

PURCHASE COLLEGE

Market Research Report - Revised

E14028 - RFP Development and Operator Selection

December 15, 2014



envision
strategies

 **Purchase College**
STATE UNIVERSITY OF NEW YORK

Overview

- Introduction
- Survey Results and Analysis
 - Demographics
 - Population Distribution
 - Market Capture
 - Importance Factors
 - Meal Plans
 - Operating Hours
 - Type of Eatery
 - Improvements
- Next Steps
- Appendix (provided under separate cover)
 - Survey Instrument
 - Data Tables
 - Verbatim Responses





Introduction

Introduction

- Methodology
 - Survey Type: Web-based
 - Invitation: Random sample broadcast email by Purchase College with link to survey site by Envision Strategies
 - Survey Available: October 27 - November 7, 2014

Sub Sample	Respondents
Undergraduates On Campus	418
Undergraduates Off Campus	119
Graduate/Professional Students	17
Total Students	554
Faculty/Staff	137
Total Respondents	691



Introduction

- Confidence Interval 3.2% for Total Respondents at the 95% Confidence Level - i.e. if the same question is asked 95 times out of 100, the answer will fall within a range of +/-3.2% of the answers presented here.

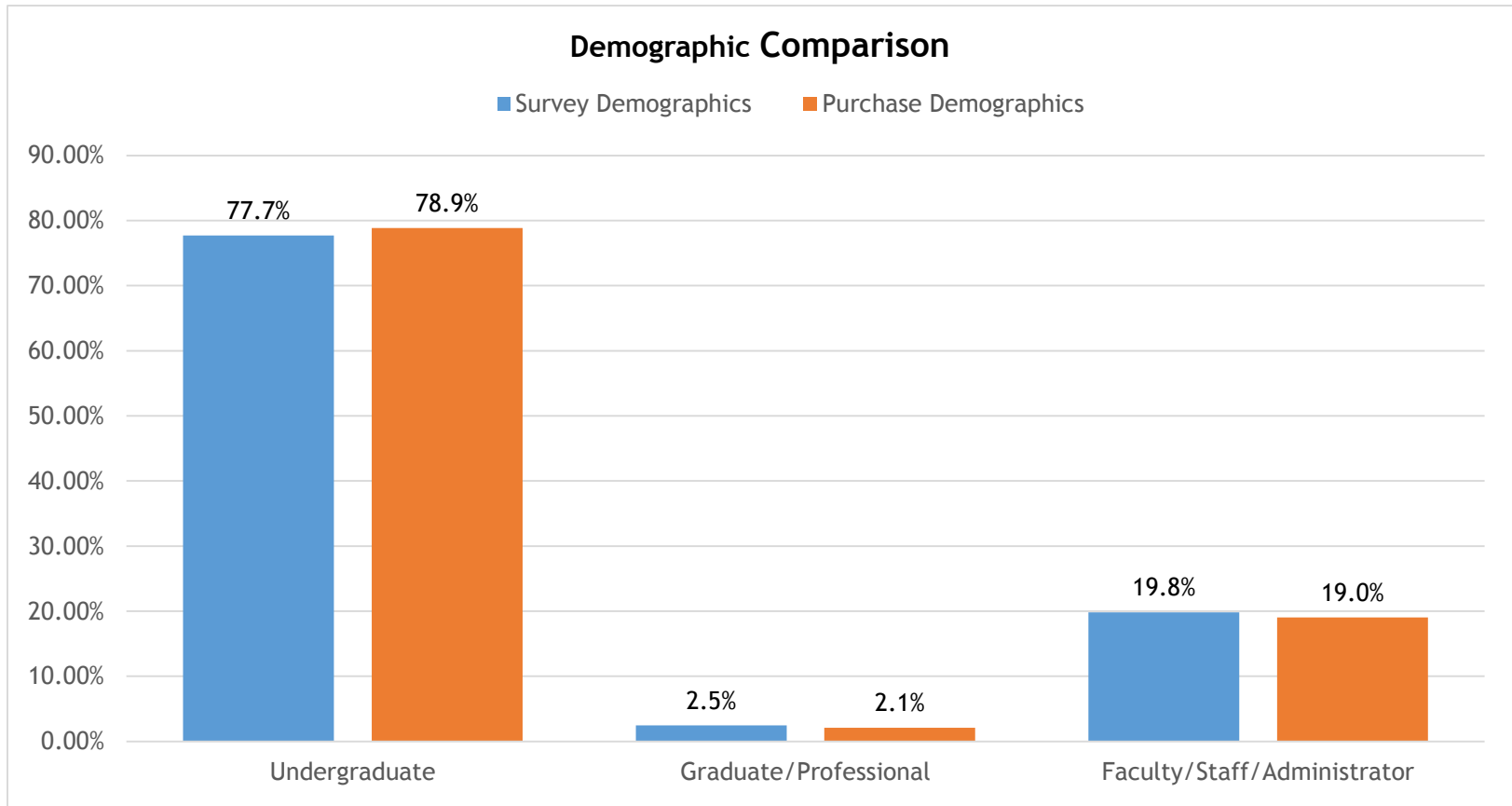
- Questionnaire
 - Survey Instrument: Provided in Appendix A of this report.
 - Time to Complete: Mean 12 minutes - Overall, the amount and quality of information supplied by the respondents was good and allowed for a thorough analysis of the collected data.
 - Survey Type: Single instrument containing specific questions for various indicated classification
 - Surveys Started: 1,382 with a completion percentage of 50%



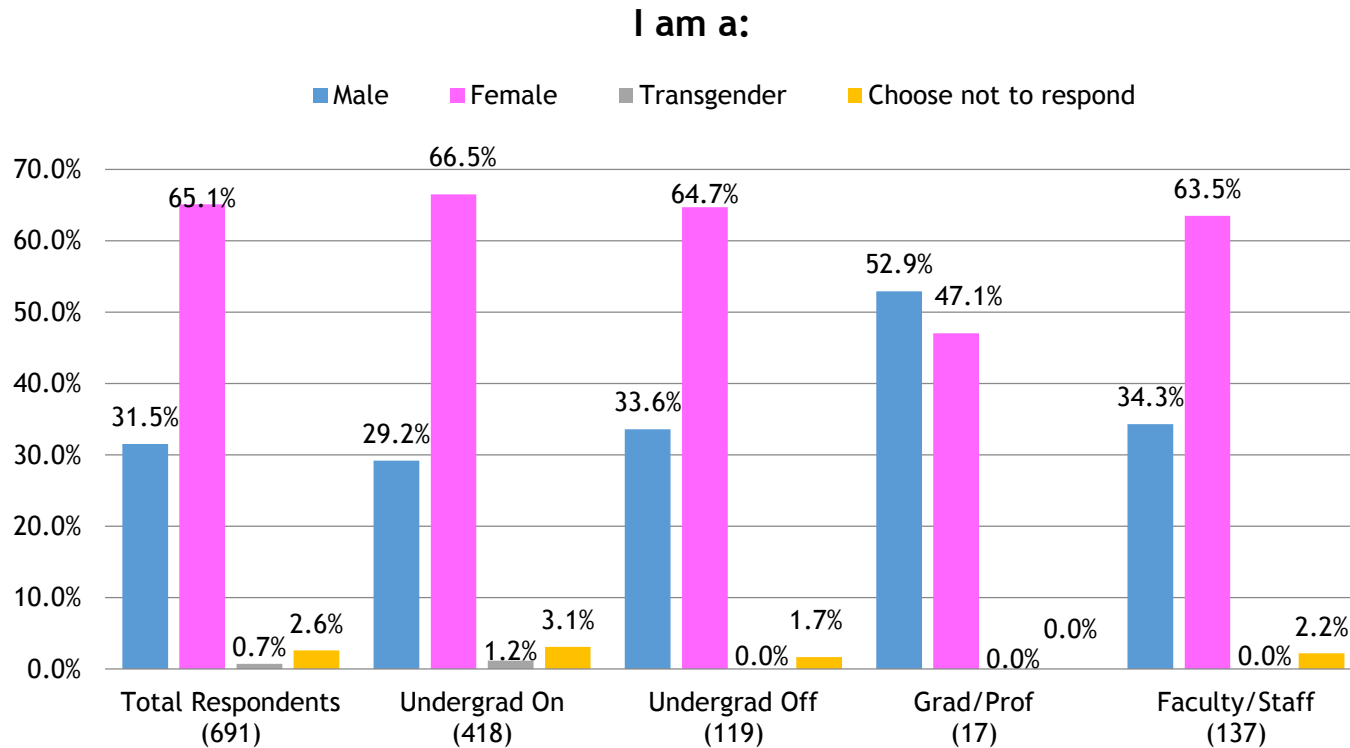


Survey Results and Analysis

Demographics



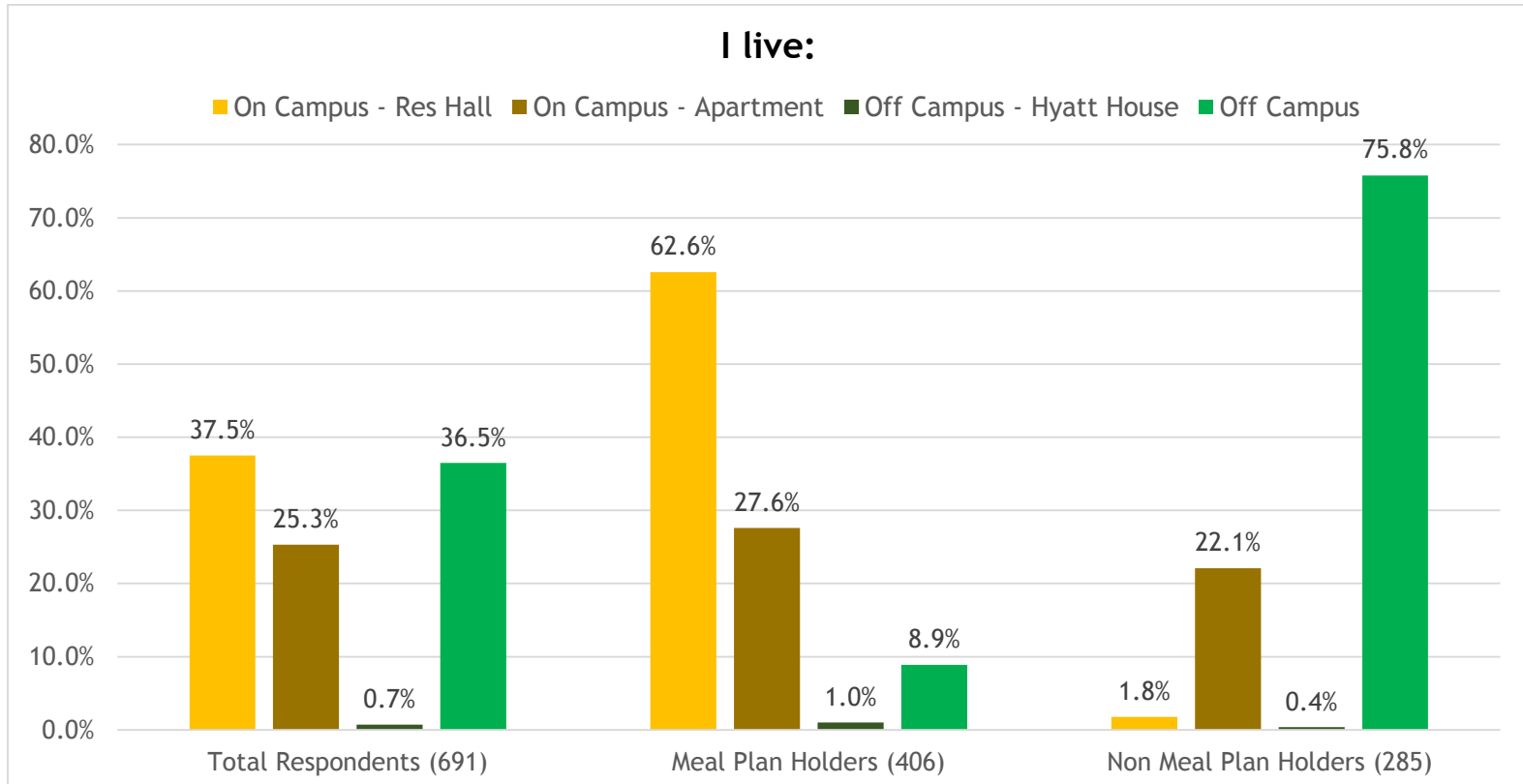
Demographics



- As typical with most surveys, females have a greater response than males with 65.1% of the Total Respondents



Demographics



- 62.8% of Student Respondents Live On Campus



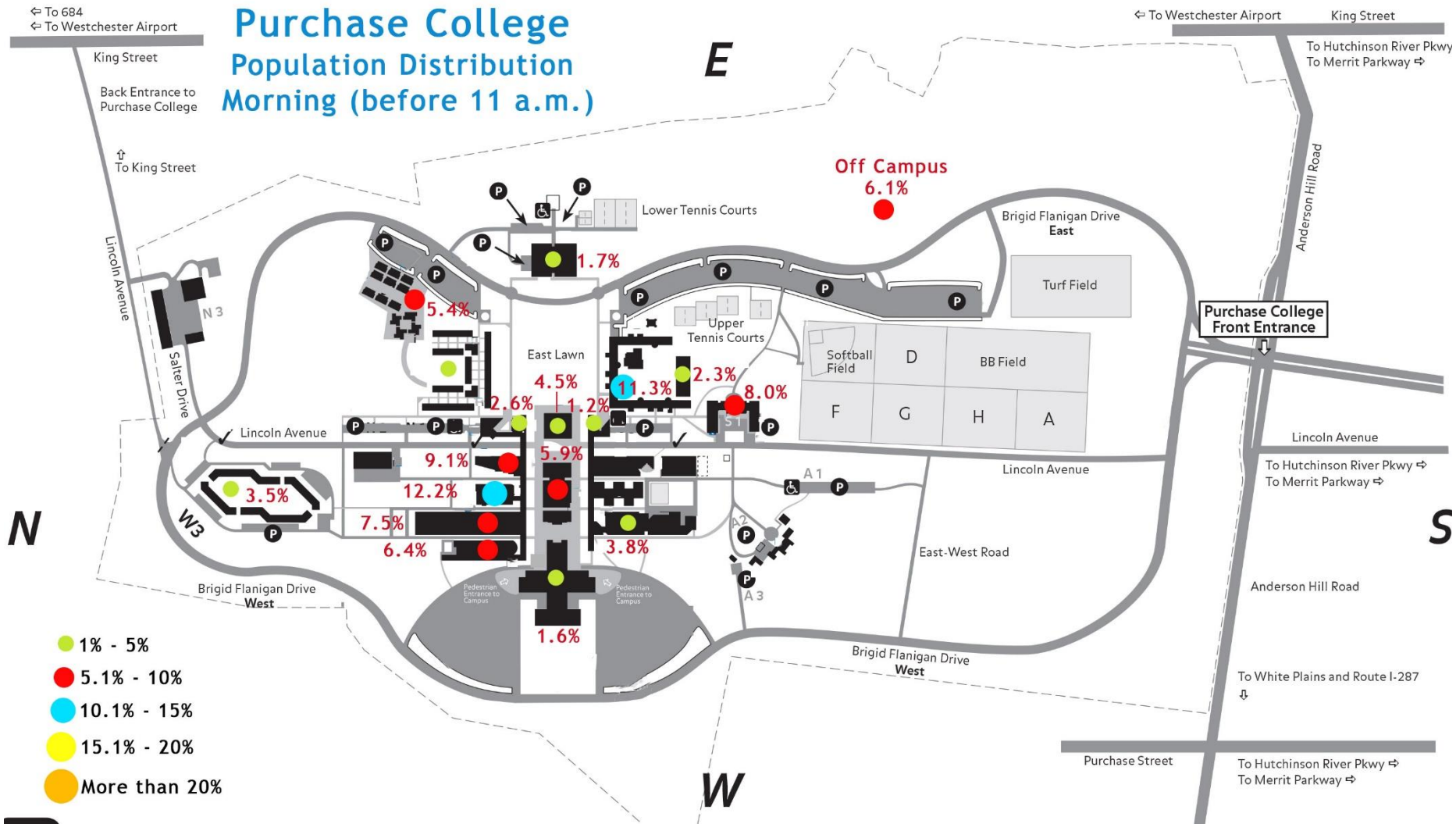
Population Distribution On Campus

- Respondents were asked on a typical weekday to indicate in which building they spend the majority of their time in during the specified time periods:
 - Morning (before 11:00 a.m.)
 - Mid-day (11 a.m. - 2 p.m.)
 - Evening (5 p.m. - 9 p.m.)
 - Late Evening (9 p.m. - Midnight)

The map, on the next slide, indicates the buildings where more than 1% of the respondents are located.



Population Distribution - Morning (Before 11 a.m.)



*Residence Hall (11.3%) percentage is the total of The Far Side, Crossroads and The Big Haus hall percentages



Population Distribution - Morning (Before 11 a.m.)

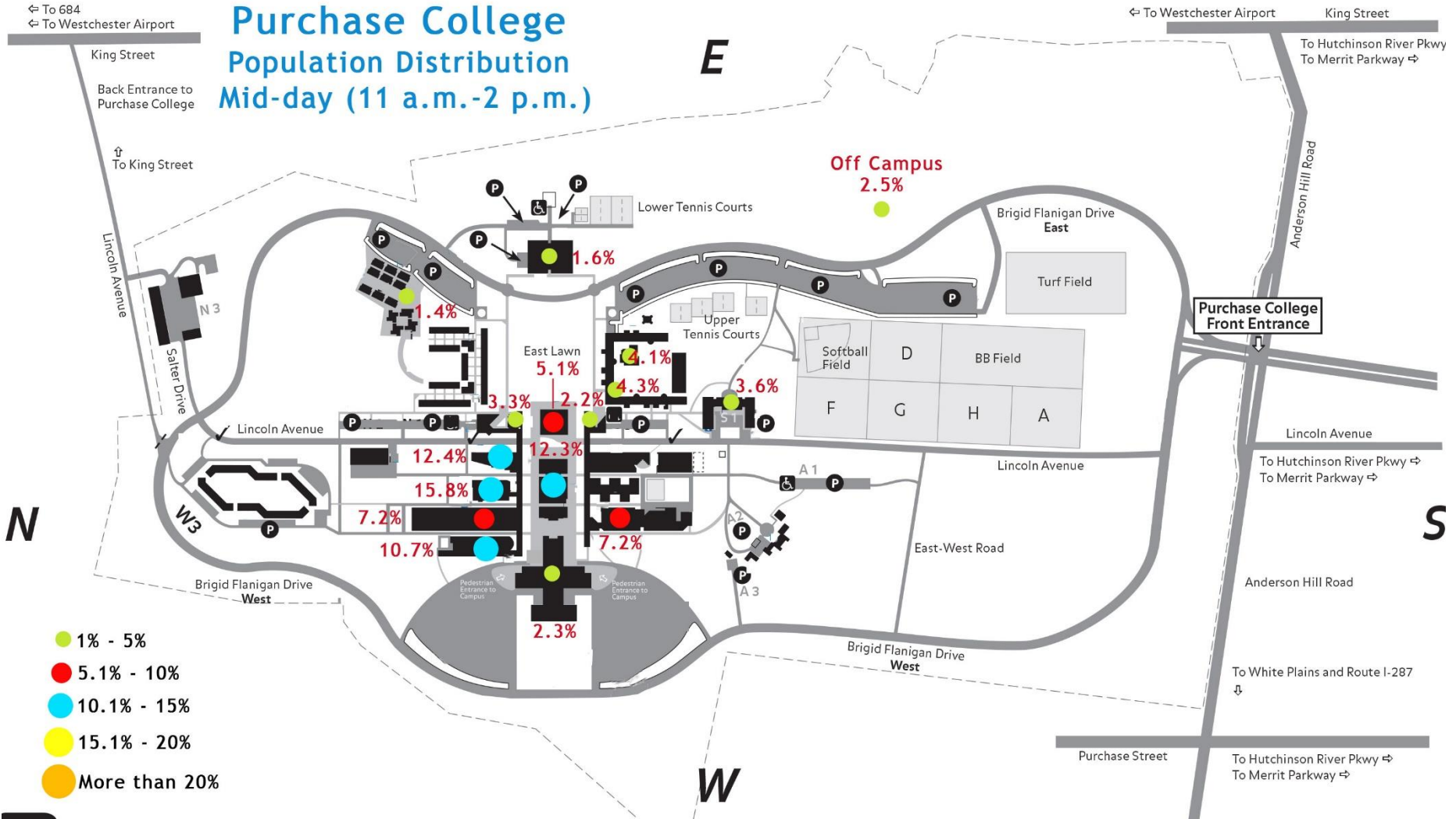
	Total Respondents (691)	First Year (140)	Soph./Jr./Sr./5th Yr. (397)	Grad/Prof. Students (17)	Faculty/Staff (137)	Ugrad On Campus (418)	Ugrad Off Campus (119)	On Campus Apartment (175)	On Campus Res Hall (259)	Meal Plan Holders (406)	Non Meal Plan Holders (285)
Off Campus	6.1%	2.1%	6.3%	5.9%	9.5%	0.7%	21.0%	1.7%	0.0%	3.4%	9.8%
Natural Sciences Building	12.2%	8.6%	14.6%	11.8%	8.8%	8.6%	28.6%	8.0%	8.5%	10.3%	14.7%
Social Sciences Building	9.1%	10.7%	7.8%	0.0%	12.4%	8.6%	8.4%	7.4%	9.7%	9.4%	8.8%
Fort Awesome Residence Hall	8.0%	6.4%	11.3%	5.9%	0.0%	10.5%	8.4%	2.3%	15.4%	10.3%	4.6%
Dance Building	7.5%	9.3%	8.8%	0.0%	2.9%	10.0%	5.0%	8.0%	10.8%	9.1%	5.3%
Music Building	6.4%	4.3%	4.3%	41.2%	10.2%	3.1%	8.4%	4.0%	3.9%	3.9%	9.8%
Library	5.9%	10.0%	4.3%	11.8%	5.8%	5.5%	6.7%	4.6%	5.8%	4.9%	7.4%
Alumni Village Apartments	5.4%	0.0%	9.1%	5.9%	0.0%	8.6%	0.0%	20.6%	0.4%	5.7%	4.9%
The Olde Apartments	4.8%	0.0%	8.1%	0.0%	0.7%	7.7%	0.0%	18.9%	0.0%	5.7%	3.5%
Big Haus Residence Hall	4.6%	9.3%	4.8%	0.0%	0.0%	7.7%	0.0%	0.0%	12.4%	7.9%	0.0%
Student Services Building	4.5%	0.0%	0.5%	0.0%	21.2%	0.2%	0.8%	0.6%	0.4%	1.2%	9.1%
Visual Arts	3.8%	2.9%	3.8%	5.9%	4.4%	3.1%	5.0%	2.9%	3.1%	2.7%	5.3%
The Commons Apartments	3.5%	0.7%	5.5%	5.9%	0.0%	5.5%	0.0%	13.7%	0.0%	3.2%	3.9%
Crossroads Residence Hall	3.5%	15.7%	0.3%	0.0%	0.7%	5.5%	0.0%	0.6%	8.9%	5.9%	0.0%
Far Side Residence Hall	3.2%	12.1%	1.0%	5.9%	0.0%	5.0%	0.0%	0.0%	8.5%	5.4%	0.0%
Campus Center North	2.6%	3.6%	1.5%	0.0%	5.1%	1.7%	3.4%	1.7%	1.9%	2.2%	3.2%
Outback Residence Hall	2.3%	0.7%	3.5%	0.0%	0.7%	3.6%	0.0%	0.0%	6.2%	3.9%	0.0%
Physical Education	1.7%	0.0%	2.8%	0.0%	0.7%	1.4%	4.2%	2.3%	0.8%	1.5%	2.1%
The Performing Arts Center	1.6%	2.9%	0.8%	0.0%	2.9%	1.7%	0.0%	0.0%	2.7%	1.7%	1.4%
Campus Center South	1.2%	0.0%	0.3%	0.0%	5.1%	0.2%	0.0%	0.0%	0.4%	0.2%	2.5%

- 28.6% of Undergraduates Off Campus are in the Natural Sciences Building while Undergraduates On Campus are in Fort Awesome (10.5%) & the Dance Building (10.0%).



Population Distribution - Mid-day (11 a.m. - 2 p.m.)

Purchase College Population Distribution Mid-day (11 a.m.-2 p.m.)



*Residence Hall (4.3%) percentage is the total of The Far Side, Crossroads and The Big Haus hall percentages



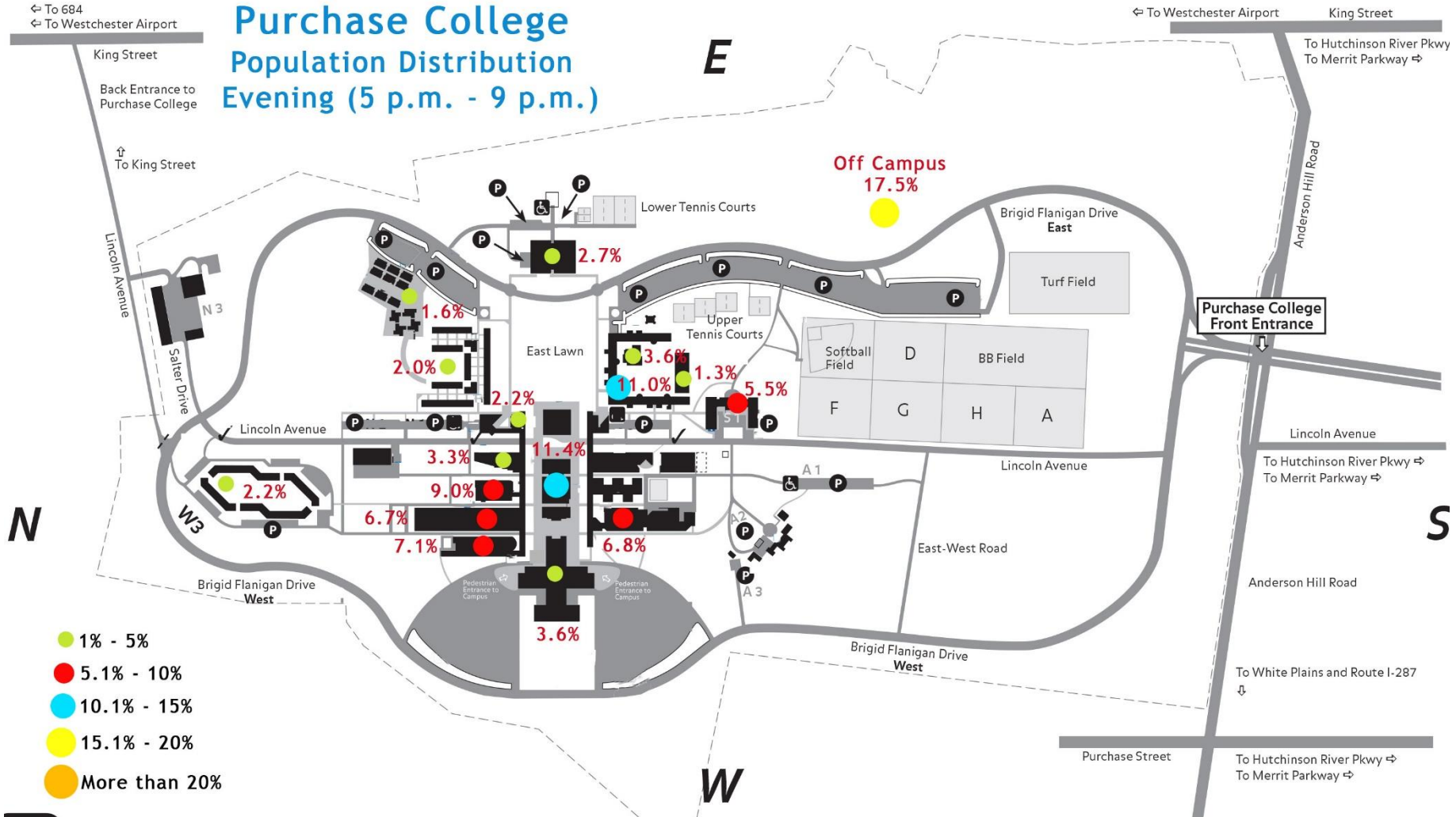
Population Distribution - Mid-day (11 a.m. - 2 p.m.)

	Total Respondents (691)	First Year (140)	Soph./Jr./Sr./5th Yr. (397)	Grad/Prof. Students (17)	Faculty/ Staff (137)	Ugrad On Campus (418)	Ugrad Off Campus (119)	On Campus Apartment (175)	On Campus Res Hall (259)	Meal Plan Holders (406)	Non Meal Plan Holders (285)
Off Campus	2.5%	0.0%	3.3%	0.0%	2.9%	1.2%	6.7%	2.3%	0.4%	1.5%	3.9%
Natural Sciences Building	15.8%	14.3%	17.9%	17.6%	10.9%	13.9%	27.7%	16.0%	11.6%	14.3%	17.9%
Social Sciences Building	12.4%	10.7%	13.4%	0.0%	13.1%	13.9%	8.4%	12.6%	14.7%	13.3%	11.2%
Library	12.3%	15.0%	12.8%	17.6%	7.3%	12.0%	18.5%	10.9%	12.0%	11.8%	13.0%
Music Building	10.7%	14.3%	8.1%	47.1%	10.2%	9.8%	9.2%	10.9%	10.4%	10.1%	11.6%
Dance Building	7.2%	7.1%	9.3%	0.0%	2.2%	10.0%	4.2%	9.1%	10.0%	9.4%	4.2%
Visual Arts	7.2%	4.3%	9.3%	5.9%	4.4%	8.6%	5.9%	12.0%	5.8%	7.1%	7.4%
Student Services Building	5.1%	0.0%	1.5%	0.0%	21.2%	1.0%	1.7%	2.3%	0.4%	2.0%	9.5%
Dining Hall	4.1%	6.4%	3.5%	0.0%	3.6%	5.0%	1.7%	1.7%	7.7%	5.7%	1.8%
Fort Awesome Residence Hall	3.6%	2.9%	5.3%	0.0%	0.0%	3.6%	8.4%	4.0%	3.1%	4.2%	2.8%
Campus Center North	3.3%	2.9%	2.8%	0.0%	5.8%	2.2%	5.0%	2.3%	2.3%	2.5%	4.6%
The Performing Arts Center	2.3%	6.4%	0.8%	0.0%	2.9%	2.9%	0.0%	0.6%	4.2%	3.0%	1.4%
Campus Center South	2.2%	0.7%	1.5%	0.0%	5.8%	1.4%	0.8%	1.7%	1.2%	1.5%	3.2%
Physical Education	1.6%	1.4%	2.0%	0.0%	0.7%	2.2%	0.8%	2.3%	1.9%	1.2%	2.1%
Alumni Village Apartments	1.4%	0.0%	2.0%	11.8%	0.0%	1.9%	0.0%	5.1%	0.4%	1.2%	1.8%
Big Haus Residence Hall	1.4%	2.1%	1.8%	0.0%	0.0%	2.4%	0.0%	0.0%	3.9%	2.5%	0.0%
Crossroads Residence Hall	1.4%	5.7%	0.3%	0.0%	0.7%	2.2%	0.0%	0.6%	3.5%	2.5%	0.0%
Far Side Residence Hall	1.4%	5.0%	0.8%	0.0%	0.0%	2.4%	0.0%	0.0%	3.9%	2.5%	0.0%

- Majority of the Total Respondents are located at the Natural Sciences Building, Social Sciences Building and the Library.
- Only a total of 7.5% of the Meal Plan Holders are in the Residential Neighborhood during this timeframe, which is where the Dining Hall is located.



Population Distribution - Evening (5 p.m. - 9 p.m.)



*Residence Hall (11.0%) percentage is the total of The Far Side, Crossroads and The Big Haus hall percentages



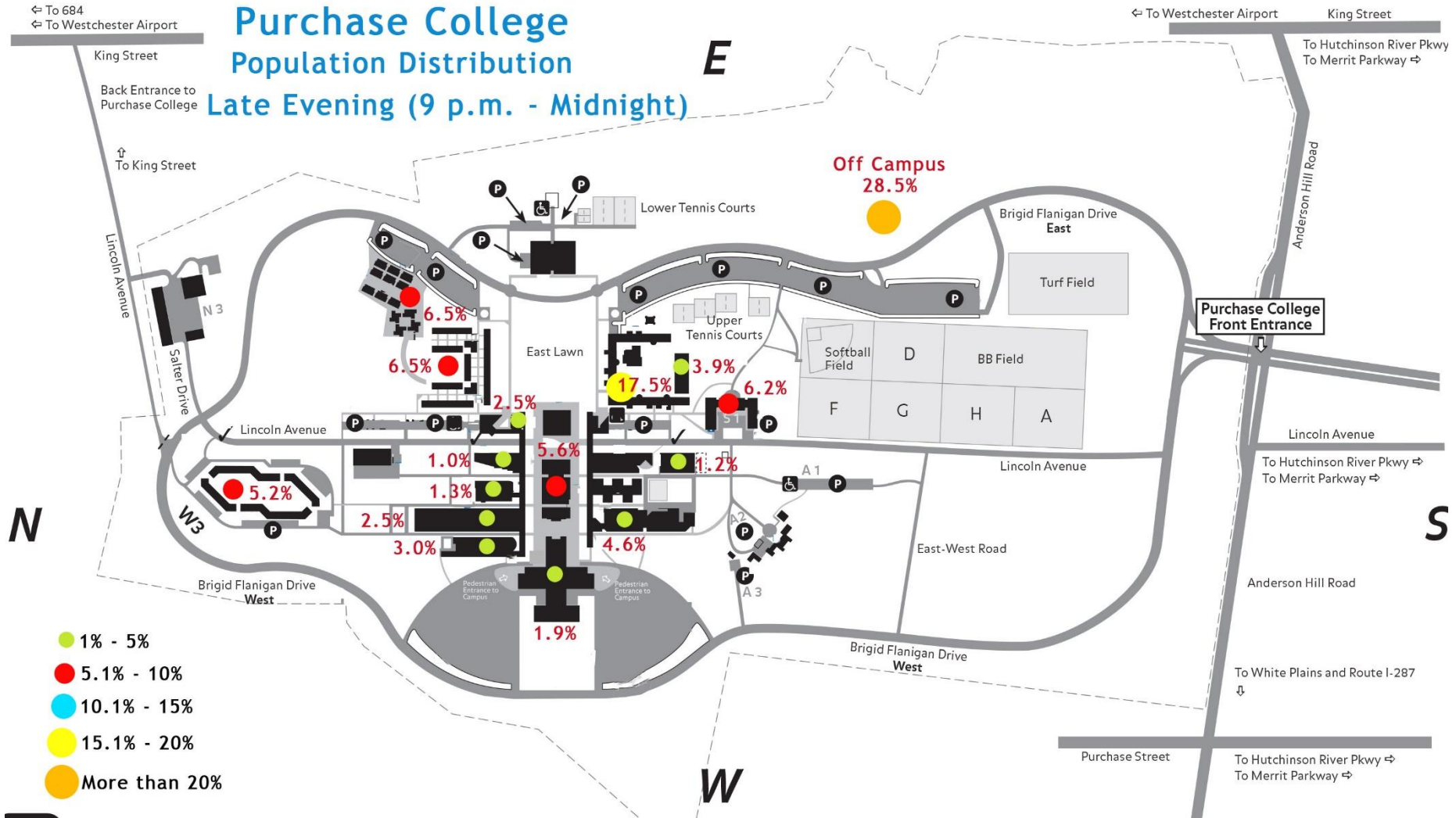
Population Distribution - Evening (5 p.m. - 9 p.m.)

	Total Respondents (691)	First Year (140)	Soph./Jr./Sr./5th Yr. (397)	Grad/Prof. Students (17)	Faculty/Staff (137)	Ugrad On Campus (418)	Ugrad Off Campus (119)	On Campus Apt (175)	On Campus Res Hall (259)	Meal Plan Holders (406)	Non Meal Plan Holders (285)
Off Campus	17.5%	2.9%	8.8%	5.9%	59.1%	3.1%	21.8%	5.7%	1.2%	5.7%	34.4%
Library	11.4%	11.4%	13.1%	29.4%	4.4%	11.0%	18.5%	14.3%	8.1%	10.1%	13.3%
Natural Sciences Building	9.0%	5.0%	12.1%	0.0%	5.1%	6.7%	22.7%	6.9%	6.2%	5.4%	14.0%
Music Building	7.1%	3.6%	6.5%	58.8%	5.8%	5.7%	5.9%	10.3%	5.0%	5.9%	8.8%
Visual Arts	6.8%	5.0%	8.6%	5.9%	3.6%	8.9%	3.4%	12.0%	6.2%	7.6%	5.6%
Dance Building	6.7%	6.4%	8.8%	0.0%	1.5%	9.8%	2.5%	9.1%	9.7%	8.9%	3.5%
Fort Awesome Residence Hall	5.5%	2.9%	8.3%	0.0%	0.7%	5.5%	11.8%	3.4%	6.9%	6.7%	3.9%
Far Side Residence Hall	4.2%	17.9%	1.0%	0.0%	0.0%	6.9%	0.0%	0.0%	11.2%	7.1%	0.0%
Big Haus Residence Hall	3.6%	10.0%	2.8%	0.0%	0.0%	5.7%	0.8%	0.0%	9.3%	5.9%	0.4%
Dining Hall	3.6%	7.1%	3.3%	0.0%	1.5%	5.3%	0.8%	0.6%	8.1%	5.7%	0.7%
The Performing Arts Center	3.6%	4.3%	3.8%	0.0%	2.9%	4.5%	1.7%	3.4%	5.0%	5.2%	1.4%
Social Sciences Building	3.3%	2.1%	4.3%	0.0%	2.2%	3.6%	4.2%	2.3%	4.2%	3.7%	2.8%
Crossroads Residence Hall	3.2%	15.0%	0.3%	0.0%	0.0%	5.3%	0.0%	0.0%	8.5%	5.4%	0.0%
Physical Education	2.7%	2.1%	3.3%	0.0%	2.2%	3.3%	1.7%	5.7%	1.5%	2.7%	2.8%
Campus Center North	2.2%	1.4%	3.0%	0.0%	0.7%	3.1%	0.8%	3.4%	2.7%	3.0%	1.1%
The Commons Apartments	2.2%	0.0%	2.3%	0.0%	4.4%	2.2%	0.0%	8.6%	0.0%	2.2%	2.1%
The Olde Apartments	2.0%	0.0%	3.3%	0.0%	0.7%	3.1%	0.0%	8.0%	0.0%	2.5%	1.4%
Alumni Village Apartments	1.6%	0.0%	2.8%	0.0%	0.0%	2.4%	0.8%	5.1%	0.4%	1.7%	1.4%
Outback Residence Hall	1.3%	0.7%	1.8%	0.0%	0.7%	1.9%	0.0%	0.0%	3.5%	2.2%	0.0%

- Largest segment Undergraduates On Campus can be found in the Library and Undergraduates Off Campus that are on campus are in the Natural Sciences Building.
- Although the off campus population increases to 17.5%, this consists largely of Faculty/Staff.



Population Distribution - Late Evening (9 p.m.- Midnight)



*Residence Hall (17.5%) percentage is the total of The Far Side, Crossroads and The Big Haus hall percentages



Population Distribution - Late Evening (9 p.m. - Midnight)

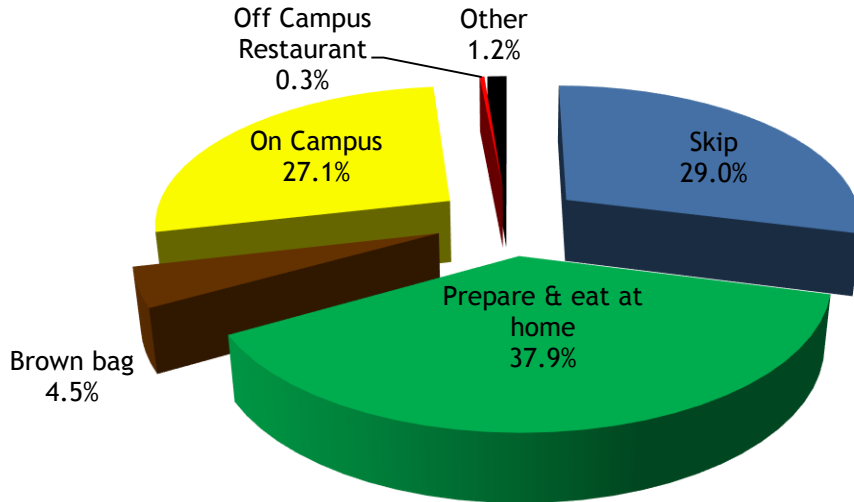
	Total Respondents (691)	First Year (140)	Soph./Jr./Sr./5th Yr. (397)	Grad/Prof. Students (17)	Faculty/Staff (137)	Ugrad On Campus (418)	Ugrad Off Campus (119)	On Campus Apartment (175)	On Campus Res Hall (259)	Meal Plan Holders (406)	Non Meal Plan Holders (285)
Off Campus	28.5%	12.1%	17.1%	29.4%	78.1%	1.2%	67.2%	0.6%	1.5%	7.6%	58.2%
Big Haus Residence Hall	7.2%	15.7%	7.1%	0.0%	0.0%	12.0%	0.0%	0.0%	19.3%	11.8%	0.7%
Alumni Village Apartments	6.5%	1.4%	10.1%	17.6%	0.0%	9.8%	0.8%	23.4%	1.2%	7.1%	5.6%
The Olde Apartments	6.5%	0.7%	10.6%	5.9%	0.7%	10.0%	0.8%	23.4%	1.2%	7.6%	4.9%
Fort Awesome Residence Hall	6.2%	1.4%	9.8%	5.9%	0.7%	9.3%	1.7%	0.6%	15.1%	10.1%	0.7%
Library	5.6%	5.0%	6.8%	11.8%	2.2%	6.0%	7.6%	8.0%	4.2%	4.7%	7.0%
The Commons Apartments	5.2%	1.4%	7.1%	0.0%	4.4%	7.2%	0.0%	18.9%	1.2%	6.2%	3.9%
Far Side Residence Hall	5.2%	22.1%	1.3%	0.0%	0.0%	8.4%	0.8%	0.0%	13.5%	8.9%	0.0%
Crossroads Residence Hall	5.1%	22.9%	0.8%	0.0%	0.0%	8.4%	0.0%	0.0%	13.5%	8.6%	0.0%
Visual Arts	4.6%	3.6%	6.0%	5.9%	1.5%	5.7%	4.2%	9.1%	3.1%	4.9%	4.2%
Outback Residence Hall	3.9%	0.7%	6.3%	0.0%	0.7%	6.2%	0.0%	0.0%	10.4%	6.7%	0.0%
Music Building	3.0%	1.4%	2.8%	23.5%	2.9%	2.2%	3.4%	4.0%	1.9%	2.2%	4.2%
Campus Center North	2.5%	3.6%	2.5%	0.0%	1.5%	2.4%	4.2%	2.9%	1.9%	2.5%	2.5%
Dance Building	2.5%	0.7%	4.0%	0.0%	0.0%	3.3%	2.5%	3.4%	3.1%	3.4%	1.1%
The Performing Arts Center	1.9%	0.0%	2.3%	0.0%	2.9%	1.9%	0.8%	1.7%	1.9%	2.2%	1.4%
Natural Sciences Building	1.3%	0.0%	2.0%	0.0%	0.7%	1.4%	1.7%	2.9%	0.4%	1.0%	1.8%
Student Center - the Stood	1.2%	2.9%	1.0%	0.0%	0.0%	1.9%	0.0%	0.0%	3.1%	2.0%	0.0%
Social Sciences Building	1.0%	2.1%	1.0%	0.0%	0.0%	1.0%	2.5%	0.6%	1.2%	1.2%	0.7%

- Population shifts towards residence halls and apartments from the academic core during this timeframe.

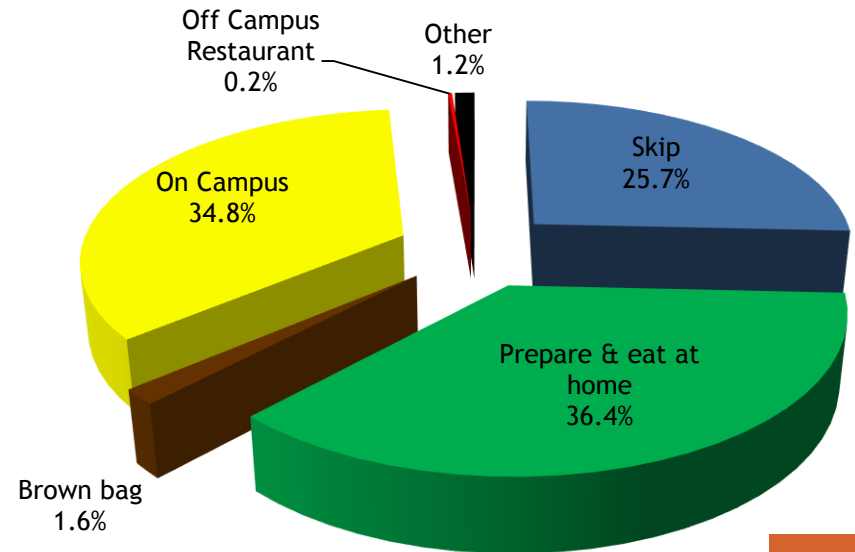


Market Capture - Morning (before 11 am)

Morning (before 11 a.m.) Total Respondents (649)



Morning (before 11 a.m.) Undergrad On (415)



Market Capture - Morning (Before 11 a.m.)

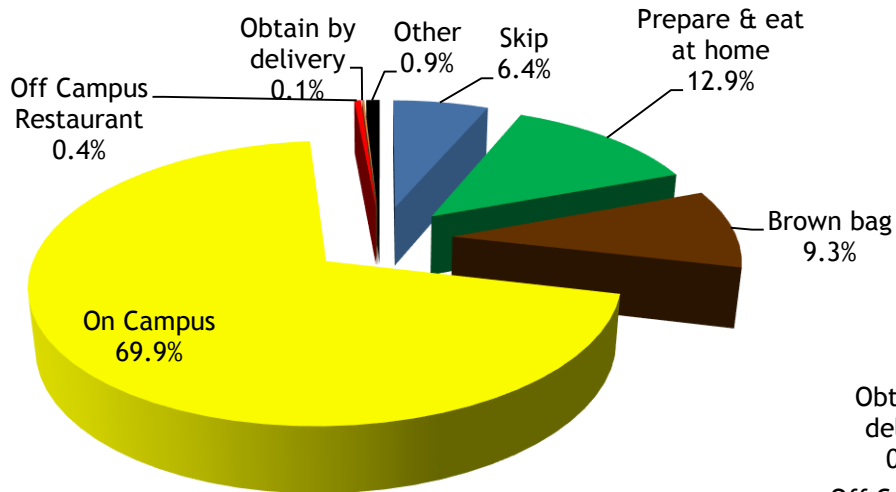
	Total Respondents (649)	First Year (137)	Soph./Jr./Sr./5th Yr. (372)	Grad/Prof. Students (16)	Faculty/Staff (124)	Ugrad On Campus (415)	Ugrad Off Campus (94)	On Campus Apartment (175)	On Campus Res Hall (259)	Meal Plan Holders (392)	Non Meal Plan Holders (257)
Skip eating this meal	29.0%	35.8%	32.0%	18.8%	13.7%	35.4%	22.3%	29.1%	38.2%	34.2%	21.0%
Prepare & eat at home/residence/apartment	37.9%	26.3%	38.2%	75.0%	45.2%	31.6%	50.0%	46.5%	23.2%	29.1%	51.4%
Brown bag	4.5%	1.5%	1.9%	0.0%	16.1%	1.4%	3.2%	2.3%	1.2%	1.8%	8.6%
On Campus - The HUB	17.4%	28.5%	15.6%	6.3%	12.1%	20.2%	13.8%	11.0%	25.9%	22.7%	9.3%
On Campus - Starbucks	8.9%	5.8%	9.9%	0.0%	10.5%	9.6%	5.3%	7.8%	11.2%	10.5%	6.6%
On Campus - Bookstore	0.3%	0.0%	0.5%	0.0%	0.0%	0.2%	1.1%	0.6%	0.0%	0.3%	0.4%
On Campus - Vending Machine	0.5%	2.2%	0.0%	0.0%	0.0%	0.2%	2.1%	0.6%	0.0%	0.3%	0.8%
Off Campus Restaurant	0.3%	0.0%	0.3%	0.0%	0.8%	0.2%	0.0%	0.6%	0.0%	0.3%	0.4%
Other	1.2%	0.0%	1.6%	0.0%	1.6%	1.0%	2.1%	1.7%	0.4%	1.0%	1.6%

- A high percentage of First Year Students (35.8%) and Meal Plan Holders (34.2%) tend to skip this meal.
- Respondents who eat on campus, eat at The HUB.

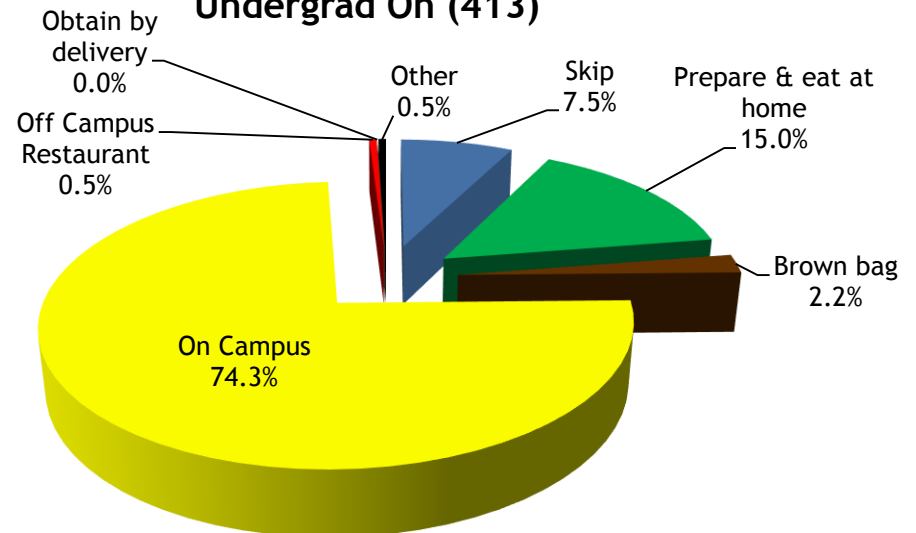


Market Capture - Mid-Day (11 a.m. - 2 p.m.)

Mid-Day (11 a.m.-2 p.m.)
Total Respondents (674)



Mid-Day (11 a.m.-2 p.m.)
Undergrad On (413)



Market Capture - Mid-day (11 a.m. - 2 p.m.)

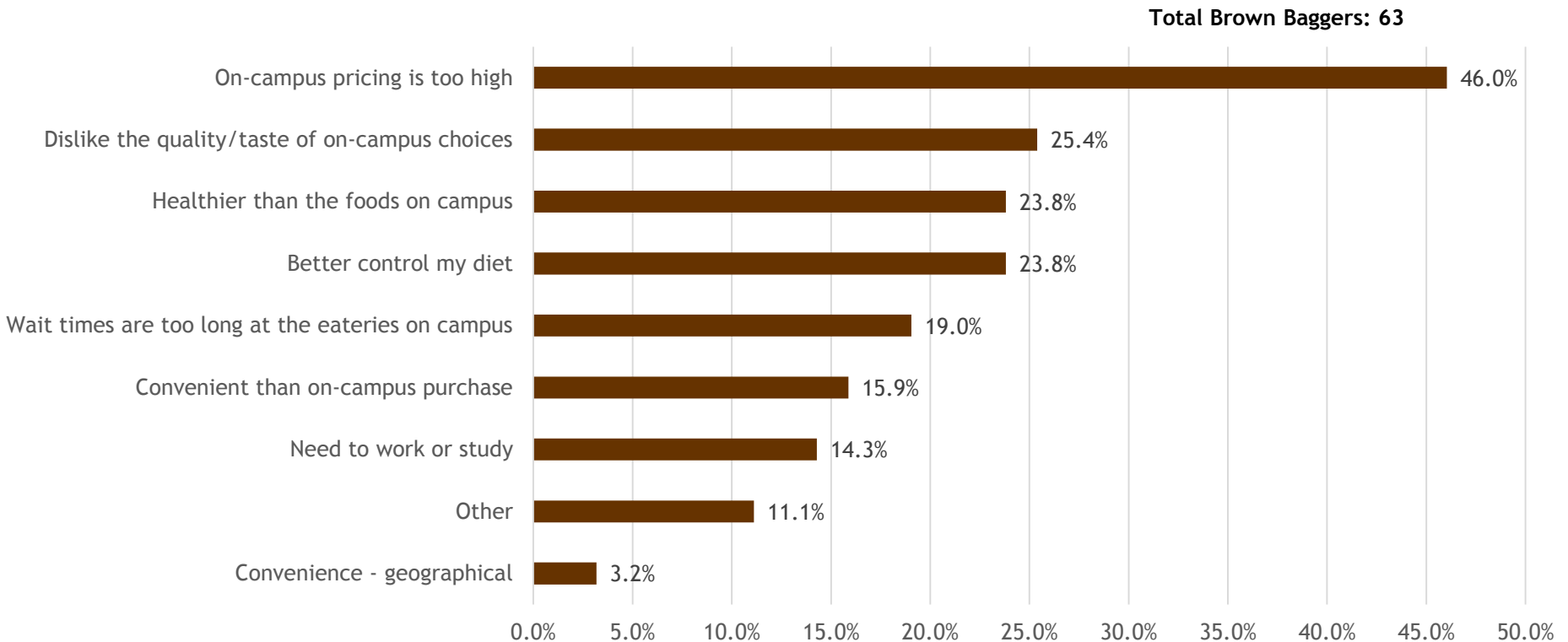
	Total Respondents (649)	First Year (137)	Soph./Jr./Sr./5th Yr. (372)	Grad/Prof. Students (16)	Faculty/Staff (124)	Ugrad On Campus (415)	Ugrad Off Campus (94)	On Campus Apartment (175)	On Campus Res Hall (259)	Meal Plan Holders (392)	Non Meal Plan Holders (257)
Skip eating this meal	6.4%	6.4%	7.6%	5.9%	3.0%	7.5%	6.3%	7.6%	7.0%	6.5%	6.2%
Prepare & eat at home	12.9%	3.6%	18.5%	29.4%	4.5%	15.0%	12.6%	33.9%	3.5%	10.5%	16.4%
Brown bag	9.3%	1.4%	4.4%	11.8%	31.6%	2.2%	9.0%	4.1%	1.2%	1.8%	20.4%
On Campus - Main Dining Hall	8.8%	17.9%	7.6%	11.8%	2.3%	12.3%	2.7%	4.7%	17.8%	13.3%	2.2%
On Campus - The HUB	35.8%	32.9%	33.6%	35.3%	45.1%	31.7%	39.6%	28.7%	33.7%	36.8%	34.3%
On Campus - Terra Ve	19.4%	30.7%	19.8%	0.0%	9.0%	23.7%	18.9%	11.1%	30.6%	24.3%	12.4%
On Campus - Starbucks	3.6%	3.6%	4.4%	0.0%	1.5%	4.1%	4.5%	3.5%	4.3%	4.0%	2.9%
On Campus - The MORE Store	0.6%	0.7%	0.8%	0.0%	0.0%	0.7%	0.9%	0.0%	1.2%	0.8%	0.4%
On Campus - Bookstore	0.3%	0.0%	0.5%	0.0%	0.0%	0.5%	0.0%	0.6%	0.4%	0.5%	0.0%
On Campus - Vending Machine	1.5%	2.1%	1.6%	5.9%	0.0%	1.2%	3.6%	2.3%	0.4%	0.5%	2.9%
Off Campus Restaurant	0.4%	0.0%	0.8%	0.0%	0.0%	0.5%	0.9%	1.2%	0.0%	0.3%	0.7%
Obtain by delivery	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.6%	0.0%	0.3%	0.0%
Other	0.9%	0.7%	0.5%	0.0%	2.3%	0.5%	0.9%	1.85	0.0%	0.8%	1.1%

- All the academic buildings near The HUB, pulls majority of the respondents to The HUB including Meal Plan Holders who are not walking back to eat at the Main Dining Hall.
- The largest majority, 33.9%, of Apartment Residents are going back to their apartment.
- Of the 63 Respondent who typically Brown bag, 66.7% are Faculty/Staff.



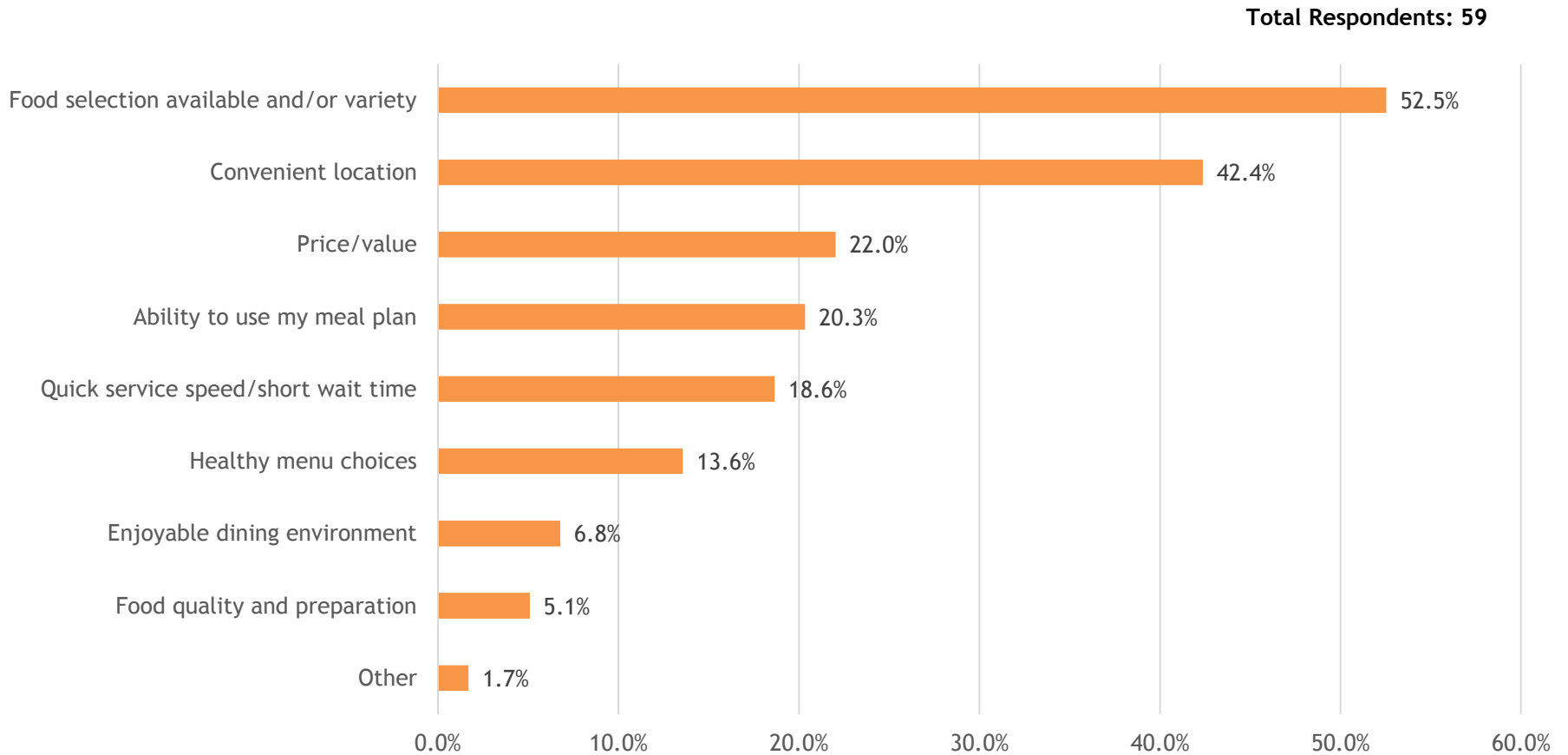
Market Capture - Mid-day - Brown Bag - Reasons

Respondents were asked to select two reasons why they brought their mid-day meal from home.

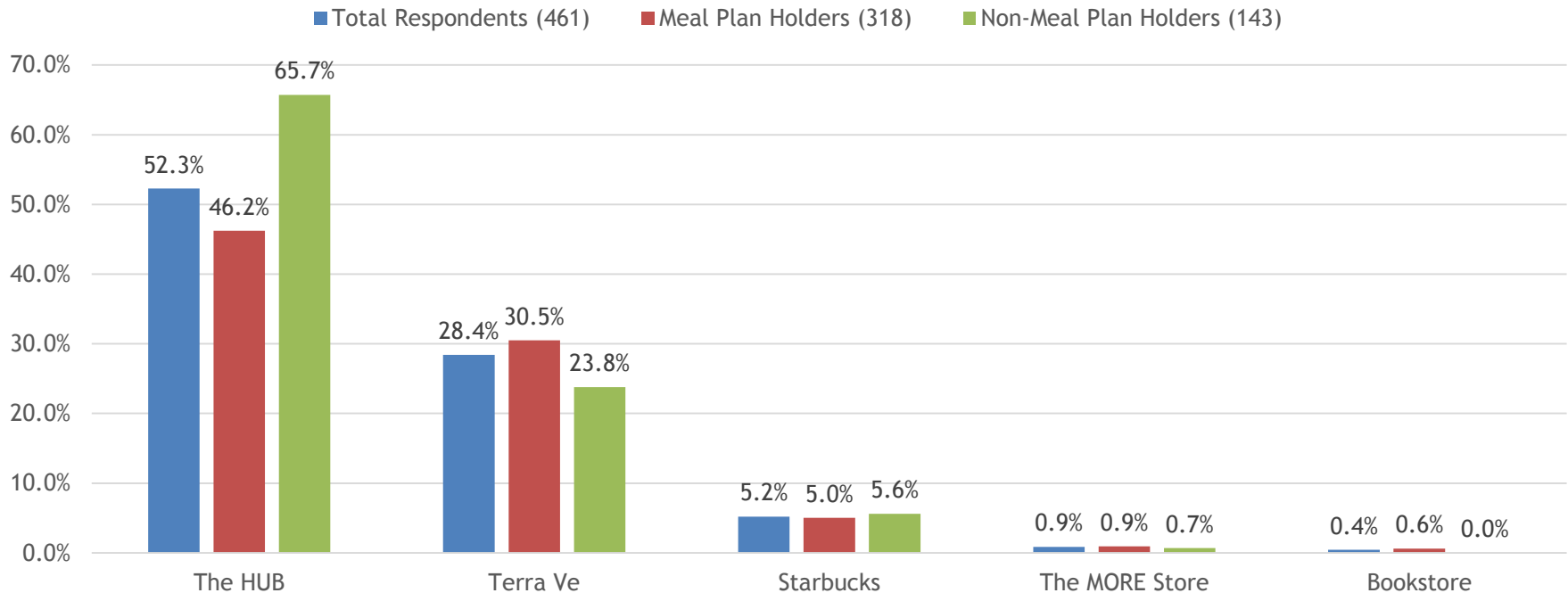


Market Capture - Mid-day - Main Dining Hall - Reasons

Respondents were asked to select two reasons why they typically eat their meal at the Main Dining Hall.



Market Capture - Mid-day - Retail Locations & Reasons



The top three reasons why Total Respondents made purchases at the on-campus retail locations are:

- The HUB
 - Convenient location (55.6%)
 - Ability to take my meal 'to go' (34.4%)
 - Food selection available and/or variety (21.6%)



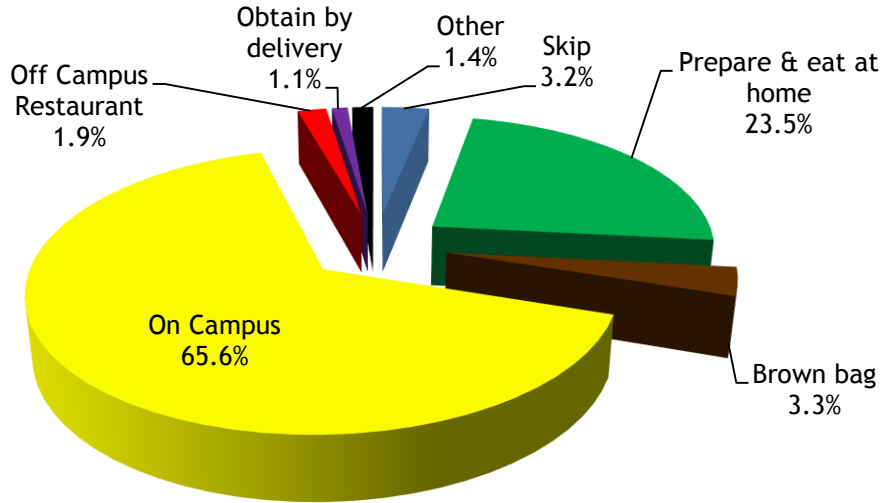
Market Capture - Mid-day - Retail Locations & Reasons

- Terra Ve
 - Food selection available and/or variety (50.4%)
 - Food quality and preparation (44.3%)
 - Healthy menu choices (38.2%)
- Starbucks
 - Ability to use my meal plan (37.5%)
 - Food selection available and/or variety (33.3%)
 - Food quality and preparation (29.2%)
- The MORE Store
 - Convenient location (75.0%)
 - Ability to take my meal 'to go' (50.0%)
 - Quick service speed/short wait time (25.0%)
- Bookstore
 - Quick service speed/short wait time (100.0%)
 - Food selection available and/or variety (50.0%)

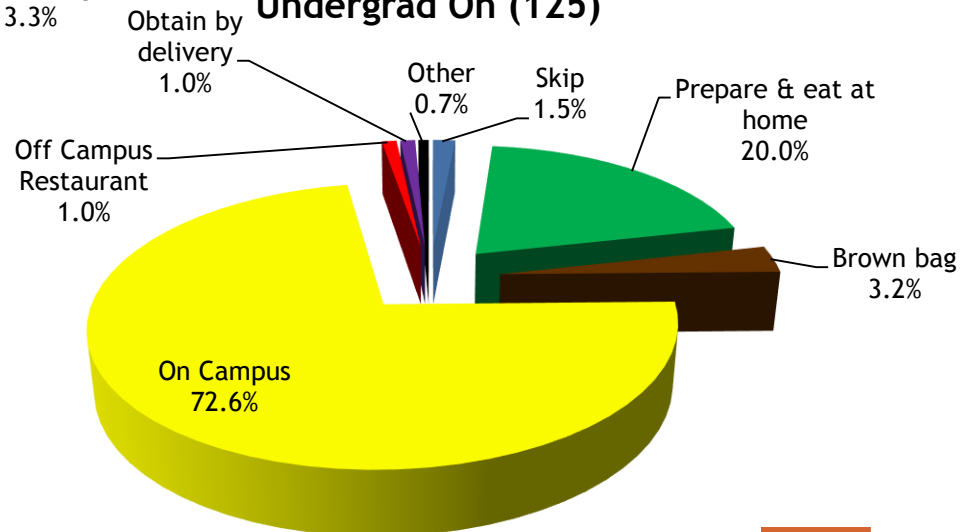


Market Capture - Evening (5 p.m. - 9 p.m.)

Evening (5 p.m.-9 p.m.)
Total Respondents (570)



Evening (5 p.m.-9 p.m.)
Undergrad On (125)



Market Capture - Evening (5 p.m. - 9 p.m.)

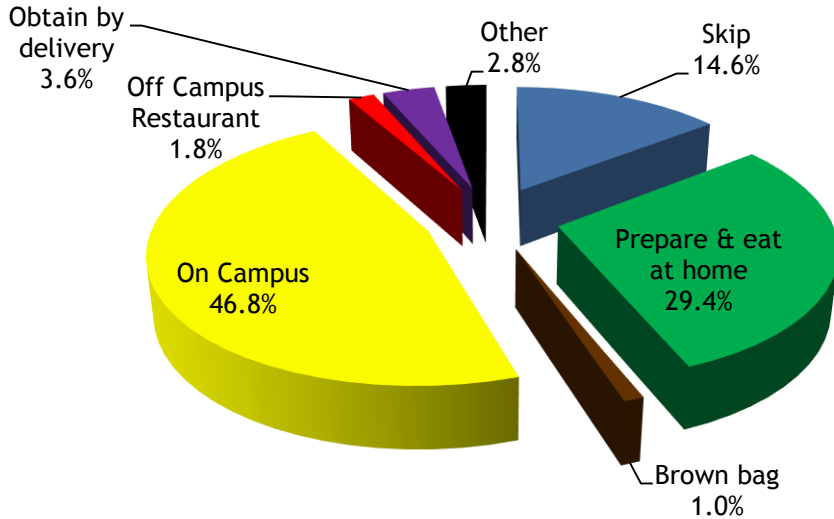
	Total Respondents (649)	First Year (137)	Soph./Jr./Sr./5th Yr. (372)	Grad/Prof. Students (16)	Faculty/Staff (124)	Ugrad On Campus (415)	Ugrad Off Campus (94)	On Campus Apartment (175)	On Campus Res Hall (259)	Meal Plan Holders (392)	Non Meal Plan Holders (257)
Skip eating this meal	3.2%	0.7%	3.6%	6.3%	5.4%	1.5%	8.6%	1.8%	1.2%	1.6%	6.4%
Prepare & eat at home/residence/apartment	23.5%	3.7%	26.2%	31.3%	51.8%	20.0%	20.4%	53.3%	1.2%	14.6%	41.7%
Brown bag	3.3%	1.5%	3.3%	12.5%	5.4%	3.2%	1.1%	4.8%	2.3%	2.1%	5.9%
On Campus - Main Dining Hall	17.7%	30.1%	15.7%	6.3%	3.6%	21.7%	10.8%	6.7%	30.5%	24.3%	4.3%
On Campus - The HUB	29.5%	36.8%	29.3%	25.0%	14.3%	30.9%	33.3%	19.4%	37.1%	33.7%	20.9%
On Campus - Terra Ve	13.3%	21.3%	11.9%	12.5%	3.6%	15.8%	8.6%	4.8%	21.9%	16.2%	7.5%
On Campus - Starbucks	3.9%	3.7%	4.7%	0.0%	0.0%	3.7%	7.5%	4.8%	2.7%	4.2%	3.2%
On Campus - The MORE Store	0.5%	0.0%	0.6%	0.0%	1.8%	0.2%	1.1%	0.0%	0.4%	0.3%	1.1%
On Campus - Vending Machine	0.7%	0.0%	0.6%	6.3%	1.8%	0.2%	1.1%	1.2%	0.0%	0.5%	1.1%
Off Campus Restaurant	1.9%	0.0%	1.7%	0.0%	8.9%	1.0%	2.2%	1.8%	0.8%	1.0%	3.7%
Obtain by delivery	1.1%	0.7%	1.4%	0.0%	0.0%	1.0%	2.2%	0.6%	1.2%	0.8%	1.6%
Other	1.4%	1.5%	1.1%	0.0%	3.6%	0.7%	3.2%	0.6%	0.8%	0.8%	2.7%

- As with Mid-Day, The HUB continues to be a popular dining spot with most of the sub-samples.

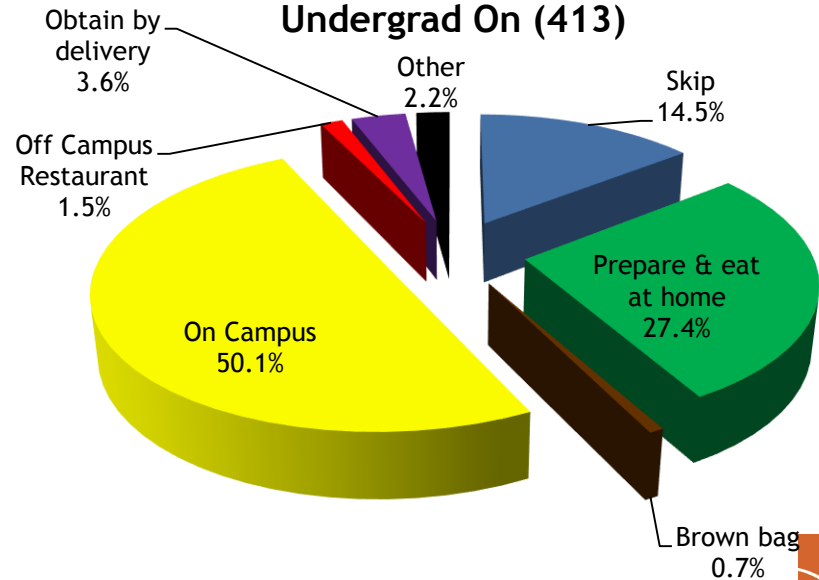


Market Capture - Late Evening (9 p.m. or later)

Late Evening (9 p.m. or later)
Total Respondents (494)



Late Evening (9 p.m. or later)
Undergrad On (413)



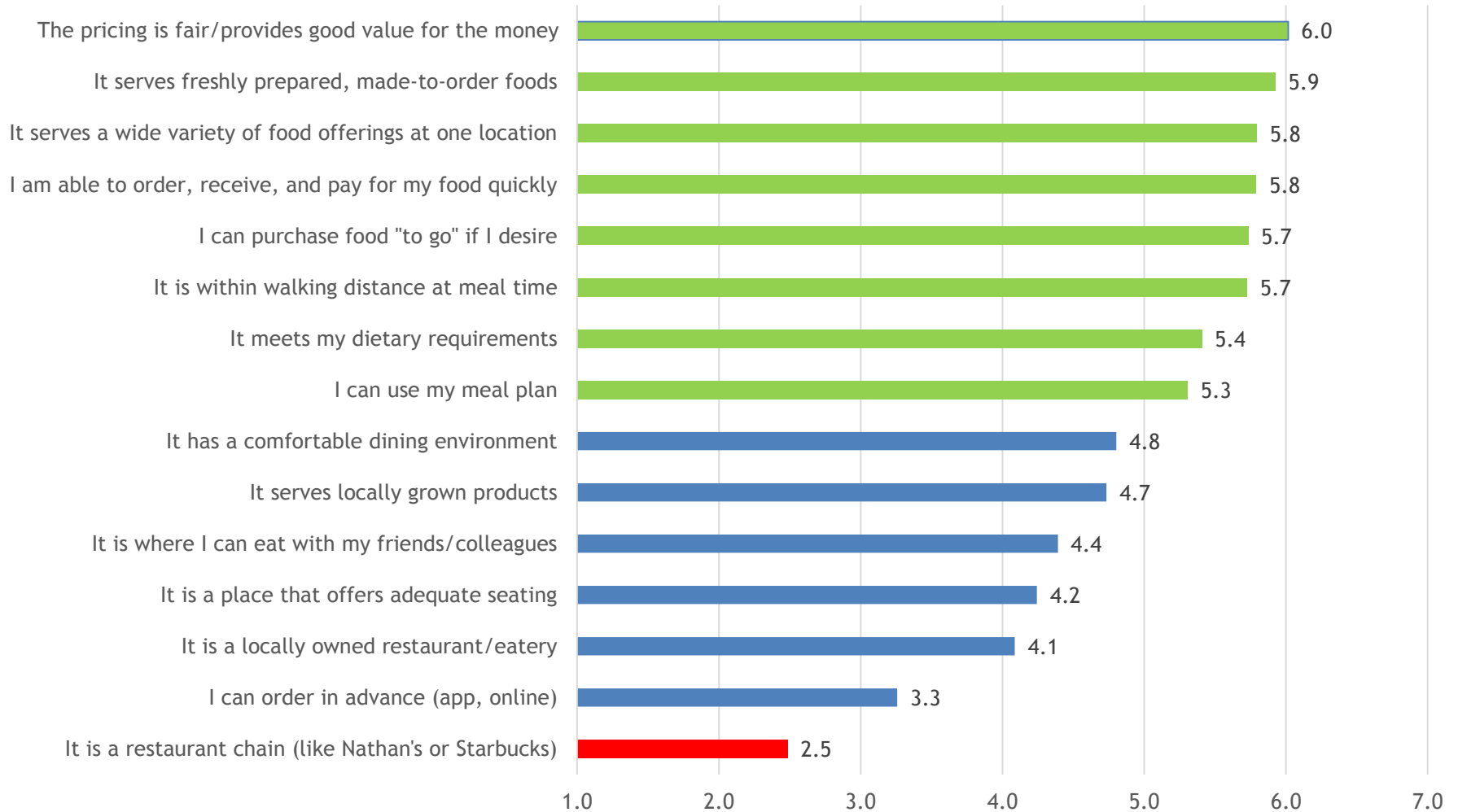
Market Capture - Late Evening (9 p.m. - Midnight)

	Total Respondents (649)	First Year (137)	Soph./Jr./Sr./5th Yr. (372)	Grad/Prof. Students (16)	Faculty/Staff (124)	Ugrad On Campus (415)	Ugrad Off Campus (94)	On Campus Apartment (175)	On Campus Res Hall (259)	Meal Plan Holders (392)	Non Meal Plan Holders (257)
Skip eating this meal	14.6%	12.2%	15.2%	8.3%	20.0%	14.5%	12.8%	12.1%	16.5%	13.6%	17.6%
Prepare & eat at home/residence/apartment	29.4%	12.2%	34.0%	33.3%	46.7%	27.4%	35.9%	50.0%	14.1%	25.1%	42.9%
Brown bag	1.0%	0.0%	0.9%	8.3%	3.3%	0.7%	0.0%	1.7%	0.0%	0.0%	4.2%
On Campus - The HUB	33.0%	48.0%	29.8%	33.3%	6.7%	34.9%	33.3%	20.7%	43.1%	37.9%	17.6%
On Campus - Starbucks	9.1%	16.3%	7.0%	8.3%	3.3%	9.9%	5.1%	0.6%	15.7%	11.2%	2.5%
On Campus - The MORE Store	3.4%	5.7%	3.0%	0.0%	0.0%	3.9%	2.6%	0.6%	5.9%	4.0%	1.7%
On Campus - Vending Machine	1.2%	0.8%	1.5%	0.0%	0.0%	1.5%	0.0%	2.9%	0.4%	0.8%	2.5%
Off Campus Restaurant	1.8%	0.0%	1.8%	8.3%	6.7%	1.5%	0.0%	2.9%	0.4%	1.6%	2.5%
Obtain by delivery	3.6%	2.4%	4.0%	0.0%	6.7%	3.6%	2.6%	5.2%	2.4%	3.5%	4.2%
Other	2.8%	2.4%	2.7%	0.0%	6.7%	2.2%	7.7%	3.4%	1.6%	2.4%	4.2%

- 48.0% of First Year Students make at purchase at The HUB.



Dining Statements - Importance



Total Respondents: 691



Dining Statements - Importance

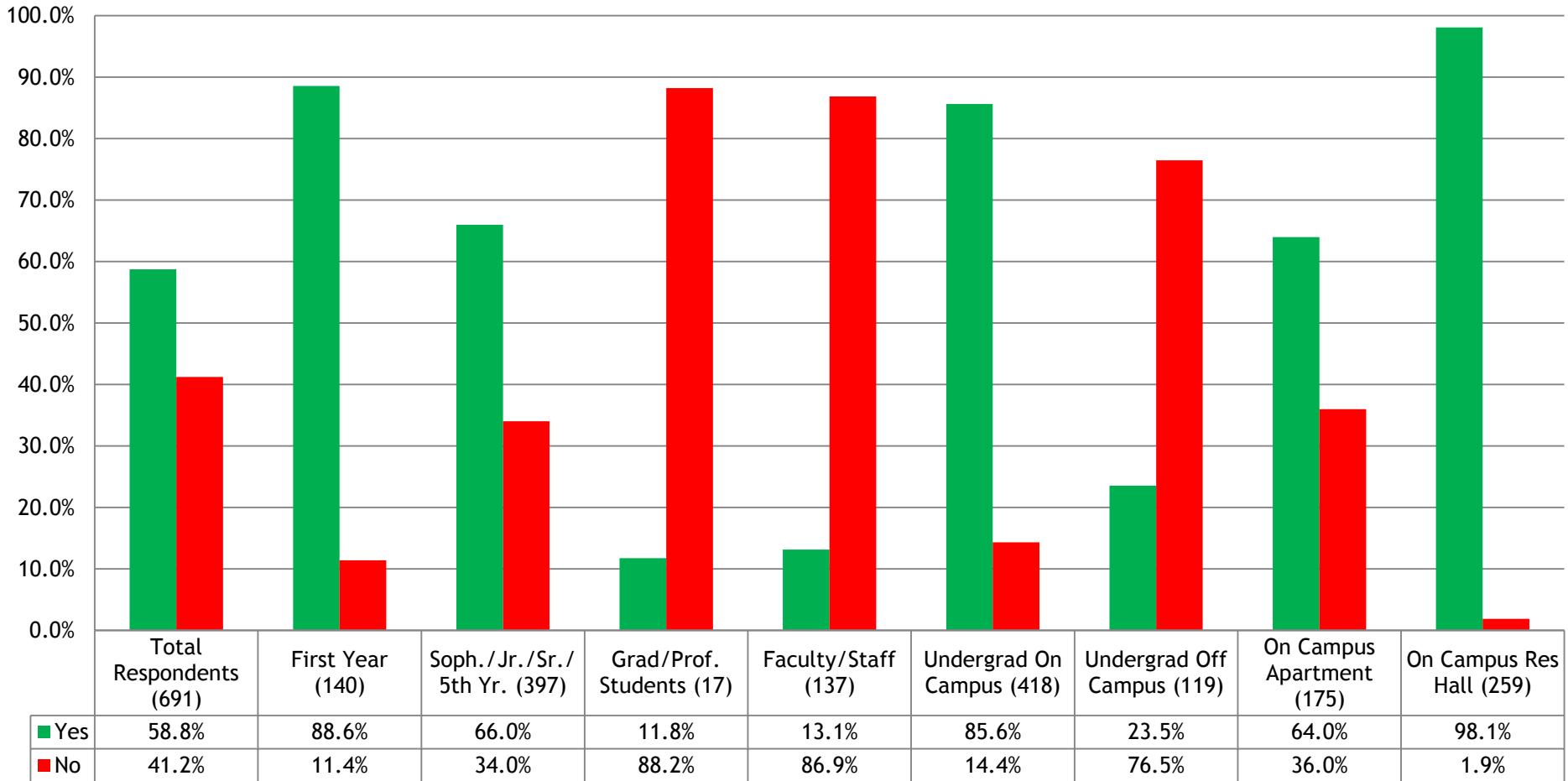
	First Year (140)	Soph./Jr./Sr./5th Yr. (397)	Grad/ Prof. Students (17)	Faculty/ Staff (137)	Ugrad On Campus (418)	Ugrad Off Campus (119)	On Campus Apartment (175)	On Campus Res Hall (259)	Meal Plan Holders (406)	Non Meal Plan Holders (285)
It serves freshly prepared, made-to-order foods	5.8	6.0	5.7	6.0	5.9	6.0	6.0	5.8	5.9	6.0
I am able to order, receive, and pay for my food quickly	5.5	5.8	5.5	6.1	5.7	5.7	5.7	5.7	5.7	5.9
I can purchase food "to go" if I desire	5.4	5.8	5.1	5.9	5.7	5.8	5.5	5.8	5.7	5.7
The pricing is fair/provides good value for the money	5.7	6.1	6.0	6.2	5.9	6.3	6.1	5.7	5.8	6.3
It is a place that offers adequate seating	4.6	4.3	4.1	3.9	4.4	4.3	4.2	4.5	4.3	4.2
It is where I can eat with my friends/colleagues	5.0	4.4	4.2	3.8	4.7	4.0	4.3	4.9	4.6	4.1
It meets my dietary requirements	5.0	5.5	5.2	5.7	5.3	5.4	5.6	5.2	5.3	5.6
It is a restaurant chain (like Nathan's or Starbucks)	2.6	2.5	2.5	2.5	2.5	2.5	2.7	2.4	2.5	2.5
It is within walking distance at meal time	5.1	5.7	6.4	6.2	5.6	5.6	5.7	5.5	5.6	5.8
It serves a wide variety of food offerings at one location	5.8	5.7	5.6	6.0	5.8	5.7	5.7	5.8	5.8	5.8
I can use my meal plan	6.2	5.5	4.5	3.8	6.2	3.8	5.6	6.7	6.5	3.6
It serves locally grown products	4.8	4.7	4.8	4.6	4.8	4.6	4.9	4.8	4.8	4.7
It is a locally owned restaurant/eatery	3.9	4.2	4.0	4.1	4.2	3.9	4.4	4.0	4.1	4.1
I can order in advance (app, online)	2.8	3.3	2.6	3.5	3.2	3.1	3.4	3.2	3.3	3.3
It has a comfortable dining environment	4.9	4.9	4.5	4.6	4.9	4.6	4.99	5.0	4.8	4.8

* Statements of importance with mean scores between 6.0 and 7.0 have been indicated in highlighted yellow.

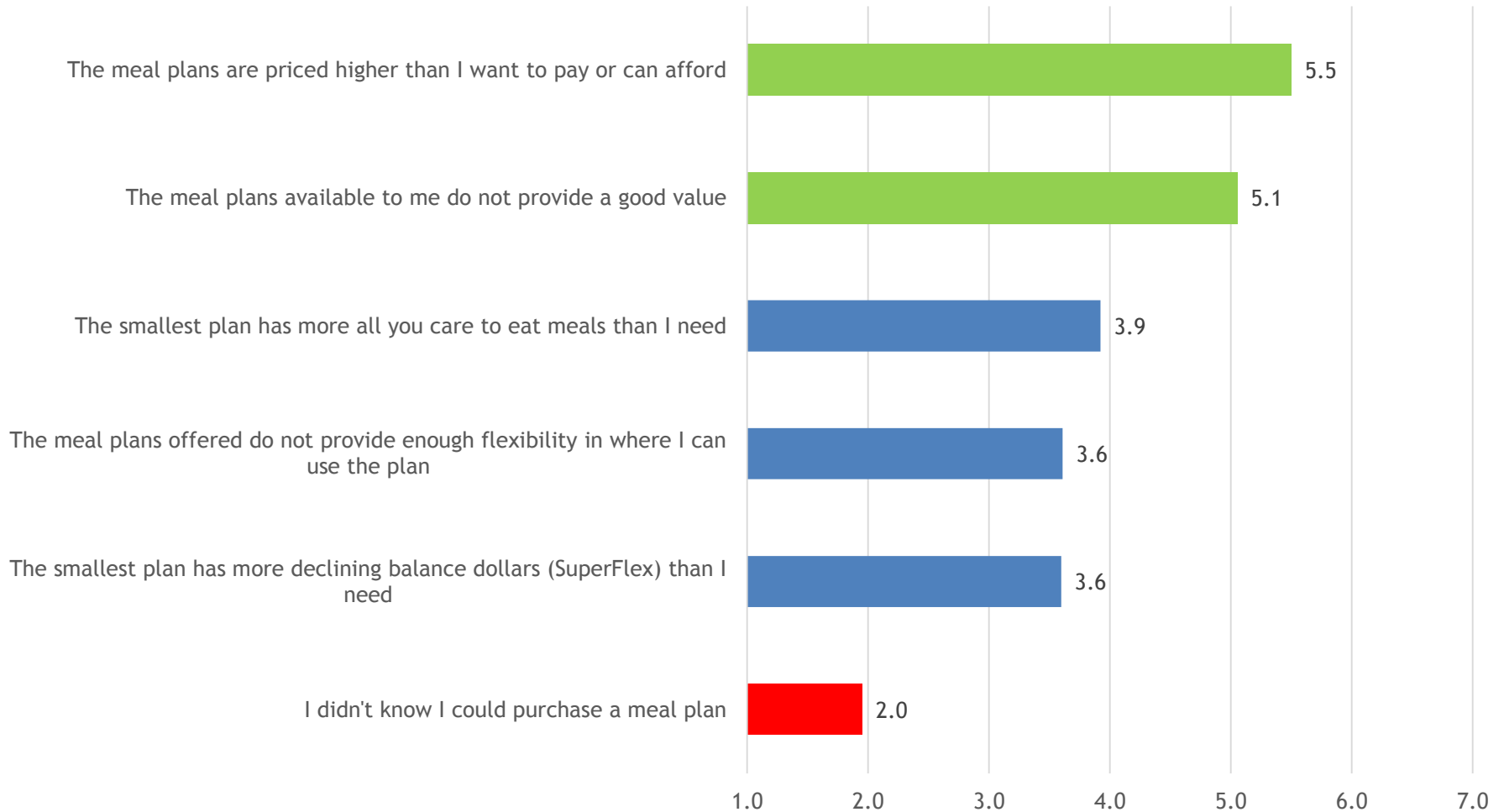


Meal Plan

Are you currently a meal plan holder?



Non-Meal Plan Holders - Factors To Not Purchase



Student Non-Meal Plan Holders: 166



Non-Meal Plan Holders - Factors To Not Purchase

	First Year (16)	Soph./Jr./Sr./ 5th Yr. (135)	Grad/ Prof. Students (15)	Ugrad On Campus (60)	Ugrad Off Campus (91)	On Campus Apartment (61)	On Campus Res Hall (5)
The meal plans are priced higher than I want to pay or can afford	5.6	5.5	5.1	5.7	5.4	5.8	4.6
The smallest plan has more all you care to eat meals than I need	3.9	3.9	3.8	4.2	3.8	4.2	4.6
The smallest plan has more declining balance dollars (SuperFlex) than I need	3.8	3.6	3.4	3.6	3.6	3.6	3.8
The meal plans available to me do not provide a good value	4.5	5.2	4.6	5.5	4.9	5.5	3.6
I didn't know I could purchase a meal plan	2.9	1.8	2.7	1.4	2.2	1.4	2.0
The meal plans offered do not provide enough flexibility in where I can use the plan	3.9	3.6	3.0	3.6	3.7	3.6	3.2

** Factors of importance with mean scores between 5.0 and 7.0 have been indicated in highlighted yellow.*



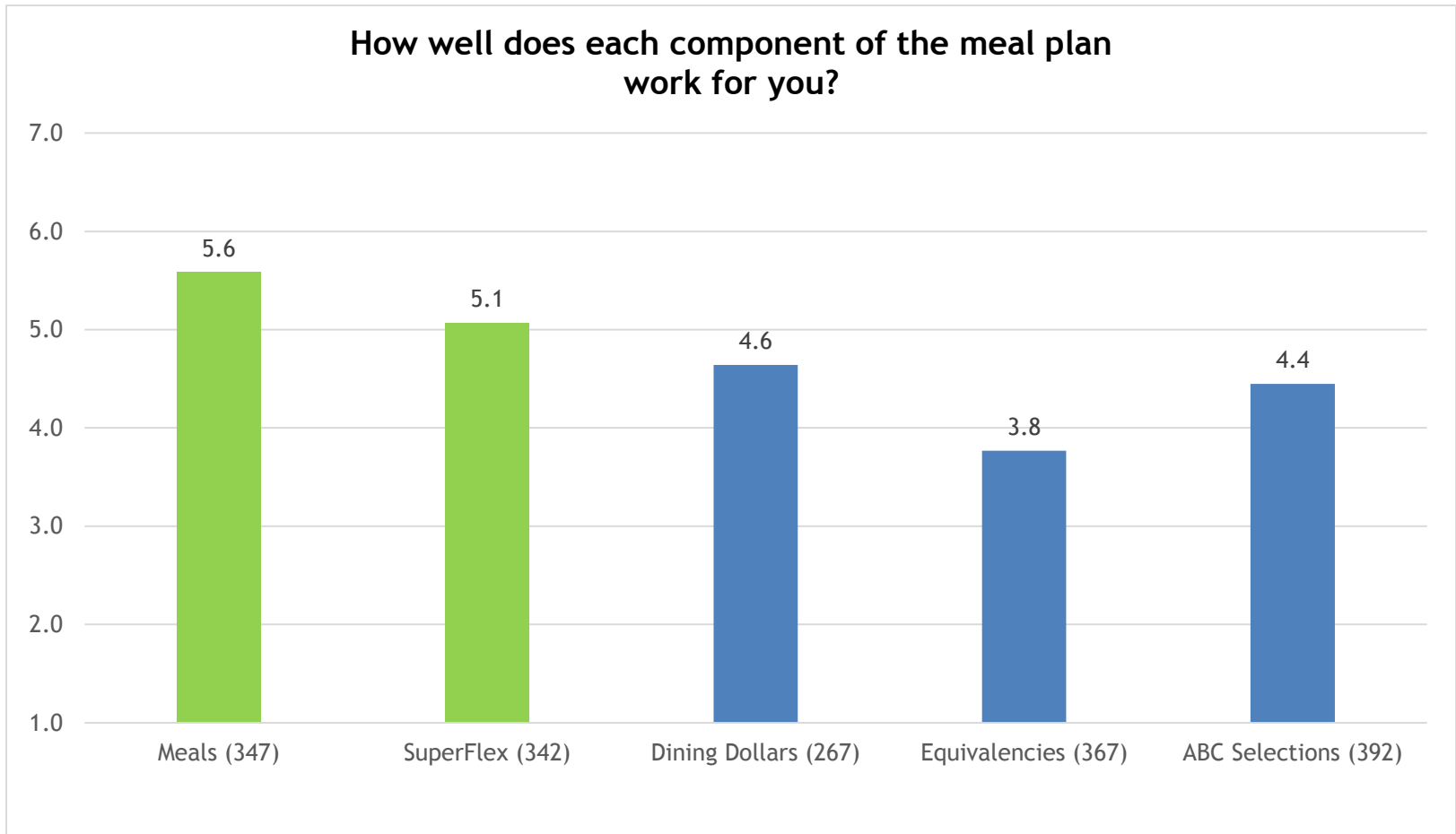
Non-Meal Plan Holders - Purchase Influencers

	Total Non-Meal Plan Holders (285)	First Year (16)	Soph./Jr./Sr./5th Yr. (135)	Grad/Prof. Students (15)	Faculty/Staff (119)	Undergrad On Campus (60)	Undergrad Off Campus (91)	On Campus Apartment (63)	On Campus Res Hall (5)
If the buy-in threshold was low (i.e. if I could purchase just a few meals at time, rather than for the entire semester)	5.2	5.3	5.2	5.9	5.0	5.1	5.3	5.0	5.8
If unused meals were fully refundable at the end of each semester	6.0	6.4	6.4	6.1	5.4	6.5	6.3	6.3	7.0
If I was offered a bonus at the time of purchase (such as buy 10 meals and get the 11th meal free)	5.2	5.7	5.6	5.3	4.7	5.4	5.7	5.2	6.8
If I was rewarded with coupons or bonus meals the more I used the plan	5.0	5.9	5.4	5.3	4.4	5.4	5.5	5.2	6.6
Other	4.2	4.0	5.1	5.0	3.2	5.1	5.1	5.0	7.0

* Factors with the highest mean scores for each sub-sample have been indicated in highlighted yellow.



Meal Plan Holders - Understanding/Satisfaction



Scale: 1= Difficult to understand/does not work for me
7= Easy to understand/works well for me



Meal Plan Holders - Understanding/Satisfaction

	First Year	Soph./Jr./Sr. /5th Yr.	Undergrad On Campus	Undergrad Off Campus	On Campus Apartment	On Campus Res Hall
Meals (for use in the Main Dining Hall)	(119)	(220)	(319)	(20)	(112)	(254)
	5.6	5.6	5.6	5.0	5.2	5.8
SuperFlex (declining balance dollars associated with a meal plan and only used in dining locations on campus)	(118)	(216)	(316)	(18)	(32)	(16)
	4.6	5.4	5.1	4.9	5.7	4.9
Dining Dollars (declining balance dollars, no tax and can be used in dining locations, MORE Store and vending machines)	(76)	(172)	(226)	(22)	(112)	(254)
	3.7	4.9	4.5	5.0	5.6	4.0
Equivalencies (ability to use a meal for a retail purchase, value of meal is based on time of use [\$3 open to 11am & \$5 11am to close])	(118)	(237)	(333)	(22)	(14)	(14)
	3.8	3.7	3.7	4.1	3.8	3.7
ABC Selections (ability to select food items from categories A, B, C in retail locations in exchange for a meal)	(123)	(250)	(348)	(25)	(112)	(254)
	4.1	4.6	4.4	4.2	4.6	4.4

* Attributes with mean scores between 5.0 and 7.0 have been indicated in highlighted yellow.



Meal Plan Holders - Preferred Meals

Preferred Meal Component of a Meal Plan	Total Meal Plan Holders (406)	First Year (124)	Soph./Jr./Sr. /5th Yr. (262)	Ugrad On Campus (358)	Ugrad Off Campus (28)	On Campus Apartment (112)	On Campus Res Hall (254)
Meals per Week - a certain number of meals available to use per week	42.6%	54.8%	36.6%	44.7%	14.3%	33.0%	50.4%
Meals per Semester - a certain number of meals available to use during the semester	24.6%	17.7%	28.2%	24.0%	35.7%	33.9%	19.3%
Unlimited Access - unlimited entries into the Main Dining Hall throughout the semester	32.8%	27.4%	35.1%	31.3%	50.0%	33.0%	30.3%

‘Meals per Week’ and ‘Meals per Semester’ Respondents - how many meals they would like as part of their meal plan during a 7-day week.

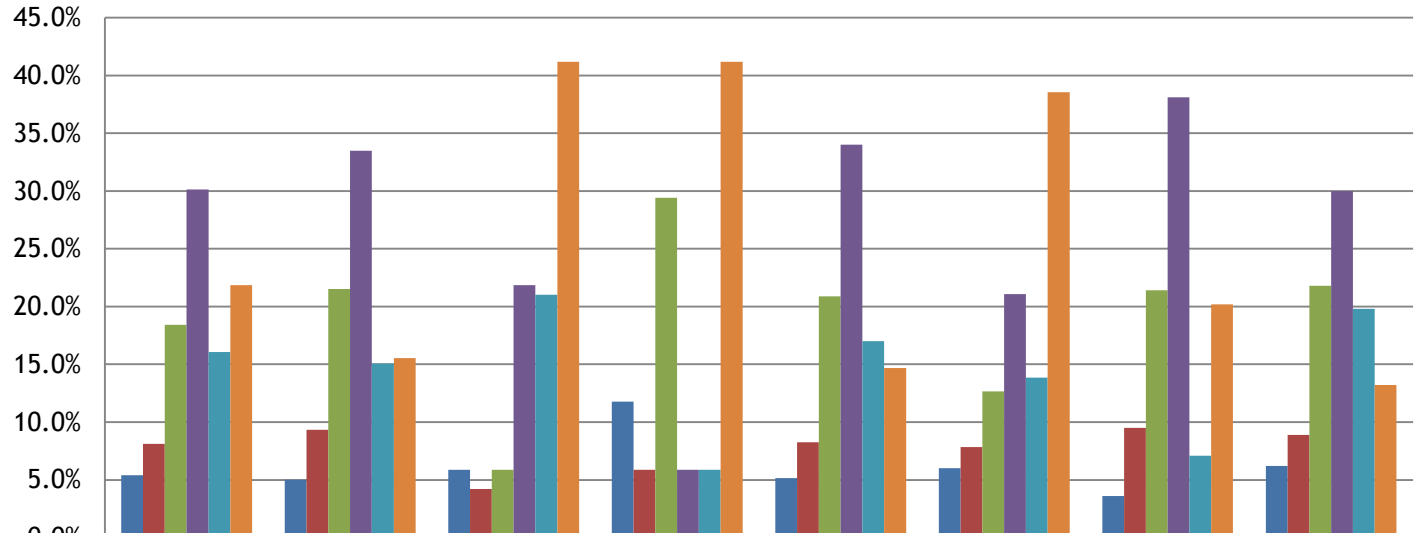
**Unlimited meals are excluded from the mean*

	MPW & MPS Respondents (273)	First Year (90)	Soph./Jr./Sr./5th Yr. (170)	Ugrad On Campus (246)	Ugrad Off Campus (14)	On Campus Apartment (75)	On Campus Res Hall (177)
Average number of meals	16.2	17.8	15.9	17.0	10.0	12.6	18.6



Operating Hours

Which of the following timeframes could be improved to better meet your needs?



	Total Respondents (554)	Undergrad On Campus (418)	Undergrad Off Campus (119)	Grad/Prof. Students (17)	Meal Plan Holders (388)	Non Meal Plan Holders (166)	On Campus Apartment (168)	On Campus Res Hall (257)
■ Sunday - Thursday dinner	5.4%	5.0%	5.9%	11.8%	5.2%	6.0%	3.6%	6.2%
■ Friday & Saturday dinner	8.1%	9.3%	4.2%	5.9%	8.2%	7.8%	9.5%	8.9%
■ Saturday & Sunday brunch	18.4%	21.5%	5.9%	29.4%	20.9%	12.7%	21.4%	21.8%
■ Late night service	30.1%	33.5%	21.8%	5.9%	34.0%	21.1%	38.1%	30.0%
■ Monday - Friday breakfast	16.1%	15.1%	21.0%	5.9%	17.0%	13.9%	7.1%	19.8%
■ Operating hours - meeting my needs	21.8%	15.6%	41.2%	41.2%	14.7%	38.6%	20.2%	13.2%



Operating Hours - Late Night Service

The table shows student respondents who indicate that late night service hours do not meet their needs.

Preferred Dining Venue for Late Night	Students (Late Night) TR (167)	Ugrad On Campus (140)	Ugrad Off Campus (26)	On Campus Apartment (112)	On Campus Res Hall (254)	Meal Plan Holders (132)	Non Meal Plan Holders (35)
HUB Food Court	49.1%	50.7%	38.5%	67.2%	37.7%	47.7%	54.3%
Terra Ve	24.6%	25.7%	19.2%	17.2%	32.5%	25.8%	20.0%
Main Dining Hall	15.6%	15.0%	19.2%	6.3%	22.1%	18.9%	2.9%
Starbucks	10.8%	8.6%	23.1%	9.4%	7.8%	7.6%	22.9%
Preferred Opening Hour for Late Night	After 11 p.m. (26.3%)	After 11 p.m. (27.1%)	After 11 p.m. (23.1%)	After 11 p.m. (37.5%)	8 p.m. (19.5%)	After 11 p.m. (22.7%)	After 11 p.m. (40.0%)
Preferred Closing Hour for Late Night	After 2 a.m. (34.7%)	After 2 a.m. (34.3%)	After 2 a.m. (38.5%)	After 2 a.m. (40.6%)	2 a.m. (29.9%)	After 2 a.m. (34.1%)	After 2 a.m. (37.1%)
	2 a.m. (26.9%)	2 a.m. (28.6%)	2 a.m. (19.2%)	2 a.m. (26.6%)	After 2 a.m. (28.6%)	2 a.m. (26.5%)	2 a.m. (28.6%)

- Currently, The HUB is the only late-night dining operation on campus and is open until midnight or 1 a.m. during the week.



Operating Hours - Saturday and Sunday Brunch

The table shows student respondents who indicate that the brunch hours on Saturday and Sunday do not meet their needs.

Preferred Dining Venue for Brunch	Students (Sa & Su Brunch) TR (102)	Ugrad On Campus (90)	Ugrad Off Campus (7)	On Campus Apartment (36)	On Campus Res Hall (56)	Meal Plan Holders (81)	Non Meal Plan Holders (21)
HUB Food Court	34.3%	31.1%	42.9%	55.6%	16.1%	28.4%	57.1%
Terra Ve	28.4%	27.8%	57.1%	16.7%	33.9%	29.6%	23.8%
Main Dining Hall	20.6%	23.3%	0.0%	13.9%	28.6%	23.5%	9.5%
Starbucks	16.7%	17.8%	0.0%	13.9%	21.4%	18.5%	9.5%
Preferred Opening Hour for Brunch	8 a.m. (26.5%)	8 a.m. (27.8%)	8 a.m. (28.6%)	8 a.m. (27.8%)	8 a.m. (26.8%)	8 a.m. (28.4%)	9 a.m. (28.6%)
Preferred Closing Hour for Brunch	2 p.m. (24.5%)	2 p.m. (25.6%)	After 3 p.m. (42.9%)	2 p.m. (36.1%)	3 p.m. and After 3 p.m. (21.4%)	2 p.m. and After 3 p.m. (22.2%)	2 p.m. (33.3%)

- Although 34.3% of the student respondents would like to dine at The HUB for weekend brunch, 29.6% of the Meal Plan Holders would like to dine at Terra Ve.
- Currently, Terra Ve is closed during the weekends. The Hub opens at 10 a.m. and the Main Dining Hall opens at 11 a.m. The Main Dining Hall closes at 3 p.m.



Operating Hours - Monday through Friday Breakfast

The table shows student respondents who indicate that the brunch hours on Saturday and Sunday do not meet their needs.

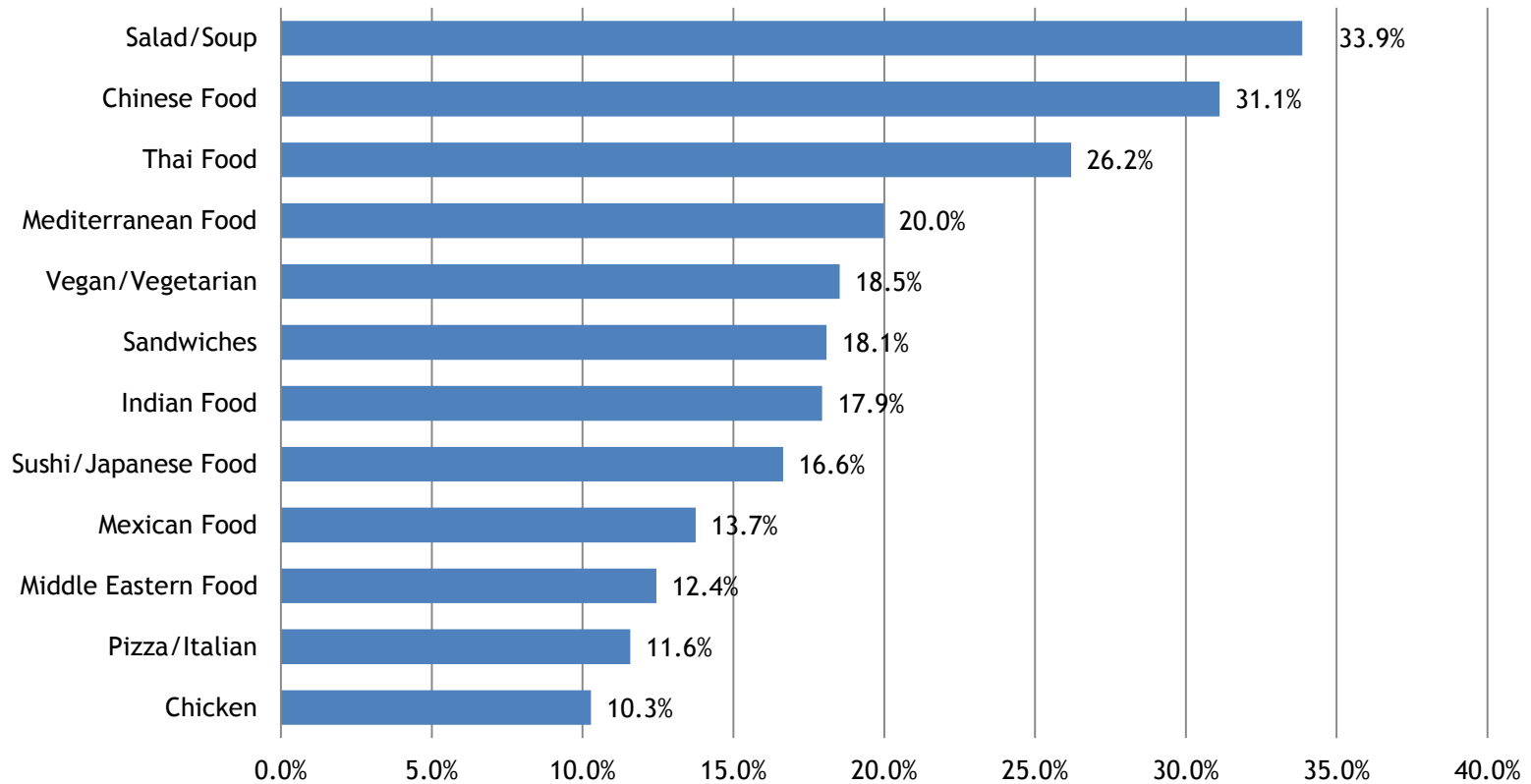
Preferred Dining Venue for Breakfast	Students (Mo-Fr Bfast) TR (89)	Ugrad On Campus (63)	Ugrad Off Campus (25)	On Campus Apartment (12)	On Campus Res Hall (51)	Meal Plan Holders (66)	Non Meal Plan Holders (23)
Main Dining Hall	43.8%	57.1%	12.0%	16.7%	66.7%	56.1%	8.7%
HUB Food Court	34.8%	30.2%	44.0%	58.3%	23.5%	31.8%	43.5%
Terra Ve	12.4%	3.2%	36.0%	0.0%	3.9%	6.1%	30.4%
Starbucks	9.0%	9.5%	8.0%	25.0%	5.9%	6.1%	17.4%
Preferred Opening Hour for Breakfast	7 a.m. (29.2%)	7 a.m. (30.2%)	7 a.m. (28.0%)	7 a.m. (33.3%)	7 a.m. (29.4%)	7 a.m. (30.3%)	7 a.m. (26.1%)

- Currently, Main Dining Hall is closed for breakfast and opens for lunch only at 11 a.m.
- The preferred opening time is 7 a.m.



Type of Eatery

Add/replace eateries, which types would you most prefer?

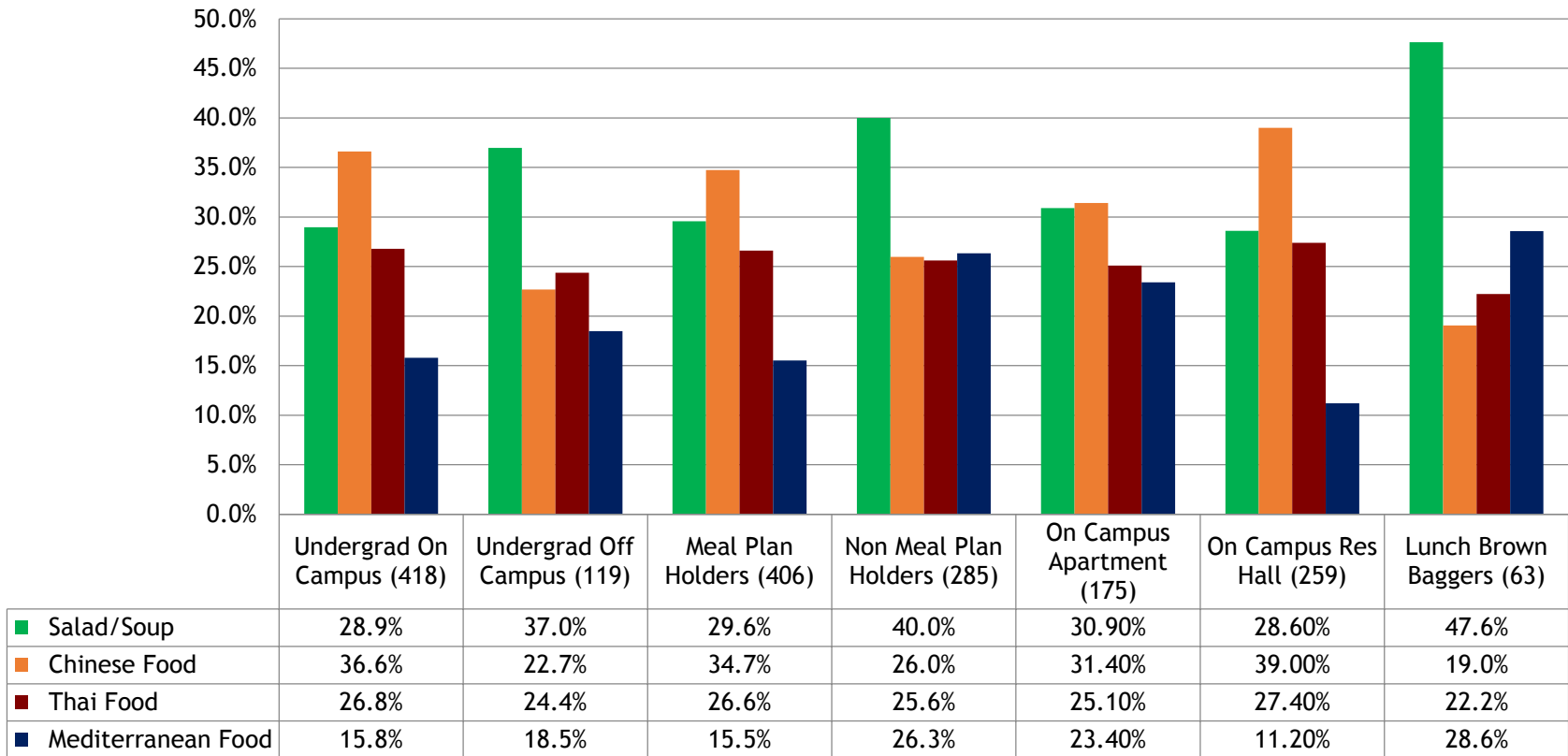


Total Respondents: 691

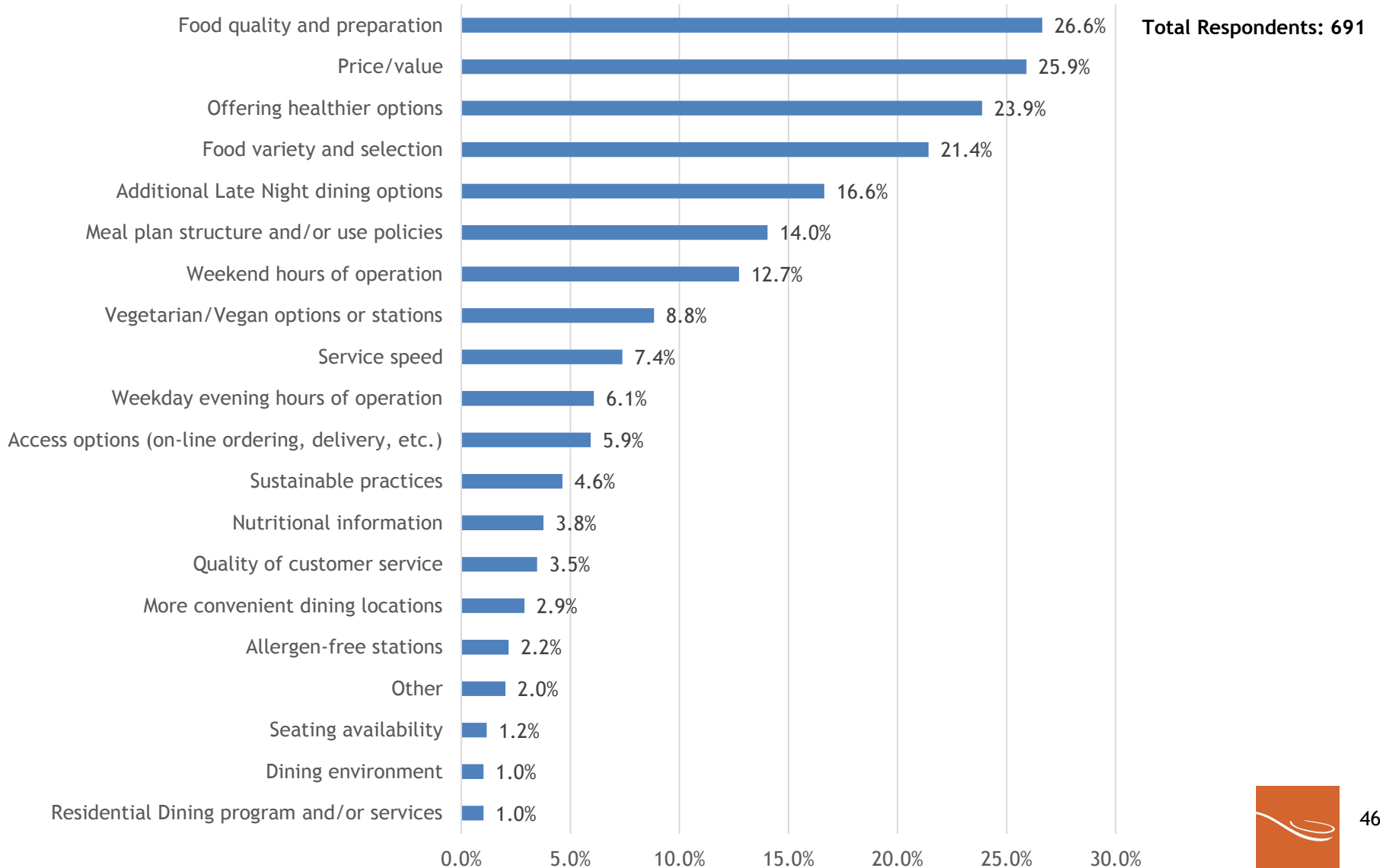


Type of Eatery

Add/replace eateries, which types would you most prefer?



Improvements



Improvements

Undergrad On

- 25.6% Offer Healthier Options
- 24.9% Food Quality/Preparation
- 22.0% Price/Value
- 22.0% Additional Late Night Options

Undergrad Off

- 38.7% Price/Value
- 25.2% Food Quality/Preparation
- 22.7% Food Variety/Selection

Lunch Brown Baggers

- 38.1% Price/Value
- 30.2% Food Quality/Preparation
- 25.4% Food Variety/Selection



On Campus Apartments

- 29.7% Price/Value
- 26.3% Food Quality/Preparation
- 25.1% Offer Healthier Options

On Campus Residence Hall

- 25.9% Offer Healthier Options
- 24.3% Food Quality/Preparation
- 22.0% Weekend Hours

Meal Plan Holders

- 25.6% Offer Healthier Options
- 24.6% Food Quality/Preparation
- 19.5% Food Variety/Selection

Non Meal Plan Holders

- 35.4% Price/Value
- 29.5% Food Quality/Preparation
- 24.2% Food Variety/Selection

