*Final Report*

# CONCORDIA UNIVERSITY
# Campus Foodservice Survey


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# 1 Introduction

## 1.1 Background

Concordia University ("Concordia" or the "University") is located in Montreal, Quebec on two campuses: Loyola and Sir George Williams ("SGW"). The University's community consists of over 46,000 students and approximately 7,000 faculty and staff (the "Population").

Hospitality Concordia ("Hospitality") oversees on-campus foodservices including residence meal plans, catering, retail foodservice outlets and snack vending machines. The contract with Concordia's foodservice provider expires in May 2022. In preparation for the process to select its next foodservice provider, Concordia engaged *fs*STRATEGY Inc. ("*fs*STRATEGY") to conduct an independent survey (the "Survey") of the Population.

The Survey was initially scheduled to launch in early 2020 to understand the satisfaction, needs and preferences of the Population for foodservice on campus. Because of campus closures and restrictions related to COVID-19, the survey launch was moved to February 2021. The new timing and campus restrictions affected the target respondent pool. Some target respondents have never experienced foodservice on campus and others had since graduated; thereby, reducing the number of respondents with the necessary experience and requiring those respondents to remember preferences from nearly a year prior. As such, Concordia and *fs*STRATEGY opted to reposition the survey to focus less on historical campus experience and satisfaction and to focus more on foodservice preferences in general.

## 1.2 Report Structure

This report has been structured as follows:

- Section 1 – Introduction
- Section 2 – Methodology and Response Rates
- Section 3 – Results
- Section 4 – Conclusions

Readers interested a synopsis of the overall results should review Section 4

# 2 Methodology and Response Rates

## 2.1 Questionnaire Development

*fs*STRATEGY prepared a draft questionnaire using an iterative process that incorporated feedback from the University and student representatives. The original draft was finalized in March 2020, but was redesigned with collaboration in January and February 2021 to accommodate COVID-19 related restrictions on campus. The final questionnaire contained 25 questions[1] with a variety of multiple-choice and open-ended questions. The Survey questionnaire may be found in Appendix 1.

## 2.2 Data Collection and Promotion

*fs*STRATEGY published the Survey using Survey Monkey, an online survey tool, and provided links to Concordia who promoted the Survey to its community.

Concordia launched the Survey on February 15, 2021. The Population was invited to participate in English or French. They Survey was open for two weeks and closed on March 1, 2021. During this time, Concordia used a variety of marketing tools to promote the survey.

- Promotion Schedule:
    - February 15: Concordia Facebook page (111,981 followers); banner live on Food Services and Hospitality webpages; myConcordia portal (an internal system for Students, Staff and Faculty that acts as the main entry point for all on-line learning)
    - February 16: NOW story in graduate student newsletter (8,000 subscribers)
    - February 17: NOW story in Faculty and Staff newsletter (9,300 subscribers)
    - February 18: NOW story in undergraduate student newsletter (30,300 subscribers); posted survey to Shoptalk (internal staff communication listserv); Concordia Student Experiences Facebook page (1,812 followers) shared by the Concordia Facebook page
    - February 22: Concordia Facebook page
    - February 23: NOW one-liner reminder in graduate newsletter
    - February 24: NOW one-liner reminder in faculty and staff newsletter; Concordia Student Experiences Facebook page, shared by the Concordia Facebook page
    - February 25: NOW one-liner in undergraduate student newsletter, reminder on shoptalk
    - February 26: Final promotion on Facebook

As shown, the Population was invited or reminded to participate through at least one form of media nearly every weekday during the period the Survey was open.

While no direct email marketing was used to promote the Survey, the bilingual format, length of Survey window and variety of promotional methods used (particularly the myConcordia portal through which

[1] Excluding questions related to participation incentives and interest in participating in focus groups.

most active students and faculty pass through daily) reflects a good faith effort to make the Survey reasonably and practically accessible to any Concordia community member wishing to participate.

As an incentive to participate, respondents were able to enter a draw to win the grand prize (a $200 certificate) or one of six $50 certificates for online purchases at the Concordia Book Stop. Respondents could also indicate whether they wished to participate in future focus groups or community engagement related to campus foodservices.

Respondents who were interested in the draw or focus groups provided an email address and valid Concordia ID number. The prize draw was conducted on March 1, 2021 and winners are scheduled to be announced the week of March 8, 2021.

Email addresses and Concordia IDs provided by respondents were disconnected from the data set to preserve the privacy of respondents.

## 2.3 Response Rates

Exhibit 2.1 summarizes the final response count for the Survey by Population Group.

**Exhibit 2.1**
**Responses by Population Group**

| | Sir George Williams | Loyola | Not Sure | Total |
|---|---|---|---|---|
| **Students** | | | | |
| Student - Full-time | 558 | 160 | 119 | 837 |
| Student - Part-Time | 80 | 22 | 4 | 106 |
| Student - Continuing Education | 2 | 3 | 6 | 11 |
| Total Student Sample | 640 | 185 | 129 | 954 |
| **Staff, Faculty and Other** | | | | |
| Staff or Faculty | 222 | 54 | 1 | 277 |
| Other | 16 | 3 | 12 | 31 |
| Total Population Sample | 878 | 242 | 142 | 1,262 |

*Source: fsSTRATEGY Inc.*

As shown, 1,262 people responded to the Survey. The response represents approximately 2.4% of the University's 53,000-person Population.[2] Of these, at least 1,154 (90.4%) respondents completed the entire Survey, none of the responses were duplicates, which is a greater completion rate than past studies.[3] SGW respondents represented 78.4% of the total sample, comparable to campus population distribution. Most student respondents (87.7%) are full-time. Student respondents represent 76% of total respondents. Most respondents who selected other are future students (64.5%).

[2] Source: https://www.concordia.ca/about/fast-facts.html, accessed March 3, 2021; includes 46,077 students and 6,639 staff and faculty.
[3] In 2013, the Beverage Survey yielded 6,024 responses, but 179 were duplicates (i.e., respondents replied more than once) and 996 were incomplete.

The response rate (2.4%) is less than those experienced in previous food and beverage surveys completed by *fs*STRATEGY at Concordia (10% to 17%). The difference between the current and historical response rates is largely due to two factors: use of email invitations for past surveys and campus restrictions related to COVID-19.

Previous surveys at Concordia used aggressive direct email campaigns in addition to a variety of marketing tools. In *fs*STRATEGY's experience, direct email can increase response rates by a factor of three to four, but, as in this case, is not always necessary to meet the two core objectives of the Survey: capture a meaningful sample of opinions; and, publish the survey in a manner that all interested parties are aware and have access to the survey.

Intuitively, a reduced interest in the Survey makes sense as most of the population is not on-campus, parts of the population have never been on campus, and others may not return to campus if they graduate this term. Despite the relatively lower response rate, the number of responses received is sufficient to gain meaningful insights into the population's food service preferences and provide valuable direction for future foodservice offerings on campus.

*fs*STRATEGY cross-tabulated the results of the Survey using three groups: total Students, Staff and Faculty, and All Respondents.

# 3 Survey Results

## 3.1 Food and Beverage Spending

Section 3.1 examines what respondents spend for a typical coffee, snack or lunch meal purchase away from home. The responses do not differentiate between product preferences within the categories (i.e., pizza versus entrée salad, or coffee versus latte), nor do they infer frequency of purchase. Instead, the data helps define price points and respondent budgets for these categories, which, in turn, may be used to drive menu pricing strategies.

### 3.1.1 Coffee Purchases

Exhibit 3.1 summarizes the typical amount respondents spend on coffee per purchase.

**Exhibit 3.1**
**Typical Coffee Spend per Purchase**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Less than $2.00 per Purchase | 155 | 17% | 33 | 12% | 192 | 15% |
| Between $2.00 and $2.99 per Purchase | 319 | 34% | 113 | 41% | 444 | 36% |
| Between $3.00 and $3.99 per Purchase | 166 | 18% | 35 | 13% | 205 | 17% |
| $4.00 or Greater per Purchase | 115 | 12% | 46 | 17% | 162 | 13% |
| I do not Purchase Coffee | 182 | 19% | 46 | 17% | 236 | 19% |
| Total | 937 | 100% | 273 | 100% | 1,239 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, the most commonly reported (36% of respondents) purchase price for coffee is between $2.00 and $2.99. More than half of respondents pay less than $3.00 for coffee. While this indicates the importance of value-based pricing for coffee on campus, 30% of respondents also reported paying more than $3.00 for coffee, suggesting a potential opportunity for a premium alternative offering in addition to the core coffee program. Nearly one-fifth of respondents do not purchase coffee.

Care should be taken if attempting to infer product type by price paid. This question did not differentiate between standard drip coffee and specialty, espresso-based coffee. Based on observed market prices, spends greater than $3.00 typically infer specialty coffee (i.e., latte, cappuccino, etc.); however, this does not necessarily imply that spends less than $3.00 are not specialty coffee. Emerging coffee programs like McCafé offer a variety of specialty coffee products below the $3.00 threshold.

### 3.1.2 Snack Purchases

Exhibit 3.2 summarizes the typical amount respondents spend on snacks per purchase.

**Exhibit 3.2**
**Typical Snack Spend per Purchase**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Less than $2.50 per Purchase | 149 | 16% | 37 | 14% | 192 | 16% |
| Between $2.50 and $4.99 per Purchase | 493 | 53% | 142 | 52% | 647 | 52% |
| Between $5.00 and $7.49 per Purchase | 172 | 18% | 49 | 18% | 227 | 18% |
| $7.50 or Greater per Purchase | 27 | 3% | 3 | 1% | 31 | 3% |
| I do not Purchase Snacks | 95 | 10% | 40 | 15% | 139 | 11% |
| Total | 936 | 100% | 271 | 100% | 1,236 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, most respondents (52%) spend between $2.50 and $4.99 per purchase on snack items. Snack purchases patterns appear comparable between Students and Staff and Faculty respondents. Student respondents appear slightly more likely to purchase snacks than Staff and Faculty respondents. Overall, 11% of respondents do not purchase snacks.

### 3.1.3 Lunch Purchases

Exhibit 3.3 summarizes the typical amount respondents spend on lunch meals per purchase.

**Exhibit 3.3**
**Typical Lunch Meal Spend per Purchase**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Less than $5.00 per Purchase | 55 | 6% | 3 | 1% | 60 | 5% |
| Between $5.00 and $9.99 per Purchase | 288 | 31% | 55 | 20% | 354 | 29% |
| Between $10.00 and $14.99 per Purchase | 397 | 42% | 143 | 53% | 549 | 44% |
| Between $15.00 and $20.00 per Purchase | 100 | 11% | 44 | 16% | 150 | 12% |
| Greater than $20.00 per Purchase | 12 | 1% | 3 | 1% | 15 | 1% |
| I do not Purchase Lunch | 85 | 9% | 24 | 9% | 110 | 9% |
| Total | 937 | 100% | 272 | 100% | 1,238 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, most respondents (44%) spend between $10.00 and $14.99 per lunch meal purchase. Staff and Faculty respondents report spending more per purchase than Student respondents on average. Using the midpoint for each price bucket weighted by the response distribution, Staff and Faculty respondents spend approximately 13% more per lunch meal purchase than Student respondents. Overall, 9% of respondents do not purchase lunch meals.

## 3.2 Foodservice Preferences

### 3.2.1 Cultural, Religious, and Dietary Requirements

Exhibit 3.4 summarizes special dietary requirements (cultural, religious, and food intolerances) among respondents.

**Exhibit 3.4**
**Specialty Diet Requirements Among Respondents**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| None | 568 | 61% | 186 | 68% | 771 | 62% |
| Prefer not to Answer | 10 | 1% | 3 | 1% | 13 | 1% |
| Yes | 359 | 38% | 84 | 31% | 455 | 37% |
| Vegetarian (lacto-ovo) | 115 | 12% | 40 | 15% | 158 | 13% |
| Halal | 103 | 11% | 5 | 2% | 109 | 9% |
| Vegan | 86 | 9% | 16 | 6% | 106 | 9% |
| Dairy Free | 63 | 7% | 19 | 7% | 81 | 7% |
| Gluten Free or Wheat Free | 37 | 4% | 16 | 6% | 54 | 4% |
| Egg free | 25 | 3% | 5 | 2% | 31 | 3% |
| Kosher | 25 | 3% | 5 | 2% | 30 | 2% |
| Nut, Seed or Peanut Free | 13 | 1% | 4 | 1% | 17 | 1% |
| Soy Free | 12 | 1% | 3 | 1% | 15 | 1% |
| Other | 47 | 5% | 16 | 6% | 70 | 6% |
| Total | 937 | 100% | 273 | 100% | 1,239 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, greater than a third (37%) of respondents indicated they do have special dietary requirements. Thirteen percent of respondents identified as vegetarian (lacto-ovo) making this the most common dietary requirement followed by Halal and vegan (9%). Student respondents are more likely to require Halal diet than Staff and Faculty respondents (representing 11% of the Student respondents and 2% of Staff and Faculty respondents). The average number of dietary preferences among respondents, with at least one dietary preference, was 1.5 preferences.

The most common "Other" responses included no beef (16 responses), no pork (12 responses) and no shellfish (six responses).

### 3.2.2 Sustainability

Exhibit 3.5 summarizes environmental and sustainability considerations that affect respondents' food purchasing decisions.

**Exhibit 3.5**
**Environmental and Social Sustainability Considerations**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Compostable Packaging and/or Less Packaging | 483 | 53% | 173 | 64% | 673 | 56% |
| Reusable Packaging and/or Service Ware (Cups, Plates, etc.) | 428 | 47% | 123 | 46% | 565 | 47% |
| Locally Produced | 367 | 40% | 146 | 54% | 529 | 44% |
| Organic | 333 | 37% | 95 | 35% | 443 | 37% |
| Respect for Animal Welfare | 331 | 36% | 89 | 33% | 433 | 36% |
| Fair Trade | 284 | 31% | 122 | 45% | 419 | 35% |
| Fair Labour Practices | 268 | 29% | 98 | 36% | 374 | 31% |
| Lower Carbon Footprint | 277 | 30% | 64 | 24% | 348 | 29% |
| Contributes to more Equitable, Healthy Communities | 259 | 28% | 68 | 25% | 338 | 28% |
| Protects Biodiversity | 190 | 21% | 49 | 18% | 245 | 20% |
| Lower Natural Resource Usage (Water, Land, etc.) | 185 | 20% | 37 | 14% | 228 | 19% |
| Other | 11 | 1% | 9 | 3% | 20 | 2% |
| None or No Response | 174 | 19% | 36 | 13% | 212 | 18% |
| Total | 912 | 100% | 269 | 100% | 1,207 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, the environmental and social sustainability factors most important to respondents include compostable or less packaging material, reusable packaging or service ware, and locally produced items. Staff and Faculty respondents appear more likely than Student respondents to make purchase decisions based on use of compostable or less packaging material, locally produced items, Fair Trade products and fair labour practices.

Of the 39 respondents who selected "Other", three indicated the use of small and local businesses affected their decisions.

The wording of this question is such that a null response (i.e., no answer given) implies environmental and sustainability considerations are not important to the respondent's decision process. Therefore, the total number of responses to this question includes respondents that did not select a consideration; and reflects the estimated number of respondents that read the question. Combined, non-answers and the 19 explicit answers discussed above suggest up to 212 respondents (18%) do not consider sustainability when making food purchase decisions. More importantly, the inverse observation implies that sustainability initiatives are considered by 82% of respondents when making food purchase decisions.

Exhibit 3.6 summarizes which zero-waste services respondents would support.

**Exhibit 3.6**
**Services Respondents Would Support**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Receiving a Discount for Bringing My Own Reusable Mug for Beverage | 735 | 83% | 216 | 82% | 970 | 83% |
| Receiving a Discount for Bringing My Own Reusable Container for Food | 702 | 79% | 188 | 72% | 907 | 77% |
| Creating Cupless Stations where You are Required to Bring Your Own Mug and Single Use Cups are Not Offered | 399 | 45% | 125 | 48% | 534 | 46% |
| Paying a Deposit for a Reusable Mug and/or Reusable Container for Take Out | 276 | 31% | 81 | 31% | 364 | 31% |
| Paying for Use of Single Use Service Ware (Utensils, Cups, etc.) | 238 | 27% | 69 | 26% | 311 | 27% |
| Other | 20 | 2% | 9 | 3% | 31 | 3% |
| None or No Response | 34 | 4% | 11 | 4% | 45 | 4% |
| Total | 888 | 100% | 262 | 100% | 1,172 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, most respondents support a system that offers discounts for bringing a reusable mug for beverages (83%) or bringing a reusable container for food (77%). Interestingly, less than one-third of respondents support a system that charges extra for using single-use service ware (i.e., not using a reusable mug or container), which, in essence, is the same outcome as discounting when reusable wares are used. While this form of perceptive bias is common (people generally prefer outcomes they see as rewarding to those perceived as punishment), it also may suggest a support for systems that "do good" only if there is no perceived cost to the user. In this context, a consumer may support the efforts to increase the use of reusable service ware, but not necessarily intend to make use of the program.

Again, the wording of this question is such that a null response (i.e., no answer given) implies the zero-waste services suggested are not important to the respondent when making a food or beverage purchase. Therefore, the total number of responses to this question includes respondents that did not select a service; and reflects the estimated number of respondents that read the question. Combined, non-answers and the five explicit answers only 45 respondents (4%) do not support at least one of the proposed zero-waste services.

Most respondents who selected other indicated they would support reusable wares (without discount or fee components) (ten respondents) and use of compostable materials (eight respondents).

### 3.2.3 Determining Where to Eat

Exhibit 3.7 summarizes what respondents consider when deciding where (i.e., which restaurant, cafeteria, etc.) to eat.

**Exhibit 3.7**
**Most Important Factors When Deciding Where to Eat**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| The Pricing is Fair/Provides Good Value for the Money | 753 | 83% | 206 | 77% | 980 | 81% |
| Convenience of Location/Proximity | 595 | 65% | 218 | 81% | 832 | 69% |
| Speed of Service (Able to Order, Receive and Pay for Food Quickly) | 611 | 67% | 187 | 70% | 816 | 68% |
| Variety of Menu Options | 421 | 46% | 133 | 49% | 570 | 47% |
| Hours of Operation | 416 | 46% | 98 | 36% | 526 | 44% |
| Customer Service | 318 | 35% | 116 | 43% | 443 | 37% |
| Grab and Go (Hot/Cold Foods) | 301 | 33% | 81 | 30% | 388 | 32% |
| Seating | 261 | 29% | 49 | 18% | 320 | 27% |
| Made-to-Order Food On Site | 171 | 19% | 86 | 32% | 267 | 22% |
| Online Ordering/Payment | 221 | 24% | 32 | 12% | 263 | 22% |
| I Always Choose Based Solely on the Lowest Price Possible | 157 | 17% | 13 | 5% | 177 | 15% |
| The Business is Student-Run | 85 | 9% | 23 | 9% | 111 | 9% |
| Other | 33 | 4% | 27 | 10% | 62 | 5% |
| Total | 910 | 100% | 269 | 100% | 1,205 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, fair pricing / good value is the most important factor for respondents when determining where to eat. It is important to note that "I always choose based solely on lowest price" scored relatively low, selected by only 15% of respondents. This illustrates the importance of catering to the "right" price points, not just focusing on "low" price points, a concept that is both supported and directed by the responses presented in Section 3.1. After price and value, convenience of location, speed of service, menu variety and hours of operation round out the top five decision factors. These factors speak largely to accessibility: quick access to a variety of food where and when I want it, at a fair price I can afford.

For the most part, the Student factors aligned with those of Staff and Faculty with a few exceptions. Staff and Faculty were more likely to consider convenience of location than Students were, and were more likely to consider convenience than price. Customer service and made-to-order food were considered more often by Staff and Faculty than by students.

The most common "Other" responses included taste or quality of food (14 responses), dietary requirements – specifically gluten free and vegetarian (ten responses) and healthy options (seven responses).

### 3.2.4 Determining What to Eat

Exhibit 3.8 summarizes what respondents consider important when deciding what to eat once a foodservice outlet (i.e., restaurant, cafeteria, etc.) is selected.

**Exhibit 3.8**
**Most Important Factors When Deciding What to Eat**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Taste of Food | 778 | 85% | 212 | 79% | 1,011 | 84% |
| Quality of Food | 716 | 79% | 217 | 81% | 950 | 79% |
| Healthy | 517 | 57% | 179 | 67% | 713 | 59% |
| Fresh Made | 504 | 55% | 167 | 62% | 686 | 57% |
| Portion-Size | 439 | 48% | 87 | 32% | 534 | 44% |
| Clear Labeling (Nutritional, Origin of Food, Local, etc.) | 210 | 23% | 63 | 23% | 283 | 23% |
| Other | 31 | 3% | 13 | 5% | 45 | 4% |
| Total | 912 | 100% | 269 | 100% | 1,207 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, the taste and quality of food are the most important factors when respondents are deciding what to eat. Staff and Faculty respondents consider healthy and freshly made items more important than Student respondents. Student respondents consider portion size more important than Staff and Faculty respondents.

The most common "Other" responses included price (17 responses) and dietary requirements (15 responses).

### 3.2.5 Healthy Food

Respondents who indicated in the previous question that they consider the healthiness of food when making purchase decisions were asked to define what "healthy" meant to them. Exhibit 3.9 summarizes what respondents consider to be healthy food.

**Exhibit 3.9**
**What is Considered Healthy Food**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Made With Lots of Fruits and Vegetables | 403 | 79% | 139 | 79% | 556 | 79% |
| Unprocessed or Minimally Processed | 374 | 73% | 148 | 84% | 534 | 76% |
| Low Sugar and Salt | 314 | 62% | 110 | 62% | 436 | 62% |
| Organic Foods | 242 | 47% | 80 | 45% | 335 | 48% |
| Low Fat | 224 | 44% | 69 | 39% | 302 | 43% |
| Local / Seasonal Ingredients | 191 | 37% | 96 | 54% | 299 | 42% |
| Raw Foods / Ingredients | 173 | 34% | 45 | 25% | 224 | 32% |
| Low Carbohydrates | 154 | 30% | 50 | 28% | 210 | 30% |
| High Protein Meat Substitute | 161 | 32% | 39 | 22% | 206 | 29% |
| High Protein Meat | 147 | 29% | 38 | 21% | 189 | 27% |
| Other | 13 | 3% | 4 | 2% | 17 | 2% |
| Total | 510 | 100% | 177 | 100% | 704 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, respondents most commonly consider healthy food to be made with lots of fruits and vegetables, unprocessed (or minimally processed) and/or low in sugar and salt. Staff and Faculty respondents consider local and seasonal ingredients healthy to a greater degree than Student respondents.

The “Other” responses were varied. The most common “Other” response was well balanced meals (three responses), and a clean ingredient deck (two responses).

### 3.2.6 Preferred Types of Food

Exhibit 3.10 summarizes what types of food respondents would purchase from restaurants at lunch.

**Exhibit 3.10**
**Preferred Types of Food for Lunch**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Sandwiches / Wraps | 620 | 69% | 172 | 65% | 807 | 67% |
| Salads | 477 | 53% | 163 | 61% | 654 | 55% |
| Rice or Grain Bowls | 423 | 47% | 127 | 48% | 564 | 47% |
| Burritos / Tacos | 421 | 47% | 108 | 41% | 541 | 45% |
| Chicken | 398 | 44% | 103 | 39% | 513 | 43% |
| Sushi | 379 | 42% | 108 | 41% | 501 | 42% |
| Flatbreads / Pizzas | 372 | 41% | 104 | 39% | 487 | 41% |
| Soup | 313 | 35% | 159 | 60% | 481 | 40% |
| Dumplings (Steamed or Fried) | 323 | 36% | 111 | 42% | 444 | 37% |
| Pasta | 344 | 38% | 69 | 26% | 428 | 36% |
| Noodles (other) | 318 | 35% | 95 | 36% | 423 | 35% |
| Smoothies / Yogurts | 333 | 37% | 57 | 21% | 407 | 34% |
| Breakfast Foods (Eggs, Pancakes, Bagels, etc.) | 320 | 35% | 72 | 27% | 403 | 34% |
| Hot Entrees (Protein, Vegetable, Starch) | 277 | 31% | 99 | 37% | 387 | 32% |
| Stir Fries | 273 | 30% | 103 | 39% | 386 | 32% |
| Small Snacks | 305 | 34% | 64 | 24% | 376 | 31% |
| Fried Foods (French Fries, Poutine, Fish and Chips, etc.) | 318 | 35% | 47 | 18% | 373 | 31% |
| Pastries and Baked Goods | 290 | 32% | 53 | 20% | 351 | 29% |
| Plant-Based Proteins | 267 | 30% | 74 | 28% | 350 | 29% |
| Whole Fruit | 257 | 28% | 52 | 20% | 318 | 27% |
| Other Meat Proteins (Beef, Pork, etc.) | 217 | 24% | 58 | 22% | 281 | 23% |
| Raw Vegetables / Crudité | 169 | 19% | 57 | 21% | 230 | 19% |
| Fish | 156 | 17% | 53 | 20% | 213 | 18% |
| Other | 26 | 3% | 11 | 4% | 39 | 3% |
| Total | 904 | 100% | 266 | 100% | 1,196 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, the top three most preferred types of food include sandwiches or wraps (67%), salads (55%), and rice or grain bowls (47%). Staff and Faculty respondents prefer soup (60%) to a greater degree than Student respondents (35%).

The fact that most options were selected by one-third or more of respondents, illustrates the importance of product variety on campus.

The most common "Other" responses included a variety of international cuisine (six responses) – specifically Indian (three responses), and vegan items (three responses).

### 3.2.7 Preferred Dining Experiences

Exhibit 3.11 summarizes what types of dining experiences respondents prefer.

**Exhibit 3.11**
**Preferred Dining Experiences**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Lounge Seating to Eat, Relax and Study | 664 | 74% | 120 | 46% | 800 | 68% |
| Café | 588 | 65% | 162 | 62% | 763 | 64% |
| Grab and Go (Hot/Cold Foods) | 340 | 38% | 132 | 50% | 479 | 40% |
| Pub Style (Food and Alcohol) | 283 | 32% | 104 | 40% | 396 | 33% |
| Experience is Not Important to Me | 72 | 8% | 27 | 10% | 101 | 9% |
| Vending Machines with More Variety | 63 | 7% | 6 | 2% | 70 | 6% |
| Other | 20 | 2% | 9 | 3% | 30 | 3% |
| Total | 898 | 100% | 263 | 100% | 1,185 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, most respondents prefer lounge seating to eat, relax and study (68%) and a café dining experience (64%). Grab and go and pub style were also popular preferences, especially among Staff and Faculty respondents.

The most common “Other” responses included a quiet place or somewhere not overly crowded (seven responses) and it depends on the time or occasion (five responses).

### 3.2.8 Services to Increase Campus Purchases

Exhibit 3.12 summarizes which services would most increase respondents’ likelihood of purchasing food on-campus.

**Exhibit 3.12**
**Services to Increase On-Campus Food Purchases**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Express Pick Up for Pre-Ordered Food | 508 | 58% | 164 | 65% | 683 | 59% |
| Pre-Order/Pre-Pay Mobile Apps or Website | 431 | 49% | 102 | 40% | 542 | 47% |
| Delivery Options | 271 | 31% | 73 | 29% | 353 | 31% |
| Take Out Option at Residential Dining Halls | 224 | 26% | 31 | 12% | 264 | 23% |
| I am Not Interested in any of these Services | 160 | 18% | 66 | 26% | 231 | 20% |
| Total | 874 | 100% | 254 | 100% | 1,149 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, express pick up for pre-ordered food is the most popular service among respondents, 59% indicating this would increase the likelihood of respondents purchasing food on campus. Pre-order and pre-pay mobile apps or web-based ordering was the second most popular service, suggesting convenience and speed of service are important for increasing the likelihood of respondents purchasing food on campus.

## 3.3 Purchase Preferences

### 3.3.1 Popular Cold Beverages

Exhibit 3.13 summarizes what cold beverages respondents drink most frequently.

**Exhibit 3.13**
**Most Frequently Consumed Cold Beverages**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Tap/Fountain Water | 456 | 56% | 150 | 60% | 619 | 57% |
| Juice | 358 | 44% | 57 | 23% | 427 | 39% |
| Bottled Water | 340 | 41% | 56 | 22% | 402 | 37% |
| Iced Tea | 288 | 35% | 51 | 20% | 349 | 32% |
| Sparkling/Bubbly Water | 171 | 21% | 84 | 34% | 260 | 24% |
| Soda | 173 | 21% | 41 | 16% | 216 | 20% |
| Milk | 174 | 21% | 26 | 10% | 206 | 19% |
| Kombucha | 150 | 18% | 27 | 11% | 180 | 16% |
| Vitamin/Smart Water | 120 | 15% | 14 | 6% | 138 | 13% |
| Protein Drinks | 102 | 12% | 15 | 6% | 120 | 11% |
| Iced Coffee[1] | 33 | 4% | 12 | 5% | 47 | 4% |
| Other | 61 | 7% | 22 | 9% | 84 | 8% |
| Total | 821 | 100% | 250 | 100% | 1,092 | 100% |

*Source: fsSTRATEGY Inc.*

1. *Iced coffee was not included as an option but was extracted from the Other responses tally due to the number of mentions.*

As shown, respondents most frequently drink tap or fountain water, followed by juice, bottled water and iced tea. Staff and Faculty respondents drink sparkling water more frequently than Student respondents.

Popular "Other" responses included smoothies (11 responses) and bubble tea (ten responses).

### 3.3.2 Vending

Exhibit 3.14 summarizes what items respondents would purchase from vending machines.

**Exhibit 3.14**
**Vending Machine Item Purchase Preferences**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Snacks (Chocolate Bars, Chips, Gum, etc.) | 489 | 63% | 111 | 45% | 610 | 59% |
| Healthy Snacks (Fresh Vegetable, Cheese, Fruits, Granola Bar, etc.) | 272 | 35% | 53 | 22% | 332 | 32% |
| Coffee / Teas | 228 | 30% | 24 | 10% | 256 | 25% |
| Sandwiches | 158 | 20% | 21 | 9% | 185 | 18% |
| Dairy and Dairy Substitute Beverages | 84 | 11% | 16 | 7% | 104 | 10% |
| Salads | 62 | 8% | 14 | 6% | 77 | 7% |
| None - I Would Not Purchase Food / Snacks from Vending Machines | 257 | 33% | 130 | 53% | 396 | 38% |
| Total | 772 | 100% | 244 | 100% | 1,037 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, confectionary snacks (chocolate bars, chips, gum, etc.) is the most common product category respondents would purchase from a vending machine (59%), followed by healthy snacks (32%) and coffee or tea (25%). Respondents seem less willing to purchase meal items such as sandwiches (18%) or salads (7%) from vending machines and 38% of respondents would not make purchases from a vending machine. Student respondents are more likely than Staff and Faculty respondents to make purchases from vending machines for all items included in the Survey.

### 3.3.3 Chain Restaurants versus Independent Restaurants

Exhibit 3.15 summarizes respondents' preferences for chain and independent restaurants when deciding where to purchase food or drink.

**Exhibit 3.15**
**Restaurant Purchase Preferences (Chain versus Independent)**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| National Restaurant Franchise/Chain | 210 | 23% | 41 | 16% | 254 | 21% |
| Local Restaurant Franchise/Chain | 200 | 22% | 51 | 19% | 257 | 22% |
| Local Independent Restaurants | 363 | 40% | 132 | 50% | 505 | 43% |
| I Do Not Have a Preference | 396 | 44% | 114 | 43% | 521 | 44% |
| Total | 898 | 100% | 263 | 100% | 1,185 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, respondents most often have no preference (44%) or prefer local independent restaurants (43%). Approximately half of Staff and Faculty respondents prefer a local independent restaurant.

### 3.3.4 Preferred Chain Restaurants

Exhibit 3.16 summarizes what franchise or chain restaurants respondents frequent most (of those respondents who selected they prefer a nation or local restaurant chain or franchise in the previous question).

**Exhibit 3.16**
**Most Popular Chain Restaurants**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Tim Hortons | 154 | 55% | 35 | 54% | 191 | 54% |
| McDonald's | 100 | 36% | 18 | 28% | 121 | 34% |
| Starbucks | 75 | 27% | 14 | 22% | 90 | 26% |
| Subway | 32 | 11% | 4 | 6% | 36 | 10% |
| Boustan | 25 | 9% | 3 | 5% | 28 | 8% |
| A&W | 20 | 7% | 2 | 3% | 23 | 7% |
| Sushi Shop | 17 | 6% | 4 | 6% | 22 | 6% |
| Van Houtte | 21 | 8% | - | 0% | 21 | 6% |
| Second Cup | 16 | 6% | 4 | 6% | 20 | 6% |
| Thai Express | 13 | 5% | 5 | 8% | 18 | 5% |
| Burger King | 16 | 6% | - | 0% | 16 | 5% |
| Mandy's | 12 | 4% | 2 | 3% | 14 | 4% |
| Cooper Branch | 10 | 4% | 2 | 3% | 12 | 3% |
| Pizza Pizza | 11 | 4% | - | 0% | 11 | 3% |
| Poulet Rouge | 11 | 4% | - | 0% | 11 | 3% |
| Vua Sandwiches | 4 | 1% | 3 | 5% | 9 | 3% |
| Wendy's | 8 | 3% | 1 | 2% | 9 | 3% |
| Amir | 6 | 2% | 1 | 2% | 7 | 2% |
| Aux Vivres | 4 | 1% | 2 | 3% | 7 | 2% |
| Harvey's | 5 | 2% | 2 | 3% | 7 | 2% |
| Java U | 3 | 1% | 4 | 6% | 7 | 2% |
| 3 Amigos | 4 | 1% | 2 | 3% | 6 | 2% |
| Dominos | 6 | 2% | - | 0% | 6 | 2% |
| KFC | 5 | 2% | - | 0% | 6 | 2% |
| CocoBun | 5 | 2% | - | 0% | 5 | 1% |
| Other | 138 | 49% | 49 | 75% | 191 | 54% |
| Total | 279 | 100% | 65 | 100% | 351 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, the most preferred brands among respondents include Tim Hortons, McDonald's, Starbucks, Subway, Boustan and A&W. With the exception of Boustan (a regional Lebanese-Canadian quick-service chain based in Saint-Laurent Quebec), the top brands in this Survey are the same (and in the same ranking based on system sales) as the top national restaurant brands in Canada.[4] "Other" responses are brands that were mentioned fewer than five times by respondents.

### 3.3.5 Expected Safety and Sanitation Measures

Exhibit 3.17 summarizes the safety measures respondents would you expect to see at campus food locations in order to feel comfortable to make a purchase.

[4] Kostuch Media, Foodservice and Hospitality Magazine Top 100 Report

**Exhibit 3.17**
**Expected Safety and Sanitation Measures to Purchase Food On-Campus**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Handwashing / Sanitation Stations for Customers | 748 | 86% | 216 | 84% | 985 | 86% |
| Employees Wear Face Mask | 747 | 86% | 212 | 83% | 978 | 85% |
| Increased Spacing Between Tables | 659 | 76% | 194 | 76% | 869 | 76% |
| Controlled Entry / Customer Count in Service and Dining Areas | 493 | 57% | 148 | 58% | 657 | 57% |
| Employees Wear Face Shields | 403 | 46% | 123 | 48% | 535 | 47% |
| Decals and Signage to Improve Distancing | 376 | 43% | 140 | 55% | 525 | 46% |
| Dedicated Employee Greets, Guides and Enforces Safety Policies | 317 | 36% | 86 | 34% | 412 | 36% |
| Single Use Packaging / Tableware in the Residential Dining Halls | 263 | 30% | 49 | 19% | 319 | 28% |
| Despite Any Safety Measures, I Will Continue to Bring My Own Food from Home | 130 | 15% | 46 | 18% | 178 | 15% |
| Total | 871 | 100% | 256 | 100% | 1,149 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, handwashing, sanitation stations, face masks and spacing are considered most important by respondents. Despite any safety measures, 15% of respondents will bring food from home. The average respondent selected between four and five of the eight measures listed in the question (unless they indicated they would continue to bring food from home despite any safety measures).

### 3.3.6 Communication Preferences

Exhibit 3.18 summarizes how respondents prefer to receive communication regarding on-campus foodservice operations.

**Exhibit 3.18**
**Preferred Means of Communication Regarding On-Campus Foodservice Operations**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Email | 621 | 71% | 202 | 78% | 836 | 72% |
| MYConcordia Portal | 473 | 54% | 95 | 37% | 584 | 50% |
| Digital Screens on Campus | 299 | 34% | 74 | 29% | 383 | 33% |
| Instagram | 325 | 37% | 21 | 8% | 350 | 30% |
| Facebook | 297 | 34% | 37 | 14% | 338 | 29% |
| Web | 171 | 19% | 83 | 32% | 261 | 23% |
| Twitter | 68 | 8% | 5 | 2% | 75 | 6% |
| Other | 19 | 2% | 9 | 3% | 28 | 2% |
| Total | 880 | 100% | 259 | 100% | 1,160 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, the majority of respondents prefer to receive communication regarding on-campus foodservice operations via email (72%) or through the MYConcordia Portal (50%). Unsurprisingly, Student respondents appear more willing to receive communications through social media than Staff and Faculty respondents (but still prefer communication through email or the MYConcordia Portal).

## 3.4 Catering

Approximately 24% of Respondents indicated they had used catering services on campus. (43% of Staff and Faculty respondents and 19% of Student respondents). The following catering questions were posed to respondents who indicated they had used catering services on campus.

### 3.4.1 Deciding Factors

Exhibit 3.19 summarizes the most important factors for respondents when selecting caterers form the Approved Caterers list.

**Exhibit 3.19**
**Factors when Selecting an Approved Caterer**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Food Quality | 132 | 80% | 88 | 79% | 222 | 80% |
| Lower Price | 127 | 77% | 50 | 45% | 179 | 64% |
| Healthier Food Options | 93 | 56% | 67 | 60% | 160 | 58% |
| Better Menu Variety | 73 | 44% | 69 | 62% | 143 | 51% |
| Customizable Menus | 45 | 27% | 52 | 47% | 97 | 35% |
| Greater Flexibility to Meet Dietary Needs of Attendees | 44 | 27% | 52 | 47% | 97 | 35% |
| On-Time Delivery and Cleanups | 38 | 23% | 57 | 51% | 96 | 35% |
| Better Service | 56 | 34% | 34 | 31% | 91 | 33% |
| Greater Diversity of Cultural Options | 51 | 31% | 34 | 31% | 86 | 31% |
| Larger Portions | 64 | 39% | 19 | 17% | 83 | 30% |
| Creative Menu Options | 33 | 20% | 42 | 38% | 75 | 27% |
| Better Presentation and Appearance | 34 | 21% | 36 | 32% | 71 | 26% |
| Greater Use of Local Ingredients | 42 | 25% | 25 | 23% | 68 | 24% |
| Pre-Set Packages to Simplify Ordering | 15 | 9% | 17 | 15% | 33 | 12% |
| Other | 2 | 1% | 3 | 3% | 5 | 2% |
| Total | 165 | 100% | 111 | 100% | 278 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, food quality (80%), price (64%) and healthy food options (58%) are the most important factors for respondents when selecting a caterer form the Approved Caterers list. Student respondents consider price more important than Staff and Faculty respondents (77% and 45% respectively). Portion size is more than twice as important to Students as it is for Staff and Faculty.

In general, factors related to value (price, portion size) were more important to Students than Staff and Faculty, while factors related to adaptability and quality were more important to Staff and Faculty respondents.

### 3.4.2 Important Initiatives

Exhibit 3.20 summarizes the initiatives most important to respondents when selecting caterers from the Approved Caterers list.

**Exhibit 3.20**
**Important Initiatives when Selecting Catering**

| | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|
| Use of Compostable Plates, Cups, Utensils, Napkins | 93 | 58% | 79 | 76% | 174 | 65% |
| Use of Reusable Dishes and Service Ware Without Additional Charge | 81 | 51% | 73 | 70% | 155 | 58% |
| Minimized Wrapping of Products for Deliveries | 75 | 47% | 65 | 63% | 140 | 53% |
| Recyclable Lunch Boxes | 80 | 50% | 52 | 50% | 133 | 50% |
| A Caterer Who is Socially Engaged | 52 | 33% | 39 | 38% | 92 | 35% |
| Other | 2 | 1% | 4 | 4% | 6 | 2% |
| Total | 160 | 100% | 104 | 100% | 266 | 100% |

*Source: fsSTRATEGY Inc.*

As shown, compostable materials and reusable dishes were identified as the most important initiatives for respondents when selecting a caterer. All initiatives (other than a socially engaged caterer) where identified as important by at least 50% of respondents.

### 3.4.3 Service Elements

Exhibit 3.21 summarizes the importance of identified service elements to respondents when using catering service on campus.

**Exhibit 3.21**
**Important Service Elements when Selecting Catering**

| | Importance | Students | | Staff or Faculty | | All Respondents | |
|---|---|---|---|---|---|---|---|
| Same Day Delivery | Important (2) | 81 | 50% | 32 | 30% | 113 | 42% |
| | Somewhat Important (1) | 38 | 24% | 31 | 29% | 69 | 26% |
| | Neither Unimportant nor Important (0) | 25 | 16% | 25 | 23% | 51 | 19% |
| | Somewhat Unimportant (-1) | 9 | 6% | 13 | 12% | 22 | 8% |
| | Unimportant (-2) | 8 | 5% | 6 | 6% | 15 | 6% |
| | Total | 161 | 100% | 107 | 100% | 270 | 100% |
| | Average Score | | 1.09 | | 0.65 | | 0.90 |
| Ease of Online Ordering | Important (2) | 101 | 63% | 79 | 74% | 180 | 67% |
| | Somewhat Important (1) | 38 | 24% | 21 | 20% | 61 | 23% |
| | Neither Unimportant nor Important (0) | 18 | 11% | 5 | 5% | 23 | 9% |
| | Somewhat Unimportant (-1) | 3 | 2% | 1 | 1% | 4 | 1% |
| | Unimportant (-2) | 1 | 1% | 1 | 1% | 2 | 1% |
| | Total | 161 | 100% | 107 | 100% | 270 | 100% |
| | Average Score | | 1.46 | | 1.64 | | 1.53 |
| Ability to Speak with Representative | Important (2) | 71 | 44% | 64 | 59% | 136 | 50% |
| | Somewhat Important (1) | 44 | 28% | 31 | 29% | 75 | 28% |
| | Neither Unimportant nor Important (0) | 29 | 18% | 10 | 9% | 39 | 14% |
| | Somewhat Unimportant (-1) | 8 | 5% | 3 | 3% | 11 | 4% |
| | Unimportant (-2) | 8 | 5% | - | 0% | 9 | 3% |
| | Total | 160 | 100% | 108 | 100% | 270 | 100% |
| | Average Score | | 1.01 | | 1.44 | | 1.18 |
| Responsive and Friendly Communication | Important (2) | 105 | 66% | 83 | 77% | 190 | 70% |
| | Somewhat Important (1) | 39 | 24% | 23 | 21% | 62 | 23% |
| | Neither Unimportant nor Important (0) | 12 | 8% | 2 | 2% | 14 | 5% |
| | Somewhat Unimportant (-1) | 2 | 1% | - | 0% | 2 | 1% |
| | Unimportant (-2) | 2 | 1% | - | 0% | 2 | 1% |
| | Total | 160 | 100% | 108 | 100% | 270 | 100% |
| | Average Score | | 1.52 | | 1.75 | | 1.61 |

*Source: fsSTRATEGY Inc.*

As shown, all service elements were considered important or somewhat important by most respondents. The average scores indicate the most important service elements are responsive and friendly communication (average score of 1.61) and ease of online ordering (average score of 1.53).

# 4 Conclusions

Based the results presented in Section 3, *fs*STRATEGY has identified the following conclusions, opportunities and suggestions for foodservices at Concordia. Where appropriate, financial analysis and feasibility testing should be conducted to validate these opportunities and suggestions.

## 4.1 Food and Beverage Spending

Most respondents reported paying $2.00 to $2.99 (36%) for coffee, $2.50 to $4.99 for snack (52%) and $10.00 to $14.99 for lunch meal (44%) purchases. While these ranges represent a target price range for many offerings, the foodservice operator should also acknowledge the value of pricing variety. For example, while most respondents pay less than $3.00 for coffee, 30% of respondents are willing to pay more than $3.00, representing a possible opportunity for a premium alternative to the core coffee program. In another example, Staff and Faculty, on average, report paying approximately 13% more for lunch meals than Students. When considered with other preference variables, this pricing variance may represent an opportunity for foodservice outlets targeting Staff and Faculty.

## 4.2 Foodservice Preferences

### 4.2.1 Cultural, Religious, and Dietary Requirements

Over one-third of respondents (37%) reported special dietary requirements. The most common requirements are vegetarian, Halal and vegan. Many dietary requirements may be addressed at the product level (i.e., a vegetarian sandwich) and need not drive the food service concept; however, some requirements (i.e., Halal, Kosher, severe allergies, etc.) may require greater consideration at the concept-level to prevent contamination and preserve the diet objectives. For example, gluten free dough rolled on a table used for regular dough or cooking Halal meat on a griddle used for bacon, nullifies the special nature of the products.

Where possible, concepts and menus should seek to address multiple diets (including general public and specialty diets) at the same time. For example, a Halal Kebab satisfies customers with or without Halal requirements; and grain bowls with the option to add protein provides an option for vegetarian, vegan and general public at once. In this way, Concordia may meet a greater number of specialty diet requirements while still providing variety for most if not all community members, without the overhead of multiple, highly specialized outlets addressing those requirements independently.

### 4.2.2 Sustainability

Eight out of ten respondents consider sustainability initiatives when choosing a restaurant. Compostable or less packaging material, reusable packaging or service ware, and locally produced items are the most important environmental and social sustainability factors to respondents when making food and beverage purchase decisions. Staff and Faculty respondents appear more likely than Student respondents to make purchase decisions based on use of compostable or less packaging material, locally produced items, Fair Trade products and fair labour practices.

Most respondents support a system that offers discounts for bringing a reusable mug for beverages (83%) or bringing a reusable container for food (77%). However, less than one-third of respondents support the reverse, wherein fees are charged when reusable service where is not provided by the customer and single-use service ware is provided.

### 4.2.3 Food and Dining Preferences

Fair Pricing and good value drives respondents' decision of ***where*** to eat (81% of respondents); however, not to the extent that respondents only look for the lowest priced product. Only 15% of respondents indicated they choose where to eat based solely on price. Providing fair prices and value means balancing what is important to the consumer with a price the consumer is willing/able to spend and aligning with market pricing. As illustrated in the Sections on spending, the acceptable price varies by respondent and a balanced campus may have more than one tier of foodservice to optimally address that demand.

Convenience of location, speed of service, menu variety and hours of operation also play key roles in the process of deciding where to eat.

Once a location is selected, taste and quality of food drive the decision of ***what*** to eat (considered by 84% and 79% of respondents respectively). Healthiness and whether a product is freshly made is also important to the decision process (59% and 57% of respondents respectively), especially for staff and Faculty who were 13% to 18% more likely to report these considerations than Students. Menu price has greater impact on the Student decision (48%) than the Staff and Faculty decision (32%).

Respondents' definition of healthy food varied, but many agreed on certain elements. Approximately eight out of ten respondents believe that healthy food contains lots of fresh fruits and vegetables and is either unprocessed or minimally processed. Nearly two-thirds of respondents feel healthy food is low in sugar and salt. Over half of staff and Faculty respondents feel healthy is defined in part by the use of local / seasonal ingredients compared to only one third of students.

Sandwiches and wraps, salads, and rice or grain bowls where the top three most preferred types of food among respondents. Staff and Faculty respondents prefer soup to a greater degree than Student respondents. Most of the preferred food types include fresh and/or healthy foods. Most food categories presented in the Survey were selected by a third or more of respondents, again illustrating the importance of variety on campus.

The most preferred dining experiences included lounge seating to eat, relax and study, café dining experience and grab and go. It is recommended to have a variety of seating and common spaces to suite the population's various needs.

Express pick up for pre-ordered food and pre-order and pre-pay mobile apps or web-based ordering where the top ranked services identified to increase respondents' likelihood of purchasing food on-campus. This further suggests convenience and speed of service are important for increasing the likelihood of respondents purchasing food on campus.

## 4.3 Purchase Preferences

Respondents drink tap or fountain water more frequently than other cold beverages. Juice, bottled water, iced tea, sparkling water (especially among Staff and Faculty respondents) and soda were the top ranked beverages respondents would purchase.

Confectionary snacks (chocolate bars, chips, gum, etc.), healthy snacks and coffee or tea were the top ranked vending machine purchase preferences among respondents. Respondents seem less willing to purchase meal item or perishable items such as sandwiches (18% of respondents) or salads (7% of respondents) from vending machines and 38% of respondents would not make purchases from a vending machine.

### 4.3.1 Chain Restaurants versus Independent Restaurants

Respondents most often have no preference (44%) or indicated they prefer local independent restaurants (43%) compared to local chains (22%) and national chains (21%). Approximately half of Staff and Faculty respondents prefer a local independent restaurant.

Tim Hortons, McDonald's, Starbucks and Subway where the top ranked chains with respondents who indicated they prefer chains and franchises (local or national). Boustan (a Lebanese-Canadian quick-service concept) is the most preferred local chain.

### 4.3.2 Expected Safety and Sanitation Measures

Handwashing, sanitation stations, face masks and spacing are seen as most important or expected by respondents in order to feel comfortable to make a purchase. Most respondents selected most of the proposed safety and sanitation measures indicated these measures should all be followed and even showcased, so the population is well aware they are occurring and feel safe.

Despite any safety measures 15% of respondents will bring food from home.

### 4.3.3 Communication Preferences

Three quarters of respondents indicate email is a preferred means of communication regarding on-campus foodservice; followed by one half of respondents that indicated the MYConcordia portal. Unsurprisingly, Student respondents appear more willing to receive communications through social media than Staff and Faculty respondents (but still prefer communication through email or the MYConcordia Portal).

## 4.4 Catering

Food quality, price and healthy food options are the most important deciding factors for respondents when selecting caterers from the Approved Caterers list. Student respondents consider price and portion size more important than Staff and Faculty respondents. Menu variety, customization and flexibility to meet dietary needs is considered more important to Staff and Faculty respondents compared to Student respondents.

Waste reduction initiatives are important to users when selecting an approved caterer on campus; although, this importance is somewhat more evident for Staff and Faculty respondents than Students. Use of compostable materials and reusable dishes were identified as most important waste reduction initiatives to respondents when selecting caterers (selected by 65% and 58% respectively). Nearly all initiatives suggested were considered important by at least half of the respondents.

All service elements suggested were considered important or somewhat important by most respondents. The most important service elements are responsive and friendly communication and ease of online ordering. This suggests the user experience may be evaluated for potential improvements or simplification in the ordering and process and access to speak with a representative should be a priority.

## 4.5 Key Takeaways

Surveys are valuable tools for collecting insight on community preferences and ensuring the University community has a voice in its campus experience. While survey results alone are insufficient to develop comprehensive master plans, they provide important direction for such plans. Key takeaways from this Survey include:

**The Campus Population is Diverse:** While key common preferences are apparent in the Survey results, so too is the diversity of preferences and needs. This observation applies to food preferences and special diet requirements but also extends to spending patterns. A one size-fits-all strategy to campus foodservice that focuses only on the most common responses may risk missed opportunities to increase satisfaction and revenue.

**Sustainability Initiatives are Important to the Campus Community:** Respondents make purchase decisions based on sustainability initiatives and support initiatives that reward sustainable actions (i.e., bring your own mug and receive a discount).

**Price is Important:** Price is a key decision factor when selecting foodservice outlets and approved caterers; however, the price consideration is routed in fairness and value for price paid, not necessarily lowest possible price. The Survey illustrates several value drivers including product quality, taste and healthiness of food products. Recognize that value is measured differently by different people. The typical-spend questions in this Survey illustrate core price points, but also identify potential opportunities for alternative offerings above or below the core to maximize access, satisfaction and revenue.

**Convenience and Speed are Important:** Community members have limited time to reach, receive and consume food. To some degree, vending may fortify the convenience of food on campus, but with some limitations. Vending may hold a stigma that limits offerings to items like confections, beverages and snacks, not other items (i.e., sandwiches, salads, etc.) sought by the Population.

While these takeaways may seem broad in nature, when used as pointers to Survey content and combined with other planning tools, they should help guide the planning process.

# Appendix 1 – Survey Questionnaire

UNIVERSITÉ Concordia UNIVERSITY

HOSPITALITY CONCORDIA

Food Services

## Concordia Food Service Survey

Thank you for your interest in our Survey.  The objective of this Survey is to understand the Concordia community's preferences when purchasing food away from home.

In appreciation for your time, respondents who complete the entire survey are eligible to**enter a draw for these amazing prizes**:

- **A $200 Certificate for online purchase at the Concordia Book Stop**
- **One of Six (6) $50 Certificates for online purchase at the Concordia Book Stop**

You must be employed or enrolled at Concordia to participate in the draw.

Your response is confidential. No identifying information will be linked to your response when Concordia sees the results.

To start this five- to eight-minute Survey, click "Next"!

UNIVERSITÉ Concordia UNIVERSITY

HOSPITALITY CONCORDIA

Food Services

## Concordia Food Service Survey

### Getting to Know You

*** 1. Which of the following best describes your primary role at Concordia? (Select one)**

- ◯ Student - Full-time
- ◯ Student - Part-Time
- ◯ Student - Continuing Education
- ◯ Staff or Faculty
- ◯ Other (please specify)

[ ]

*** 2. On which campus will you likely spend the most time when you return to campus? (Select one)**

- Sir George Williams Campus
- Loyola Campus
- Not sure, I have never attended class on Campus

UNIVERSITÉ Concordia UNIVERSITY

HOSPITALITY CONCORDIA

Food Services

## Concordia Food Service Survey

### Food and Beverage Spending (per Purchase)

**3. How much do you typically spend if you purchase a <u>coffee?</u> (Select one)**

- Less than $2.00 per purchase
- Between $2.00 and $2.99 per purchase
- Between $3.00 and $3.99 per purchase
- $4.00 or greater per purchase
- I do not purchase coffee

**4. How much do you typically spend if you purchase a <u>snack</u>? (Select one)**

- Less than $2.50 per purchase
- Between $2.50 and $4.99 per purchase
- Between $5.00 and $7.49 per purchase
- $7.50 or greater per purchase
- I do not purchase snacks (i.e. bring snacks from home)

**5. How much do you typically spend If you purchase a <u>lunch</u> meal? (Select one)**

- Less than $5.00 per purchase
- Between $5.00 and $9.99 per purchase
- Between $10.00 and $14.99 per purchase
- Between $15.00 and $20.00 per purchase
- Greater than $20.00 per purchase
- I do not purchase lunch (i.e., bring lunch from home)

*** 6. Do you have any cultural, religious or other special dietary preferences (i.e., allergies, vegan, etc.) that affect where and what you purchase from restaurants?**
**(Select One)**

- ○ Yes
- ○ No
- ○ Prefer not to answer

UNIVERSITÉ Concordia UNIVERSITY
HOSPITALITY CONCORDIA
Food Services

## Concordia Food Service Survey

Food Service Preferences

**7. Which of the following cultural, religious or other special dietary considerations apply to your purchase decision?**

- ☐ Halal
- ☐ Kosher
- ☐ Vegan
- ☐ Vegetarian (lacto-ovo)
- ☐ Gluten Free or Wheat Free
- ☐ Nut, Seed or Peanut Free
- ☐ Dairy Free
- ☐ Soy Free
- ☐ Egg free
- ☐ Other (please specify)

**8. Do environmental and social sustainability considerations affect your food purchasing decisions? If so, select all that apply:**

- ☐ Organic
- ☐ Respect for animal welfare
- ☐ Lower carbon footprint
- ☐ Locally Produced
- ☐ Lower natural resource usage (water, land, etc.)
- ☐ Protects biodiversity
- ☐ Fair Trade
- ☐ Fair labor practices
- ☐ Contributes to more equitable, healthy communities
- ☐ Compostable packaging and/or less packaging
- ☐ Reusable packaging and/or service ware (cups, plates, etc.)
- ☐ Other (please specify)

**9. Which attributes are most important to you when deciding <u>WHERE</u> to buy a meal or snack? (How do you select which restaurant to use?)**
**(Select all that apply)**

- ☐ Speed of service (able to order, receive and pay for food quickly)
- ☐ Online Ordering/Payment
- ☐ Hours of operation
- ☐ Customer service
- ☐ Seating
- ☐ Convenience of location/proximity
- ☐ Grab & Go (Hot/Cold foods)
- ☐ Made-to-order food on site
- ☐ Variety of menu options
- ☐ The pricing is fair/provides good value for the money
- ☐ I always choose based solely on the lowest price possible
- ☐ The business is student-run
- ☐ Other (please specify)

*** 10. Which attributes do you consider most important when deciding WHAT to eat? (How do you choose menu items?)**
**(Select all that apply)**

- [ ] Taste of Food
- [ ] Quality of Food
- [ ] Fresh Made
- [ ] Healthy
- [ ] Portion-Size
- [ ] Clear Labeling (Nutritional, Origin of Food, Local, etc.)
- [ ] Other (please specify)



## Food Service Preferences

**11. What do you consider to be "Healthy" food? (Select all that apply)**

- [ ] Unprocessed or minimally processed
- [ ] Made with lots of fruits and vegetables
- [ ] Raw foods/ingredients
- [ ] High protein meat substitute
- [ ] High protein meat
- [ ] Organic foods
- [ ] Local / Seasonal Ingredients
- [ ] Low fat
- [ ] Low sugar and salt
- [ ] Low carbohydrates
- [ ] Other (please specify)

**12. What types of foods would you prefer to purchase from restaurants at LUNCH? (Select all that apply)**

- ☐ Pastries and Baked Goods
- ☐ Sandwiches, wraps
- ☐ Burritos, tacos
- ☐ Plant-Based Proteins
- ☐ Flatbreads / Pizzas
- ☐ Hot Entrees (protein, veg, starch)
- ☐ Sushi
- ☐ Pasta
- ☐ Noodles, Other
- ☐ Dumplings (steamed or fried)
- ☐ Rice or Grain Bowls
- ☐ Soup
- ☐ Salads
- ☐ Stir Fries
- ☐ Fried Foods (French fries, Poutine, Fish and Chips, etc.)
- ☐ Chicken
- ☐ Fish
- ☐ Other meat proteins (beef, pork, etc.)
- ☐ Whole Fruit
- ☐ Raw Vegetables / Crudite
- ☐ Smoothies, yogurts
- ☐ Small snacks
- ☐ Breakfast foods (eggs, pancakes, bagels, etc.)
- ☐ Other (please specify)

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## Concordia Food Service Survey

Food Service Preferences

*** 13. What type of dining experience do you prefer? (Select all that apply)**

- ☐ Café
- ☐ Pub style (Food and alcohol)
- ☐ Lounge seating to eat, relax and study
- ☐ Grab & Go (Hot/Cold foods)
- ☐ Vending machines with more variety
- ☐ Experience is not important to me
- ☐ Other (please specify)

**14. What types of cold beverages do you most frequently drink? (Select all that apply)**

- [ ] Vitamin/Smart Water
- [ ] Milk
- [ ] Soda
- [ ] Juice
- [ ] Protein Drinks
- [ ] Bottled Water
- [ ] Tap/fountain water
- [ ] Sparkling/bubbly water
- [ ] Kombucha
- [ ] Iced tea
- [ ] Other (please specify)

*** 15. When deciding where to purchase food or drink, which you do you prefer?(Select all that apply)**

- [ ] National restaurant franchise/chain (example Tim Horton's)
- [ ] Local restaurant franchise/chain (example Van Houtte)
- [ ] Local independent restaurants
- [ ] I do not have a preference



## Purchase Preferences

**16. Which franchise or chain restaurants do you frequent most?**

1.

2.

3.

**17. What items would you purchase from a <u>vending machine</u>? (Select all that apply)**

- [ ] Salads
- [ ] Sandwiches
- [ ] Coffee/Teas
- [ ] Healthy snacks (Fresh Vegetable, Cheese, Fruits, Granola bar, etc.)
- [ ] Snacks (Chocolate Bars, Chips, Gum, etc.)
- [ ] Dairy and dairy substitute beverages
- [ ] None - I would not purchase food/snacks from vending machines



## Sustainability Preferences

**18. Which zero-waste services would you support/use?**
**(Select all that apply)**

- [ ] Receiving a discount for bringing my own reusable container for food
- [ ] Receiving a discount for bringing my own reusable mug for beverage
- [ ] Paying a deposit for a reusable mug and/or reusable container for take out
- [ ] Paying for use of single use service ware i.e. utensils/cups/etc.
- [ ] Creating cupless stations where you are required to bring your own mug and single use cups are not offered
- [ ] Other (please specify)

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## Interaction Preferences

**19. How will you prefer to receive communication about on-campus Food Service operations? (select all that apply)**

- [ ] Facebook
- [ ] Instagram
- [ ] Twitter
- [ ] Email
- [ ] Web
- [ ] Digital Screens on campus
- [ ] MYConcordia Portal
- [ ] Other (please specify)

**20. Which of the following services would most increase your likelihood of purchasing food on campus? (Select all that apply).**

- [ ] Delivery options
- [ ] Pre-order/Pre-pay Mobile Apps or Website
- [ ] Express pick up for pre-ordered food
- [ ] Take out option at residential dining halls
- [ ] I am not interested in any of these services

**21. Which of the following safety measures would you expect to see at campus food locations in order to feel comfortable purchasing from them? (Select all that apply).**

- [ ] Employees wear face mask
- [ ] Employees wear face shields
- [ ] Handwashing / sanitation stations for customers
- [ ] Increased spacing between tables
- [ ] Controlled entry / customer count in service and dining areas
- [ ] Decals and signage to improve distancing
- [ ] Single use packaging/ tableware in the residential dining halls
- [ ] Dedicated employee greets, guides and enforces safety policies
- [ ] Despite any safety measures, I will continue to bring my own food from home.

*** 22. Do you, or have you, used the Catering Service on Campus?**

- Yes
- No

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## Concordia Food Service Survey

Catering

**23. When choosing a Caterer from the Approved Caterers list, what makes your decision? (Select all that apply)**

- Lower Price
- Larger Portions
- Food quality
- Better menu variety
- Better presentation and appearance
- Creative menu options
- Customizable menus
- Healthier food options
- Greater flexibility to meet dietary needs of attendees
- Greater diversity of cultural options
- Greater use of local ingredients
- Better service
- Pre-set packages to simplify ordering
- On-time delivery and cleanups
- Other (please specify)

**24. Which of the following initiatives are important to you when making catering decisions? (Select all that apply)**

- Use of reusable dishes and service ware without additional charge
- Use of compostable plates, cups, utensils, napkins
- Recyclable lunch boxes
- Minimized wrapping of products for deliveries
- A caterer who is socially engaged
- Other (please specify)

**25. Please rate the importance of the following service elements when using the Catering Service on Campus.**
**(Select a level of importance for each element)**

| | Important | Somewhat Important | Neither Unimportant nor Important | Somewhat Unimportant | Unimportant |
|---|---|---|---|---|---|
| Able to order for same-day delivery | ○ | ○ | ○ | ○ | ○ |
| Easy online ordering process | ○ | ○ | ○ | ○ | ○ |
| Availability to talk to someone about my event to receive recommendations or get ideas | ○ | ○ | ○ | ○ | ○ |
| Responsive & friendly communication | ○ | ○ | ○ | ○ | ○ |

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## Concordia Food Service Survey

End of Survey -- Next Steps

*** 26. Would you like to be entered in the draw for a chance to win one of:**

- **A $200 Certificate for online purchase at the Concordia Book Stop**
- **One of Six (6) $50 Certificates for online purchase at the Concordia Book Stop**

○ Yes (Must provide email address and Concordia ID)

○ No Thanks

*** 27. Are you interested in participating in a focus group to discuss food services on campus?**

○ Yes (Must provide email address and Concordia ID below)

○ No Thanks

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# Concordia Food Service Survey

## Details

*** 28. You answered "yes" to being entered in the draw and/or participating in a focus group.**

**Please provide your email address and Concordia ID so we know how to reach you.**

*(Email and ID will only be used to contact draw winners and focus group participants. They will not identify your survey response. Your email and ID will be detached from your responses before Concordia sees the results.)*

Email Address:

Concordia ID: