Research and Feasibility Study
Community Review
Research and Feedback
November 7, 2014

CHANGE FOR THE BETTER  l www.kaizenfood.com l 866 386-4613
Outline

1. Survey Results
   - Demographics
   - Purchasing Habits
   - Typical Spending
   - Dining Habits
   - Current Satisfaction
   - Meal Plan Enrollment and Satisfaction
   - Future Preferences
   - Marketing
   - Catering

2. Focus Group Results

3. Open House Results

4. Conclusions and Recommendations

5. Next Steps & RFP Timeline
1. Survey Results

Demographics

- The foodservice survey was open for 14 days and received 2,557 complete responses.

- 95% of respondents are full-time staff, faculty or students
- 84% of respondents are on campus at least 4 days a week
1. Survey Results

Day Part Purchasing

• By Gender

![Graphs showing purchase distribution by gender]

- The distribution of purchases by gender is virtually identical with males slightly more likely to purchase lunch and dinner on campus, while females are slightly more likely to purchase coffee and snacks.
1. Survey Results

Day Part Purchasing

- 53% of respondents purchase a Small Breakfast/Coffee on campus at least once per week, which is slightly below expectations. In similar campus settings, internal benchmarks show this figure between 65 and 70%.
- 63% of respondents purchase lunch on campus at least once per week which is in line with internal benchmarks.

**Only 29% of respondents purchase breakfast on campus at least once per week, with 59% rarely or never purchasing breakfast.**

**Of participants that purchase a small breakfast/coffee daily, 73% of them do so at Tim Horton’s, either in the Meeting Place or at the Express.**
1. Survey Results

Typical Daily Spending

- **Students**
  - 26% of full-time students spend between $8.00 and $10.99 on food purchases daily.
  - An additional 27% spend between $5.99 and $7.99 on food purchases daily.
  - Only 4% of all respondents do not purchase meals on campus.

- **Staff/Faculty**
  - 35% of staff and faculty spend between $8.00 and $10.99 on food purchases daily.
  - An additional 26% spend between $5.99 and $7.99 on food purchases daily.
1. Survey Results

Typical Daily Spending

- **1st Year Students**

- **Upper Years**

- First year students and those in upper years typically spend about the same amount daily.

- 2nd, 3rd and 4th year students only spend about $1-$2 more per day than 1st Year Students.
1. Survey Results

Typical Daily Spending

- **Students on a Meal Plan**
  - 51% of students on a meal plan spend at least $11.00 per day on meal purchases.

- **Students not on a Meal Plan**
  - Students who are not on a meal plan spend significantly less.
1. Survey Results

Dining Habits – On Campus

Current Usage - First Year Students
Current Usage - Upper year students

- Tim Horton’s, Starbucks and Pizza Pizza are consistently the most popular locations regardless of meal plan participation.
1. Survey Results

Dining Habits – On Campus

Current Usage- With Meal Plan

Current Usage- No Meal Plan

- Tim Horton’s, Starbucks and Pizza Pizza are consistently the most popular locations regardless of meal plan participation.

- Only 7% of non-meal plan participants eat at OPH at least once per week.

Sample size: 321
Sample size: 1936
1. Survey Results

Dining Habits – Off Campus

How often do you leave campus to purchase a meal?

First Year Students

- 27.06% at least 1x week
- 12.12% 3-4 times per month
- 24.03% less often
- 36.80% never

Upper Years

- 37.59% at least 1x week
- 13.38% 3-4 times per month
- 22.03% less often
- 26.99% never

- 27% of 1st year students and 38% of upper year students leave campus at least once per week in order to purchase a meal.

- Text analysis of the responses shows that the majority of individuals go to the Square One Food court and purchase their meals at:

  - Thai Express
  - Manchu Wok
  - Shanghai Story
  - Big Smoke Burger
  - Sushi-Q
  - Villa Madina

- Other popular responses included Golden Square, Burrito Boys, Five Guys, and Osmow's Grill
1. Survey Results

Current Satisfaction - Retail

Satisfaction Scores - All Retail

- 48% of respondents reported that they are satisfied with the taste of food, 45% were satisfied with the cleanliness of dining areas and 41% reported that they were satisfied with the quality of food at retail locations.

- 57% of respondents are dissatisfied with the overall value of retail offerings.

- Nearly half of respondents are dissatisfied with the availability of healthy options on campus.

- 58% of respondents are dissatisfied with the overall value of offering at retail locations.
1. Survey Results

Meal Plan Enrollment

By Type

- 321 respondents (14%) reported that they were enrolled in a meal plan, with the Group A Regular plan being the most popular among respondents.
- Current participation of meal plans at UTM is 18%

By Class Standing

- Of the respondents on a meal plan, 50% were 1st year Students.
1. Survey Results

Meal Plan Satisfaction by Type

Value

- Less than half of all meal plan participants are satisfied with the overall value of their meal plan.
- Of all meal plans, the Group A Light and Group A Regular plans have the greatest perceived value.
1. Survey Results

Meal Plan Satisfaction

1st Year Meal Plan Satisfaction

<table>
<thead>
<tr>
<th></th>
<th>Satisfied</th>
<th>Neither satisfied nor dissatisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value of Meal Plan</td>
<td>46.50%</td>
<td>18.47%</td>
<td>35.03%</td>
</tr>
<tr>
<td>Availability of Meal</td>
<td>31.21%</td>
<td>19.75%</td>
<td>49.04%</td>
</tr>
<tr>
<td>Choices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexibility of Meal</td>
<td>45.22%</td>
<td>25.48%</td>
<td>29.30%</td>
</tr>
<tr>
<td>Plan</td>
<td></td>
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</tbody>
</table>

- Of 1st year students, a majority of them are satisfied with the value and flexibility of their plans, but almost half are dissatisfied with the availability of meal choices.

Upper Year Students Meal Plan Satisfaction

<table>
<thead>
<tr>
<th></th>
<th>Satisfied</th>
<th>Neither satisfied nor dissatisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value of Meal Plan</td>
<td>21.74%</td>
<td>15.53%</td>
<td>62.73%</td>
</tr>
<tr>
<td>Availability of Meal</td>
<td>17.39%</td>
<td>13.66%</td>
<td>68.94%</td>
</tr>
<tr>
<td>Choices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexibility of Meal</td>
<td>24.22%</td>
<td>19.88%</td>
<td>55.90%</td>
</tr>
<tr>
<td>Plan</td>
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</tbody>
</table>

- Satisfaction levels of upper year students on a meal plan drop significantly.
1. Survey Results

**Current Satisfaction - Colman Commons**

<table>
<thead>
<tr>
<th>Category</th>
<th>Satisfied</th>
<th>Neither satisfied nor dissatisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort of dining areas</td>
<td>65.09%</td>
<td>20.28%</td>
<td>14.62%</td>
</tr>
<tr>
<td>Cleanliness of dining areas</td>
<td>51.18%</td>
<td>20.52%</td>
<td>28.30%</td>
</tr>
<tr>
<td>Hours of operation</td>
<td>46.23%</td>
<td>20.75%</td>
<td>33.02%</td>
</tr>
<tr>
<td>Taste of Food</td>
<td>36.32%</td>
<td>20.75%</td>
<td>42.92%</td>
</tr>
<tr>
<td>Healthy Options</td>
<td>31.13%</td>
<td>25.24%</td>
<td>43.63%</td>
</tr>
<tr>
<td>Quality of Food</td>
<td>29.01%</td>
<td>22.17%</td>
<td>48.82%</td>
</tr>
<tr>
<td>Ethnically Diverse Options</td>
<td>28.54%</td>
<td>37.03%</td>
<td>34.43%</td>
</tr>
<tr>
<td>Speed of Service</td>
<td>27.36%</td>
<td>29.01%</td>
<td>43.63%</td>
</tr>
<tr>
<td>Variety of Offering</td>
<td>23.35%</td>
<td>20.05%</td>
<td>56.60%</td>
</tr>
<tr>
<td>Nutritional Information</td>
<td>22.64%</td>
<td>35.14%</td>
<td>42.22%</td>
</tr>
</tbody>
</table>

- Users of Colman Commons are generally satisfied with the hours of operation, comfort and cleanliness of the areas.

- Speed of service variety of offering and the availability of nutritional information score poorly.
### 1. Survey Results

#### Current Satisfaction - Colman Commons

#### Meal Plan Users

<table>
<thead>
<tr>
<th>Category</th>
<th>Satisfied</th>
<th>Neither satisfied nor dissatisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort of dining areas</td>
<td>67.95%</td>
<td>16.99%</td>
<td>15.06%</td>
</tr>
<tr>
<td>Cleanliness of dining areas</td>
<td>47.88%</td>
<td>17.76%</td>
<td>34.36%</td>
</tr>
<tr>
<td>Hours of operation</td>
<td>46.33%</td>
<td>15.06%</td>
<td>38.61%</td>
</tr>
<tr>
<td>Taste of Food</td>
<td>32.05%</td>
<td>18.92%</td>
<td>49.03%</td>
</tr>
<tr>
<td>Ethnically Diverse Options</td>
<td>30.12%</td>
<td>33.98%</td>
<td>35.91%</td>
</tr>
<tr>
<td>Healthy Options</td>
<td>28.96%</td>
<td>23.94%</td>
<td>47.10%</td>
</tr>
<tr>
<td>Quality of Food</td>
<td>24.32%</td>
<td>23.55%</td>
<td>52.12%</td>
</tr>
<tr>
<td>Speed of Service</td>
<td>23.55%</td>
<td>26.25%</td>
<td>50.19%</td>
</tr>
<tr>
<td>Nutritional Information</td>
<td>20.46%</td>
<td>32.43%</td>
<td>47.10%</td>
</tr>
<tr>
<td>Variety of Offering</td>
<td>17.37%</td>
<td>18.92%</td>
<td>63.71%</td>
</tr>
</tbody>
</table>

- When data is filtered to only include meal plan participants, satisfaction levels decrease further.
1. Survey Results

Overall Ranking – All Users

• Overall Ranking of Foodservices on Campus.

• Of all participants, only 17% ranked the foodservices at UTM above 7.

• Overall improvement.

- 43% believe that foodservices have improved over the last 12-24 months. (data excludes 1st year students)
- The Bistro at Deerfield was the most often cited improvement.
- Better tasting food, better quality and better food choices were also noted.
1. Survey Results

Future Preference - Concepts

- All Respondents.

- 60% of all respondents listed Chinese, and 55% listed Italian as their preferred future concepts.
- The most popular write-in responses were Thai and Mexican.
- These responses are consistent with feedback received within open houses and focus groups, as well as with students’ off-campus dining habits.
1. Survey Results

Future Preference / Best-in-Class

- When asked what factors would make UTM food services “best in class”, the majority of respondents tied price and quality together.
- The current sentiment is that the quality of offering does not match the asking price at many outlets.
1. Survey Results

Future Preference / Local, Sustainable Foods

- When asked if students would pay a premium for locally produced, sustainable foods, 37% of them said yes.

- When asked how much of a premium they would be willing to pay, 44% would pay up to a 10% premium, and 86% would pay up to a 5% premium.

- There may be a future opportunity to implement and promote a limited, local food program using only locally produced, sustainable foods.
1. Survey Results

Marketing & Communications

- **What medium would be most effective?**
  - Emails through student... 40.26%
  - Social Media 37.39%
  - Traditional Marketing... 22.35%

- **Marketing posts through Blackboard or social media would be most effective**

- **Which Social Media Platform would be most effective?**
  - Facebook 78.27%
  - Twitter 56.64%
  - Instagram 35.39%
  - University Blog 27.22%
  - LinkedIn 2.58%

- **Facebook and Twitter posts are the most effective social media tools to reach students.**
1. Survey Results

Catering – Usage

- 270 or 13% of survey respondents use catering services.
- The majority of catered events are booked to serve 10-50 people.
- Lunch and beverage services are catered most often.
1. Survey Results

Catering – Satisfaction

- Users are generally satisfied with the process of and ease of ordering...

- ...but are dissatisfied with the product and the price.
1. Survey Results

Catering – Future Preferences

- Quality of Food and Price are the most important factors relating to catering services.
- As with the retail offering, catering users do not feel that the quality of offering received matches the price paid.

Rank the Importance of the Following 1= Most Important
2. Focus Group Results

Key Statistics

• A total of four focus groups were held from late September to late October in order to gather information on the needs and wants of the UTM community as well as to receive feedback on a number of topics including pricing, hours, and offering, as well as to validate responses received within the survey.

• The focus groups were conducted over 45-90 minutes and included groups of both students and staff in order to capture a representative sample of the current population.

• The focus groups held included
  • UTM staff (9 participants)
  • UTMSC Executives (11 participants)
  • Residence Council (7 participants)
  • Faculty Club (8 participants)
## 2. Focus Group Results

### Feedback and Insight

#### Key highlights / comments from student and staff focus groups

| Concepts | § There is a high demand for a better representation of Asian concepts including Chinese, Thai and Vietnamese. Branded concepts would be welcomed however there is a desire for in-house versions of these offerings. (international station)  
§ There is also a high demand for a gourmet burger, deli and Greek concepts  
§ The expanded food truck program has been very well received.  
§ There is demand for a served salad bar, where greens are pre-portioned and customers modify with toppings.  
§ The Bistro at Deerfield has been well received by all groups.  
§ There is a fair amount of fatigue on campus, specifically with branded concepts and at Colman Commons. A greater variety of in-house offerings where possible is desired.  
§ There is a strong opinion that the Colman Commons menu cycle is too short and contains too many fried and heavy options.  
§ All day breakfast options would be welcomed. |
|-------------------|-------------------------------------------------|
| Value/Pricing     | § All groups felt that prices were too high  
§ The overall perceived value of offering is very low.  
§ Pricing does not match the quality of food received.  
§ Lower priced options, or half sizes are desired.  
§ Combo meal pricing, or Meal of the Day options are desired at TFC and Colman Commons. |
| National Brands   | § The most desired national brands currently not on campus include: |

![Thai Express](image)  
![Manchu Wok](image)  
![Jimmy the Greek](image)  
![Chipotle](image)
### 2. Focus Group Results

#### Feedback and Insight

#### Key highlights / Comments from Student and Staff Focus Groups

<table>
<thead>
<tr>
<th>Category</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quality</strong></td>
<td>▪ Overall impression of quality is low. TFC Chartwells brands were often considered to be the poorest quality.</td>
</tr>
<tr>
<td></td>
<td>▪ There is the impression that the offering at Booster Juice and Pizza Pizza is not equivalent to that of the street.</td>
</tr>
<tr>
<td><strong>Staffing/Training</strong></td>
<td>▪ Many complaints about rude staff at Tim Horton’s, Colman Commons and TFC. High praise for staff at Deerfield</td>
</tr>
<tr>
<td></td>
<td>▪ Staff use the same utensils to cut pork and other products promoting cross-contamination</td>
</tr>
<tr>
<td></td>
<td>▪ Some staff are not aware of which products are Halal, and which aren’t.</td>
</tr>
<tr>
<td><strong>Speed of service</strong></td>
<td>▪ There are frequent complaints of slow service, especially at Tim’s during peak periods.</td>
</tr>
<tr>
<td><strong>Healthy Options and Availability of Information</strong></td>
<td>▪ Healthy options are lacking throughout campus and where they are available, high pricing prevents frequent purchases.</td>
</tr>
<tr>
<td></td>
<td>▪ There is a desire for a greater number of non-pasta based vegetarian options.</td>
</tr>
<tr>
<td></td>
<td>▪ Students would like to see nutritional information at the point of service where possible.</td>
</tr>
<tr>
<td></td>
<td>▪ Users attempt to find information on the foodservice website but find it difficult to navigate and often lacking in information</td>
</tr>
<tr>
<td><strong>Exclusivity</strong></td>
<td>▪ There is a strong desire to loosen the exclusivity rules, especially with student clubs. Forcing student funded clubs to purchase catering in-house often proves to be cost prohibitive.</td>
</tr>
</tbody>
</table>
3. Open House Results

Key Statistics

- A total of four open houses were held from late September to late October, also to gather information on the needs and wants of the UTM community as well as to receive feedback on a number of topics including branding, pricing, hours of operation, offering, marketing, environmental initiatives, “Best in Class” foodservices, as well as to validate responses received within the survey.
- The open houses were held as sessions of 2 hours each and were structured such that participants could give feedback quickly with a very small demand of their time.
- The facilitators of the open house sessions often engaged with participants in order to gain as much insight into their feedback and opinions as possible.
- The open houses were held in the following locations:
  - The Student Centre
  - The Meeting Place
  - Deerfield Hall
  - Colman Commons
- A total of 977 individual responses were collected over the four open house sessions.
3. Open House Results

Feedback and Insight

Key findings from Open House Sessions

| Brands and Concepts | A greater representation of Asian, Mexican, Italian and Mediterranean dishes and concepts  
|                     | Manchu Wok, Thai Express, and Popeye’s, listed as the most popular brands |
| Menu and Offering   | There is a desire for more vegetarian and vegan menu items  
|                     | Greater Halal offerings given the student demographic  
|                     | Quality needs to match the price  
|                     | Extended hours and availability of a broader menu, later  
|                     | Combo or value meals daily  
|                     | Less exclusivity on campus |
| Staffing, Marketing, Communication | Staff courtesy and/or training in most locations is perceived to be low.  
| | Students want to see the ability to use gift cards at branded locations  
| | Want to implement frequent buyer program  
| | Social media, specifically Facebook and twitter along with traditional marketing (posters, tent cards etc.) are best way to speak to students |
| Sustainability     | Need to implement a campus-wide compost program  
|                     | Increase local purchasing and procurement as much as possible |
| Best in Class      | Implement cooking classes for students at Colman Commons  
|                     | Have rotating local food purveyors at TFC  
|                     | UTM supported Food Bank |
4. Conclusions and Recommendation

Key Recommendations/Considerations

• Key concepts to consider in the future include Chinese, Thai, Gourmet Burger, Greek and Mexican either through National brands or in-house programs with a focus on freshness and quality.

• An expansion of healthy food offerings throughout campus including non-pasta based vegetarian options, and build to order salad options should be considered.

• The menu cycle and late night offerings at Colman Commons should be expanded in order to alleviate menu fatigue. Further, Colman commons should be aggressively marketed to non-meal plan participants

• Venue hours of operations to be reviewed and adjusted as necessary venue in order to ensure that students are served as broadly as possible
4. Conclusions and Recommendation

Key Recommendations/Considerations

- A limited exclusivity arrangement for catering services on campus should be considered, whereby the on-site operator is one of a select group of approved caterers.

- Ensure that the future operator implements a comprehensive training and development program to address future staffing issues and concerns as well as to empower the operator and university to take corrective action.

- Ensure that the future operator has infrastructure and programs in place to properly and continuously market events, promotions, initiatives, programs and offerings on an ongoing basis both with traditional marketing, online and through social media.

- Structure the future foodservice contract to include measurable minimum KPI’s relating to service and offering and develop and implement a scorecard measurement tool to ensure ongoing contract compliance.
Questions and Discussion