



UNIVERSITY OF
TORONTO
MISSISSAUGA



FOODSERVICE
PLANNING &
DESIGN INC.

University of Toronto Dining Services

Qualitative and Quantitative Research

November 2020

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Market Research

Community Engagement Process

The community engagement process consisted of the following:

Focus Groups

- 30 to 60-minute session with selected key stakeholders from October 13 – 30th, 2020
- Meeting with the following:
 - Food Advisory Committee
 - Residence Committee
 - UTM Student Union
 - Indigenous Group
 - Frequent Catering Users

Customer Survey

- Distributed to all UTM students, staff and faculty from October 5 – 30th, 2020
- Electronic based survey communicated via Dining Services social media, website and newsletter
- Survey topics:
 - Residence
 - Meal Plan
 - Pre-pandemic Dining
 - Future Campus Dining
 - Sustainability
 - Social Media & Technology

Market Research

Focus Group – Residence Committee (1st Year & Upper Year Students)

Residence committee presented the following themes as to what they value within dining operations:



Key Highlights:

- Price was major concern (e.g. \$6 for fruit or \$3.75 for yogurt)
 - Students feel it is cheaper to buy these items off-campus
- 5 out of 9 current first year residence students & 5 out of 6 upper year residence students from focus group supplement their meal plans with groceries
 - Limited flex dollars and certain grocery items use up flex (e.g. dairy-free almond milk)
- Concerns around dietary preferences and requirements (e.g. Halal, vegan)
 - Some staff are not attentive or knowledgeable about product (e.g. allergies, ingredients)
 - Some students are unaware of Fusion 8 and Halal meat options
- Longer hours of operation in the mornings and evenings
 - Especially weekends (Friday-Sunday)

Market Research

Focus Group – Food Advisory Committee

Food Advisory committee presented the following themes as to what they value within dining operations:



Key Highlights:

- Seeking menu rotations within food venues (e.g. seasonal/healthy options, food trucks)
 - Staff departments enjoy off-campus meals for variety
 - Interest in partnership with local businesses
- Inclusion of all dietary preferences and requirements (e.g. vegetarian, vegan, gluten-free)
- Issues with consistency within on-campus Brands and contractor meal portion sizes
- Strong desire for short line-ups or more staff at busy venues (Davis and IB building)

Market Research

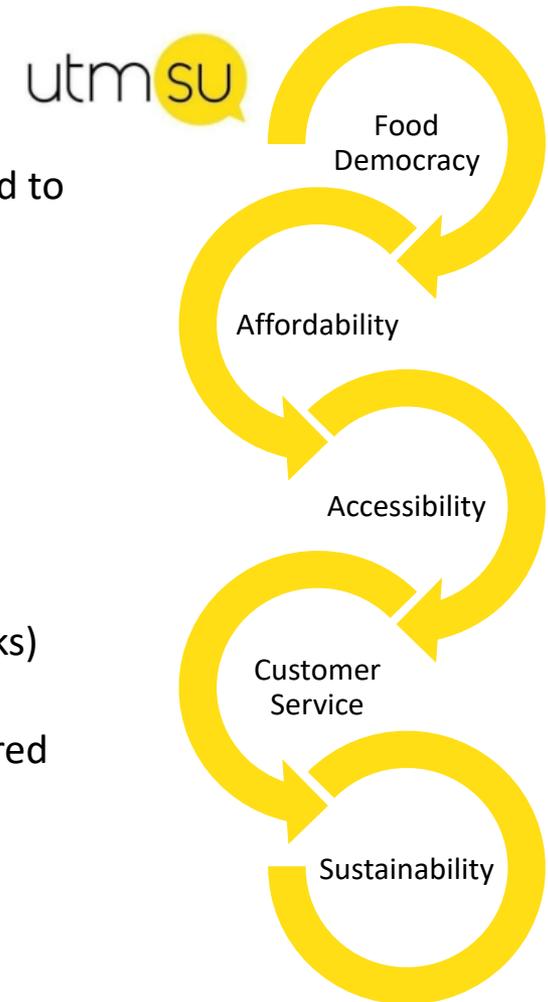
Focus Group – Student Union

UTM Student Union (UTMSU) shared their values in relation to Dining Services as outlined in the visual representation on the right.

Similar to the other committees, they shared the same concerns related to food offerings and customer service.

Sustainability

- Focus on waste management (only one compost bin available)
 - Dining Services to explore compostable containers
- Marketing focus on waste literacy
 - Community does not know how to sort out recyclable
- Initiatives to provide extra food to homeless (eg. UTMSU food banks)
 - Food bank offered 1x/week to combat food insecurity
 - Interest in Dining Services providing pre-packaged items, expired items are accepted too



Market Research

Focus Group – Indigenous Group

The Indigenous focus group is seeking affordable, fresh foods by indigenous vendors and procurement process. Below are opportunities and future desires by the group:

- Interest in local businesses (eg. Nish Dish in Toronto) & Ontario chefs
- Explore having an indigenous food coordinator role
 - Partnerships from Toronto Farmer’s Market
 - Hire indigenous catering workers (Hiawatha – catering company in Sudbury)

Indigenous food does not need to be game meat dense (venison, moose), can be vegetarian or fish or poultry based. Below are some snack/meal options the users provided:



- Sage Tea
- Sweet Grass
- Labrador Tea
- Infused Cedar
- Pike
- Pickerel
- Fiddle Heads
- Manoomin Pudding
- 3 Sister Soup

Market Research

Focus Group – Catering Group

CaterTrax Ordering

- Overall, easy to order and checkout
- Website layout isn't user friendly as it's hard to find menu items
- Frustrating to change password with special characters frequently
- Website should feature most common or popular options section



Food Offerings

- Quality and portions are inconsistent
- Seeking more variety (ethnic, seasonal and healthy options)
 - Within budget, difficult to get variety (always subs and pizza)
 - Vegan/vegetarian options are usually cold salad or carb heavy (focus on plant-based)
 - Limited gluten free options

Customer Service

- Issues with early or late deliveries and notifying missing items to users during event
 - eg. Pizza being offered without cheese, no refreshments 30 mins into event, missing cutlery
- Issues with special request items not being labelled or allergens are dismissed
 - Requires frequent follow up by user to ensure meals are allergen free

Market Research

Focus Group – Catering Group

Price

- Expensive for small meetings (fee associated with <\$100)
- Additional service charge in invoice for large events
 - Cost of event staff after 7pm
 - Cost of complimentary water or hot water for tea
 - Bistro tablecloths are \$17 or rectangular tablecloths are \$10
- Added cost for events in different building (\$50)
- Use of chinaware has charge (\$2/person)



Future Desires

- Users are seeking more initiative in menu development by contractor for special events
 - Add new menu items and taste test with users
- Desire for flexibility to bring own food/snacks for small events
- Explore food bank options for leftovers, one user mention it is done at St. George campus
 - Share with UTM students or keeping in department
- Expand list of pre-approved caterers
- Desire for sustainable containers and cutlery

Market Research

Dining Services Survey

To gain a better understanding and representation of the gaps within Dining Services at UTM, an online survey on Survey Monkey was launched from on October 5 – 23rd, and extended until October 30th. The goal was to solicit feedback on Dining Services pre-COVID and to determine the community's future desires.

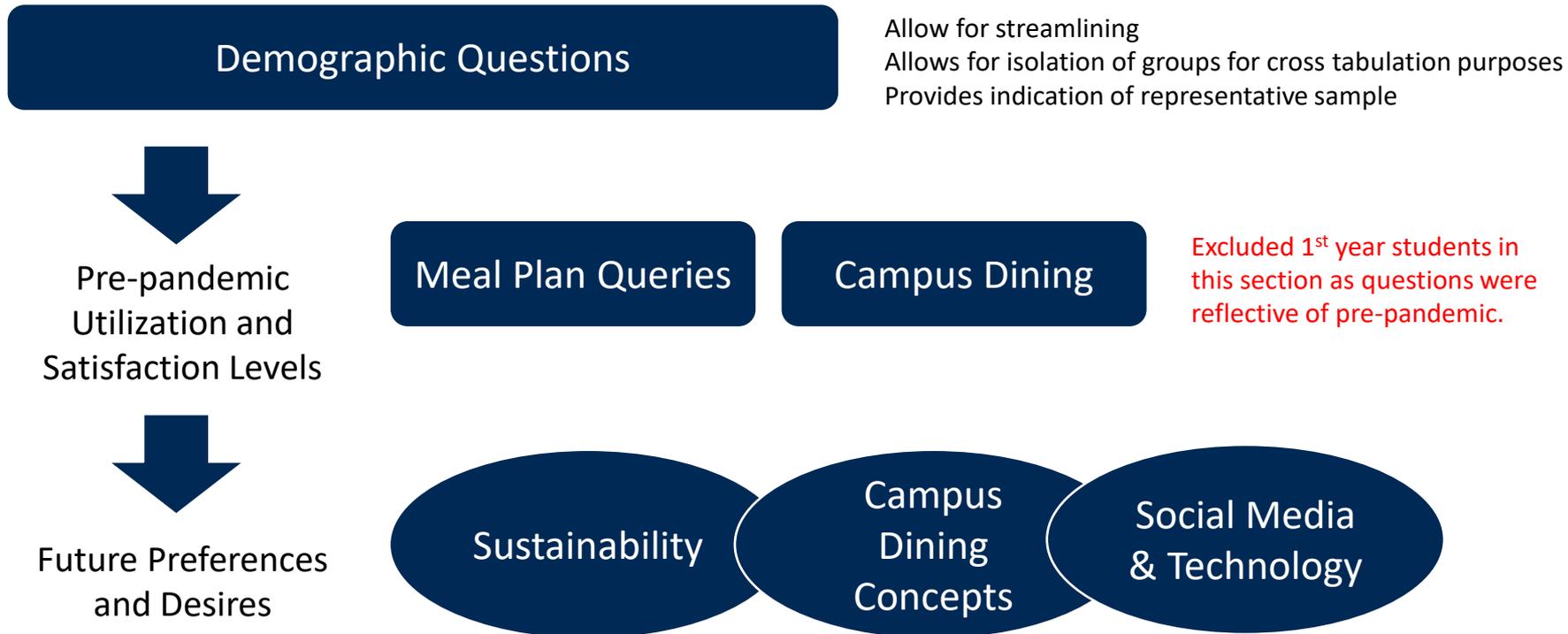
The survey was communicated via UTM newsletter, social media and website. To assist with participation, survey participants were offered a chance to enter a draw to win iPad Pro and AirPods Pro.



Market Research

Dining Services Survey

The UTM community provided their feedback, preferences and desires related to the following topics:



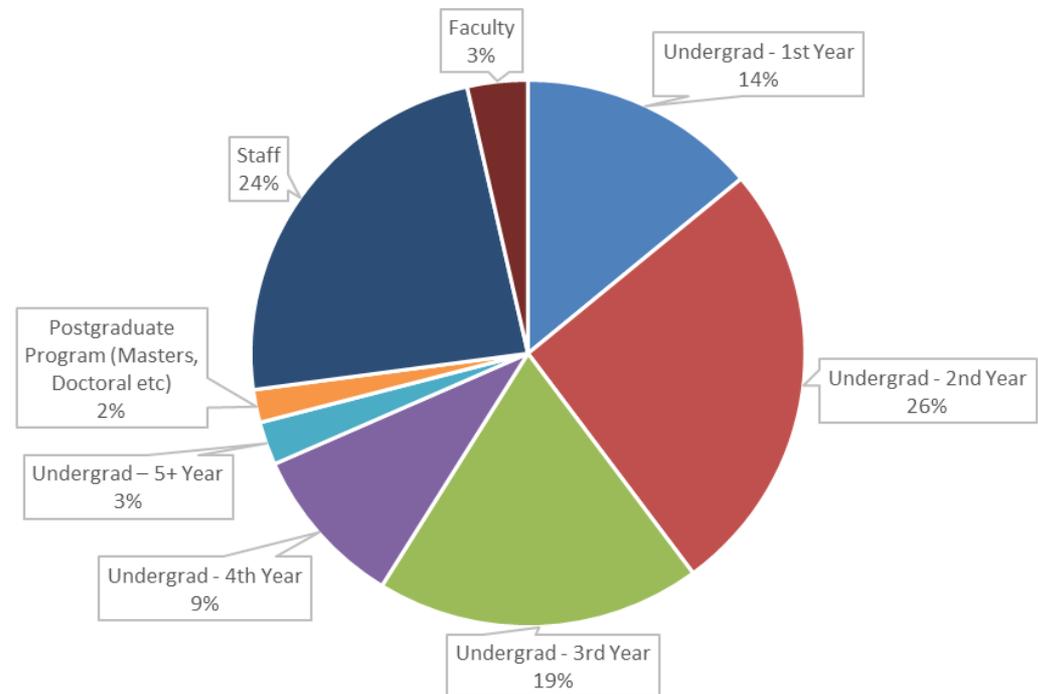
Market Research



Dining Services Survey

We obtained 1132 responses from the UTM community (students, staff and faculty) related to food services feedback, preferences and future desires.

- UTM community (2019-20) is 78% undergraduate students, 4% post-graduate students and 17% staff & faculty
 - The pie graph on the right breaks down the respondent's campus status.
- 86% of the respondents were previous UTM dining customers and were able to comment on pre-pandemic conditions, as only 14% were 1st year undergraduate students.
- In total, 96% of the respondents were full-time students or employees.
- 66% of respondents were female, 31% male and remained 3% preferred not to answer.



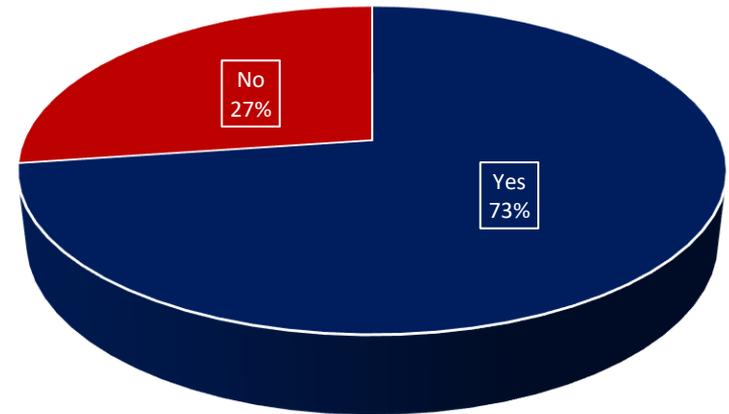
- UTM has a 55:45 female to male ratio (2018)



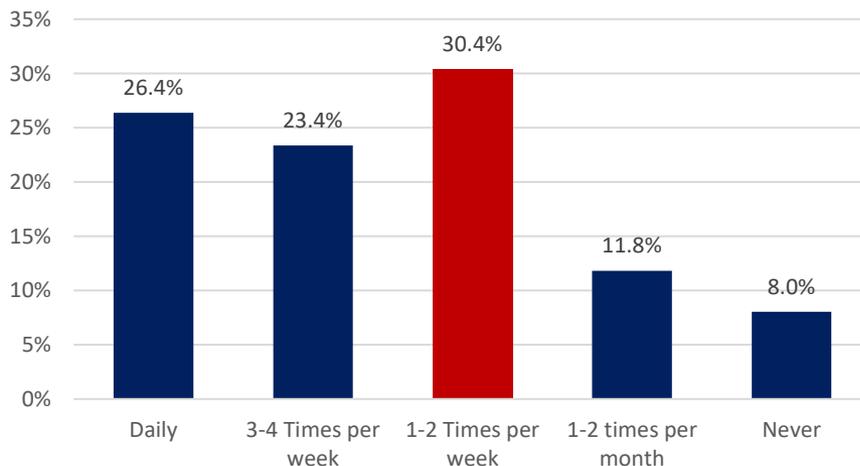
Food Services Survey - Residence

Participants (n=820) were asked about specific questions related to residence. 40% of the respondents have lived in residence in the past, 33% have never lived in residence and 27% are currently living in residence.

In the pie chart on the right, participants who answered living in residence (67%) were asked if their accommodations included a kitchen. 73% responded 'yes' their accommodations has a kitchen and 27% responded 'no'.



Residence Kitchen Usage Frequency



In the bar graph on the left, participants who have or had a residence with kitchen accommodations noted their usage frequency.

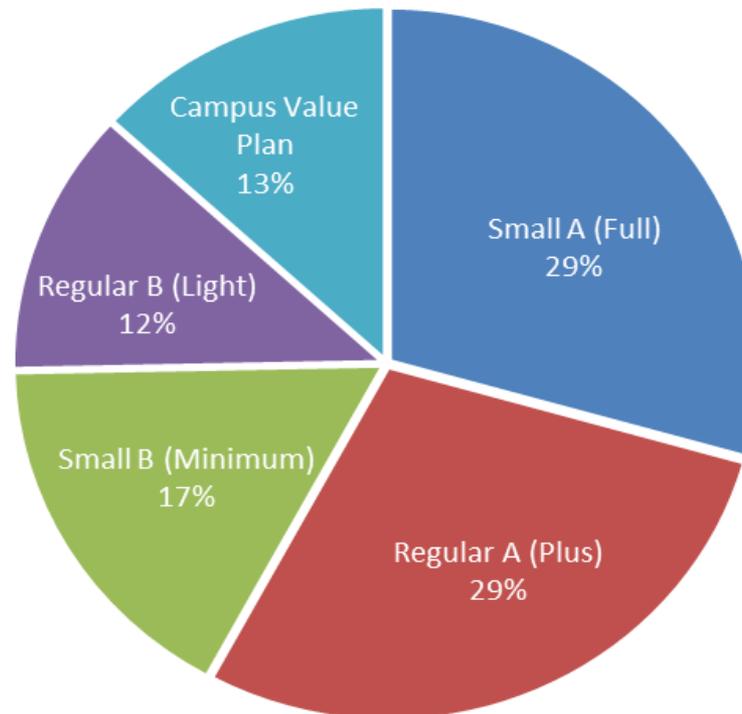
- 80% of participants use or used their kitchen at least once a week for meal preparation.
- 50% of participants use or used their kitchen more than 3 times in a week



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Dining Services Survey – Meal Plan

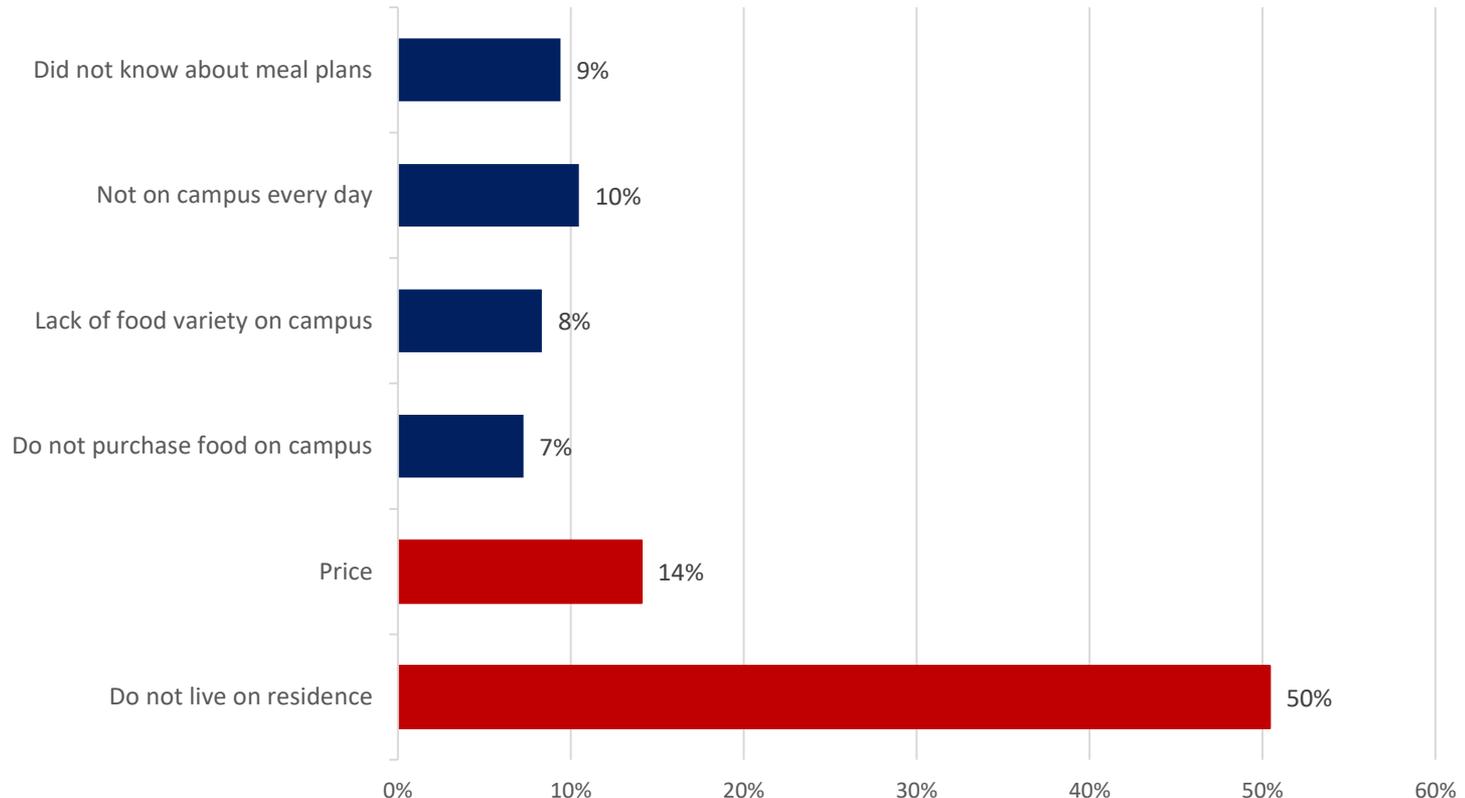
From the participants, 58% have been on a meal or campus value plan at least once during their UTM experience. They were asked which meal or campus value plan, they most recently purchased (below). The most popular meal plans are the 'Small A (full)' and 'Regular A (plus)'.



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Dining Services Survey – Meal Plan

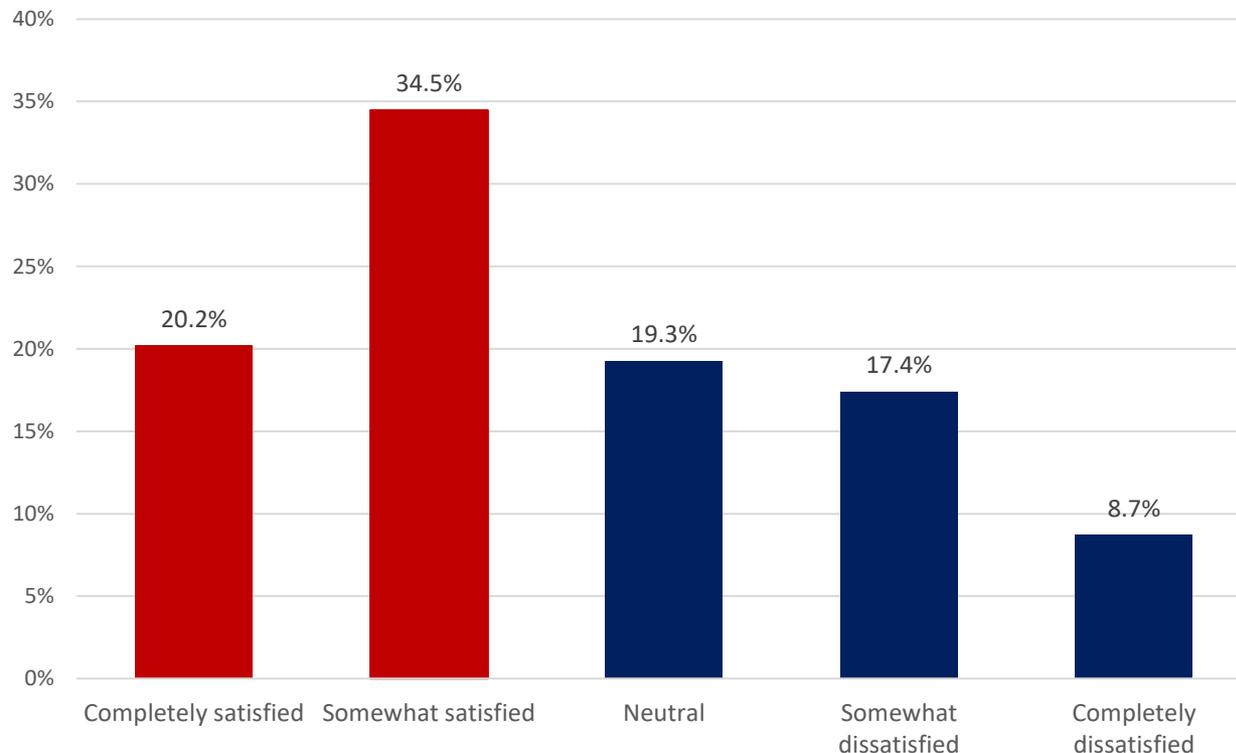
From the participants, 42% never been on a meal or campus value plan during their UTM experience. The bar graphic below outlines their reason for not purchasing a plan. It is important to note that 50% believe that a meal plan is associated with living on residence and another 9% do not know about meal plans.



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Dining Services Survey – Meal Plan

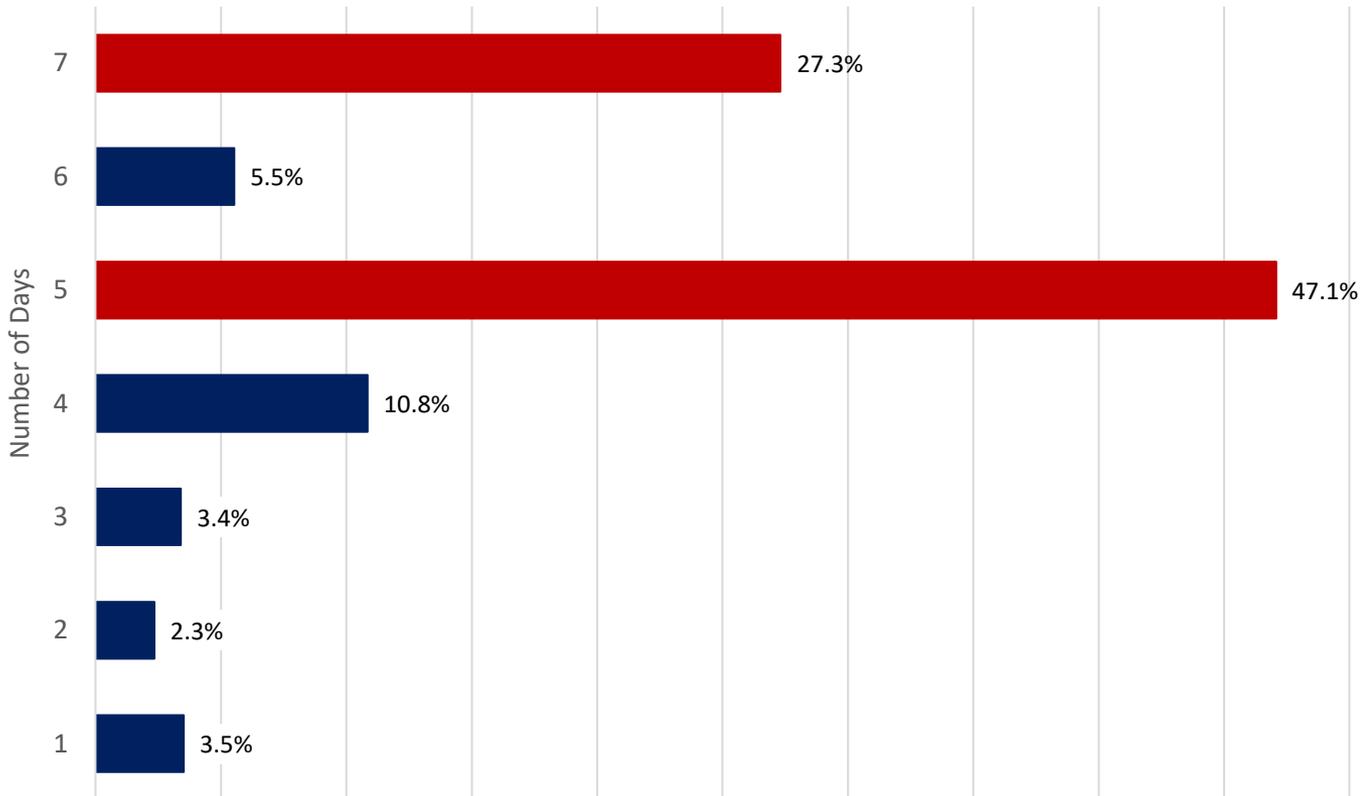
Meal or campus value plan users rated their overall satisfaction with their plan. The majority (55%) were completely or somewhat satisfied. The 26% of respondents that were unsatisfied were asked to comment on why that was the case. Major themes were expensive food and need more variety to meet healthy or dietary preference (e.g. vegan/vegetarian). It is notable, there are multiple complaints about staff not taking UTM community's allergies seriously (no labelling, must ask manager).



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Dining Services Survey – Pre-pandemic Dining

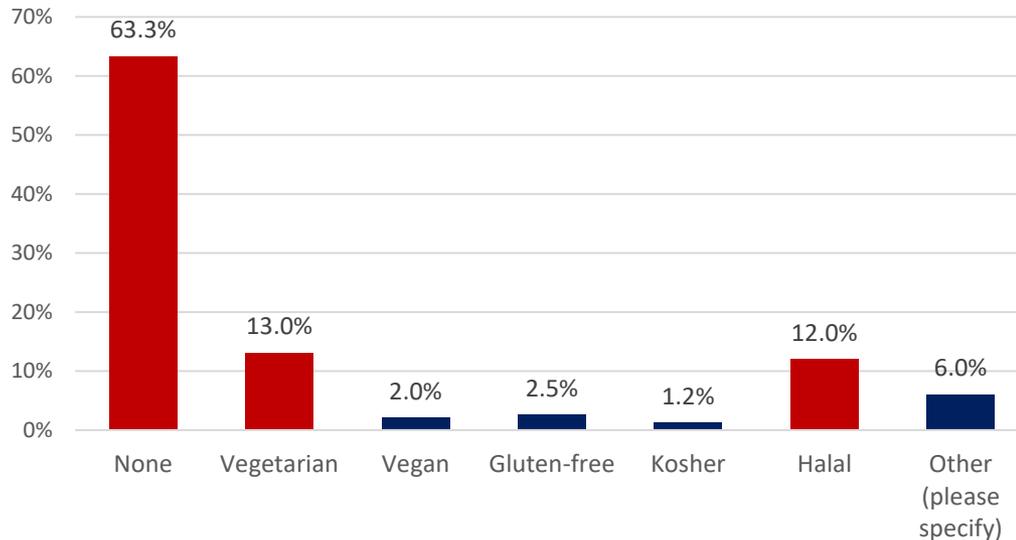
UTM upper year students and employees outlined how many days in a week they would typically spend on campus pre-pandemic. 91% were purchasing more than 4 days of the week.



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Dining Services Survey – Pre-pandemic Dining

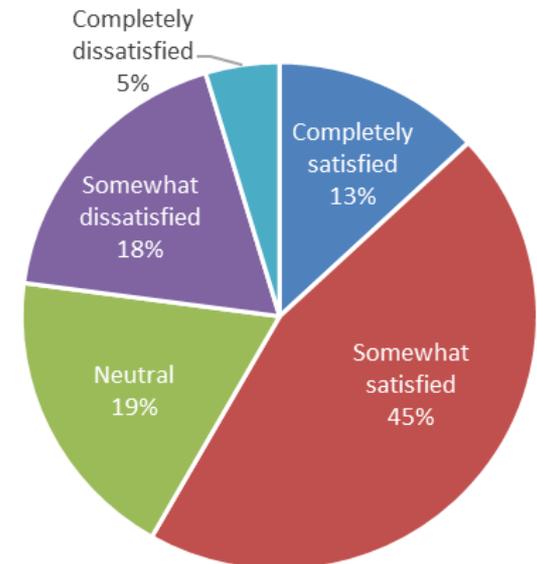
Dietary Preference and/or Requirement



Participants selected their main dietary preference and/or requirement (shown on left). Apart from “none”, the most popular dietary preference or requirement was vegetarian and halal. The remaining 6% were a combination of mixed allergies, pescatarian and lactose intolerance (dairy-free).

The same participants were asked about their satisfaction level with UTM’s ability to meeting dietary preference and/or requirement (shown on the right).

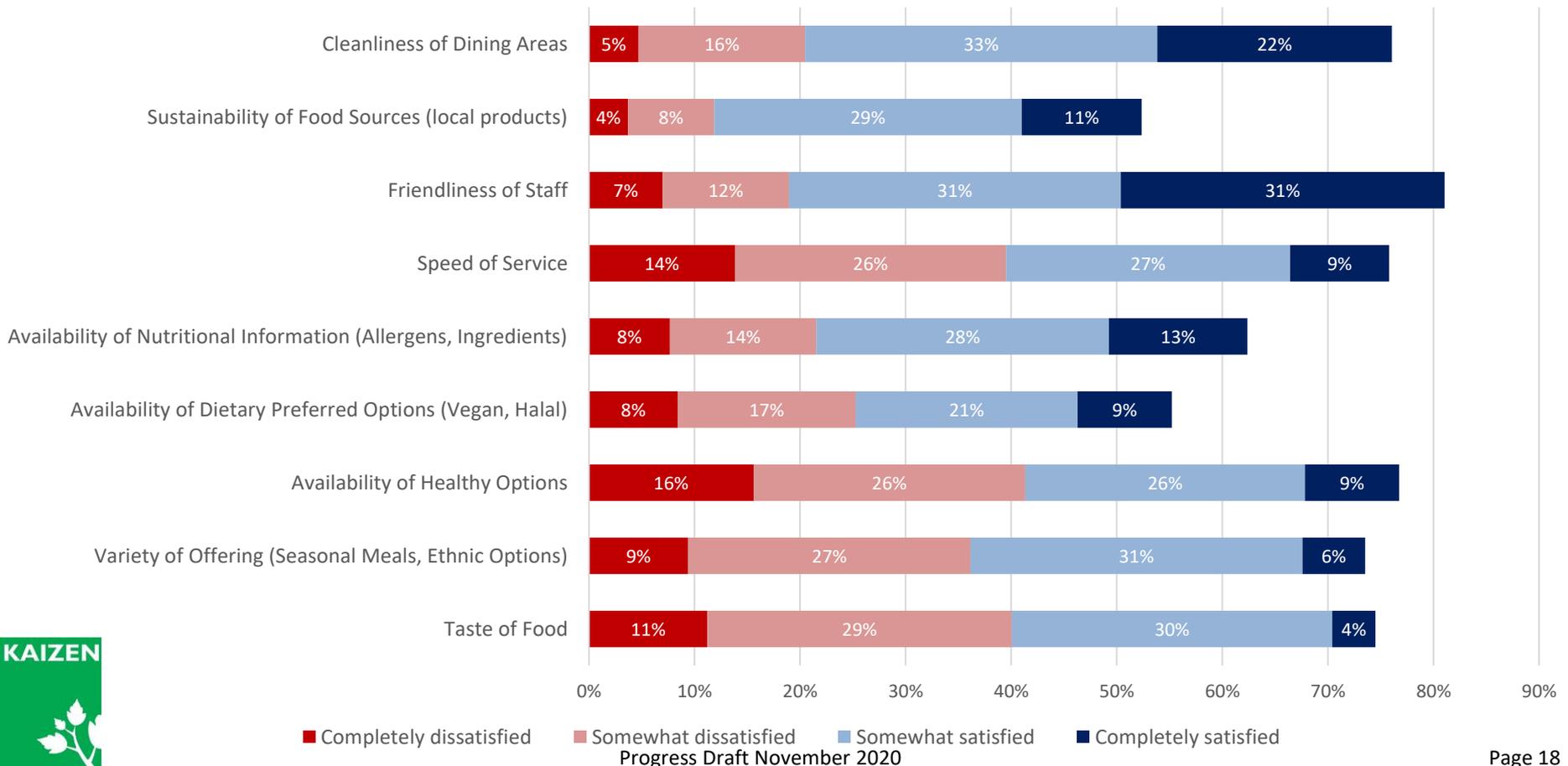
- The majority (58%) were completely or somewhat satisfied
- 23% were dissatisfied (in order) due to lack of variety (specifically vegetarian, vegan, halal), price and lack of healthy options



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Dining Services Survey – Pre-pandemic Dining

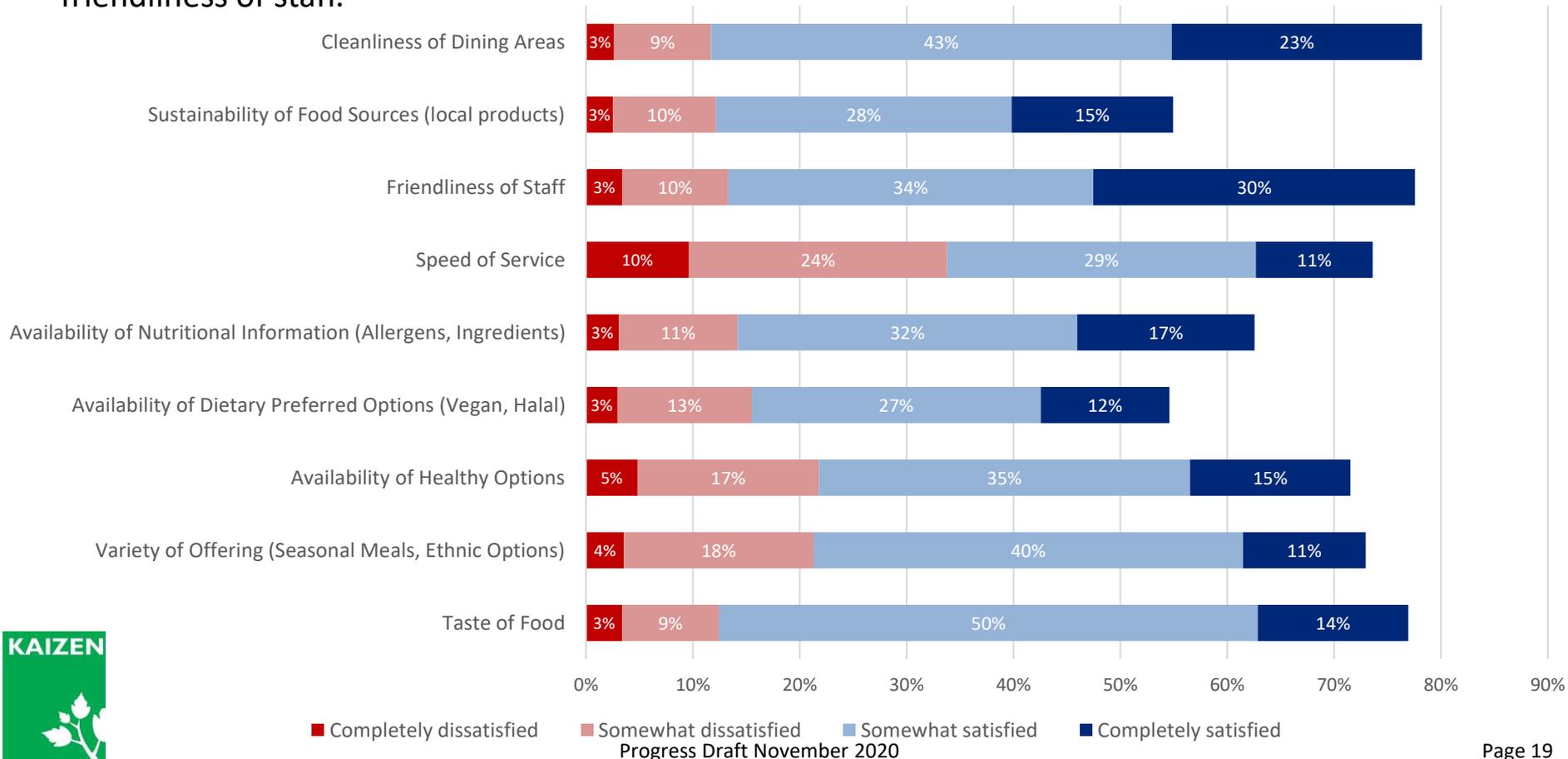
Participant rated their satisfaction level on various topics (below) at Colman Commons. Most notable, the lowest rating was for availability of healthy options, taste of food and speed of service. The highest rating was for friendliness of staff and cleanliness of dining area.



Market Research

Dining Services Survey – Pre-pandemic Dining

Participant rated their satisfaction level on various topics (below) on campus excluding Colman Commons. Most notable, the lowest rating was speed of service, availability of healthy options and variety of offerings. The highest rating was for cleanliness of dining areas, taste of food and friendliness of staff.

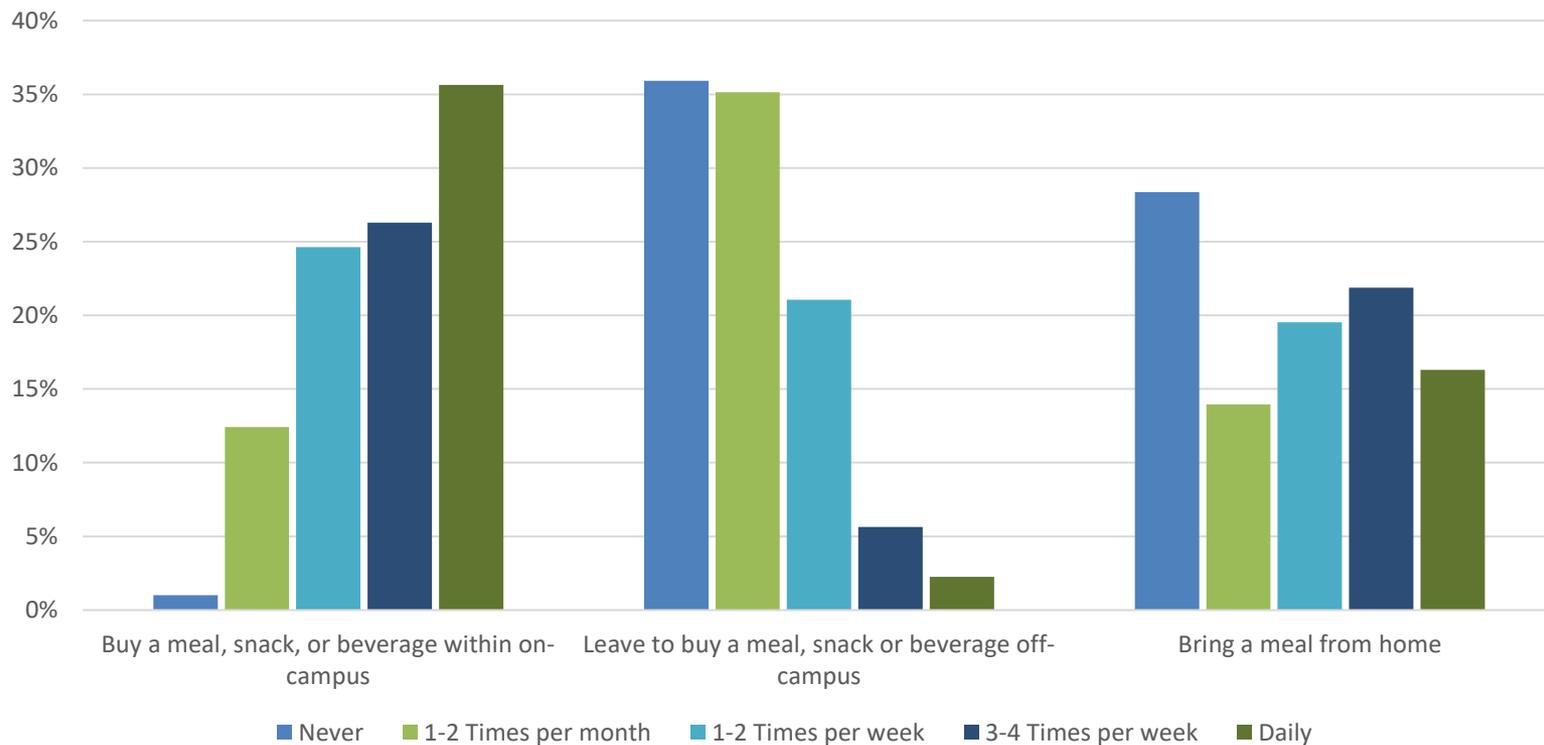


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Dining Services Survey – Pre-pandemic Dining

Survey respondents were asked to indicate how frequently they purchase on-campus, off-campus and bring meals from home. 87% of them were purchasing at least once per week on-campus. 57% of them will bring a meal from home at least once per week. And only 29% are leaving to go off-campus at least once a week to purchase off-campus.

Type of Purchasing vs. Frequency



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Dining Services Survey – Pre-pandemic Dining

Respondents were asked their rationale about why they order meal delivery from off-campus competition. The top 5 responses in order are the following:



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Dining Services Survey – Pre-pandemic Dining

Participants were asked to rate their pre-pandemic food offerings at UTM, from poor (1 star) to excellent (5 star). Collectively, the average rating was of 3.2.

3.2★
average rating



-  Price
-  Lack of Variety
-  Lack of Healthy Options

Dissatisfied participants were asked to comment on their experience (top 3 shown on left in order). Respondents felt that on-campus offerings are more expensive than off-campus (especially at Chef’s Table). Variety was a common issue at Colman Commons and CCIT. Lastly, healthy options were desired with incorporation of seasonal items. In addition quality of food, poor taste and speed of service were concerns expressed.

Market Research

Dining Services Survey – Future Dining

All survey participants were asked to pick their top 3 concepts they would like to see in the future. The most popular concepts are as follows: Chinese cuisine, Italian cuisine, Middle Eastern cuisine (specifically shawarma and falafel) and Korean cuisine (specifically Korean BBQ style).



Chinese

1



Italian

2



Middle
Eastern

3



Korean

4

Market Research

Dining Services Survey – Future Dining

All survey participants were asked to rank their top 3 National Brand they would like to see in the future. Chipotle was the chosen the most frequently, followed by Popeyes. Tier 2 brands represents brands chosen within the same range. Burger brands got the lowest ranking. It is important to note that the community may desire Middle Eastern food but they are not seeking Villa Madina as it received the lowest ranking but they are interested in Osmow's.

Tier 1



Tier 2

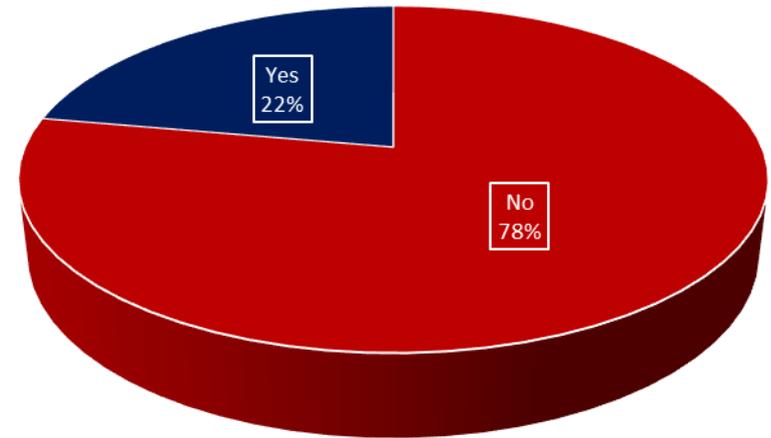


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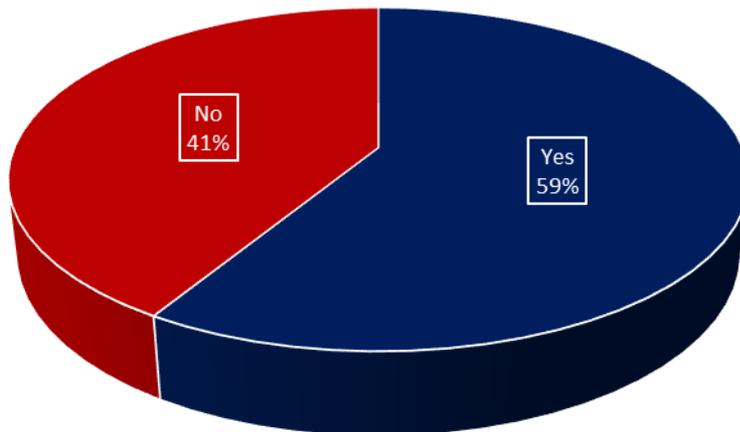
Dining Services Survey – Future Dining

Participants were asked about their future desire for local food businesses or partnerships on-campus. The majority responded with ‘no’ and 22% responded with ‘yes’, as shown in the right pie graph. Mary Brown’s, Katsuya, Pho restaurants and Owl of Minerva were restaurants that were frequently mentioned.

Local Business Partnership



Full-Service Restaurant

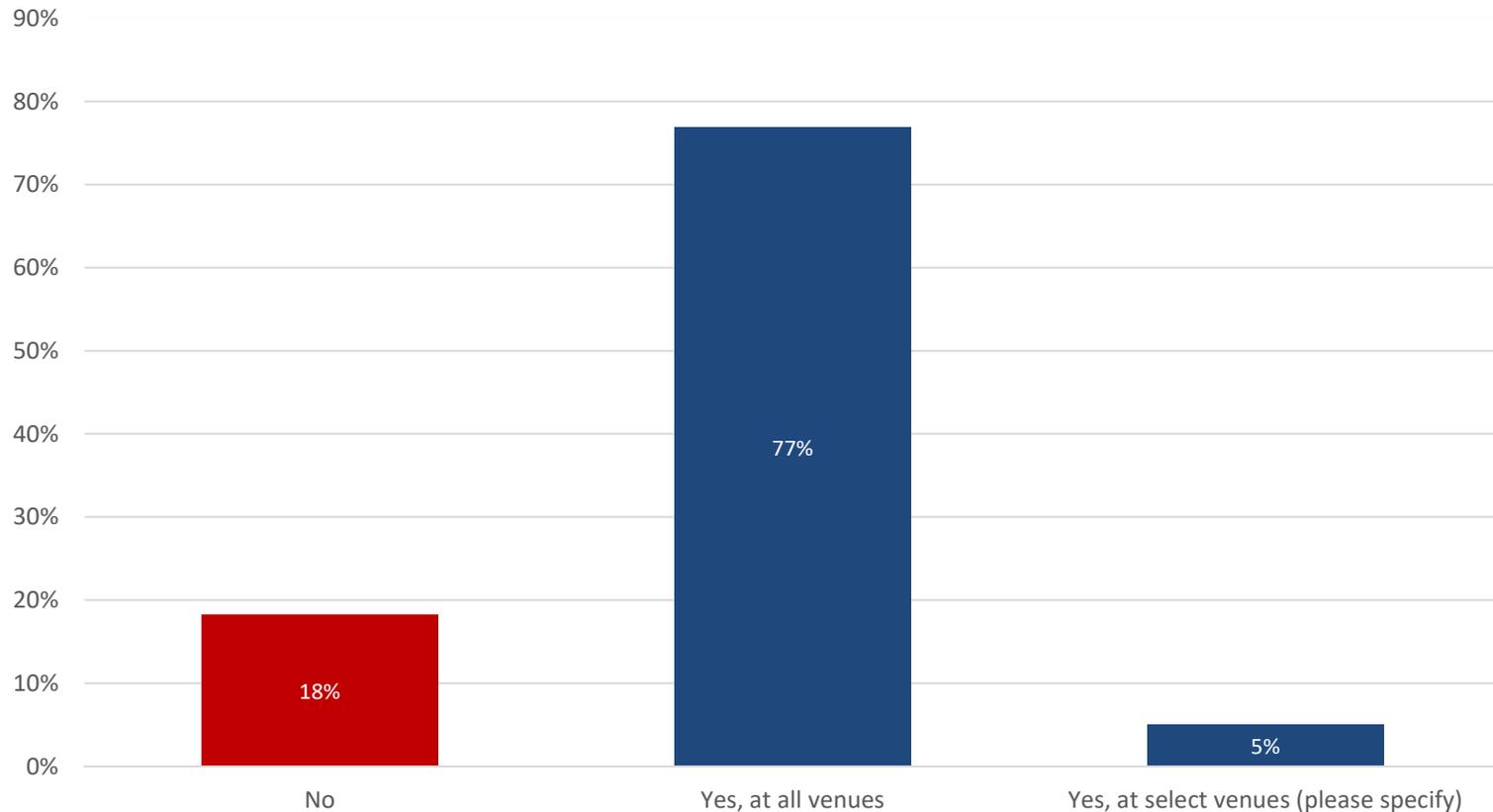


Similarly, they were asked if they would utilize a full-service restaurant with waiter service. As shown in the left pie chart, majority said ‘yes’ at 59% and remaining 41% responded with ‘no’. Greater proportion of students desire a full-service restaurant. 63% of the students who responded desire a site down restaurant. Only 46% of staff and faculty indicated the desire for a sit-down restaurant.

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Dining Services Survey – Future Dining

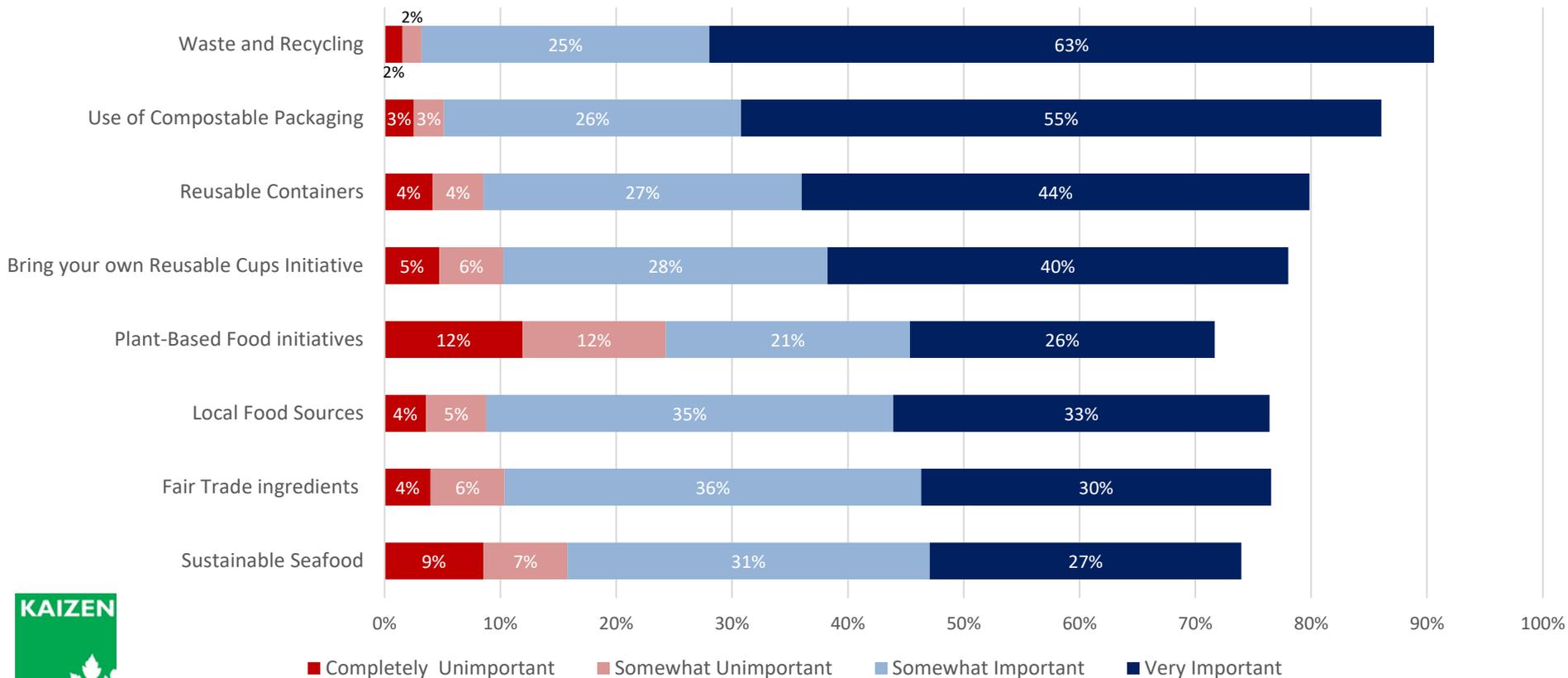
Participants were asked their desire for pre-ordering and curbside pick up options to exist within UTM campus. 82% of respondents expressed interest in this option. Specifically at venues with long lines such as Tim Horton's, Starbucks and Thai Express. Venues within the Davis and IB building were frequently mentioned.



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Dining Services Survey – Sustainability

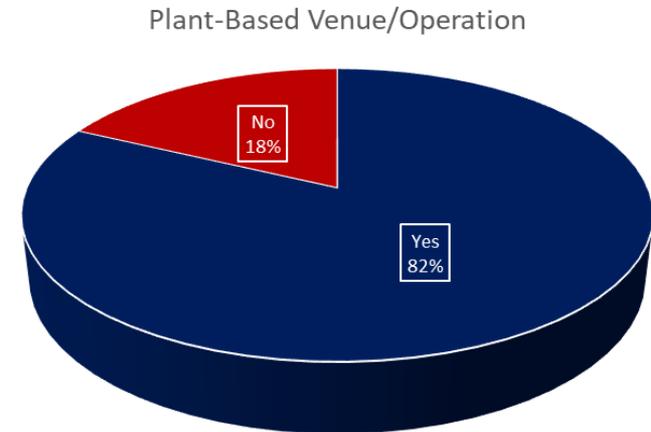
Sustainability is important to the UTM community, specifically waste and recycling, use of compostable packaging and reusable container. Waste diversion initiatives are ranked the highest when compared to sustainable food procurement efforts. Below is breakdown of how important the following sustainability topics are to the community.



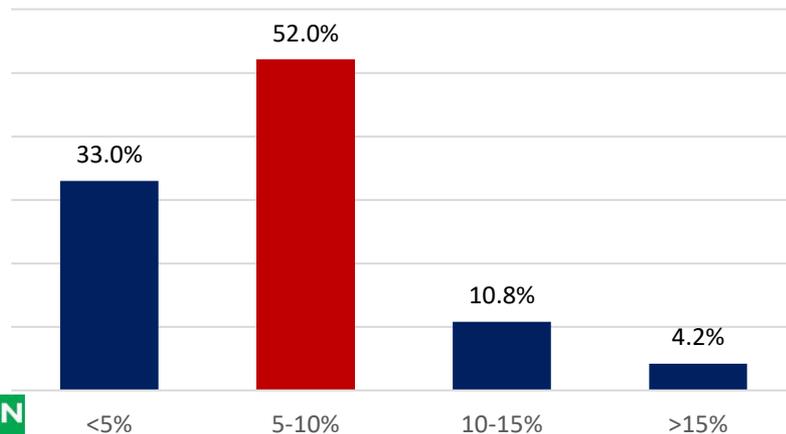
Market Research

Dining Services Survey – Sustainability

Participants (n=847) were asked if they would support a 100% plant-based food venue as shown on the right pie chart. The majority (82%) would support a plant-based food venue. Approximately 87% of women desired plant-based venue whereas 71% of men responded ‘yes’ to plant-based operation.



Sustainability Premium



Participants were asked if they would pay a premium for locally produced and/or sustainable food. 53% of respondents selected ‘yes’ and 47% of respondents selected ‘no’. Next, the majority group was asked how much of a premium they were willing to pay on their sustainable food. The bar chart on the left outlines that the UTM community (85%) are not willing to pay more than 10% premium on sustainable foods.



Market Research

Dining Services Survey – Social Media & Communication

UTM Dining Services would like to know how to best communication with their community. The bar chart below outlines two major communication methods: Instagram and E-mail. Keeping an updated Instagram presence will increase capture rate as most students are active on the platform.

