurants need to be looked at as a system that connects with consumers, suppliers, local communities and other stakeholders. Aspects that can be addressed at restaurant level include the incorporation of local and seasonal food, support of local food economies, energy efficiency programmes and communication of initiatives. The current status of the restaurant sector was looked at as a third party and included first hand observations. The USA-based GRA and London-based SRA were analysed as industry support mechanisms with a view to understand the basis of models that could be built on to promote sustainability through the restaurant system in Cape Town. The understanding of these issues provide the basis for the research methodology which builds an interconnected business model that addresses the support mechanism needed to help move the restaurant system in Cape Town to sustainability.

Chapter 4: Situation Analysis

4.1 Introduction

This chapter will provide a bridge between the literature review and the business model. The literature review has reviewed the scholarship, trends and policies in this field to establish a basis for the business model. The situation analysis will describe the conditions the business operates under and the capacity of the business to serve the market (Kotler & Keller, 2009:A2). A typical situation analysis assesses the macro environment and micro environment of a company. While the macro environment refers to "the larger societal forces that affect the micro environment – demographic, economic, natural, technological, political, and cultural forces", the micro environment consists of "actors close to a company that affect its ability to serve its customers – the company, suppliers, marketing intermediaries, customer markets, competitors and publics" (Kotler & Armstrong, 2010:90). Osterwalder and Pigneur (2010:200) suggest mapping out the four main areas of an environment which correspond to Kotler's macro and micro environment. These are industry forces, market forces, key trends and macro forces.

Each business model will have its unique environment. The macro environmental landscape needs to be scanned to understand shifts in demographics; socio-cultural and technological trends; economic and environmental factors; and political developments. The market situation includes restaurant associations, the restaurant industry in Cape Town, and the network of people and organisations connected to the industry.

4.2 Macro Analysis of the Marketplace:

As a city, Cape Town is affected by conditions in South Africa, which in turn are affected by global conditions. The extent of the Global Polycrisis has been discussed in the Literature Review. This section will consider how the restaurant industry in Cape Town is impacted by trends and forces in the demographic, economic, politico-legal, socio-cultural and technological spheres. These uncontrollable trends have to be considered and have strategic implications for the development of a business model (Kotler & Keller, 2012:96).

As depicted below the macro forces will impact on and help shape a relevant business model. These factors correspond to the aspects model of embedded sustainability in section 3.4.5 and the Five Capital Models in 3.6.2. It is important to note that the environmental aspect acts as a limiter to social and economic activity and that governance acts to underpin the social and economic system.

KP Key Partnerships	KA Key Activities	VP Value Proposition	CR Customer Relationships	CS Customer Segments
	KR Key Resources		CH Channels	
C$ Cost Structure		R$ Revenue Structure		

MACRO FORCES

Demographic

Politico - Legal

Socio-Cultural

Environmental

Technological
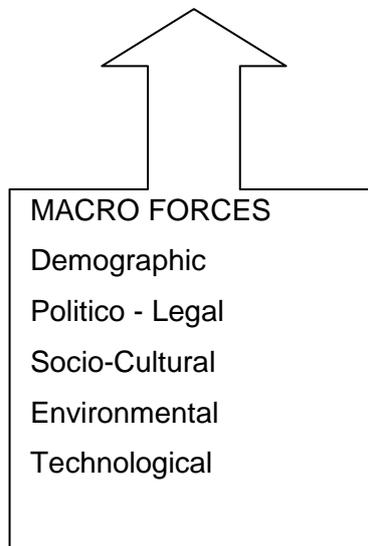
Figure 17: Role of Macro-Economic Forces

Source: Adapted from Osterwalder & Pigneur, 2010: 201

4.2.1 Demographic Factors

Cape Town has a rapidly expanding population of 3,7 million and has around 910 000 households (Pieterse, 2010:82; Cape Town, 2011:5). The household class structure has 50 percent classified as poor and/or working class households (Swilling, 2010:26). Rapid Urban Growth is evident with about 200 000 new residential units built in Cape Town each year and 900 hectares of undeveloped land being used to do this each annum (Swilling, 2010:7). Strategic Implications:

There is increased pressure on resources and "the massive and rapid urban growth of Cape Town has not been coupled to investments in the kinds of urban infrastructure, like energy and transportation systems that are appropriate for a world that is running out of atmosphere, water, oil, and sinks for liquid, solid and airborne waste" (Swilling, 2010:7).This means that restaurants in Cape Town can contribute to alleviating this pressure on resources by changing their patterns of resource consumption. It also highlights the importance of embracing social issues (needs of the working class) to contribute to alleviating the social imbalance.

4.2.2 Politico-Legal Factors

The embedded model of sustainability in section 3.4.3 depicts governance as underpinning the socio-political system embedded within the environmental system. Governance is affected by political changeovers and the impact of party politics. The City of Cape Town and the Western Cape Province is governed by the Democratic Alliance (DA) but central government is controlled by the African National Congress (ANC). This can be a cause of conflict. There are also impending laws regarding carbon taxes and waste.

Strategic Implications:

The restaurant industry in Cape Town would need to work within the framework of existing initiatives within the City of Cape Town and national legislation. The Industry may need to make changes to be compliant with impending or existing legislation nationally or locally, for example waste management. Conversely the industry should lobby or take advantage of any tax benefits or incentives.

4.2.3 Economic Factors

Since the economic collapse of 2008 we have been in a recessionary environment.

There have been steep increases in city rates and tariffs. There is potential for energy demand to outstrip supply. This energy is predominantly supplied by Eskom. Cape Town has experienced power outages and steep cost increases. The transport sector uses half of the city's energy (Pieterse, 2010, 82). This sector is vulnerable to increases in oil price which feeds through to the price of other goods such as food. Increases in transport also impacts on the costs of coming to work for restaurant staff.

Strategic Implications:

Energy and transport interventions are a necessary part of restaurant strategic initiatives. Although expenses incurred through implementing efficiencies may seem costly in the short-term these may prove to be a saving in the longer term.

4.2.4 Socio-Cultural Factors

The OgilvyEarth survey reflected the attitudes of South African consumers to sustainability. The respondents identified themselves as predominantly moderately sustainable, meaning they do what they can and follow the news on green trends. Findings that have relevance to sustainable restaurants in Cape Town are:

Question	% Disagree	% Neutral	% Agree	% Strongly Agree
Big Brands should tell what they are doing to make positive changes relating to environmental and social challenges			44	49
Climate change poses a real threat to how we live in the future			28	64
A company or brands "green credentials" can be trusted	41	41	18	
I'd boycott a company or brand that was suspected of acting in a damaging way either toward its workers, a community or the environment			38	47
Is it important to you that the products and services you use are made from sustainable and renewable resources			84	
I care where my food comes from			40	44

Table 4: South African Consumers on Sustainability
Source: Based on OgilvyEarth Sustainability Study

South African Trend Forecaster Dion Chang (Chang, 2011) of Fluxtrends commented on how 2011 saw the rise of the artisan eater, "the new 'foodies' who are interested in consuming local, hand-made products bought at small scale urban markets." He ties this trend in with nostalgia, a reaction to industrialised food systems and a culture of ethical eating. "The use of local ingredients to diminish the effects of food transportation – in the attempt to reduce our 'carbon-footprint' – is an example of consumption that is consciously reflexive of effects of eating on the ecosystem" (Chang, 2011).The findings of Ogilvy Earth and Fluxtrends are promising to restaurants wanting to move to sustainability. The OgilvyEarth survey shows that consumers have an awareness of sustainable issues such as climate change and water conservation. They want products and services to be made from sustainable and renewable resources. They care about where their food is coming from. They would like to be communicated to with regard to the efforts of a brand. However restaurants would need to win their trust as they are also concerned with greenwashing. Restaurants must also appreciate that if they do harm to the environment or society there is the risk of being boycotted by consumers (OgilvyEarth, 2011). Dion Chang identifies a

market segment that is interested in ethical eating that can be reached by restaurants moving to sustainable food practices.

Chef as Activist

Chefs play a pivotal role in restaurant shifts and trends. The National Restaurant Association in the USA produces an annual trend report (NRA, 2010). A survey was conducted with 1800 professional chefs of the American culinary federation who ranked 214 items as trends. The top trends that emerged for 2010 were

1. Locally grown produce (88 percent of chefs rated)

2. Locally sourced meats and seafood (84 percent of chefs rated)

3. Sustainability (80 percent of chefs rated)

Locally produced wine and beer, farm branded ingredients and sustainable fish also featured on the top ten. In addition chefs rated environmentally friendly equipment as the top kitchen equipment trend (55 percent of chefs rated). The restaurant concept most highly rated (88 percent of chefs rated) is restaurants with food gardens. This demonstrates that sustainable concerns are being recognised by professional chefs who create menus and drive innovation in many restaurants.

Some chefs have also moved into the space of taking an activist role when it comes to issues around sustainability. In September 2011 nine chefs including some of the most famous chefs in the world - Rene Redzipa, Michael Bras and Ferran Adria - signed a communiqué regarding the role of chefs in the world:

> We dream of a future in which the chef is socially engaged, conscious of and responsible for his or her contribution to a just and sustainable society ... through our cooking, our ethics and our aesthetics, we can contribute to the culture and identity of a people, a region, a country ... we can also serve as an important bridge to other cultures ... we all have a responsibility to know and protect nature. (Rayner, 2011)

A month prior to this Rene Redzipi had organised a 'Mad Food Camp' in his home country, Denmark where 200 chefs and producers debated their role in the production of food. This demonstrates the shifting and influential role of chefs where they go beyond food to look at their significant role in shifting food and consumption (Mad Food Camp, 2011). Rene Redzipi's intent is summed up as "if we can plant some fertile thoughts on ethics, sustainability and the joy of good food, the MAD Food camp may help re-establish the balance of the food chain we all depend on (Mad Food Camp, 2011)."

Strategic Implications:

Social and cultural shifts are highly relevant to restaurants as eating food is a cultural activity. Cape Town restaurants will experience the impact of global shifts in society and

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culture as many are frequented by tourists. There is a growing 'green consciousness' among consumers, globally and locally. Chefs are often the drivers of social change in the industry.

4.2.5 Technology Factors

There are also innovations in the space of energy, food, water and waste. There are rapid changes in communication technology, with consumers using technology and sharing information via blogs and social networking.

Strategic Implications:

Restaurants can capitalise on and keep abreast of these changes. Restaurants need to respond to changing consumer patterns. They must cater for and use technology to reach these consumers. Consumers are also empowered through their ability to use social media to voice their opinions.

4.2.6 Environmental Factors

As shown in the literature review there is degradation of the environment and pressure on ecosystem services through aspects such as unsustainable resource use, inefficient use of water, pressure on wastewater systems, carbon emissions and land and soil degradation.

Strategic Implications:

A sustainable restaurant's strategy should be to help restore and enhance ecosystems through food procurement, renewable energy, reduced transport and other sustainable initiatives. The changes demanded by a shifting macro-environment can be responded to individually by restaurants or they can mobilise collectively with industry support to address these challenges.

4.3 Market Situation

4.3.1 Restaurant Associations

In order to create a model to help restaurants to move to sustainability it is instructive to describe existing formal models that serve this purpose. Two Sustainable Restaurant Associations were examined as a basis for this business model. The Green Restaurant Association (GRA) is an American model and the Sustainable Restaurant Association (SRA) serves the city of London. These are described in detail in Section 3.6.7.

The characteristics of The Green Restaurant Association (GRA) are

- Ongoing Certification
- Voluntary membership
- Detailed Certification
- Restaurants need to verify claims
- Continuous annual grading

The characteristics of the Sustainable Restaurant Association are

- Recognises sustainability as a continuous process
- Voluntary membership
- Account managers recruit London restaurants to join the SRA
- Members pledge to three actions from SRA Charter of Actions
- Membership renewed annually

Strategic Implications:

Both the GRA and the SRA have developed business models that are applicable to the markets they operate in. The GRA is a voluntary progressive certification system with star ratings. Many of the criteria for inclusion require investment in equipment to earn points. This approach could be onerous in the context of Cape Town restaurants. The SRA is a newer association and works on a system of voluntary pledges to three key issues. This enables the restaurant to be a member of the association but is not a certification tool. Continued effort is also required. This approach may be more applicable to the Cape Town context as the criteria are less technical and can be modified for local conditions. A certification system would also be costlier to fund and manage.

Table 5 below depicts the SRA charter and the requirements that are needed in each of the 14 areas the SRA members need to commit to. This is a useful guideline for South African Restaurants, but would need to be adapted to local conditions.

	ASPECT	ACTION	POSSIBLE ACTIVITIES
SRA CHARTER			
1	Local and seasonal	Change menus at least quarterly to reflect food that is in season Source at least 20 percent more fresh produce from a producer within 50 miles of your restaurant (100 miles for London)	Make fish dishes that are sustainable and in season Make your own preserves, pickles and chutneys Use seasonal British produce Use mainly seasonal British fruits Have English wine on the wine list Reduce of imported produce
2	Environmentally Positive Farming	Source at least 20 percent more (by value) of your fresh produce from an ecologically certified producer (e.g. Soil Association, LEAF Marque, Rainforest Alliance) Deal directly with at least 3 farmers or producers of fresh produce Conclude SRA approved supplier agreements with at least 2 of your major fresh produce suppliers Arrange a staff visit to an ecologically managed farm	Source from small-scale farmers supporting rare breeds and varieties Take part in Community Supported Agriculture (CSA) or join a Landshare scheme Organise a staff excursion to a local supplier
3	Ethical Meat and Dairy	Ensure 100 percent of eggs and milk are from free range or RSPCA Freedom Food sources Source at least 20 percent more meat from RSPCA Freedom Food or free range sources Conclude SRA approved supplier agreements with at least 2 of your major meat suppliers	Replace European veal with British 'rose' veal Source meat that is farmed to high environmental standards Source meat that is farmed to high welfare standards Source local meat Practice and encourage nose-to-tail eating
4	Sustainable Fish	Only buy herbivorous farmed fish (e.g. tilapia and basa) Only source fish from a Marine Stewardship Council (MSC) certified supplier or fisherman Only use fish from the Marine Conservation Society's (MCS's) 'Fish to Eat' list Conclude SRA approved supplier agreements with your major fish suppliers (at least 2)	Do not use fish from the Marine Conservation Society's 'Fish to Avoid' list Use the Marine Conservation Society's 'Fish to Eat' list as your guide Sign up for Fish-Flash e-bulletin alerts from Good Catch Organise a staff training event with Good Catch
5	Fairtrade	All tea, coffee and sugar are Fairtrade or Rainforest Alliance certified Ensure all cocoa, chocolate and spices are Fairtrade or Rainforest Alliance certified	Source Fairtrade or Rainforest Alliance tea and coffee Source Fairtrade or Rainforest Alliance sugar Source Fairtrade or Rainforest Alliance cocoa and chocolate

		Include a Fairtrade signature dish on all your menus Organise a Fairtrade event at your restaurant in association with the Fairtrade Foundation	Source Fairtrade or Rainforest Alliance wine Source Fairtrade or Rainforest Alliance fruit juice and fruit Source Fair Trade produce from an Alternative Trading Organisation (ATO) Organise Fair Trade staff training during Fairtrade Fortnight
	ENVIRONMENT		
6	Supply Chain	Insist that over 75 percent of meat and vegetable suppliers take back and reuse or recycle all packaging Group with local restaurants to aggregate your food orders and accept deliveries together	Follow Supplier Codes of Conduct Follow the Prompt Payment Code Ask your suppliers for written statements about their environmental, social and ethical policies Carry out social audits Avoid air-freighted produce Insist suppliers use 'green' transport Use supplier delivery hubs
7	Energy	Carry out an energy audit and commit to reducing energy use by 10 percent Switch to a renewable energy or a green energy tariff Fit 2 electricity or gas submeters to monitor kitchen energy use	Develop and follow a Climate Change Strategy Benchmark your energy use against other restaurants Monitor your energy use on a monthly basis (and set a target to reduce it) Run a staff training or awareness session to encourage energy efficient behaviour Use low energy light bulbs Install photocell, timers and movement sensors to automate lighting Buy energy efficient kitchen ('A' rated) equipment
8	Water	Install a water meter and maintain weekly measurements Replace your bottled mineral water with a filtered tap water system (or only serve tap water)	Use trigger operated spray guns on spray washers Install low flush toilets and waterless urinals or urinal controls Install rainwater butts for outdoor water use Fit flow restrictors on your sink taps Follow a Water Saving Policy Insist that external contractors use less water
9	Waste management	Conduct a waste audit and commit to sending no more than 20 percent waste (by weight) to landfill Recycle paper, plastic, cans and glass	Follow a Waste Reduction Policy Offer doggy bags to customers Offer different portion sizes to minimise wasted food

		Separate food waste for composting or anaerobic digestion	Start a coffee grounds distribution programme
			Encourage suppliers to use packaging that can be returned and reused
			Lobby your Local Authority for better waste and recycling
10	Workplace Resources	Buy 100 percent recycled or FSC certified paper and paper products	Avoid purchasing catering disposables (napkins, cutlery etc)
		Use only environmentally friendly cleaning products (e.g. Ecolabel certified)	Replace paper towels in lavatories with efficient hand driers or washable towels
			Buy natural, low or zero VOC paints
			Source sustainable building materials for new builds or refits
			Carry out an Environmental Assessment
			Source sustainable furniture and fittings
			Source FSC certified wooden furniture
			Recycle office waste including paper, card and printer cartridges and toners
	SOCIETY		
11	Healthy Eating	Design the menu to cater for food allergies and offer vegetarian/vegan alternatives	Volunteer for a local charity or community initiative
		Support Drinkaware by ensuring bartenders receive responsible service training within 3 months of starting	Buy produce and services from within the local community
			Commit to employing local people from disadvantaged backgrounds
		Include calorific values for meals on the menu	Support local grow-your-own schemes
			Work only with local businesses and external contractors
			Implement a 'recommend a tradesman' scheme with your local SRA hub
			Actively raise awareness about sustainable issues
12	Community Engagement	Start an apprenticeship scheme	Use relevant sustainability logos in marketing material and on menus
		Choose a local charity or community initiative to support on an annual basis	Publicise more sustainable ways of getting to your restaurant (e.g. public transport or cycling)
		Buy an increased percentage of your produce from, or support employees volunteering at a community farm or allotment	Follow a Responsible Marketing Policy
		Share skills with local schools or groups (e.g. through Let's Get Cooking)	Back up all marketing claims including environmental and health claims

Table 5: SRA Charter

Source: Modified from SRA, 2011

4.3.2 Restaurant Industry

The StatsSA report on the 2009 state of the Food and Beverages industry (StatsSA, 2009) can be used to make deductions regarding the state of the industry. The total Food and Beverage industry was worth R39 919 million for the 2009 period. Expenses incurred by the industry overall were R39 347 million and included purchases (52 percent), salaries and wages (18 percent), rental (5 percent), royalties (5 percent), advertising (4 percent), depreciation (3 percent) and water and electricity (2 percent). This resulted in an overall net profit rate of 0.8 percent. (P6421:3).

The category of restaurants, coffee shops and tearooms accounted for R18 717 million or 47 percent of the food and beverage industry which includes fast foods, takeaways, caterers and catering services (StatsSA, 2009:1).Expenses incurred by restaurants, coffee shops and tearooms were R18 335 million and were comprised of purchases (48 percent), salaries and wages (24 percent), rental (7 percent), royalties (3 percent), depreciation (3 percent) advertising (2 percent) and water and electricity (2 percent). This resulted in an overall net profit rate of 1.2 percent. (StatsSA, 2009:3).

Conclusions that can be drawn from this data are that margins are tight and the predominant expenditure is spent on inputs. There is only slight variation between the restaurant industry and the total food and beverages industry. For restaurants purchases are lower and profits slightly higher. Given the global polycrisis, food and energy prices will probably continue to increase. While this may be an incentive to look for more sustainable approaches to business, restaurants may also be deterred from making changes when margins are so tight. A net profit rate of 1.2 percent does not give restaurants room to move. This may explain why the restaurants that are showcases of sustainability, Eight and Babel are both part of projects with a longer range vision and are backed by wealthy businessmen. [16]

The national split in the restaurant industry between large, medium and small enterprises is 30 percent of revenue from large enterprises (R13 million/year), 26 percent from medium enterprises and 44 percent from small enterprises. In the food industry as a whole, larger industries make up 50 percent of the total accounted for by a greater percentage of large

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[16] The Spier estate is owned by the Enthoven family. Babylonstoren is owned by Koos and Karen Becker. Koos Bekker is the CEO of Naspers, a large media company.(Babylonstoren, 2012; Landman, 2011:92; Spier, 2012).

companies in the take away market (StatsSA, 2009:8). This indicates that there is room in the industry for medium and small enterprises that together make up 70 percent of the industry. Statistics South Africa (StatsSA) produces a monthly national Food and Beverage report, which can be used to understand the sector nationally and give a rough indication of the size of the Restaurant sector in Cape Town. There is no other data study that provides this information. The StatsSA food and beverages report (StatsSA, 2010) details revenue nationally for food and bar sales from restaurants and coffee shops. The food and beverages survey is "a monthly survey covering a sample of public and private enterprises involved in the preparation of meals and drinks for immediate consumption in South Africa." (StatsSA 2010:8). As there is no specific data for the Cape Town market this section will assess the market nationally and then make some broad assumptions about the Cape Town market. The Cape Town Market is primarily assessed through a database of 431 restaurants that have been analysed giving a more bottom up nuanced picture of the market. The monthly reports can be used to track sales over a year and to get an indication of the amount of food and alcohol in monetary terms that is used by the Restaurant Industry.

Breakdown of annual Restaurant Sales in South Africa							
Month	Based on July 2009 - June 2010			Month	Based on July 2010 - June 2011		
	Food Sales National	Bar Sales National	Total National[17]		Food Sales National	Bar Sales National	Total National
	R million	R million	R million		R million	R million	R million
2009				2010			
July	1 358,9	209,4	1 568,3	July	1 395,5	197,1	1 592,6
August	1 365,7	200,0	1 565,7	August	1 348,2	181,6	1 529,8
September	1 351,5	202,7	1 554,2	September	1 366,7	193,5	1 560,2
October	1 383,1	221,7	1 604,8	October	1 381,3	204,6	1 585,9
November	1 450,6	228,8	1 679,4	November	1 433,0	222,2	1 655,2
December	1 595,3	247,0	1 842,3	December	1 679,1	247,6	1 926,7
2010				2011			
January	1 361,0	241,9	1 602,9	January	1 367,4	194,7	1 562,1
February	1 278,9	207,4	1 486,3	February	1 300,7	194,0	1 494,7
March	1 446,1	230,3	1 676,4	March	1 454,5	205,3	1 659,8
April	1 379,3	231,9	1 611,2	April	1 416,9	205,9	1 622,8
May	1 446,1	213,6	1 659,7	May	1 318,8	173,5	1 492,3
June	1 460,7	232,4	1 693,1	June	1 345,7	172,3	1 518
Total sales	16 877,2	2 667,1	19 544,3	Total sales	16 807,8	2 392,3	19 200,1
				Change	-0.4%	-10.3%	-1.8%

Table 6: Sales Figures for 2010 and 2011

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[17] This figure includes food sales, bar sales and other income

Source: Adapted from StatsSA P6420 June 2010 & P6420 June 2011

In the absence of actual data the following estimations have been made to ascertain the revenue values of the market for food and beverages passing through the system in Cape Town. Actual national figures have been adjusted by both an estimate of the Cape Town share of market and an estimation of food value as a percentage of total restaurant sales as described below.

There is a lot of variability in the marketplace in pricing models and these may vary from item to item. However on average a rule of thumb mark-up for the Restaurant industry for viability is 200 percent on the cost of food and drink to cover fixed and variable overheads such as rent, salaries, energy etc. (Franco, 2012; Kratz, 2011). The cost of sales on average is 33 percent but certain items such as coffee or tea may have a cost of sales that is lower, or if margins are reduced to remain competitive or promote the restaurant.

These figures represent the amount the restaurant industry in Cape Town is estimated to spend on Food and Alcohol. This represents a significant market for both Food and Alcohol. and can be significantly impacted on by moves to sustainability.

Descriptor	Amount	Rationale/Evidence
Size of National Market Jul 2010 - Jun 2011 –Food	R16 807,8 million	StatsSA
Size of National Market Jul 2010 - Jun 2011 – Drink	R2 392,1 million	StatsSA
Size of National Market Jul 2010 - Jun 2011 – Total	R19 200,1 million	StatsSA
Cost of Food Cost of Drink Total cost	Less mark up: R5 603 million R 797 million R 6 400 million	Less 200 percent mark up Industry Standard

Table 7: Estimate of National sales

Source: Adapted from StatsSA, 2011

The Retail value of food passing through the restaurant system is R16,808 million and beverages of R2,392 million totalling R19,200 million for year ending June 2011. The true cost of the food is closer to R5,603 million (including VAT[18]) and beverages R797 million. This measurement is crude as it works on a fixed mark-up and doesn't take VAT into account as many basic food items are zero rated. But it does indicate that about R6.4 billion

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[18] Value Added Tax. Currently at 14% of Sales. Certain basic food items are zero rated.

of food and drink is purchased by the restaurant industry annually. A guideline has been used to estimate the Cape Town market as percent of the national market. This is inflated insofar as Cape Town is a popular tourist destination. According to Rey Franco of Fedhasa (Franco, 2012) it can be estimated that Cape Town restaurants could represent as much as 20% of the national average given the concentration of restaurants in the tourist-focused city. Based on the assumptions of Cape Town representing 20 percent of the National Market and Food and Alcohol being marked up on average at 200 percent an estimate can be made for the size of the Cape Town sector. The retail value of food and drink passing through the restaurant system in Cape Town annually can be estimated at R3.84 billion which represents 1.4 percent of Cape Town's GDP (2010). The cost of food and drink passing through the restaurant system in Cape Town annually can be estimated at R1.2 billion. The implication is that shifts in the system with regard to resource usage can be significant in shifting other systems such as less transportation, local food economies, and transition to sustainable agriculture. Although these aspects already exist within the system they can be increased.

Findings From Restaurant Database [19]

The database of Cape Town restaurants in Appendix A was analysed to arrive at a better understanding of the breakdown of restaurants. This can be the basis of specific strategies as the basis of the business plan. It is important to establish the unique identity of the Cape Town restaurant market.

Restaurant Type

Single restaurants accounted for 78 percent of total restaurants while chains made up 22 percent. Single type restaurants predominate but chains such as Spur, Ocean Basket, Primi Piatti and others can make a significant impact on the market. For instance Ocean Basket has joined SASSI . As a chain Primi Piatti introduced changes to one of its Johannesburg branches after environmental and waste audits were conducted. These changes included renewable energy, pollution controls and planting trees to offset carbon emissions (Primi, 2011).

On their website they describe the amount of food they use each year: 500 000 eggs, 23 000 kg. of mushrooms, 338 tons of pasta and 9 tons of coffee. (Primi Piatti Facts, 2011). Shifting to local or sustainable suppliers for any of these products would make a significant

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[19] The database in Appendix comprises 335 restaurants and 96 additional chain restaurants. Based on this information restaurants can be categorized according to type, location and spend. All information is derived from the judgement sample of 431 restaurants.

difference in the food system. One of the interventions they make is by buying Utz certified coffee, a global sustainability programme (Utzcertified, 2011). Chain restaurants may not have the responsiveness of an independent restaurant but they have power in terms of their centralised buying decisions and the number of customers they service.

Restaurant Food Designation
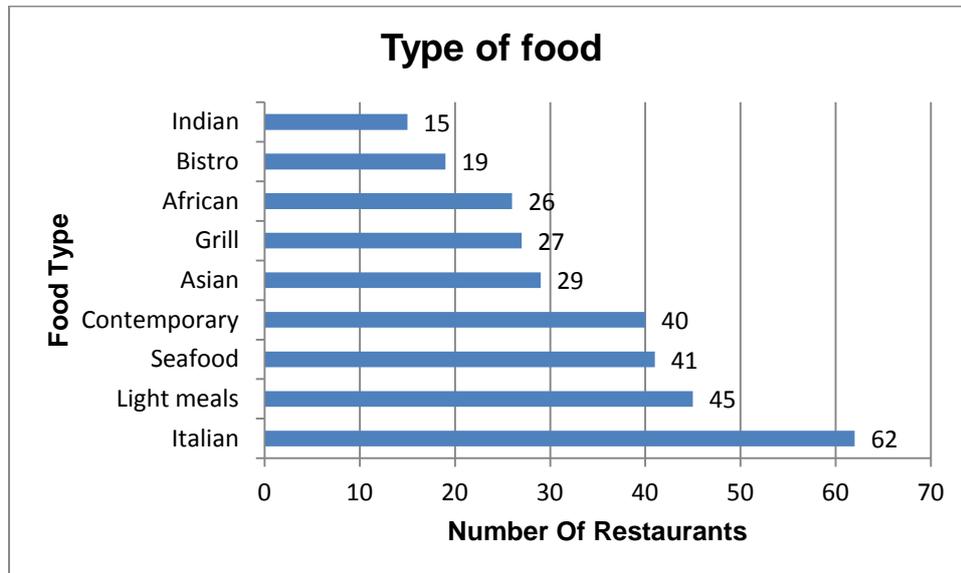
Figure 18: Restaurant Food Offering
Source: Based on Restaurant Database (Appendix A)

This Graph is based on restaurant designations, either by the restaurant or author of the review. The descriptors have been simplified as many restaurants had multiple designations. The most relevant one was selected.

The graph shows that the biggest restaurant designations are

- Italian - encompasses Mediterranean, pizza
- Light meals
- Seafood

These choices will have implications for sustainability in the marketplace. Italian food by definition relies on regional, fresh, seasonal produce which represents an opportunity for these establishments (Finding Authentic Cuisine in Italy, 2005). As Cape Town is on the coast it makes sense that seafood restaurants predominate. The popularity of seafood means that there is a need to educate restaurants with regard to sustainable seafood. Restaurants such as Ocean Basket, Moyo, Wild Woods, Blowfish, Pepernero, Panama Jacks and On the Rocks are members of SASSI (SASSI, 2010b). The demand for light meals points to the inclusion of coffee shop style restaurants and potentially a trend to

healthier eating. The value of this approach is based on the insight that different restaurant groupings may have different needs and can be served as a cluster.

Price Range

The price refers to average spend per person on food. There are fewer restaurants catering for the top end of the market with the majority being in the R51 - R100 category.
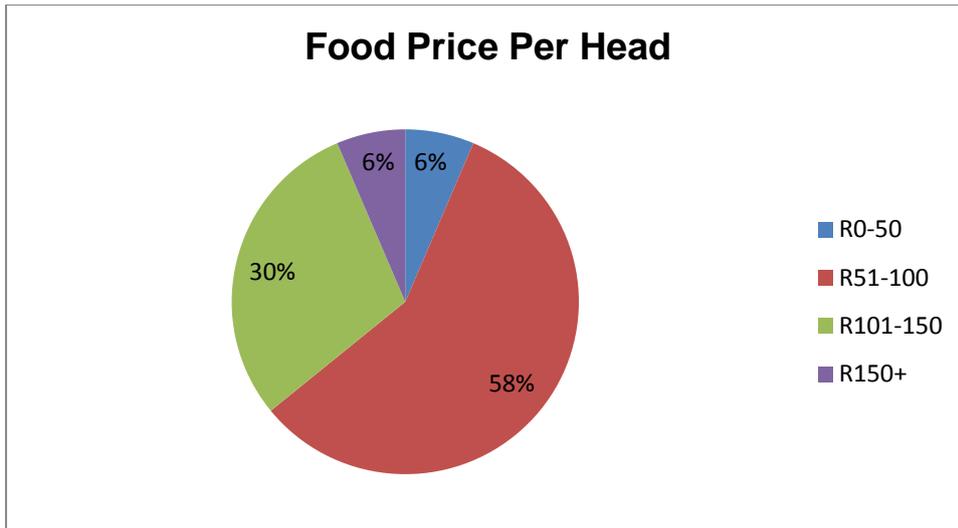
Figure 19: Restaurant Food Price per Head

Source: Based on Restaurant Database (Appendix A)

Location

This graph is derived from the broader areas where the restaurants are located. It only includes stand alone restaurants that are part of the sample, but is indicative of larger distribution.
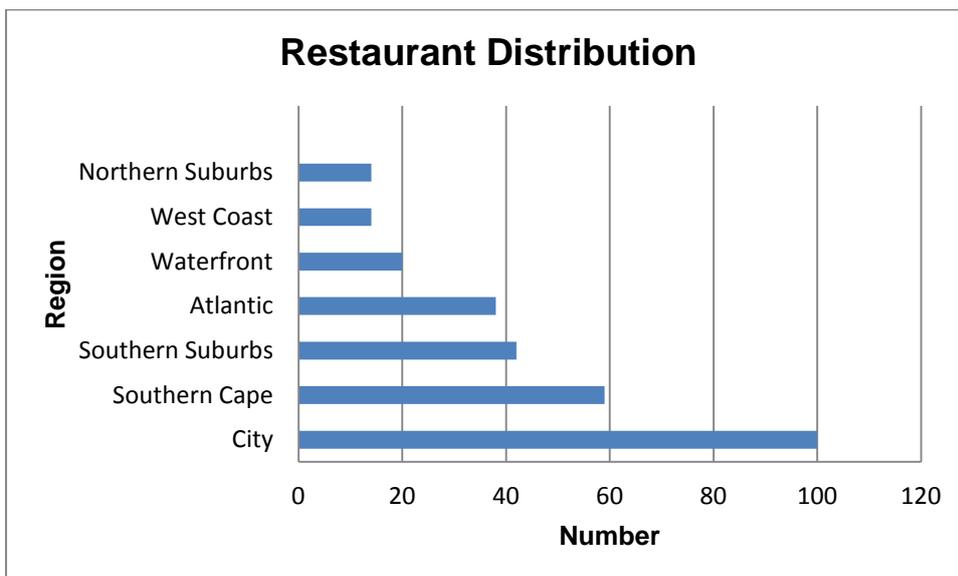
Figure 20: Restaurant Distribution

Source: Based on Restaurant Database (Appendix A)

The database in the Appendix A can be used to extract more specific information on each of these factors.

4.3.3 Individual Restaurants: Best Practice

There are a number of restaurants in Cape Town that exemplify the practices described in section 3.8 of the literature review. Some of the practices are described in more detail below. The Eat Out reviews combined with interviews showcased the following innovations in Cape Town restaurants.

RESTAURANT	TYPE	INITIATIVE	SOURCE
1800	Grill	Vivreau water filtration system Recycling Sourcing food directly from farmer	Interview
& Union	Tapas City	Artisanal Beer Organic Produce – Eggs, Coffee Ethically sourced meat - charcuterie Tap water Menu -communication	Eat Out 2011 Interview
Africa Cafe	Africa City	Traditional African Recycled Plastic Chandeliers	Eat Out 2010
Birds Boutique Cafe	Light Meals City	Menu on Butchers paper taped to wall Local and/or Organic produce	Eat Out 2011
Buitenverwachting	Fine Dining Southern Cape	Local Ingredients Seasonal Own wines	Eat Out 2011
Caveau	French Bistro City	Seasonal Blackboard menu Preservation of heritage building	Eat Out 2011
Il leone	Italian City	Seasonal	Eat Out 2011
Kwalapa	Light Meals	Built – tent Organic Recycling Spring water	Interview
Ocean Basket	Seafood	SASSI	wwfsassi.org
River Cafe	Light Meals	Organic Garden Seasonal	Eat Out 2011
Superette	Light Meals	Community support – furnishings Small producers Market produce – farm to plate Organic	Eat Out 2011 Interview
Wild Woods	Contemporary	Local Produce SASSI Slow Food Sundays	Eat Out 2011 Interview

Table 8: Examples of Sustainable Practices by Cape Town restaurants

Source: Eat Out Guide (2010, 2011) and interviews

Other examples of sustainable practices that were uncovered by the research involve food, people and communication.

Food

Examples of restaurants that grow their own produce tend to be outside the Cape Town CBD. Organic at Heart is an organic restaurant in Plumstead, Cape Town, housed in a national monument. It has an extensive vegetable garden which supplies the restaurant with most of its vegetables and herbs. At a more elaborate level, Babyonstoren's restaurant, Babel, draws its fresh produce from an eight acre garden developed by Patrice Taravella from France. The garden has over 300 varieties of edible plants which are grown organically where possible. The fruit and vegetables are harvested year round for use in the restaurant. The organic matter is recycled as compost for their own use (Babylonstoren, 2012).

Other restaurants source their ingredients carefully. Local sourcing is dependent on availability and may range from immediate neighbourhood to regional to national. Dear Me in the City Bowl which opened in 2010 "decided that sourcing all our ingredients locally as far as possible was non-negotiable. It's been tough, but we have managed to find local suppliers for almost all our food. We get pork from Happy Hog Butchery near Ashton, beef from Greenfields farm near Mooi River in Kwazulu-Natal and our vegetables from Wild Organics in Cape Town, the Drift Farm near Elgin and Magic Herbs. Each supplier is as passionate about its products as we are" (Taste Magazine, 2011). Mike Basset from Myoga in the Vineyard Hotel also prefers fresh produce from people that rotate their crops and chooses organic wherever possible (Taste Magazine, 2008:78). SASSI is a guideline for sustainable fish. Restaurants in Cape Town that are SASSI supporters include Bertha, The Codfather, the Square Live Bait, Harbour house and The Ocean Basket (SASSI, 2010b). Mike Bassett of Myogo in the Vineyard hotel researches all his suppliers to ensure they use sustainable resources, especially seafood (Taste, 2008). Seasonality requires shifting menus with seasonal produce. Menu flexibility is also required as restaurants need to work around what is available. A blackboard menu listing specials of the day is often used (Wild Woods).[20] Emily Moya[21] of Kwalapa commented (Moya, 2010) that "If we were really strict about local and seasonal food in winter we would be serving a lot of cabbage and eggs".

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[20] Wild Woods has closed down, but this was accurate at the time of visit in December 2010.

[21] Emily Moya is no longer the chef at Kwalapa but was at the time of interview.

In Cape Town there are a number of markets which feature the produce of local farmers. These are often more lifestyle markets than farmers markets but do give restaurants the opportunity to connect with local producers supported by these initiatives. Some markets within Cape Town include Rondebosch Village Market, Constantia Waldorf Organic Market, Earth Fair Food Market in the city and Tokai , Hout Bay Organic Market, Kalk Bay Fresh Etc Market, Plumstead Organic Market and Porter Estate Produce Market (Markets in Cape Town, 2010).

A restaurant in Cape Town, Starlings started a small urban farmers market in their garden in July 2011. The market is held on Wednesdays, from four to six in the afternoon. The idea behind it is to help smaller suppliers reach consumers directly and also to showcase the produce the restaurant uses on their menu. Although relatively new, the market is attracting regular followers (Kratz, 2011). The Food Shed, which is an online market for smaller suppliers, used the market as a collection point for online orders. The restaurant is marketed via social media – facebook and twitter.[22]

Matt Allison supplies the market with organic vegetables that he has grown himself or sourced from Natural Organics, an organic farm in Philippi. In a blog post Allison said "on market days, my food is picked out of the fields at around 2-3pm and sold at 4pm. My patrons know what I and my fellow producers stand for and that our ethics are uncompromisable" (Parla, 2011). Afrikara a biodynamic co-op in Wolseley bring through dairy and lamb when in season. Simply wholesome supplies "free-running" chicken, eggs and butter. Urban beekeepers, Gardeners Glory supply raw honey from Neighbouring suburbs. Julie Carter brings in freshly caught fish that is sustainable (green on the Sassi list). Richard Bosman cures charcuterie locally. Starlings provides homemade brown bread. Consumers who frequent the market can meet the producers of their produce. Consumers who walk or cycle to the market are rewarded with a half price coffee. This is to encourage the locals to support the market and create a sense of community through a common meeting place.

People and Community

Fyndraai is a restaurant on a wine estate in Stellenbosch that is attempting to connect with its cultural heritage (Solms Delta, 2011). The estate has a two hectare culinary garden, Dik-Delta, that has been created to preserve the food heritage of the Cape; Afrikaner, Khoi and

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[22] Starlings cafe page on facebook ; @starlingscafe on Twitter

Cape Malay (Solms Delta, 2011). These indigenous plants are cultivated to be used in the restaurant's kitchen. Food writer Renate Coetzee experimented with traditional khoi 'veldkos' but found many of the tastes were too bitter for modern palates. The menu features "Afrikaner Boerekos which has strong European and "Cape Malay" influences with ingredients first used by the indigenous Khoi nomads who lived in the Franschhoek valley thousands of years ago". This initiative also supports the Khoi community living at Solms-Delta who are given responsibility for Dik Delta and have the opportunity to share their knowledge with the local community (Landman, 2011:92; Solms Delta, 2011).

Superette in Woodstock is a restaurant that helps the local community. Food is sustainable as "the menu changes daily to showcase locally sourced market produce 'fresh from farm to plate' (Eat Out Guide, 2011:161, Superette, 2011)". The premises of Superette were originally a cafe family store. It had degenerated into a drug den (tik). It took fifty days to get dealers out (Munro, 2010). The name Superette was derived from its original name Runnels Superette. The restaurant is open for breakfast, lunch and tea and showcases produce from select producers from the nearby Neighbourhood Goods Market started by the owners, Cameron Munro and Justin Rhodes (Munro, 2010).

The sourcing for the market is based on the idea of quality gourmet local produce. It is based on three principles: organic or free-range produce; small scale and produce that has a story. The Shop part of Superette is a space to educate people. The furniture is designed by local designer Zandre Kriel and the wooden tables made by a Woodstock local. Wherever possible, the fittings were sourced from neighbourhood suppliers (Munro, 2010). It can be argued that the consequences of the venture, together with similar investments, are good for the locals in the working class neighbourhood as a derelict area has now increased in value. (Munro, 2010).

Bird Boutique cafe (Villanueva, 2010) is known for its local and organic food. The Eat Out review highlighted that "the menu on butchers paper taped to the wall is filled with light healthy options made from local/organic ingredients" (Eat Out, 2011). According to Dax Villanueva (2010) they have also implemented a staff upliftment programme. "Look at everything from their crockery to the crates you sit on. It is 80 percent food and 20 percent love" (Villanueva, 2010). These are examples of restaurants within Cape Town and nearby regions that show an interest and concern for people, whether through heritage, community support or staff upliftment.

Communication

An example of a restaurant initiative to attract attention to sustainable issues was the first African Carrotmob event that was held at a Cape Town restaurant in November 2011. The initiative was driven by Climate Smart Cape Town. The restaurant, Maria's Cafe committed 100 percent of the money raised on the evening of the Carrotmob to make the business more environmentally and socially responsible. Maria's submitted a proposal to Climate Smart that included a communal composting system, urban garden, education initiatives, and renewable energy (Introducing Carrotmob Cape Town, 2011). Maria's benefited from the event by receiving publicity and attracting consumers. The consumers benefited by knowing the proceeds of their meal were going to a good cause.

Integrated Sustainability

"Eight is the manifestation of Spier's belief that a restaurant can be a catalyst for social and environmental change, while still offering fabulous food." (Heidi Newton King in Spier, 2012)

A restaurant that aims for a holistic model of sustainability is Spier's Eight[23]. Eight is a farm to table restaurant on the Spier Wine Estate with a focus on local and organic food and wine. The idea of the restaurant was the offshoot of the biodynamic farm started in 2009 by Angus Macintosh, as a way to supply the public with the produce that was being grown on the farm (Heyns in Landman, 2011:93).

Eight was chosen as the restaurant's name to signify balance, abundance, harmony and cycles (Spier, 2012). Eight as a logo is horizontal to evoke the infinity sign. The restaurant was built according to feng shui principles. The feng shui consultant suggested raising the existing roof for a month to release trapped energy. There is a lot of natural light and ventilation created by windows and skylights which saves energy. Furniture has been reused and restored and the artwork by local artists is for sale. The lighting was designed by artist Heath Nash who used over ten thousand white flowers as sparkling lights which were fashioned from recycled milk bottles. This is a reflection on the Spier focus on recycling and sustainable business. Members of staff from the estate were called in to help complete the job.

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[23] Based on visit May 2010/ personal interview with waiter Charles and Chef Lorianne

Menu

The menu at Eight is "short and seasonal, nutritious and wholesome". (Taste, 2010:84). Much of the produce used at Eight is grown either on Spier using biodynamic farming techniques, or is sourced from nearby farmers who meet their standards. (Landman, 2011:91).

For the restaurant Eight, "farm to table cuisine is what this menu is about. Here every ingredient tells a story of its origin. Good food starts with natural raw ingredients sourced close to the soil – with herbs salads and vegetables harvested fresh from Spier's own biodynamic vegetable farm" (Donnelly, 2011:14).

The restaurant uses biodynamic eggs as well as chickens and vegetables sourced from farm. Seafood is on the SASSI green list. Trout is sourced from nearby Franschhoek. Additional vegetables are sourced from neighbouring farms. Suppliers are vetted to ensure environmental best practice. Lamb is free range and sourced from the Karoo. Fresh juices replace carbonated drinks on the menu. (Heyns, 2010; Taste, 2010:84). An external distributor Three Peas sources fresh produce that is primarily local and organic, or if from further afield organic, or if neither from BBBEE companies or fair-trade suppliers. (Landman, 2011:96). Eight recycles 100 percent of its waste water and 80 percent of its solid waste (Taste, 2010:84) which is part of the bigger Spier sustainability vision (Spier 2012).

According to Charles the waiter – "The hardest part is managing expectations. Eighty percent love it even if they have another expectation." The restaurant is a place of learning: Staff underwent a month of training so they would be able to understand and communicate what Eight is trying to accomplish. "It is not trying to offer all the solutions but is creating a space for us to learn about our food and our relation to it" (Heidi Newton King in Taste, 2010:84). Lorianne Heyns the chef says that running Eight is not as complex as it may seem. It is a day to day affair. She regularly consults with the farmers to see what can be produced and then is challenged by the limitations of using those ingredients offset by the freshness and quality of the produce (Heyns 2010).

Although Eight experiences the challenges of finding sustainable suppliers and building consumer demand to be economically viable (Landman, 2011:94) Eight provides a blueprint of a restaurant that is trying to integrate sustainable practices into their brand as a continuous process.

4.3.4 Consumer Analysis

"When companies think about sustainability they nearly always think about the supply side-changing energy, reducing carbon, waste, pollution, sustainable and ethical sourcing. But most companies could have a far bigger impact if they helped people live greener, less wasteful and in many cases more enjoyable lives" (Grant, 2010:84).

Although restaurants are destinations and also serve tourists, many service their local community which in the case of Cape Town are the affluent and more cosmopolitan communities. The map below of Cape Town is to be correlated with restaurants in Cape Town below.
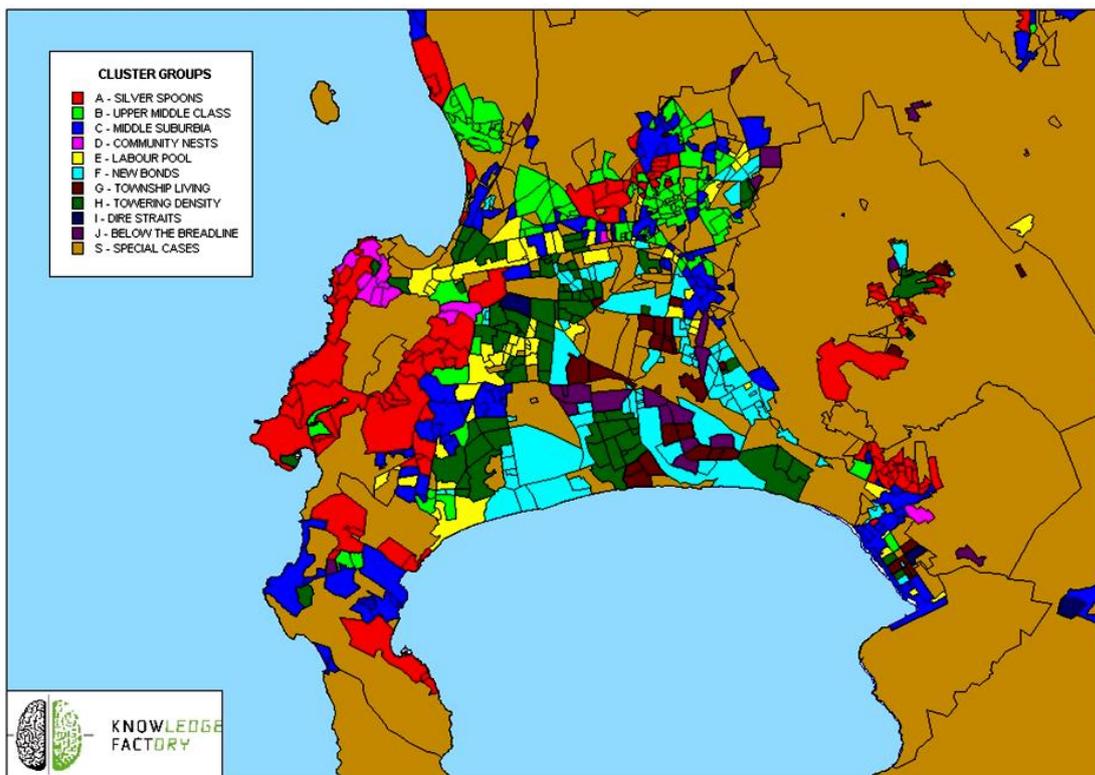
Figure 21: Clusterplus in Cape Town
Source: Based on Swilling, 2005:14

	ClusterPlus Group	Characteristics	% of Households	Number of Restaurants	% of Restaurants
a	Silverspoons	Elite Largest consumers Getting richer	7	103	38
b	Middleclass	Established Mature Conservative Professionals	9	27	10
c	Middle Suburbia	Tight budgets Mid level jobs Bargain hunters Big spending on educating children	10	16	6
d	Community Nests	Mixed Afro-cosmopolitan Shifting Small spaces Stylish Cafe culture dense	2	121	44
e	Labour Pool	High density family neighbourhoods Stable jobs Secondary education struggling	6	1	1
f	New Bonds	New families youngish	13	1	1
g	Township Living	Old places Few jobs Youth culture	11	1	0
h	Towering Density	Teetering High hopes Few options Limited reinvestment	22	0	0
i	Dire Straits	Old places Overcrowded High unemployment	3	0	0
j	Below the Breadline	Shacks Desperation insecurity	15	0	0
				269	100

Table 9: Clusterplus Characteristics

 Source: Based on Swilling, 2005:17- 20 and Report of Cape Town Conference 2025:7

This diagram depicts the distribution of restaurants across clusters with community nests and silverspoons predominating.

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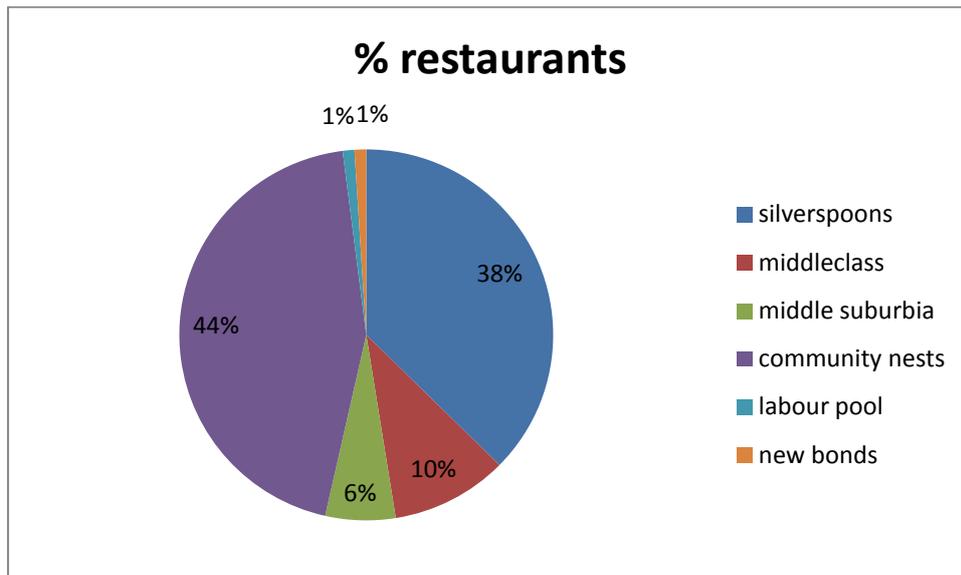
Figure 22: Clusterplus and Restaurant Location

Source: Based on Restaurant Database (Appendix A) and Swilling, 2005:14

This diagram shows how for community nests and silverspoons the percentage of restaurants is disproportionate to the percentage of households for the cluster.

'Silverspoons' have 7 percent of households in Cape Town but 38 percent of restaurants. This could be a reflection of the fact that this segment has the greatest disposable income, and restaurants fall into that pattern. "Their living standards reflect their status as "first class world citizens – achievers in a first world society. They have "tasted the good life and accept nothing less" (Swilling, 2005:17). It is also indicative that restaurants are situated in places that attract tourists and upmarket consumers. In addition customers are not bound to their neighbourhoods when they eat out and may travel to do so, going to wealthier areas. Restaurants in this instance may have aspirational value. These restaurants may require travelling by staff who cannot afford to live in the area.

In contrast, the less affluent 'community nests' has 2 percent of the households and 44 percent of the restaurants. This includes areas such as Vredehoek, Gardens, Greenpoint, Mowbray, Cape Town Centre and Sea Point. Sea Point and the city centre have a high proportion of restaurants. Again these may cater for locals but also attract other Capetonians and tourists for the vibrancy of the areas. Community nests are the "most varied of all groups, both in demographic profile and dwelling type, the older and wealthier part and the up and coming Afro-cosmopolitan society form a melting pot" (Swilling, 2005:19).

Restaurants in these areas may have the opportunity to create a sense of place and also to attract staff from nearby which is good for reducing transport and staff costs for workers.

4.4 SWOT Analysis

The SWOT Analysis is derived from the macro and micro analysis and looks at the restaurant industry in Cape Town with a view to its capacity to move to sustainability. This will guide the thinking around solutions to help the industry.

Strengths

- The restaurant industry is concentrated, particularly in clusters e.g. Waterfront, Atlantic Seaboard.
- There is evidence of innovative sustainable practices within Cape Town and surrounding areas.
- There is availability of fresh and seasonal produce.
- Cape Town is close to a wine producing region.

Weaknesses

- There are relatively few sustainability initiatives within the industry.
- There are economic pressures on restaurants to survive.
- The industry is reliant on tourists and seasonality.
- There isn't strong support yet via legislation to move to sustainability.

Opportunities

- There is a global move to sustainability which can be capitalised on.
- The restaurant industry can lock into local food economies.
- It is relatively easy to implement changes in energy, waste and water usage.
- Consumer demand shifting to sustainable restaurants.

Threats

- Economic viability as a major force.
- Energy prices becoming exorbitant.
- Pressure on food supply and prices.

4.5 Key Objectives

These objectives are derived from the situation analysis and are based on what is needed to enable the industry to move towards sustainability. These were generated by catering for all stakeholders. They would need to be progressively implemented. They also represent ideals that would require interventions from many parties.

- Create a business that can help restaurants, consumers and other stakeholders move to sustainability using restaurants as a point of influence
- Create a brand identity for the support mechanism
- Identify innovators as opinion leaders within this environment –restaurants, chefs, consumers and other partners
- Provide a space for consumers to voice their needs
- Create alliances with like minded parties – City Partnership, Slow Food Mother City, SRA, suppliers
- Create an online presence that can assist restaurants in Cape Town to move toward sustainability
- Support this presence by means of social media
- Create events that can educate restaurants about sustainability and provide opportunity to network
- Provide a space for interested parties to communicate online e.g. bloggers concerned with issues around sustainability to have a voice
- Provide an avenue to market suitable products for sustainable restaurants by suppliers

Chapter 5: Research: business model

5.1 Structure of the Business Strategy

The essence of the strategy is a business model which "describes the rationale of how an organisation creates, delivers and captures value" (Osterwalder & Pigneur, 2010:14). The rationale behind depicting the business model canvas is a format that is simple and easy to understand but doesn't take away from the complexity of a business. In addition, the revenue and cost structure are embedded into the business strategy. Depicting the canvas as a blank format, allows contributors to the business model to view the elements in an interconnected way and to capture ideas to construct a workable business framework. These elements will be used as a way of mapping out the traditional elements of a marketing strategy – segmentation, positioning, product, price, distribution and promotional strategy but in a way that promotes systemic thinking and encompasses key stakeholders (Kotler & Armstrong, 2008:51; du Plessis et al., 2009:363).

5.2 Business Model Canvas

Restaurants need to be helped to progressively move towards sustainability. The business model canvas will structure the strategy needed to assist restaurants to do so. The canvas incorporates the following interconnected elements:

- Value Propositions - solve customer problems and satisfy customer needs
- Channels - communication, distribution and sales channels
- Customer Relationships - established with each segment
- Revenue Streams - result from value propositions
- Key Resources - assets requires to deliver the elements
- Key Activities - key activities needed to fulfil value proposition
- Key Partners - outsourced activities
- Cost Structure - based on elements

This approach allows for a simple, straightforward analysis of the business logic behind a brand and creates a blueprint for strategic application via the structures, processes and systems of the business (Osterwalder & Pigneur, 2010:15).

KP Key Partnerships: Network of suppliers and partners	KA Key Activities: Most important things to do to make the business work	VP Value Propositions: The solution to the customer problem	CR Customer Relationships: Types of relationships created	CS Customer Segments: Group/groups served
	KR Key Resources: Assets to make the business model work		CH Channels: How to reach the customer segments	
CS Cost Structure: Costs of operating the business model		R$ Revenue Streams: Income generated from each segment		

Figure 23: Business Model Canvas

Source: Osterwalder & Pigneur, 2010:44

5.3 Value Proposition

KP	KA	Value Proposition	CR	CS
	KR		CH	
C$			R$	
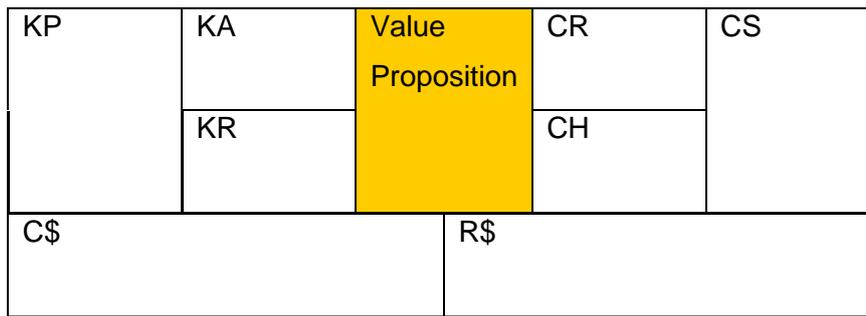
Figure 24: Value Proposition

Source: Osterwalder & Pigneur, 2010:44

A value proposition is the essence of the business model as the customer needs to be satisfied. "The value proposition is the solution to the customer need, the bundle of products/services that create value for a particular segment" (Osterwalder & Pigneur, 2010:22).

What is the Value Proposition?

To provide a space, physically or virtually, for Cape Town restaurants and relevant stakeholders where they can be informed, educated and inspired; and can collaborate and be helped to move to sustainability. Restaurants will be helped towards sustainability within the areas of food, resources (energy, water, waste) people and communication. (based on the literature review).

This value proposition is the culmination of insights expressed in the research with regard to

- Local and international trends
- Best practice overseas
- Existing initiatives by restaurants
- Shifts by suppliers towards providing sustainable resources
- Expressions of a need for support by individual restaurants
- The growth of the ethical consumer

However this cannot be taken as a concrete reflection of demand but rather a desire to support an industry in a trajectory that is evident. The shape that the support mechanism takes is responsive enough to take into account evolving demand for the service.

Vision:

To help restaurants in Cape Town collaboratively move toward sustainability.

Mission:

To create a platform that will inform, educate, help bring together and provide tools for the restaurant industry in Cape Town and its various stakeholders.

Values:

Values that are relevant to the vision and mission of the platform include:

- Generosity
- Integrity
- Collaboration
- Resilience
- Sustainability

These values have been derived from the strategic thinking behind the business plan which calls for good intent to provide information and needed services and the ability to give and work together.

Branding of the Initiative

The initiative will be called The Longtable Project. It is a consulting platform to the industry that has an online presence predominantly and helps to connect like-minded people.

Rationale

The term Longtable is inspired by the concept of the whole community is seated at a long table. Everyone is invited and everyone contributes.

Two initiatives provided inspiration for the branding of Longtable. The first is *Outstanding in the Field* (Outstanding in the field, 2010). It is a business that since 1999 has connected restaurant diners with the land and the producers of their food. This is by setting a long table at various locations and preparing a meal of local food by a regional chef. In doing so they celebrate and honour the farmers and producers of food. Another inspirational business model is the *Chefs Collaborative* (Chefs Collaborative, 2007).This is a non-profit network of chefs who promote sustainability within the industry through educating chefs and connecting them with sustainable suppliers.

5.4 Customer Segments

KP	KA	VP	CR	Customer Segments
	KR		CH	
C$			R$	
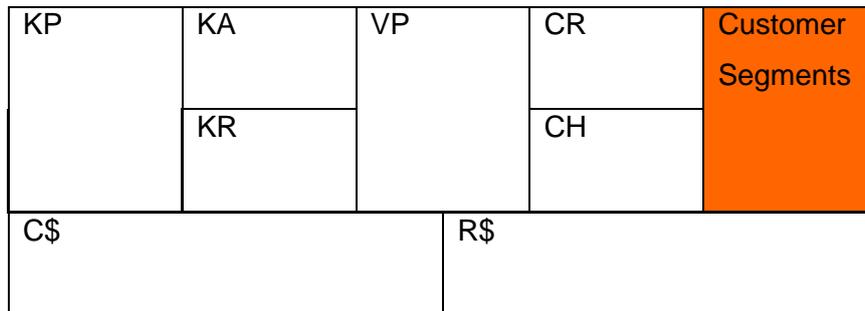
Figure 25: Customer Segments

Source: Osterwalder & Pigneur, 2010:44

This aspect represents the different groups of people that the business model is designed to serve. These can be grouped into different segments with common needs, common behaviours or attributes. Segments are not created but identified (Osterwalder & Pigneur, 2010:20; Kotler & Keller, 2012:234). Given the relatively small size of the Cape Town market, segmentation has already been implemented insofar as the market is relatively homogenous geographically.

The primary customers are the restaurants themselves. However the value proposition must look after other customers who have different needs. These include local consumers and tourists; partners and other stakeholders (e.g. NGOs, the City Bloggers, tour operators, concierges).
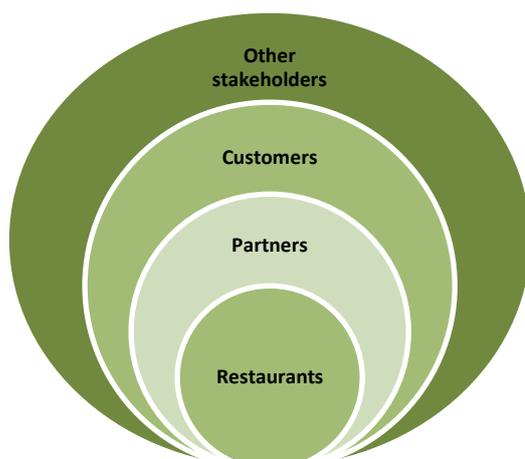
Figure 26: Segmentation of Stakeholders

Source: Chapter 4

Restaurant as Segment

Within the restaurant sector as already illustrated in the market analysis further grouping can take place according the criteria that apply to the segmentation of businesses. Business markets can be segmented in the same way as consumer markets but there are other variables that businesses use (Kotler & Keller, 2006:258). Some of these relevant variables are shown below.

Segmentation Criteria	Relevant question	Answer
Demographic		
Industry	Which industry to serve?	Restaurant
Company Size	What size companies should we serve?	All
Location	What geographical areas should we serve?	Cape Town
Purchasing Criteria/Needs	What criteria should we serve?	Restaurant types Certification
Buyer-Seller Similarity	Should we serve those whose values similar?	Initially early adopters

Table 10: Segmentation Variables

Source: Adapted from Kotler & Keller, 2006: 259

The most relevant criteria are analysed as geographical segmentation, type of restaurants and early adopters.

Geographical Segmentation within Cape Town

The information in the database of restaurants (Appendix A) has been used to group restaurants into four key areas. This has been described in Fig. 21 in the situation analysis. In this context the data can be looked at as a way of grouping or segmenting customers. The relevance of this level of segmentation is that restaurants can be encouraged to collaborate, share information and source smaller and local suppliers. It can be seen that the biggest concentration is in the Southern Suburbs and City Bowl. Restaurants within each region can be further subdivided as needed – by type of restaurant, shared values, and price.

Geographic Segmentation of Restaurants
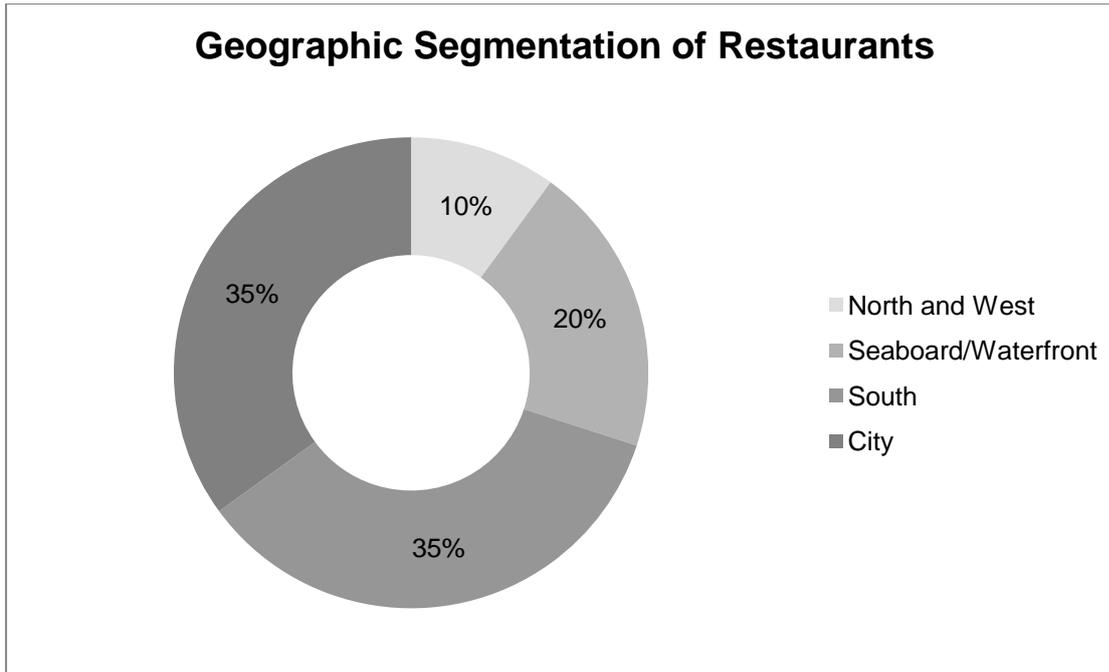
Figure 27: Geographic Segmentation Of Restaurants

Source: Based on Restaurant Database (Appendix A)

Segmentation by Restaurant Type

The information in the restaurant database (Appendix A) has also been used to group restaurants according to type of offering which may be regional (e.g. Italian) or correspond to a style, such as contemporary. These designations are derived from the key guides used to compile the database (Eat Out, 2010). The information has been presented in Fig. 17 of the situation analysis. Again it becomes a way of grouping similar customers which can be layered with geographical segmentation. The segments are roughly the same size ranging from 20-40 restaurants/segment. The value of this approach is based on the insight that different restaurant groupings may have different needs and can be served as a cluster. As an example Italian restaurants can be helped to source local, seasonal produce and reduce imports. Seafood restaurants can be helped to become SASSI compliant. Restaurants of the same type and geographical region may collaborate in sourcing food from local growers.

Segmentation by Restaurant Type

Light meals, 14%

Bistro/Grill, 15%

Contemporary, 13%

Indian/African, 14%

Seafood, 14%

Asian, 10%

Italian, 20%
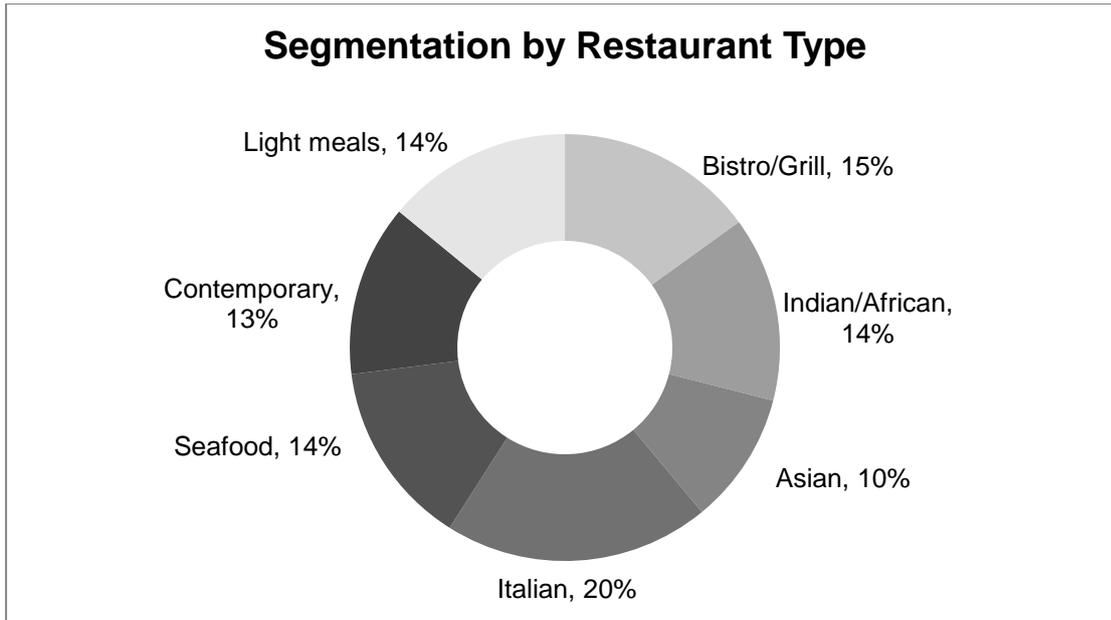
Figure 28: Segmentation by Restaurant Type

Source: Based on Restaurant Database (Appendix A)

Segmentation by Values of Restaurant – Early Adopters

Another model that is useful from a segmentation point of view is the idea that adopters of a new product can be categorized according to the relative time of adoption. This would indicate readiness to move to sustainability. In each category there are innovators, followed by an increasing number of adopters until the number peaks and then reduces as there are fewer non adopters. It is important to try and identify innovators and early adopters first (Kotler & Keller, 2012:611) and tailor the offering accordingly.

21/2% Innovators

131/2% Early adopters

34% Early majority

34% Late majority

16% Laggards

Time of Adoption of Innovations
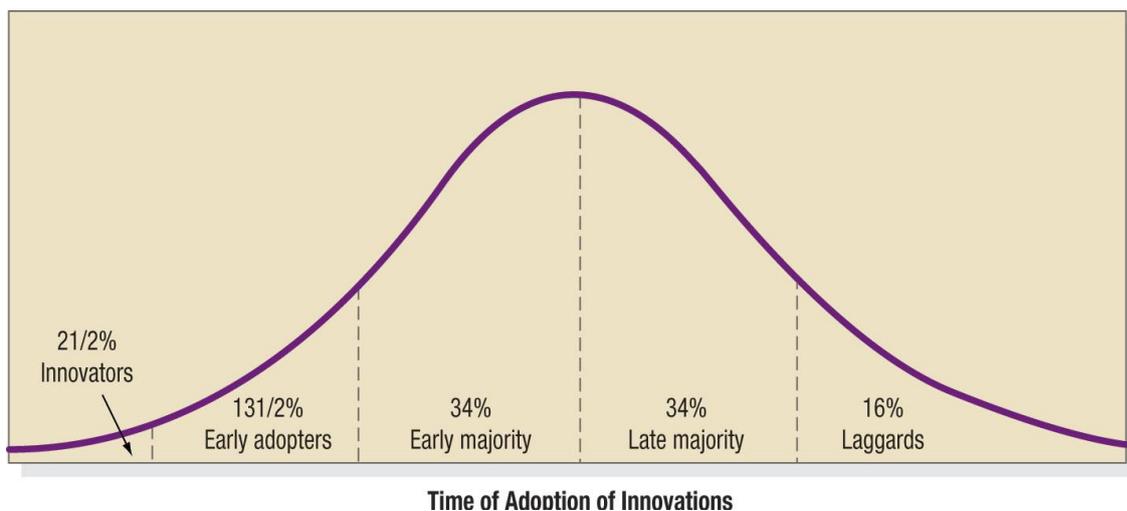
Figure 29: Characterisation of Adopters of Innovation

Source: Kotler & Keller, 2012:611

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The characteristics of each group of adopters are

Adopter Categories	
Innovators	Venturesome Enjoy new products Happy to test products in return for lower prices
Early adopters	Opinion leaders Less price sensitive Value personalised solutions, good service support
Early majority	Mainstream Want proven benefits
Late majority	Sceptical Risk Averse Conservative
Laggards	Tradition bound Resist innovation

Table 11: Adopter Categories

Source: Based on Kotler & Keller, 2012:633

Profile

The customer of the business model is any restaurant within the Cape Town region that is looking for information, collaboration, support or ultimately certification. Ideally innovators and early adopters can be targeted and to a large measure can be assessed by existing moves towards sustainability, e.g. local, organic, seasonal, and recycling. Within this, food clusters can be grouped as their requirements are different, as per restaurant type segmentation.

5.5 Key Channels

KP	KA	VP	CR	CS
	KR		Channels	
C$		R$		
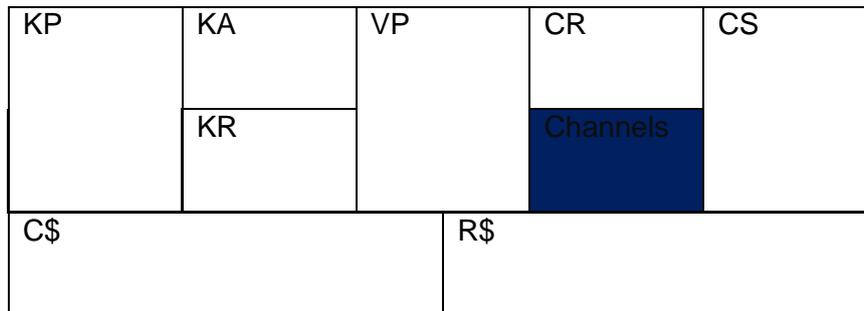
Figure 30: Key Channels

Source: Osterwalder & Pigneur, 2010:44

This describes how the business connects with the customer to deliver the value proposition. Channels can be used to raise awareness, allow evaluation and delivery of the value proposition and allow purchase of products and services (Osterwalder & Pigneur, 2010:26).

To achieve the value proposition, it is proposed that a well designed and run website with links to social media would be an ideal platform to bring together the different players that need to collaborate in the Industry.

Why a Website?

A website is a space where multiple needs can be fulfilled. A website is multifunctional. A website can be a reflection of the tools and support the Longtable will offer. These will be based on the needs of the various stakeholders.

These will range from:
- Information
- Advocacy
- Education
- Tools
- Listings
- Opportunities for collaboration
- Links to social media platforms

A website can also be easily updated and accessed.

5.6 Customer Relationships

KP	KA	VP	Customer Relationships	CS
	KR		CH	
C$		R$		
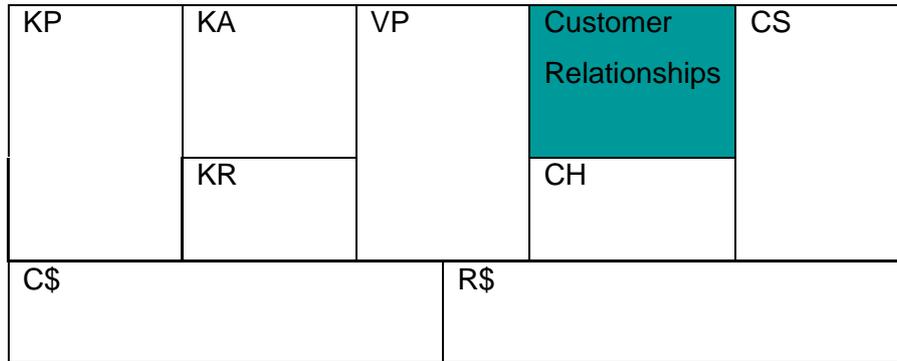
Figure 31: Customer Relationships

Source: Osterwalder & Pigneur, 2010:44

This aspect of the business model is enabled by understanding the types of relationships that are expected by customer segments. There are a range of relationships possible from automated, personal, communities and co-creation. Companies are increasingly making use of communities to enable their customers to interact with one another (Osterwalder & Pigneur, 2010:29). The feasibility of these models is dependent on cost. It is envisaged that the relationship will start as relatively one sided by imparting information and support and information to the industry.

However the idea behind the Longtable is that everyone is seated at the table. Therefore as the relationships are created and communities are developed via the website and social media, the business can progress from being a consultancy to a co-operative.

consult	co-operate	co-operative
Information Connecting	Information Connecting Sharing Openness	Economic Participation
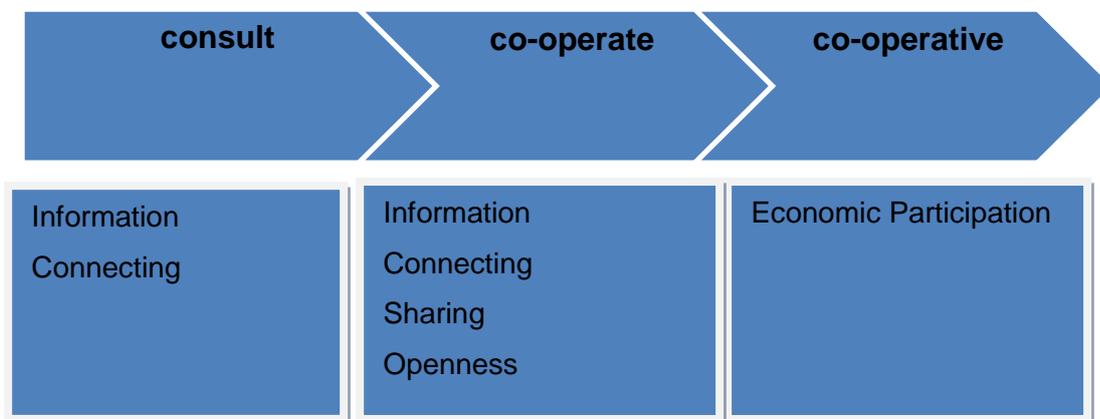
Figure 32: Progression of Business

Source: Based on Chapter 4

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As a consultancy the Longtable Project is a social enterprise as the purpose of the project is to use a business-like approach through offering a service to achieve a social and environmental purpose (Legal Resource Centre, 2011:2). However there is no legal definition or legal business form in South Africa for the establishment of these enterprises (Legal Resource Centre, 2011:2). While the enterprise is starting to develop it makes sense to run it as a sole proprietorship for the ease of establishment. The disadvantage of this legal form is the personal liability should it fail. However as a service business there is minimal investment in overheads. It is intended to slowly make inroads into the market and then to showcase the results with a view to scaling up restaurant support and raise funding if needed.

As the business grows a co-operative as a potential business structure has been selected as "a co-operative is an autonomous association of persons united voluntarily to meet their mutual economic, social and cultural needs and aspirations through a jointly owned and democratically controlled enterprise organised and operated on co-operative principles" (Cipro, 2011). The idea behind the co-operative is a business owned and run by the members, in this case the restaurants and other stakeholders. The year 2012 has been designated the International Year of Co-operatives by the United Nations as many people are turning to fairer, more ethical businesses (The Ecologist, 2012). This would allow for a grouping of restaurants and stakeholders that is voluntary, funded by contributions and committed to the individual and joint needs of the industry with regard to sustainability. This would provide a space for members to pool resources and expertise, e.g. a group of restaurants may collaboratively devote a piece of land to urban farming for their fresh produce. The co-operative would also be a vehicle for training and information sharing. However, the formation of the co-operative would be dependent on buy-in to succeed. The following characteristics and principles are based on the Co-operatives Act, 2005: Act No. 14. (Cipro, 2011).

Characteristics	Self-Help
	Self-Responsibility
	Democracy
	Equality
	Equity
	Solidarity
	Honesty
	Openness
	Social Responsibility

	Caring For Others
Guiding principles	Democratic Member Control
	Member Economic Participation
	Autonomy And Independence
	Education, Training and Information
	Cooperation Among Co-operatives
	Concern For The Community

Table 12: Characteristics and Principles of a Co-operative

Source: Based on Cipro, 2011

5.7 Key Activities
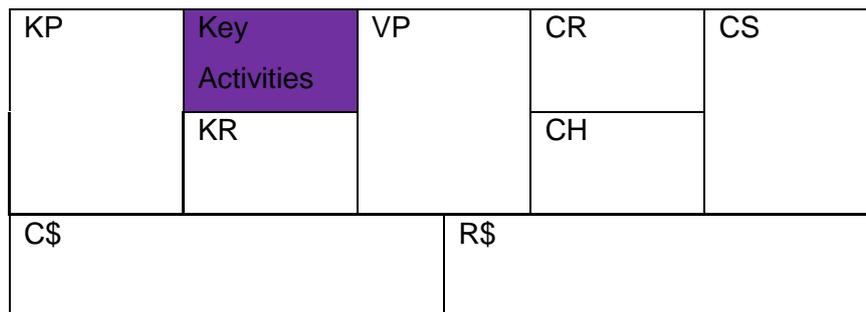
Figure 33: Key Activities

Source: Osterwalder & Pigneur, 2010:44

This describes the important activities the business needs to do to survive and operate successfully. These will deliver the value proposition, reach the customers, maintain relationships and earn revenue. The key activities related to the business proposition do not involve direct production but involve problem solving and platform maintenance (Osterwalder & Pigneur, 2010:36,7).

The key activities are derived from the needs that have been identified. These include:

- Education of restaurants with regard to sustainability
- Training of restaurants with regard to sustainability
- Creation of events for the industry relating to sustainability

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- Consulting with restaurant via assessment tools

- A listing of all restaurants on a website

- Stories of restaurants moving towards sustainability on a website

- Consumer comments on sustainable restaurants on a website

- Reviews of restaurants

- Social Media Activity via platforms such as facebook, twitter, google+ and instagram

- Link to social media feed on a website

- Links to relevant parties: e.g. SRA

- Supplier Listing on a website

- Relevant articles and academic papers on the website

Initially this information will be geared to attract attention and support and progressively members will be able to attract outside support.

5.8 Key Resources

KP	KA	VP	CR	CS
	Key Resources		CH	
C$		R$		
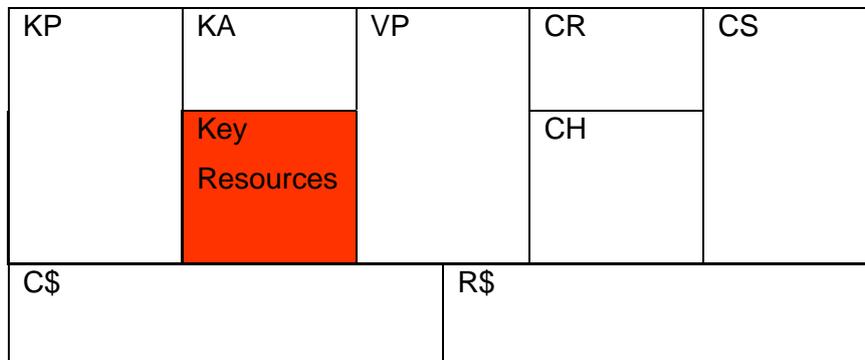
Figure 34: Key Resources

Source: Osterwalder & Pigneur, 2010:44

These resources are what make the business model work. They "allow an enterprise to create and offer a value proposition, reach markets, maintain relationships with customer segments, and earn revenues" (Osterwalder & Pigneur, 2010:34). These resources can be physical, intellectual, human or financial.

The key resources needed by Longtable are:

Financial: Start up capital to fund the setting up of a website and brand development as well as necessary supplies for communication and operational expenses.

Physical Assets: These include a vehicle for transportation, office space and computer equipment

Intellectual: These include the brand, website, proprietary knowledge and databases and other information

Human: Key persons who can run the website, consult with restaurants and market the Longtable

Initially the impetus will be to get the business started using minimal finance until it is in a position to demonstrate viability to potential sponsors/funders. This interim period will also help assess demand for the service and allow opportunity for flexibility. As the business is a social enterprise it can be responsive to the needs of the market.

Self Assessment Tool

One of the proprietary tools is the self assessment tools that have been designed to provide restaurants with a comprehensive overview of decisions they can make as well as benchmark their own progress. These effectively are an energy, menu, and service and communications audit that culminate in strategic recommendations. These have been created out of the information found in the literature review and situation analysis.

There will be a tool on the website that can help self assessment but would be most valuable to compile with a consultant who can offer specific insight into the industry and relevant details for the particular restaurant. This could include suppliers and other service providers. A fee would be charged for this service. For the purpose of this model, the assessment is expressed as a table. This information would be programmed on the website .The analysis is broken up into four parts that reflect the relevant resources of a restaurant: Food; energy, water and waste; people and communication. Food is further divided into vegetables and fruit; meat and fish.

There will be a membership section on the website. Restaurants will be able to join and be verified as members. There will be a self evaluation section on the audit. They will be able to self complete the audit. They can be sent a graphical report illustrating where they are and where they need to be with key recommendations of how to get there. They will have the option of someone helping them. The audit will help them list their current status in terms of sustainability criteria: It will be about rating a percentage of progress to a sustainable goal. For example:

Food: organic, fair trade, locally sourced, self grown

Energy: transport, efficiencies, renewable

They can submit their results to get a report on what they can do or to have a consultation, operator to operator learning. They then have the opportunity to 'sit' at the long table – appended to their listing. This will be for a fee and a commitment to making three specific changes in a year. They will also be able to evaluate their overall sustainability journey for each criterion – food, resources, people and communication. Based on the specific activities chosen, the restaurant can be helped to self assess where they are in the broader picture by using the framework below. This can help the restaurant seek longer term goals.

The point of this process is to guide the restaurateur into specific activities that can help them meet broad sustainability goals. Based in this they can select things they would like to achieve that are realistic and achievable. Once they have a list of measures they would like to achieve, specific timeframes can be applied. They can then be connected to specific partners who will be able to help them.

CATEGORY	MENU ANALYSIS	INTERVENTIONS					SHIFTS	IMPACT COST-BENEFIT
		TIME	SPACE	METHOD	DISTRIBUTE	INTERVENE		
VEG/FRUIT & HERBS Leaves Roots Bulbs Legumes Stems Vegetables as Fruit FRUIT: Deciduous Citrus Sub Tropical Tropical HERBS		Seasonal Increased Choices	Local	Organic Lei Fairtrade slow food	Markets Supplier-Contracts Box Schemes Collaborative Buying Reduce Transport Reduce Packaging	Grow Your Own Composting Foraging	More Menu Items	
MEAT/FISH Lamb Beef Game Pork Chicken Fish		Seasonal	Local	Free Range Organic Ethical Sassi (Fish) Humane Slow food	Markets Supplier-Contracts Collaborative buying Reduce transport Reduce packaging	Fishing	Nose To Tail Reduce Meat	

ASSESSMENT TOOL
FOOD ANALYSIS

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FOOD ANALYSIS								
CATEGORY	MENU ANALYSIS	INTERVENTIONS					SHIFTS	IMPACT COST-BENEFIT
		TIME	SPACE	METHOD	DISTRIBUTE	INTERVENE		
Milk Cheese Yoghurt Cream Eggs			Local Fewer Imports	Free Range Organic Ethical Humane	Markets Supplier-Contracts Collaborative buying Reduce transport Reduce packaging	Chickens	New Suppliers	
DRINKS Water Juice Soft Drinks Wine Beer Spirits Coffee Tea		Seasonal	Local Regional Fewer Imports	Fair Trade Organic Ethical BWI	Markets Supplier-Contracts Collaborative buying Reduce transport Reduce packaging	Tap water Filtration Healthy drinks Juices	New Suppliers	

Table 13: Food Analysis for Restaurants

Source: Chapters 3 & 4

The table below can be programmed or expanded to give specific actions that are connected to Table 13.

This also enables one to attach a timeframe to actions they may want to do in a longer timeframe.

FOOD GOALS	Activity	Current	One Year	% Shift	Overall Timeframe
TO WHAT EXTENT (PERCENTAGE) DO I USE/SUPPORT?					
	Change menu every season to incorporate seasonal produce				
	Incorporate more vegetarian items on the menu				
	Look to substitute items				
	Reduce food items that are produced with high external inputs				
	Increase healthier menu options				
	Grow your own vegetables and herbs				
	Source free range produce where possible Eggs Chicken Beef Lamb Pork				
	Source produce where possible that is Organic Biodynamic Pesticide free Low external input (LEI) Aim to preserve biodiversity				
	Support Fair Trade produce				
	Support the Slow Food movement – membership				
	Only use fish from the green SASSI list				

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	Partake in SASSI training programme: www.wwfsassi.org			
	Serve coffee that is Organic Fair trade Regional			
	Source food from producers closer to the restaurant local regional			
	Support local food markets			
	Support local CSA's			
	Support local box schemes			
	Create secure relationships with local suppliers			
	Create buying groups with other restaurants			
	Use foraged food on the menu if appropriate			
	Serve wine that is Natural Organic Part of the BWI Not imported			
	OTHER:			

Table 14: Food-Related Activities for Restaurants

Source: Chapters 3 & 4

RESOURCE ANALYSIS								
ENERGY	INPUT	INTERVENTIONS						IMPACT
		BUILD	COOKING	CLEANING	HVAC	LIGHTING	TRANSPORT	COST-BENEFIT
Cooking Washing HVAC Lighting Transport	Audit Energy Management System Analyse Operations	Eco Building	Efficiency Training Energystar Equipment Green Energy Renewable On Site Use Gas	Efficiency Training Energystar Equipment Green Energy	Efficiency Training Green Energy Renewable On Site	Efficiency Change Bulbs Sensors	Local	
RESOURCE ANALYSIS								
WATER	QUANTITY	INTERVENTIONS						IMPACT COST-BENEFIT
		GARDEN	COOKING	CLEANING	BATHROOM	EMBODIED	THINKING	

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	Audit	Indigenous	Efficiency	Efficiency	Grey Water	LEI Agriculture	Circular	
Cooking Washing Sanitation Garden Embodied		Grey Water Rainwater	Training Energystar Equipment Low Flow	Training Energystar Equipment	Low Flow Sensors Water Saving Toilets			
RESOURCE ANALYSIS								

WASTE	QUANTITY	INTERVENTIONS					IMPACT COST-BENEFIT
		BUILT	FOOD	PAPER	PACKAGING	THINKING	
Built Food Packaging	Audit	Use Less Recycling Reuse Repurpose	Compost Smaller Portions Take Aways Recycle Oil Separate Waste	Recycle	Recycle Repurpose Dispose of Hazardous	Circular	

Table 15: Resource Analysis for Restaurants: Energy, Water, Waste

Source: Chapters 3 & 4

The table below can be programmed or expanded to give specific actions that are connected to table 15.

This also enables one to attach a timeframe to actions they may want to do in a longer timeframe.

Energy Water Waste	ACTIVITY	Current	One Year	Percentage shift/ Yor N	Overall Timeframe
	TO WHAT EXTENT (PERCENTAGE) DO I USE/SUPPORT? Or HAVE I/CAN I IMPLEMENT?				
Energy	Conduct an audit of energy usage for lighting, heating, cooking, HVAC				
	Analyse menu for more efficient cooking methods				
	Analyse cooking equipment schedule to maximise use and minimise downtime				
	Set goals and monitor energy usage				
	Use energy saving lighting				
	Replace appliances with energy saving appliances				
	Save energy by supporting local suppliers				
	Use gas instead of electricity if possible				
	Use renewable energy on site e.g. biogas digesters				
	Support energy sources that have less emissions				
	Maintain electrical equipment to improve lifespan				
	Install light sensors to detect occupancy				
	Install an energy management system				
	Take advantage of natural light and ventilation where possible				
	Encourage employees to walk or cycle to work if possible				
	Look for energy savings in supply chain				
Water	Conduct a water audit				
	Use low flow taps to reduce usage				
	Invest in rainwater tanks				
	Invest in grey water systems for sanitation and gardening				
	Serve tap water				

	Use water efficient toilets				
Waste	Conduct a waste audit				
	Create an integrated waste management strategy				
	Analyse menu for portion sizes and items that go to waste				
	Implement doggie bags				
	Pass food on if suitable for consumption				
	Turn food waste into compost if unsuitable for consumption				
	Buy equipment and furniture second hand				
	Send packaging back to suppliers if possible				
	Recycle glass, metal, plastic and paper				
	Recycle oil				
	Dispose of hazardous waste appropriately				
	OTHER:				

Table 16: Resource Activities for Restaurants

Source: Chapters 3 & 4

PEOPLE	INPUT	INTERVENTIONS					IMPACT COST-BENEFIT
		TRAINING	BEE	PROJECTS	STAFF	COMMUNITY	
Suppliers Cooking Cleaning Service Community	Audit	Knowledge Sharing	Compliance	Existing initiatives Enterprise development	Fair Pay Training Incentives	Support Initiatives Sense Of Place	

Table 17: People Analysis for Restaurants

Source: Chapters 3 & 4

The table below can be programmed or expanded to give specific actions that are connected to table 17. This also enables one to attach a timeframe to actions they may want to do in a longer timeframe.

People	ACTIVITY	Current	One Year	Percentage shift or Y/N	Timeframe
	TO WHAT EXTENT (PERCENTAGE) DO I USE/SUPPORT? Or HAVE I/CAN I IMPLEMENT?				
People	Broad-Based Black Economic Empowerment				
	Staff: fair payment				
	Staff: training programme				
	Staff: additional incentives				
	Staff: job security				
	Community: create social and environmental initiatives				
	Community: support social and environmental initiatives				
	Community: support heritage & sense of place				
	OTHER				

Table 18: People Activities for Restaurants

Source: Chapters 3 & 4

COMMUNICATION	INPUT	INTERVENTIONS					IMPACT COST-BENEFIT
		TRAINING	INTRINSIC	MARKETING	COMMUNITY	INDUSTRY	
Staff Suppliers Customers Publics Neighbour	Brand Audit	Staff	Menu Service Signage	Social Media Listings	Associations	Collaborations Certifications	

Table 19: Communication Analysis for Restaurants

Source: Chapters 3 & 4

The table below can be programmed or expanded to give specific actions that are connected to table 19. This also enables one to attach a timeframe to actions they may want to do in a longer timeframe.

Communication	ACTIVITY	Current	One Year	Percentage shift or Y/N	Timeframe
	TO WHAT EXTENT (PERCENTAGE) DO I USE/SUPPORT? Or HAVE I/CAN I IMPLEMENT?				
Communication	Redesign menu to communicate sustainable options				
	Be transparent with consumers about your sustainable journey				
	Use publicity where appropriate				
	Avoid green-washing				
	Use multiple vehicles to reach consumer –all contact points				
	Obtain and communicate certifications where appropriate				
	Create communication channels and training for staff				
	OTHER				

Table 20: Communication Activities for Restaurants

Source: Chapters 3 & 4

The Sustainability Framework for Restaurants helps plot a restaurant's intent and progression to sustainability with regard to food, resources, people and communication. (section 3.6.2). A restaurant may have the intention to be compliant with waste regulations (elementary) but innovative with regard to food sourcing. Brand values and positioning would underpin these decisions.

STAGE	FOOD	ENERGY WATER WASTE	PEOPLE	COMMUNICATION
TRANSFORMING				
INTEGRATIVE				
INNOVATIVE				
ENGAGED				
ELEMENTARY				

BRAND VALUES AND POSITIONING

Table 21: Sustainability Framework for Restaurants

Source: Adapted from Blowfield, 2008

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5.9 Key Partnerships

KP Key Partnerships	KA	VP	CR	CS
	KR		CH	
C$		R$		
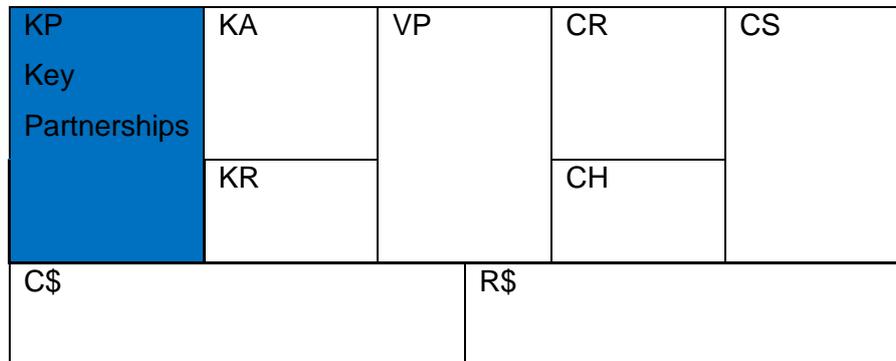
Figure 35: Key Partnerships

Source: Based on Osterwalder & Pigneur, 2010:44

This describes the network of suppliers and partners that is the basis of the business model (Osterwalder & Pigneur, 2010:38). In this instance the nature of these relationships needs to be co operative and collaborative. "Since the agricultural revolution, our society has been organised through hierarchy. The new paradigm would be more equitable, organised through parallel cooperation" (Bill Drayton in Grant, 2010:14).

The model for the business is one that provides information and directs restaurants to key players in the industry who are able to deliver needed services. This model enables the business to benefit from pre existing skill sets in the marketplace as well as optimising the allocation of resources and activities (Osterwalder & Pigneur, 2010:39). The key insight is that for restaurants sustainable issues are still low down on their agenda given economic pressures and lack of know-how and information on sustainability (Metcalfe, 2010). Restaurants are not the only acupuncture point in the system needed to move restaurants to sustainability. However collectively restaurants can have buying power and benefit from potential economies of scale.

The system includes

- City
- Suppliers
- Consumers
- Restaurant owners
- Chefs

- Staff
- Tourists
- Local Communities
- Government
- Media
- Bloggers
- Tourist Agencies
- Accommodation agents and owners

Each of these plays a role and thus need to be part of the move to sustainability.

For example:

- A restaurant may introduce energy savings but staff may not implement changes needed
- A restaurant needs reliable suppliers if they want to move to more sustainable practices
- They need the support of media to communicate these changes
- Consumers need to support these initiatives
- The city needs to provide incentives to restaurants to become sustainable

Some of the potential partnerships that can be forged by Longtable and restaurants are indicated below. These play a role in Cape Town in wide ranging areas from development, waste management, food supply and accreditation.

Kind of Partnership	Example of Partner	What it is	Nature of Relationship
Development	Cape Town Partnership	Section 21 Company Development facilitator for central city Funded by contributions from property sector/building owners and an annual grant from the City of Cape Town (CCT) "One of the primary aims of the CTP was to reconcile returns on investment in central city properties with a wider set of developmental objectives with citywide significance including job creation, residential accommodation, access to transport, tourism, public safety, cultural development and the creation of a distinct inner city urbanism(or lifestyle)."(Swilling in Pieterse, 2010: 238)	Partner
Slow Food Movement	Slow Food Mother City Slow Food Cape Town	Part of Global Slow Food movement "Slow Food Mother City is a local convivium (chapter) of the international Slow Food movement. Slow Food celebrates, protects and promotes foods that are good, clean and fair. " (slowfoodmothercity, 2011)	Knowledge sharing
Cookery School	Silwood Kitchen (Eat In, 2011:93)	Established 50 years ago Oldest, prestigious school	Knowledge sharing
Food and Wine Initiatives	SASSI www.wwfsassi.co.za	"SASSI has three primary objectives: Promote voluntary compliance of the law through education and awareness Shift consumer demand away from over-	Membership Support

		exploited species to more sustainable options. Create awareness around marine conservation issues" (SASSI, 2012)	
	Biodiversity Wine Initiative	Partnership between the conservation sector (WWF and the Botanical Society of South Africa) and the wine industry to produce wine sustainably by protecting biodiversity (BWI, 2010)	Membership
	Fairtrade	"Fair Trade is a global movement that aims to improve production and trading conditions to benefit smallholders, farm workers and disadvantaged employees and artisans" (Fair Trade South Africa, 2012)	Partner
Tourism	Cape Town Tourism	Tourism body, signatory of Responsible Tourism	Partner
	Fedhasa	Represents Hospitality Industry	Partner
	Responsible Cape Town	Responsible Tourism (responsiblecapetown, 2011)	Partner
Industry	RASA Restaurant.org.za	"The Restaurant Association of South Africa (RASA) is a non-governmental, non-profit organisation that provides a multitude of services to South Africa's restaurant industry. RASA promotes dining out, encourages restaurant careers, publicises the industry's commitment to food safety and fair labour practices, and highlights the restaurant industry's impact on the economy and local communities." (RASA, 2010)	Partner
	Eat In	Online and print resource (Eat In, 2012)	Partner

	Eat Out	Online and print resource (Donnelly, 2012)	Partner
an	SRA -London	"The Sustainable Restaurant Association (SRA) is a national not-for-profit membership association, providing restaurants with advice and support to help them navigate the whole spectrum of sustainability issues. The SRA also offers independent accreditation to evaluate how far down the sustainability path restaurants are." (SRA, 2012)	
Waste	IWEX	"IWEX (Integrated Waste Exchange) is a free online system that enables waste generators and users to exchange waste materials. Operating on the principle that 'one person's garbage is another person's gold,' IWEX facilitates the re-use of waste, thereby conserving energy, minimising resource use and reducing the pressure on Cape Town's landfill space. The service is freely available to anyone who generates or uses waste, including companies, individuals, institutions, schools, NGOs and community groups." (IWEX, 2012)	Supplier
Produce Suppliers	Simply Wholesome Ocean Jewels Gardeners Glory Richard Bosman	Free Range Chicken and eggs, fresh produce SASSI approved fresh fish Local honey Local charcuterie, ethically sourced	Supplier

Table 22: Restaurant Partners

Source: Chapters 3 & 4

5.10 Cost Structure

KP	KA	VP	CR	CS
	KR		CH	
C$ Cost Structure		R$		

Figure 36: Cost Structure

Source: Based on Osterwalder & Pigneur, 2010:44

The Longtable will need start up capital to fund the setup as outlined in the resources.
These include:

- Brand design and development (see Appendix B)
- Website design and development (see Appendix B)
- Development of audit tool
- Set up of office equipment.
- Initial PR campaign
- Training materials
- Launch event

Ultimately a sponsor/ sponsors will be needed to fund these. Larger companies and suppliers that tie in with the ethics of the Longtable can be sought to do this. Funding could also be sought from partners such as Cape Town Tourism, who will have a vested interest in the restaurant industry. However initially the venture will be self-funded and financed with a view to creating a working ,scalable model.

The running costs will include:

- Maintenance of website
- Maintenance of social media
- Listing of restaurants and suppliers
- Listing of articles
- Organising of events
- Transport
- Training materials
- Marketing and publicity
- Audits

Ideally the initiative could start with one fulltime member and drawing on the expertise of other consultants on an ad hoc basis. The initial costs can be absorbed as an opportunity cost to get the enterprise in a position to attract interest. The costing allows for a six month set up period and a six month 'pilot' period before attracting sponsors/funding.

Cost Structure	Item	Cost	Description
Start up	Brand development	7 000	Covers Research Logo Visual and brand language Website design and direction
	Website development	5000	Wordpress Template Blog Social Media Listings hosting
	Basic Audit Tool	10000	Computerised version of tool Inhouse programmer

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	Office Equipment	5000	Laptop/printer
			Supplemented by existing equipment
			Home based office
	PR Campaign	10 000	Social Media Based
			Inhouse
	Materials	12000	Stickers
			Welcome packs
			PDf guidebook
	Launch Event	10 000	Sponsored
			Innovators
		R47000	Sponsors and Partnerships sought as far as possible
Running Costs 6 Monthly After 6 months setup	Maintenance of website	12000	Inhouse
			Bandwidth
			Design
			Hosting
	Maintenance of social media Listing of articles	12000	Inhouse
			Bandwidth
	Listing of restaurants and suppliers	12000	Inhouse
			Bandwidth
			Research
			Communication
	Audits	6000	Paymrnt for energy audit
	Organising of events	30000	Admin
			PR
			Sponsorships
	Transport	6000	Visits to restaurants etc

	Training materials	12000	Stickers Books Welcome packs
	Marketing and publicity	18000	Online Advertising Email marketing
	Total	R18 000	R109 000 over 6 month 'pilot'

Table 23: Cost Projections

Source: Chapter 5

Costs need to be streamlined in order to be economically sustainable and to create a viable model that can be upscaled when necessary. As a social enterprise the idea is to pass low costs on to the client so that the service is not exhorbitant.

5.11 Revenue streams
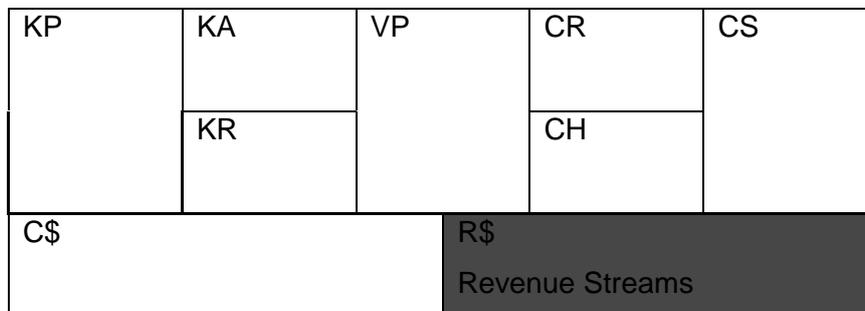
Figure 37: Revenue Streams

Source: Based on Osterwalder & Pigneur, 2010:44

Initially the venture would need funding, as if restaurants had to pay to list, there may be a downward spiral with poor listings leading to fewer listings.

The following revenue streams have been identified:

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The main revenue stream comes from the credibility and authority that comes from a well run and managed informative site for the industry. This becomes an advert for individual and group consulting.

- Paid for events for the industry
- Consulting work to restaurants
- Social Media/ Pr
- Training of restaurants
- A turnkey service to restaurants to meet their sustainability goals with a percentage of earnings from suppliers
- An online manual that is paid for
- Affiliate advertising on the website can also bring in revenue.
- Membership fees in the medium term

Revenue Structure Over 6 month 'pilot' period	Item	Revenue/target First 6 months	Description
	Longtable Events	R24000	Hosted by restaurants Free for participants, eventbrite Hosted by restaurant –food/drink Co-sponsors -fee R2000/event – branding, placement, advertisng Bi-monthly
	Audits	R15000	Energy, water, waste, menu, communication, social audits R900 –3000/audit/venueMember discounts4/month
	Training Training manuals	R8000	Training staff in resource efficency R300/h 20 hours Manuals on restaurant sustainability R200- 10
	Turnkey Sustainability	R30 000	Two restuarants –R15 000
	Social media	R30 000	Service to restuarants Communicate sustainability
	Membership	R12 000	Initial rollout:Innovators - 20R600/year –discounted.

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			benefits
;	Total	R109000	

Table 24: Revenue Streams

Source: Chpater 5

If these targets are realised the project will have recouped the variable costs of the first six months but will still need to arrange finance to pay off the initial outlay.

Restaurants need to be helped to understand how savings in resource usage can offset expenses involved in moving to sustainability –food, people, communication and inital outlay for savings in resources. This is covered by the educational function of the Longtable.

After the first six months a second phase can begin where larger clients (chains) can be approached and the supply side of the business upscaled accordingly to service these clients.

5.11 Summary

The business model is depicted below showing the interrelationship of all the elements

Figure 38: Longtable Business CanvasSource:

Chapter 5

Chapter 6: Conclusion and Recommendations

6.1 Introduction

The literature review and business model on sustainable restaurants in Cape Town have yielded interesting insights with regard to the shifts and support needed by the restaurant industry in Cape Town. This study connected global concerns to specific interventions by Cape Town restaurants with support from the Longtable Project.

6.2 Research findings

The research study investigated sustainability issues relating to the restaurant industry with a view to providing recommendations for a supportive model to guide South African, and specifically Cape Town, restaurants towards sustainable practices.

What is the significance of restaurants with regard to sustainability?

Restaurants have the opportunity to address issues around sustainability, to address an interconnected state of crisis in our global system. We live in an urbanised, globalised world and are consuming resources at a rate that does not allow the ecosystems to replenish. The predominantly linear economic system moves from extraction to disposal. Extraction of resources beyond their capacity to renew has led to the degradation of ecosystems and their services. Non renewable resources such as oil and coal are also being rapidly depleted.

Production and consumption are geared toward a minority. Although a small proportion of the population is consuming most of the world resources, overall we are living a two planet lifestyle. The by-products of this consumption economy are also detrimental to the ecosystem as they cause pollution and contribute to climate change. The poor struggle the most in the competition for resources or to be protected from environmental impacts of our current lifestyle.

In particular, the predominantly industrialised food system is unsustainable due to its dependence on non renewable resource for its energy requirements, coupled with the environmental impacts of the system. In contrast, local food based economies offer the opportunity to reduce ecological impacts and build up the social fabric of the community. Restaurants are part of the food system. They are sites where food is procured, consumed and disposed of. Energy and water are used in their process, and waste of food and other resources is eliminated. Restaurants employ people and are part of a broader community.

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Moving towards sustainability requires seeking the sustainability of socioeconomic systems within ecological limits. It means consuming less and differently in a response to the limits of the ecological system. Given the urbanised reality, much of this shift is happening at city level. Developing cities have the opportunity to leapfrog the patterns of industrialised countries with sustainable practices that can achieve growth decoupled from material usage.

Sustainable food systems also address economic, social and environmental sustainability. Sustainable agriculture includes approaches such as LEI and organic farming which work together with ecological systems by creating circular patterns of production. Minimal external inputs are employed and plants, soil and livestock work as one system. This is by introducing practices such as nutrient cycling, soil regeneration, and natural pest control. Waste strategies would need to be addressed and integrated with consumption patterns. Social and economic redress would need to be considered with regard to employees and the community. These changes and actions needed to be communicated to customers, the public and other stakeholders.

What is the status of the Cape Town restaurant sector?

The Cape Town restaurant sector needs to be understood within the context of the city of Cape Town. Cape Town is a city that is experiencing pressure on resources on many fronts. Economically 35 percent of its population of 3.7 million is earning less than R3500 a month and 26 percent are unemployed. Rapid urbanisation has taken place with 27 percent not living in formal housing. (City of Cape Town, 2011:7). Energy resources are primarily derived from unsustainable fossil fuels (Crane & Swilling, 2008:267).Food needs to be imported as the region needs 1.48 hectares to support its population (Haysom, 2010:214).There is pressure on the water supply and the existing waste disposal system.

A sustainable Cape Town needs to use institutions, infrastructure and society to move from a linear to a circular system. Wastage of energy, water and food needs to be minimised through savings and employing tools such as urban agriculture to save on resources. Renewable energy needs to be incorporated. Local economies can be built up by securing food and other resources from within the city and its immediate surrounds where possible.

There are hundreds of restaurants within Cape Town. Cape Town is a tourist destination and restaurants serve these markets. Restaurants are consumers of food, energy, and water and other resources as well as being dependent on employees and the community at large to survive. Located in this space they have the ability to implement changes that can impact on their customers, staff and their communities.

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Many restaurants have shifted to sustainable practices. Some of these include seasonal produce, organic produce, worm farms, kitchen gardens, ethical suppliers. Restaurants are also starting to communicate their initiatives, often through social media.

How can sustainability be promoted through the restaurant system in Cape Town?

The study culminated in a business model which was a reflection of many of the insights regarding the restaurant system within Cape Town. The aim of a business model is to create value for its customers and stakeholders. As a research tool the business model was valuable tool at many levels. It did not exist in isolation but was influenced by the situation analysis (chapter 4) of trends, macro and market forces. The situation analysis. culminated in a SWOT analysis (section 4.4) and a set of objectives (section 4.5). This process provided the space in which to develop an integrated strategy. The primary objective was to create a social enterprise that can help restaurants, consumers and other stakeholders move to sustainability using restaurants as a point of influence.

As a tool the business model itself was valuable insofar as integrated systemic thinking was required to create a value proposition that would satisfy customer needs (restaurants and consumers). Inter related elements – channels, relationships, partnerships, resources and activities – had to be identified. Ultimately the proposed cost structure had to dovetail with potential revenue streams to achieve viability within the scope of a social enterprise.

The insight was that the industry faced many challenges and would need to be supported on a path to sustainability at whatever level that happened. An online platform was identified as the most practical way to consolidate this support as a vehicle for information, inspiration and education as well as a way of bringing different stakeholders to the same place.

In this way sustainability can be promoted through the restaurant system at different levels. Individual restaurants can be assisted to intervene at different levels within their systems. These interventions can range from cursory to transformative and many impact on other points within their system.

Events, membership, audits and education can help restaurants individually and collectively to make changes. Restaurants do not act in isolation and are part of a bigger system encompassing suppliers, farmers, middlemen, other restaurants, customers, staff and local communities. This entire system needs to be supported to help restaurants move to sustainability. Information is needed to help restaurants connect with other stakeholders as

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well as to make changes to a more sustainable system. Best practice needs to be communicated. Restaurants may want to be 'audited to help them see where they are and what they can achieve. This would be a developmental process as opposed to policing restaurants against preset criteria. Customers and other stakeholders need to be kept abreast of changes made so they can support these endeavours. Ultimately an association of likeminded restaurants can be formed where changes are verified.This collaboration can create power within the industry that can impact on other factors such a procurement, legislation and incentives.

The changes identified by the theoretical and practical aspects of the research range from simple interventions (e.g. low flow taps) to more complex involvements (e.g. supporting local economies).. Menus can be changed to incorporate local, seasonal and organic food. Food for the menu can be sourced from local producers or be grown by the restaurant. Ethical considerations can guide the choice of suppliers. Food waste can be composted for the use of the restaurant or passed on. Restaurants can support the establishment of supplier hubs. Water and energy savings can be introduced. Energy and water saving equipment can be used. An integrated waste management system can be used to control the full spectrum of waste. Recycled and second-hand furnishings and equipment can be used. Staff can be paid fairly and have good working conditions. Through employing people, supporting local food economies and involvement in specific projects, communities can be supported. These interventions can be communicated to educate and draw in customers and other stakeholders.

6.3 Research Opportunities

This study has investigated the Cape Town restaurant industry at many levels and through a range of research methodologies. The industry has been located within the global polycrisis and the conditions unique to the city. Quantitative and qualitative analysis has been used to cluster restaurants and identify characteristics and stories of individual restaurants within the system. The research itself, although being comprehensive, opened up a number of spaces and opportunities for more detailed and nuanced view of the system that goes beyond the scope of this study. Each resource area and each stakeholder in the system could be the focus of a research topic. From a quantitative perspective it would be useful to have more exact information on the size of the restaurant industry in Cape Town, detailing food, energy and waste passing through the system. A more detailed qualitative study could be done in

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conjunction with a significant number of restaurants detailing their sustainable efforts. A study could be done of consumer attitudes towards sustainable restaurants outlining existing perceptions and future recommendations. A study can be done to establish the influence of tourists in Cape Town with reference to sustainable restaurants. An analysis can be made of the network of suppliers to the industry, detailing the specific nature of relationships and challenges. The role of the 'chef' within the system can be elaborated on. These layers would work towards building depth of insight into the challenges of businesses within the restaurant industry moving towards more sustainable practices.

6.4 Conclusion and Recommendations

Cape Town is a city that has the objectives of a green economy coupled with responsible tourism initiatives. A more sustainable restaurant industry can contribute to a more sustainable Cape Town, which in turn addresses global issues such as climate change, peak oil, ecosystem degradation, industrialisation of food and disparities in consumption and resource usage.

Through the Longtable project the Cape Town restaurant industry can be helped to move to sustainable practices through collaboration with farmers, suppliers and other stakeholders, which will impact on the goals of the city as well as reduce energy and resource usage. Shifts in menu options can promote sustainable food choices and support local food economies. These initiatives can be coupled with staff and community upliftment and be communicated to customers, tourists and other stakeholders.

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Appendices

Appendix A: Restaurant Database

CAPE TOWN RESTAURANTS NAME	TYPE	OPEN	WHERE	DETAIL LOCATION	AVE PRICE	NUMBER
&Union	Tapas	Bld	City	City	60	
1800	Grill	Bld	City	Green Point	100	
221 Waterfront	Sushi	Ld	Waterfront	Waterfront	110	
19 on Main Bistro	Bistro	Ld	Southern Cape	Kalk Bay	105	
95 Keerom	Italian	D	City	City	100	
A Tavola	Italian	Bld	Southern Suburbs	Claremont	90	
A Touch of Madness	South African	Ld	Southern Suburbs	Observatory	100	
Addis in Cape	African	Ld	City	City	80	

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Adega	Portugese	Ld	Chain	Durbanville	120	2
Africa Cafe	African	D	CIty	City	220	
Alexias	Mediterranean	Ld	West Coast	Big Bay	100	
Al Nafoora	Contemporary	Bld	City	City – Coral International	160	
Alpenstube	Austria	Ld	Southern Cape	Hout Bay	110	
Anatoli	Mediterranean	D	City	De Waterkant	90	
Andiamo	Deli	Bld	City	De Waterkant	80	
Anytime	Italian	Ld	City	City	80	
Ashtons	Fine	Bld	Southern Suburbs	Greenways Hotel, Kenilworth	150	
Aubergine	Fine	Ld	City	Gardens	135	
Azura	Continental	Bld	City	City -Mandela Rhodes	100	
Azure	Seafood	Bld	Atlantic	Camps bay	160	
Baba Ganoush	Light meals	Bl	City	City	80	
Bacinis	Pizza	Ld	City	Gardens	80	
Baia	Seafood	Ld	Waterfront	Waterfront	125	
Balduccis	Light meals	Ld	Waterfront	Waterfront	95	
Banana Jam Café	Caribbean	Ld	Southern Suburbs	Harfield	90	
Bardellis	Pizza	D	Southern Suburbs	Kenilworth	70	
Barristers	Grill	Ld	Southern Suburbs	Newlands	90	
Basilico	Italian	Ld	Southern Suburbs	Newlands	80	
Bayside Cafe	Grill	Bld	Atlantic	Camps Bay	100	
Bella Lucia	Mediterranean	Ld	Southern Cape	Wynberg	130	
Belthazar	Grill	Ld	Waterfront	Waterfront	140	
Beluga	Seafood	Bld	City	De Waterkant	100	

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Benkei	Sushi	Ld	City	Green Point	55	
Berthas	Light meals	Bld	Southern Cape	Simonstown	90	
Bhandaris	Indian	Ld	Southern Cape	Tokai	125	
Biesmiellahs	African	Ld	City	Bo Kaap	80	
Bihari	Indian	Ld	Chain	Fishhoek, Newlands, Milnerton	110	3
Birds Boutique cafe	Organic	Bl	City	City	40	
Bistro 1682	Bistro	Bl	Southern Cape	Tokai	100	
Bizerca Bistro	All	Lm	City	City	145	
The Black Marlin	Seafood	Bld	Southern Cape	Simonstown	110	
Bloemendal	African	Ld	Northern Suburbs	Durbanville	160	
Blonde	Fine	D	City	Gardens	120	
Blowfish	Seafood	Ld	West Coast	Blouberg	90	
Blue Peter	All	Bld	West Coast	Blouberg	60	
Blues	Contemporary	ld	Atlantic	Camps Bay	80	
Blue Water Cafe	Light meals	ld	Southern Cape	Kommetjie	70	
Bombay Brasserie	Indian	ld	City	City	150	
Bon Fromage	Light meals	bl	Southern Suburbs	Newlands	50	
Boo Radleys	Grill	ld	City	City	90	
Borrusos	Pizza	ld	Southern Suburbs	Rondebosch	58	
Brads Grill	Grill	d	Southern Suburbs	Harfield	90	
Bravado	Italian	bld	City	Green Point	100	
Brio	Grill	d	City	City	120	

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Buena Vista	Cuban	ld	Chain	Tygervalley, Waterfront	80	2
The Brass Bell	Light meals	ld	Southern Cape	Kalk Bay	110	
Bruegels	Pizza	d	Southern Suburbs	Mowbray	60	
Buitenverwachting	Contemporary	ld	Southern Cape	Constantia Wine Farm	150	
Bukhara	Indian	ld	Chain	City, Goodwood	120	2
Bungalow	Light meals	bld	Atlantic	Camps Bay	90	
Buzbey grill	Grill	d	Atlantic	Sea Point	90	
Cafe Blouberg	Light meals	bld	West Coast	Blouberg	70	
Café Caprice	Light meals	bld	Atlantic	Camps Bay	100	
Café Manhattan	Grill	bld	City	Greenpoint	80	
Café Mozart	Bistro	bl	City	City	60	
Café Orca	Mediterranean	bld	West Coast	Melkbos	80	
Café Paradiso	French	bld	City	Gardens	80	
Cafe Pescado	Pizza	bld	City	Simons Town	60	
Cafe Roux	Light meals	bld	Southern Cape	Noordhoek	60	
Café Sofia	Tapas	bld	Chain	Gdns,Gpt,Spt,Ron,Blouberg,Cbay	100	6
Cape Colony	Contemporary	d	CIty	Mt Nelson, Gardens	155	
Cape Malay	Cape malay	d	Southern Cape	Constantia	140	
Cape to Cuba	Seafood	bld	Chain	Kalk Bay, City	75	2
Cape Town Fish Market	Seafood	ld	Chain	BigB,Gdwd,Tokai,Tyger,Waterfrnt	100	5
Cargills	French	ld	Southern Suburbs	Rondebosch	90	
Carlas	Portugese	d	Southern Cape	Muizenberg	90	
Carlyles on Derry	Pizza	d	City	Vredehoek	90	

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Carne SA	Grill	d	City	City	100	
Casa Labia	Italian	l	Southern Cape	Muizenberg	80	
Cassia	Contemporary	ld	Northern Suburbs	Nitida Wine Farm	100	
Catharinas	Light meals	bld	Southern Cape	Steenberg Wine Farm	130	
Cattle Baron	Grill	ld	Chain	Dbn,Mil,Tvw,Tok,Bel,Plat,Tyg,Con	105	8
Caveau	Tapas	bld	Chain	Josephine Mill,City	80	
Cedar	Lebanese	ld	Atlantic	Sea Point	70	
Chai Yo	Thai	ld	Chain	Mowbray,Canal Walk	60	2
Chandani	Indian	d	Southern Suburbs	Woodstock	70	
Chaplans	International	bld	West Coast	Tableview	120	
Chapmans Peak	Seafood	ld	Southern Cape	Hout Bay	100	
Chef Pon	Asian	d	City	Gardens	55	
Cheyne	Contemporary	bl	City	City	50	
Ciao Baby Cucina	Mediterranean	bld	West Coast	Blouberg	90	1
City Grill	Grill	ld	Waterfront	Waterfront	150	
The Codfather	Seafood	ld	Atlantic	Camps Bay	150	
Colcacchio	Pizza	ld	Chain	Blou,CB,Cmnt,CWalk,City.Tvalley	60	6
Constantia Uitsig	Mediterranean	ld	Southern Suburbs	Constantia Wine Farm	120	
Crema	Coffee shop	bl	City	Gardens Centre	50	
Crush	Health	bl	Chain	Obs, City,City,Gardens	60	4
Danielles	Coffee shop	bl	West Coast	Melbosstrand	40	
De Kelder	Grill	ld	Chain	Plattekloof	80	2
Deli Delish	Global	bld	Southern Cape	Hout Bay	120	

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Den Anker	Belgian	ld	Waterfront	Waterfront	90	
Dias Tavern	Portugese	ld	City	City	90	
Die Melkbosskerm	Seafood	l	West Coast	Melkbosskerm	110	
Dunes	Seafood	bld	Southern Cape	Hout Bay	100	
Doppio Zero	Italian	ld	Chain	Claremont,Greenpoint,City	90	3
Dynasty	Chinese	ld	Atlantic	Sea Point	70	
Eastwoods	Global	ld	Northern Suburbs	Tygervalley	110	
Emilys	South African	ld	Waterfront	Waterfront	105	
Empire Cafe	Fusion	bld	Southern Cape	Muizenberg	80	
Fat Cactus	Mexican	ld	Chain	Gardens, Mowbray	55	
Ferrymans	Pub fare	ld	Waterfront	Waterfront	60	
Fiesta	Tapas	ld	City	De Waterkant	100	
Firemans Arms	Pub fare	ld	City	City	72	
Fishermans Kommetjie	Seafood	ld	Southern Cape	Kommetjie	130	
Five Flies	Contemporary	ld	City	City	120	
Flukes	Seafood	bld	Southern Cape	Glencairn	120	
Foodbarn	Contemporary	ld	Southern Cape	Noordhoek	108	
Fork	Tapas	ld	City	City	40	
Fratelli Palmieri	Italian	ld	West Coast	Milnerton	100	
FSH	Seafood	ld	Southern Cape	Kalk Bay	90	
FSH and Winesense	Seafood	ld	City	Mandela Rhodes	90	
Gardeners Cottage	Light meals	blt	Southern Suburbs	Montebello	60	
Gallery Cafe	South African	bl	City	Urban Chic hotel	60	

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Gesellig	Contemporary	bld	Atlantic	Sea Point	60	
Gold	Cape malay	ld	City	City	180	
Gourmet Burger	Light meals	ld	Chain	City, Claremont	75	2
Greek	Mediterranean	bld	Southern Suburbs	Mowbray	80	
Greek Fisherman	Greek	ld	Waterfront	Waterfront	160	
Green Dolphin	Continental	ld	Waterfront	Waterfront	200	
Green Valley	Light meals	bl	Northern Suburbs	Tygervalley	50	
Greenhouse	Contemporary	bld	Southern Cape	Constantia	100	
Greens	Light meals	bld	Chain	Cmont,Constantia,Gardens, Plat	55	4
Grill and Butcher	Grill	ld	Northern Suburbs	Tygervalley	100	
Haiku	Asian	ld	City	City	158	
Harbour House	Seafood	ld	Southern Cape	Kalk Bay	135	
Harveys	Fine Dining	bld	Atlantic	Winchester Mansions, Seapoint	120	
Health Cuisine	Health	bl	Southern Suburbs	Rondebosch	60	
Health for life	Health	bl	Southern Suburbs	Claremont	40	
Hildebrand	Italian	ld	Waterfront	Waterfront	120	
Hillcrest	Tapas	bl	Northern Suburbs	Durbanville	75	
Home	International	d	Southern Suburbs	Kenilworth	65	
Hong	Sushi	ld	Southern Suburbs	Claremont	90	
HQ	Steak	ld	City	City	140	
Hussar	Grill	ld	Chain	Rond,Greenpt,Camps Bay,Tyg	100	4
Il Leone Mastrione	Italian	ld	City	City	90	
Italian Kitchen	Italian	ld	Southern	Tokai	120	

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				Cape		
Jakes	Global	ld	Chain	Kenilworth, Tokai	85	2
Jardine	Contemporary	d	City	City	90	
Jewel of India	Indian	ld	Waterfront	Waterfront	120	
Jewel Tavern	Chinese	ld	City	City	82	
Jimmys Killer Prawns	Seafood	ld	Chain	Tableview, Gardens	120	2
Joe Fish	Seafood	bld	Southern Suburbs	Pinelands	54	
Jonkershuis	Bistro	bld	Southern Cape	Groot Constantia Winefarm	110	
Just Sushi	Sushi	ld	Southern Cape	Simonstown	150	
Kabab Mahal	Indian	ld	Atlantic	Sea Point	90	
Kalkys	Seafood	bld	Southern Cape	Kalk Bay	35	
Kaprinos	Seafood	ld	City	Green Point	90	
Karoo Cattle and Land	Grills	ld	West Coast	Big Bay	110	
Kirstenbosch Tea	Light meals	bl	Southern Suburbs	Newlands	75	
Kitima	Asian	ld	Atlantic	Hout Bay	90	
Klipkantien	Tapas	bl	Atlantic	Kalk Bay	100	
Knead	Light meals	bl	Chain	Muizenberg, Gardens, Newlands	50	3
Knife	Steak	ld	Northern Suburbs	Century City	120	
Kosies Place	Coffee shop	ld	Southern Cape	Muizenberg	80	
Kove	Grill	ld	Atlantic	Camps Bay	100	
Krugmanns Grill	Steak	ld	Waterfront	Waterfront	100	
Kushi	Indian	ld	Southern Cape	Hout Bay	150	
Kuzina	Greek	ld	City	Cape Quarter	110	

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Kyoto Garden Sushi	Sushi	d	City	Gardens	120	
La Bruixa	Tapas	bld	Atlantic	Sea Point	80	
La Colombe	Fusion	ld	Southern Cape	Constantia Wine	150	
La Cuccina	Buffet	bl	Southern Cape	Hout Bay	80	
La Masseria	Italian	ld	Northern Suburbs	Durbanville	70	
La Med	Seafood	bld	Atlantic	Clifton	80	
La Mouette	French	ld	Atlantic	Sea Point		
La Perla	Italian	ld	Atlantic	Sea Point	105	
La Piccola	Italian	ld	Southern Cape	Tokai	75	
Lazaffe	Fine Dining	bld	Northern Suburbs	Tygervalley	140	
Lazari	Light meals	bl	Chain	De Waterkant, Gardens	50	2
Leezias	Greek	ld	Southern Suburbs	Rondebosch	100	
Lemon Butta	Mediterranean	ld	Northern Suburbs	Tygervalley	100	
Live Bait	Seafood	ld	Southern Cape	Kalk Bay	115	
Long Street Cafe	Bistro	bld	City	City	70	
Lookout Deck	Seafood	ld	Southern Cape	Hout Bay	85	
Louis' on the Block	Grill	d	Southern Cape	Bergvliet	100	
Lupos	Mediterranean	bld	Southern Cape	Wynberg	70	
Magica Roma	Italian	ld	Southern Suburbs	Pinelands	90	
Maharaj	Indian	ld	Southern Suburbs	Rondebosch	30	
Mainland China	Chinese	ld		Claremont	60	
			Southern			

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			Suburbs			
Mama Africa	African		City	City	170	
Mamma Roma	Italian	ld	Chain	Newlands, CC, Tableview	120	
Mango Ginger	Coffee shop	bl	Southern Suburbs	Observatory	50	
Manna Epicure	Contemporary	bl	City	Gardens	75	
Manos	Continental	ld	City	Green Point	90	
Marcos African Place	African	ld	City	City	140	
Marikes	Greek	d	Atlantic	Bakoven	75	
Marimba	African	bld	City	CTICC	120	
Marios	Italian	ld	Southern Suburbs	Green Point	120	
Masala Dosa	Indian	bld	City	City	55	
Masons Cafe	Light meals	bld	City	City	100	
Massimos PizzaClub	Pizza	d	Atlantic	Hout Bay	88	
Maz Sushi	Sushi	ld	Chain	Tygervalley, Sea Point	120	2
Meeting Place	Light meals	bld	Southern Cape	Simonstown	100	
Meloncino	Mediterranean	ld	Waterfront	Waterfront	100	
Mesopotamia	Middle Eastern	ld	City	City	90	
Mezbaan	Indian	ld	City	Coral International, City	200	
Michaels	Mediterranean	bld	Southern Suburbs	Rondebosch	50	
Millers Thumb	Seafood	ld	City	Tamboerskloof	110	
Minato Sushi	Sushi	ld	City	City	120	
Mint	Global	bld	City	Taj Hotel, City	210	
Miss K Food Cafe	Light meals	bl	City	Green Point	55	
Morituri Pizza	Pizza	d	Southern Suburbs	Claremont	55	
Mount Restaurant	Global	l	Northern Suburbs	Hooggelegen farm, Durbanville	135	

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Moyo	African	ld	Chain	Big Bay	150	1
Mugg and Bean	Light meals	bld	Chain	mugg.com	60	13
Myoga	Fusion	ld	Southern Suburbs	Vineyard Hotel, Newlands	120	
Mzoli	Grill	ld	Cape Flats	Gugulethu	55	
Neighbourhood	American	ld	City	City	70	
News Cafe	Light meals	bld	Chain	City, Tableview	100	2
Ninos	Light meals	bld	Chain	Ken,Acc Park, Dbnv,Mil,Rond	55	6
Nobu	Sushi	d	Waterfront	One and Only	200	
Nonna Lina	Italian	ld	City	Gardens	75	
Nood	Light meals	ld	Southern Suburbs	Claremont	35	
Noon Gun	Cape malay	ld	City	Bo-Kaap	80	
Nyonis Kraal	South African	bld	City	City	95	
Ocean Basket	Seafood	ld	Chain	CW,Cmnt, Edge, Dbn,HB, Gdns, MP, N1,Nh,Plum,Spt, Tview, Tyg,Wfnt,Tok, Cbay,Apt,Cgte	100	15
Ocean Blue	Seafood	bld	Atlantic	Camps Bay	120	
Octopus Garden	Mediterranean	ld	Southern Cape	St James	110	
Olive Station	Mediterranean	bl	Southern Suburbs	Rondebosch	45	
Olympia	Light meals	bld	Southern Cape	Kalk Bay	115	
On Broadway	Light meals	d	City	City	50	
On the Rocks	Seafood	bld	West Coast	Blouberg	120	
Ons Huisie	Seafood	bld	West Coast	Blouberg	100	
Opal Lounge	Fine Dining	ld	City	Gardens	150	
Orange Marmalade	Cape Malay	bld	City	City	60	
Orchid Cafe	Light meals	bl	Southern Suburbs	Wynberg	90	

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Panama Jacks	Seafood	ld	City	Harbour	110	
Panarottis	Pizza	ld	Chain	Milnerton, Cmont,Gdwd,Belville	80	4
Paranga	Sushi	bld	Atlantic	Camps Bay	150	
Parks Cafe	Health	bl	Southern Cape	Constantia	40	
Passage to India	Indian	ld	Chain	Blouberg, Claremont	80	
Pastis Brasserie	Bistro	bld	Southern Cape	Constantia	75	
Patat Restaurant	African	bld	City	Cape Diamond Hotel	80	
Peddlars on the Bend	Country	ld	Southern Cape	Constantia	80	
Pepenero	Seafood	ld	Atlantic	Mouille Point	100	
Pepper Club	Fine Dining	ld	Atlantic	Camps Bay	150	
Pigalle	Seafood	ld	City	Green Point	120	
Pirates Grill	Grill	ld	Chain	Hout Bay,Plumstead	130	
Polana	African	ld	Southern Cape	Kalk Bay	120	
Poplars	Cosmopolitan	bld	Northern Suburbs	Durbanville	110	
Posticino	Pizza	ld	Atlantic	Sea Point	50	
Primi	Italian	bld	Chain	Tview, Con, Tyg, Cbay, Cmnt, SeaPt, CC, Wfront	70	8
Pure	Contemporary	ld	Atlantic	Hout Bay Manor	145	
Quay Four	Seafood	ld	Waterfront	Waterfront	140	
Queen of Tarts	Light meals	bl	Southern Suburbs	Observatory	60	
Raasoie	Indian	ld	City	Gardens	80	
Rafikis	Global	ld	City	Tamboerskloof	90	
Rcaffe	Coffee shop	bl	City	City	70	
Renaissance	Continental	bl	Southern Cape	Hout Bay	75	
Ricks American Cafe	American	ld	City	Gardens	150	

Rioja	Mediterranean	ld	Southern Cape	Soloe Game Reserve, Noordhoek	90	
River Cafe	Mediterranean	bl	Southern Cape	Constantia Uitsig	150	
Roundhouse	Contemporary	ld	Atlantic	Camps bay Glen	150	
Royale	Contemporary	ld	City	City	55	
Saigon	Asian	ld	City	Gardens	80	
Sake House	Asian	ld	Southern Suburbs	Claremont	100	
Salt	Contemporary	ld	Atlantic	Bantry Bay	120	
Salty Sea Dog	Seafood	bl	Southern Cape	Simonstown	60	
Salushi	Sushi	ld	Chain	Gardens, Claremont	45	
Sandbar	Light meals	bld	Atlantic	Camps Bay	70	
San Julian	Mexican	d	City	City	70	
Sauls	Seafood	ld	Chain	Sea Point (3), Wynberg, Maitland, Brackenfell	80	7
Savoy Cabbage	International	ld	City	City	135	
Seaforth	Seafood	ld	Southern Cape	Simonstown	100	
Sevruga	Seafood	ld	Waterfront	Waterfront	100	
Shoga	Fusion	d	City	City	105	
Sidewalk Cafe	Bistro	bld	City	Vredehoek	90	
Signal	Contemporary	bld	Waterfront	Cape Grace	125	
Silvertree	South African	bld	Southern Suburbs	Newlands	100	
Simons	International	ld	Southern Cape	Groot Constantia	80	
Simply Asia	Thai	ld	Chain	CW,Cmnt, GrandW, Kworth, Lkside, Gdns,Pklnds,Plum,Spt,Tyg,WF	60	11
Sinns	Contemporary	bld	City	Wembley	75	

Sloppy Sam	Middle Eastern	d	City	Green Point	75	
Societi Bistro	French		City	Gardens	100	
Southpole	International	bld	West Coast	Sunset Beach	100	
Spiros	Greek	ld	Southern Cape	Hout Bay	100	
Spur	Steak	bld	Chain	spur.co.za	80	32
Square	Cosmopolitan	bld	Southern Suburbs	Vineyard Hotel, Newlands	105	
Stardust	Mediterranean	d	Southern Suburbs	Rondebosch	130	
Starlings	Light meals	bl	Southern Suburbs	Claremont	50	
Subarshi	Sushi	ld	City	City	90	
Sunset Deck	Continental	bld	Atlantic	Peninsula hotel, Sea Point	120	
Table Mountain cafe	South African	bl	City	Table Mountain	70	
Table Thirteen	Light meals	bld	City	Green Point	75	
Tangos Grill	Steakhouse	d	Southern Cape	Constantia	100	
Tank	Sushi	ld	City	CapeQuarter	100	
Thaifoon	Asian	d	Northern Suburbs	Belville	100	
Thai Rak-Sa	Thai	ld	Chain	Durbanville, Tableview	100	
Thai World	Thai	ld	Southern Suburbs	Claremont	70	
The Atlantic Grill	Fine Dining	bld	Waterfront	Table Bay hotel, Waterfront	150	
The Bistro	Mediterranean	bl	Northern Suburbs	Durbanville	80	
The Beach House	Light meals	bld	City	Victoria Junction Hotel, Green Point	50	
The Islands	Global	bld	Atlantic	President Hotel, Bantry Bay	110	
The Raj	Indian	ld	Chain	Camps Bay	150	1
The Village Cafe and	Buffet	bld	City	Western Cape Suites, Cape Town	80	

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Pub						
Theos	Steakhouse	ld	Atlantic	Moullie Point	150	
Theresas	Continental	d	Southern Cape	Kalk Bay	85	
Tibetan teahouse	Tibetan	ld	Southern Cape	Simontown	50	
Tides	South African	bd	Atlantic	Bay Hotel, Camps Bay	150	
Toad in the Village	Pub fare	ld	Southern Cape	Noordhoek	80	
Tobagos	Global	bld	Waterfront	Radisson, Waterfront	150	
Tokyo	Asian	ld	City	Gardens	85	
Top of the Ritz	Light meals	d	Atlantic	Sea Point	110	
Trattoria Luigi	Pizza	ld	Southern Cape	Hout Bay	80	
Tuscany Beach	Pizza	bld	Atlantic	Camps Bay	150	
Twankey	Tapas	ld	City	Taj Hotel, City	100	
Two Oceans	Seafood	bl	Southern Cape	Cape Point	110	
U&Me	Light meals	bl	City	City	60	
Ultimate Tapas	Tapas	d	City	City	80	
Van Hunks	Grill	ld	City	City	90	
Vanilla	Global	bld	City	De Waterkant	180	
Vintage India	Indian	ld	City	Gardens	120	
Voila	Contemporary	bld	City	De Waterkant	90	
Wakame	Seafood	ld	Atlantic	Mouille Point	120	
Wang Thai	Asian	ld	Chain	Constantia, Milnerton, Waterfront	80	
Wasabi	Seafood	ld	Southern Cape	Constantia	90	
Wharfside Grill	Seafood	bld	Southern Cape	Hout Bay Harbour	75	
Wijnhuis	Mediterranean	ld	Chain	Newlands	200	

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Wild Fig	Continental	ld	Southern Suburbs	Mowbray	80	
Wild Woods	Bistro	ld	Southern Cape	Hout Bay	150	
Willoughby & Co	Seafood	ld	Waterfront	Waterfront	100	
Yindees	Thai	ld	City	Gardens	80	
Zenzero	Italian	bld	Atlantic	Camps Bay	160	
Zibaldone	Italian	ld	Northern Suburbs	Tygervalley	130	

Compiled: September 2010

Appendix B: Quotation

PIGEON PIE

CREATIVE BUSINESS DESIGN

Quote

"The Long Table" Brand Essentials   Quote Valid Until 01.02.12

Job Description	Pricing
Brief Research and Creative Strategy	ZAR 500
Developing the Brand Logo	ZAR 3000
Developing the Visual and Brand Language	ZAR 1000
Website Design and Direction	ZAR 2500
Total	ZAR 7000

Notes

- Standard hourly rates are R350/hr.

- This quote has been put together for a project spanning across 10 working days. 6 days of development and 4 days of review, crafting and execution.

After Hours Fee:
Pigeon Pie works to a strict deadline policy and all work is thoroughly quality controlled to ensure it is always of the highest standard. Any unarranged changes made to creative work upon clients request AFTER the allocated deadlines (and outside of the days provided for Author's Changes) will be charged at an hourly rate of R450/hr.

Marwaan Sasman
marwaan@pigeonpie.com
+27.82.459.9932

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Appendix C: Twitter Followers

Cape Town				
@konogirl				
Twitter Name	**Twitter Handle**	**Designation**	**Twitter Location**	**Follower**
				Status
Indigogirl.co.za	IndigogirlJay	Cape Town Blogger	Cape Town	Follows You
Ishay Govender-Ypma	Foodandthefab	Cape Town Blogger	Cape Town South Africa	It's Mutual
FoodBlog Cape Town	FoodBlogCT	Cape Town Blogger	Cape Town	It's Mutual
David Cope	foodie_za	Cape Town Blogger	Cape Town.	You Follow
ilovecoffee.co.za	ilovecoffeeblog	Cape Town Blogger	Cape Town	You Follow
Matt Allison	imnojamieoliver	Cape Town Blogger	Cape Town, South Africa	It's Mutual
JamieWhoSA	JamieWhoSA	Cape Town Blogger	Cape Town	It's Mutual
Jane-Anne Hobbs	Jane_Anne62	Cape Town Blogger	Hout Bay, Cape Town	It's Mutual
Kamini Pather	LadyK_za	Cape Town Blogger	Cape Town, South Africa	You Follow
Clare Mack	Mackspill	Cape Town Blogger	Cape Town and Western Cape.	You Follow
Dax Villanueva	RelaxWithDax	Cape Town Blogger	Cape Town	You Follow
urban sprout	urbansprout	Cape Town Blogger	Cape Town, SA	It's Mutual
Matthew Kent	WannabeBond	Cape Town Blogger	Cape Town, South Africa	You Follow
WhaleCottagePortfoli	WhaleCottage	Cape Town Blogger	Cape Town, South Africa	It's Mutual
Lisa Key	africanrelish	Cape Town Food	Cape Town	It's Mutual
Amelia Frenkel	Baby_Birdie	Cape Town Food	Cape Town	It's Mutual
Lizelle Steyn	BarefootB	Cape Town Food	Cape Town	It's Mutual
Betty Bake	BettyBakeBlog	Cape Town Food	Cape Town, South Africa	It's Mutual
Ming-Cheau Lin	butterfingersZA	Cape Town Food	Cape Town	It's Mutual
Captain Bread	CaptainBreadZA	Cape Town Food	Cape Town, South Africa	You Follow
caron schmidt	caronschmidt	Cape Town Food	Cape Town, South Africa	It's Mutual
Andrea Foulkes	Dishfood	Cape Town Food	Cape Town	You Follow
sam linsell	drizzleanddip	Cape Town Food	Cape Town, South Africa	It's Mutual
Deni and Carlin	FoodWithAStory	Cape Town Food	Cape Town and South Africa	You Follow
Aletta Lintvelt	foragefood	Cape Town Food	Cape Town, South Africa	You Follow
Jenny Morris	JennyMorrisChef	Cape Town Food	Cape Town	You Follow
justfoodnow	justfoodnow	Cape Town Food	Cape Town for now.	You Follow
Kitchen Cowboys Can	KCCanteen	Cape Town Food	Woodstock	Follows You

				Follows You
Kupa Coffee	kupacoffee	Cape Town Food	Cape Town	
Julie Carter	oceanjewelsfish	Cape Town Food	Cape Town	It's Mutual
Oded's Kitchen	OdedsKitchen	Cape Town Food	Cape Town	It's Mutual
Paul Galatis	paulgalatis	Cape Town Food	Cape Town, South Africa	You Follow
Darryn Lazarus	SagraFoodsZA	Cape Town Food	South Africa	It's Mutual
Sam Wilson	SamWilson1	Cape Town Food	Cape Town	You Follow
Simon Wibberley	SiWibb	Cape Town Food	Cape Town	It's Mutual
SmartChef Procure	smartchefpp	Cape Town Food	Cape Town	You Follow
The Smoking Shed	smokingshed	Cape Town Food	Cape Town	It's Mutual
The Squashed Tomato	squashed_tom	Cape Town Food	Cape Town	It's Mutual
TOFFIE FOOD	ToffieFood	Cape Town Food	Cape Town	It's Mutual
Verlaque Fine Foods	VerlaqueFoods	Cape Town Food	Cape Town, South Africa	It's Mutual
Whats On Eatery	whatsoneatery	Cape Town Food	Cape Town	Follows You
Yuppiechef	yuppiechef	Cape Town Food	Cape Town, South Africa	You Follow
Ian & Lise Manley	manleycom	Cape Town Food PR	Cape Town and Riebeek Kasteel	You Follow
Sumien Brink	sumienbrink	Cape Town Food Writer	Cape Town, South Africa	It's Mutual
Naushad Khan	48hrsincapetown	Cape Town Media	Cape Town	You Follow
CapeTownMagazine.com	CapeTownMag	Cape Town Media	Cape Town	It's Mutual
FreshLiving magazine	Fresh_Living	Cape Town Media	Cape Town	It's Mutual
Good Taste	GoodTasteMag	Cape Town Media	Cape Town, South Africa	It's Mutual
Leigh Robertson	Leigh_Robertson	Cape Town Media	Cape Town	You Follow
JP Rossouw	RossouwsRstrnts	Cape Town Media	Cape, South Africa	You Follow
Trialogue Publishing	TrialogueSA	Cape Town Media	Cape Town, South Africa	You Follow
Abigail Donnelly	AbiDonnelly	Cape Town Media Food	Cape Town, South Africa	It's Mutual
Anelde Greeff	Anelde	Cape Town Media Food	Cape Town	You Follow
Michael Olivier	FoodWineGuru	Cape Town Media Food	Cape Town , South Africa	You Follow
Andrew Boraine	andrewboraine	Cape Town Partner	Cape Town	You Follow
CapeTownTourism	CapeTownTourism	Cape Town Partner	Cape Town	You Follow
City of Cape Town	CityofCT	Cape Town Partner	Cape Town	You Follow
CapeTownPartnership	ctpartnership	Cape Town Partner	Cape Town, South Africa	You Follow
Bulelwa	Darksjokolade	Cape Town Partner	Cape Town	You Follow
Eat Out	Eat_Out	Cape Town Partner	South Africa	It's Mutual
Eat In	EatInSA	Cape Town Partner	South Africa	You Follow
Fairtrade Label SA	FairtradeSA	Cape Town Partner	Cape Town	You Follow
food24.com	food24	Cape Town Partner	South Africa	It's

				Mutual
Future Cape Town	futurecapetown	Cape Town Partner	Cape Town, South Africa	You Follow
Greenpop	greenpop_CPT	Cape Town Partner	Cape Town	You Follow
Guy Lundy	GuyLundySA	Cape Town Partner	Cape Town	You Follow
Justin Bonello	Justin_Bonello	Cape Town Partner	Cape Town	You Follow
Mariette dT-Helmbold	MariettedTH	Cape Town Partner	Cape Town	It's Mutual
Pia	mothercitylivin	Cape Town Partner	Cape Town	You Follow
Pete Goffe-Wood	PeteGW	Cape Town Partner	Cape Town	You Follow
Skye Grove	SkyeGrove	Cape Town Partner	/\/???\/\ Cape Town	It's Mutual
Slow Food CSA	SlowFoodCSA	Cape Town Partner	Cape Town, Sunny South Africa	You Follow
Slow Food MotherCity	slowmothercity	Cape Town Partner	Cape Town	You Follow
TheGlassRecyclingCo	TGRC	Cape Town Partner	South Africa	It's Mutual
Andiamo Cape Quarter	Andiamo_CQ	Cape Town Restaurant	Cape Quarter	Follows You
Brewers & Union	andUnion	Cape Town Restaurant	Cape Town	It's Mutual
Beluga Restaurant	BelugaCapeTown	Cape Town Restaurant	Cape Town, South Africa	You Follow
brad ball	bistro1682	Cape Town Restaurant	Steenberg Winery, Cape Town	You Follow
Restaurant*Music*Bar	Brio1893	Cape Town Restaurant	130 Adderley Street	It's Mutual
Cape Royale	Cape_Royale	Cape Town Restaurant	Cape Town	It's Mutual
Cape Quarter Village	capequart	Cape Town Restaurant	Somerset Road, Green Point, CT	Follows You
Dan Pinch	DanPinch	Cape Town Restaurant	Cape Town	You Follow
David Donde	DavidDonde	Cape Town Restaurant	Cape Town	It's Mutual
Duchess Of Wisbeach	DuchessWisbeach	Cape Town Restaurant	No3 Wisbeach Road Sea Point	You Follow
Grand Daddy Hotel	granddaddyhotel	Cape Town Restaurant	Cape Town	You Follow
haastig?	haascoffee	Cape Town Restaurant	Cape Town	It's Mutual
HQ Restaurant & Bar	HQ_Restaurant	Cape Town Restaurant	Heritage Square. Cape Town.	Follows You
Hudsons	HudsonsBurgers	Cape Town Restaurant	69a kloof street, cape town	It's Mutual
Emily Johnson Moya	KwalapaGirl	Cape Town Restaurant	Newlands, Cape Town.	Follows You
One&Only Cape Town	OOCapetown	Cape Town Restaurant	Cape Town, South Africa	It's Mutual
OriginCoffeeRoasting	OriginRoasting	Cape Town Restaurant	Cape Town, South Africa	It's Mutual
pastis	pastisCT	Cape Town Restaurant	Cape Town	It's Mutual
Pepenero Restaurant	PepeneroCT	Cape Town Restaurant	Cape Town, South Africa	Follows You
Massimo's	pizzaclub_hb	Cape Town Restaurant	hout bay, cape town	It's Mutual
Societi Bistro	SocietiBistro	Cape Town Restaurant	Cape Town's Orange Street!	It's Mutual
Steenberg	SteenbergHotel	Cape Town Restaurant	Constantia ,Cape Town	Follows You
Taj Cape Town	tajcapetown	Cape Town Restaurant	Cape Town, South Africa	It's Mutual

La Mouette	teamlamouette	Cape Town Restaurant	78 Regent Road 0214330856	It's Mutual
Field Office	The_FieldOffice	Cape Town Restaurant	Cape Town	You Follow
TRUTH. coffeecult	TRUTHcoffee	Cape Town Restaurant	?T: -33.918069,18.420104	It's Mutual
Vida e Caff?	vidaecaffe	Cape Town Restaurant	South Africa	It's Mutual
Vineyard Hotel & Spa	Vineyard_Hotel	Cape Town Restaurant	Cape Town, South Africa	You Follow
GoodFood&WineShow	GourmetSA	Cape Town Show	Cape Town	Follows You
BOS	BOS_Ice_Tea	Cape Town Supplier	Cape Town, South Africa	You Follow
Charly's Bakery	charlysbakery	Cape Town Supplier	Cape Town	It's Mutual
Chefs Warehouse	Chefs_Warehouse	Cape Town Supplier	Cape Town	You Follow
Rory Williams	carbonsmart	Cape Town Sustainability	Cape Town	It's Mutual
Jacqui Stephenson	jax_stephenson	Cape Town Sustainability	Plumstantia	It's Mutual
michelle_matt	michelle_matt	Cape Town Sustainability	Cape Town	It's Mutual
Cathy Marston	CathyMarston	Cape Town Wine	Cape Town, South Africa	You Follow
Carien Hugo	loveWinelife	Cape Town Wine	Cape Town	It's Mutual
Neil Pendock	neilpendock	Cape Town Wine	South Africa	You Follow
Spit or Swallow	spitorswallow	Cape Town Wine	Cape Town	It's Mutual
Andreas Spath	Andreas_Spath	Cape Town Writer	Cape Town	You Follow
Brian Berkman	BrianBerkmanZA	Cape Town Writer	Cape Town	It's Mutual
tom robbins	eatcapetown	Cape Town Writer Food	Cape Town South Africa	It's Mutual
Restaurant Reviews	gastronomically	Cape Town Writer Food	Cape Town	You Follow
The SRA	the_SRA	UK Partner	London, UK	You Follow
Dine Green	Dinegreen	USA Partner	Boston	You Follow
vanie padayachee	chefvanie	WC Food	Franschhoek, South Africa	Follows You
Slowmarket	slowfoodmarket	WC Food	Stellenbosch, South-Africa	Follows You
Alison Gilson	tierhoek	WC Food	Robertson	It's Mutual
Le Quartier Francais	lequaf	WC Restaurant	Franschhoek, South Africa	You Follow
Pierneef La Motte	pierneeflamotte	WC Restaurant	Franschhoek, South Africa	You Follow
Solms Delta	solms_delta	WC Restaurant	Franschhoek, South Africa	It's Mutual
Avondale Wine	AvondaleWine	WC Wine	Paarl, South Africa	It's Mutual
Fairview Wine	FairviewWine	WC Wine	Paarl, South Africa	You Follow
Swartland Revolution	SwartlandRev	WC Wine	Riebeek Kasteel	You Follow
Villiera Wines	villiera	WC Wine	Stellenbosch, South Africa	You Follow
Food24's Wine club	Vinatics	WC Wine	Cape Town, South Africa	You Follow

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