

Project Report



CONCORDIA UNIVERSITY Retail and Catering Foodservice Survey

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Table of Contents

1	Introduction	2
1.1	Background.....	2
1.2	Report Structure	2
2	Methodology and Response Rates	3
2.1	Questionnaire	3
2.2	Data Collection and Promotion	3
2.3	Response Rates.....	4
2.3.1	Respondent Profile.....	5
3	Survey Results	8
3.1	Importance of and Satisfaction with Campus Food Service Attributes.....	8
3.2	Food Service Experience Satisfaction	10
3.3	Campus Utilization.....	10
3.4	Sources of Food and Drink While On Campus.....	12
3.5	Reasons for Not Using Campus Food Services	15
3.6	Food and Beverage Spending	18
3.7	Special Dietary Requirements	20
3.8	Food and Beverage Preferences.....	21
3.9	Distance Respondents are Willing to Travel for Food and Beverages.....	24
3.10	Catering Services	26
3.11	General Thoughts and Comments.....	29
4	Key Takeaways	32
	Appendix 1—Survey Questionnaire.....	35
	Appendix 2 – Results by Primary Role on Campus	36
	Appendix 3 – Raw Survey Results	60

1 Introduction

1.1 Background

Located in downtown Montreal, Concordia University (“Concordia” or the “University”) has an enrolment of approximately of 46,000 students and over 8,100 faculty and staff on two campuses – Loyola Campus (“Loyola”) and Sir George Williams Campus (“SGW”) (collectively the “Population”). Hospitality Concordia oversees on-campus food services including residence meal plans, catering, retail food service outlets and snack vending machines.

Concordia engaged *fs*STRATEGY Inc. (“*fs*STRATEGY”) to conduct a survey of students, staff and faculty (the “Survey”) to solicit input on retail food services and catering.

1.2 Report Structure

This report has been structured as follows:

- Section 1 – Introduction
- Section 2 – Survey Methodology and Response Rates
- Section 3 – Detailed Survey Results by Campus
- Section 4 – Key Takeaways from the Survey and Focus Groups.

Readers interested in a synopsis of the Survey results should review Section 4.

2 Methodology and Response Rates

2.1 Questionnaire

fsSTRATEGY prepared a draft questionnaire using an iterative process that incorporated feedback from the University. The final questionnaire contained 37 multiple-choice and open-ended questions. The Survey questionnaire may be found in Appendix 1.

The Survey includes question logic that limited the questions to those relevant to the respondent.

Once the questionnaire and logic were finalized, fsSTRATEGY translated the Survey into French. Concordia reviewed, revised and finalized the French version prior to launching the Survey.

2.2 Data Collection and Promotion

fsSTRATEGY published the Survey using Survey Monkey, an online survey tool, and provided links to Concordia who promoted the Survey to its community. fsSTRATEGY also provided QR Codes for the French and English links.

The Survey was officially open for 11 days from November 27, 2023 to December 8, 2023. But was available with limited promotion on November 21, 2023.

Concordia used a variety of marketing tools to promote the Survey. Exhibit 2.1, below, summarizes Concordia's communications and marketing plan for the Survey.

Exhibit 2.1

Concordia's Communications and Marketing Plan

Date	Audience	Action item
2023-11-24	Internal project team	Final survey links are ready
2023-11-27	Survey launches	
2023-11-27	Concordia Community	Banners go live on Carrefour and Student Hub food services pages linking to survey
2023-11-27	Students	Student Eblast linking to the survey sent
2023-11-27	Faculty and Staff	Faculty and Staff eblast linking to survey sent
2023-11-27	Concordia community	QR code posters posted
11/27/2023 to 12/01/2023	Concordia Community	"Need to Know" item on Carrefour and Student Hub linking to survey
2023-11-28	Graduate Students	Newsletter one-liner link to survey circulated
2023-11-29	Faculty and Staff	Newsletter one-liner link to survey circulated
2023-11-30	Undergraduate Students	Newsletter one-liner link to survey circulated
12/12/2023 to 12/08/2023	Students	Banner on the student Hubs linking to survey
12/12/2023 to 12/08/2023	Faculty and Staff	Banner on Carrefour linking to survey
2023-12-04	Students	Student Eblast REMINDER linking to the survey sent
2023-12-04	Faculty and Staff	Faculty and Staff eblast REMINDER linking to survey sent
2023-12-05	Undergraduate Students	REMINDER one-liner link to survey circulated
2023-12-06	Faculty and Staff	REMINDER one-liner link to survey circulated
2023-12-07	Graduate Students	REMINDER one-liner link to survey circulated

Source: Hospitality Concordia

The Population was invited to participate in English or French. Most respondents (98.0%) responded via the English link. Email blasts were the most effective collection method. All told, 77.7% of respondents occurred on days with email blasts. By comparison, 1.2% of respondents scanned QR codes to access the Survey.

Respondents had an option to enter in a draw to win one of 25 \$50 gift cards as an incentive for participation.

2.3 Response Rates

Response rates vary by question. Some questions were hidden from respondents based on survey logic and others did not entirely complete the Survey. A total of 4,097 respondents started the Survey, and 3,226 completed the survey. The resulting 78.7% completion rate is normal for a voluntary survey of this length.

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

Exhibit 2.1 Responses by Population Group

	Invitations		Responses		Response
	Delivered	Share	Started	Share	Ratio
Students Living Off Campus	43,219	82.8%	2,900	69.9%	6.7%
Student Living On Campus	918	1.8%	327	7.9%	35.6%
All Students	44,137	84.5%	3,227	77.7%	7.3%
Staff and Faculty	8,078	15.5%	924	22.3%	11.4%
Total	52,215	100.0%	4,151	100.0%	7.9%

Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

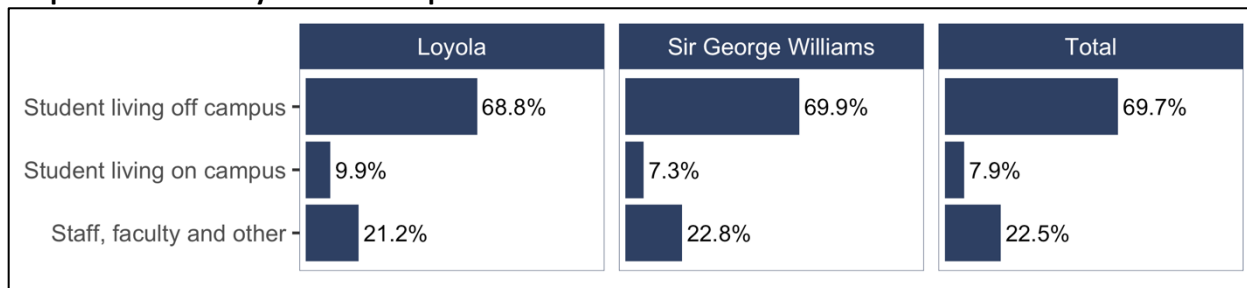
Eight percent of the 52,215 invitees responded to the Survey. The staff and faculty response ratio (11.4%) was greater than the student response ratio (6.7%). Among students, the response ratio for students living on-campus was five times greater than the response ratio for students living off-campus. Students living on campus and staff and faculty are slightly overrepresented relative to the campus Population; however, the variance is acceptable and should not adversely affect the results of the data.¹

Of the 4,151 responses, 54 were disqualified because they did not attend either Campus, leaving a usable set of 4,097 responses.

Exhibit 2.2 summarizes the respondents' primary role on campus.

¹ In fsSTRATEGY's experience, it is normal for residence students, staff and faculty to have a greater response rate as they often rely on campus food service more than the general student body. As heavier users of the services, it is acceptable if their needs are somewhat amplified by an increased share of responses so long as the general distribution is approximately similar to the Population, which they are in this study.

Exhibit 2.2
Respondents Primary Role on Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit 2.2. shows response distributions were similar for each campus.

2.3.1 Respondent Profile

Students may use both campuses. For this study, respondents were asked to select where they spent most of their time (their “Primary Campus”). Exhibit 2.3 summarizes the responses.

Exhibit 2.3
Respondents Primary Role By Campus

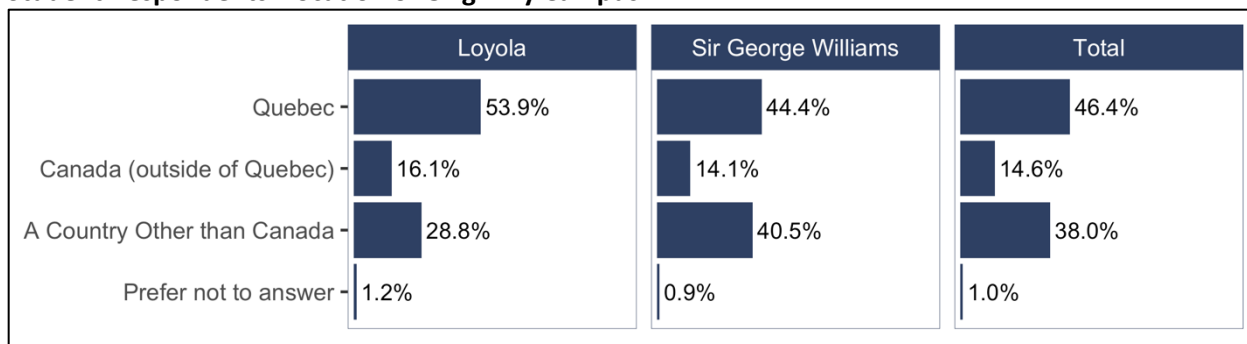


Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

As shown, most respondents (78.4%) reported SGW as their Primary Campus, which is similar to the University’s estimate that 86% of students attend SGW. Questions later in the Survey focused on the respondents’ experience and feedback for their Primary Campus.

Exhibit 2.4 summarizes the student respondent’s home prior to attending Concordia.

Exhibit 2.4
Student Respondents’ Location of Origin By Campus



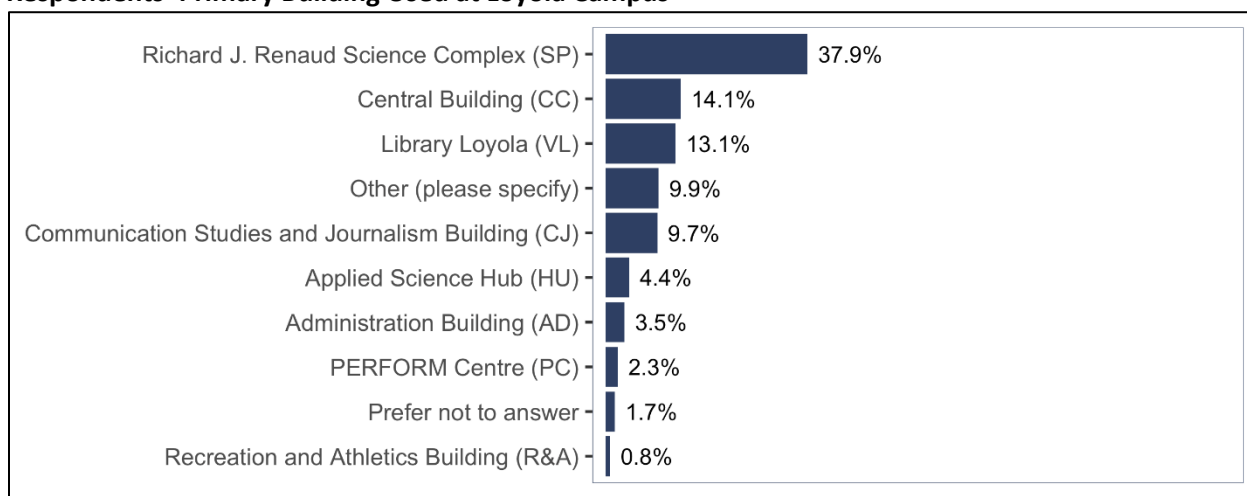
Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

As shown, greater than half of the respondents from both campuses resided in Canada prior to attending Concordia, with most respondents (46.4%) from Quebec. Approximately 38.0% of respondents are from outside of Canada. Respondents at SGW were 40% more likely than respondents at Loyola to come from a country other than Canada.

By comparison, 66.4% of students enrolled in a credit course are Quebec residents, 9.3% are Canadian (outside Quebec) and 24.3% are international.² This indicates that students who were Quebec residents were less responsive to the survey than students attending from outside Quebec.

Respondents were asked which building they spent the most time in on their Primary Campus. Exhibit 2.5 and Exhibit 2.6 summarizes the responses for Loyola and SGW, respectively.

Exhibit 2.5
Respondents' Primary Building Used at Loyola Campus

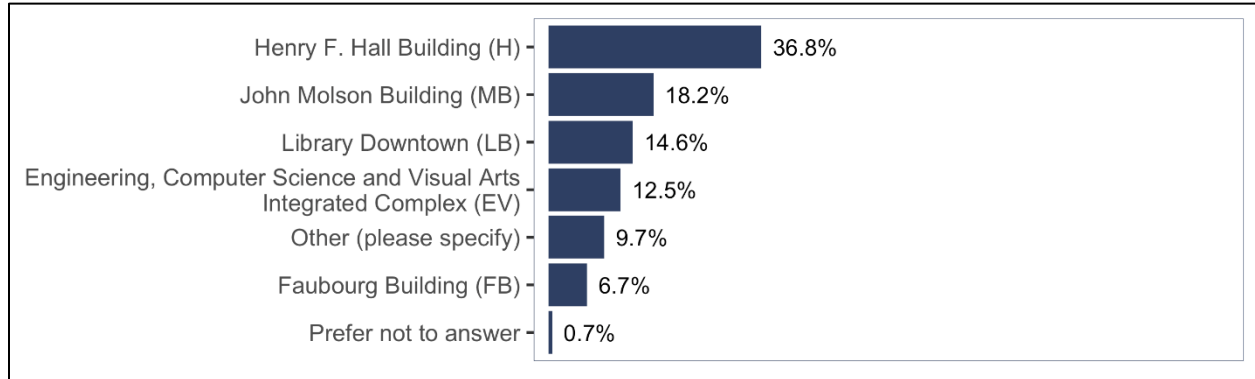


Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

As shown, Loyola respondents spend most of their time in the Richard J. Renaud Science Complex (37.9%) followed by Central Building (14.1%) and Library Loyola (13.1%). Approximately 10% of Loyola respondents reported using a building other than the those provided as question options. Other buildings included Hingston Hall, Vanier Building, Psychology Building and the Genomics Building.

² <https://www.concordia.ca/about/fast-facts.html>

Exhibit 2.6
Respondents' Primary Building Used at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

As shown, SGW respondents spend most of their time in the Henry F. Hall Building (36.8%) followed by John Molson Building (18.2%) and Library Downtown (14.6%). Approximately 10% of SGW respondents reported using a building other than the those provided as question options. Other buildings included “ER” building, Simone de Beauvoir Institute, Fine Arts Building, Liberal Arts College, and the Visual Arts Building (fsSTRATEGY notes this may be part of the EV complex).

3 Survey Results

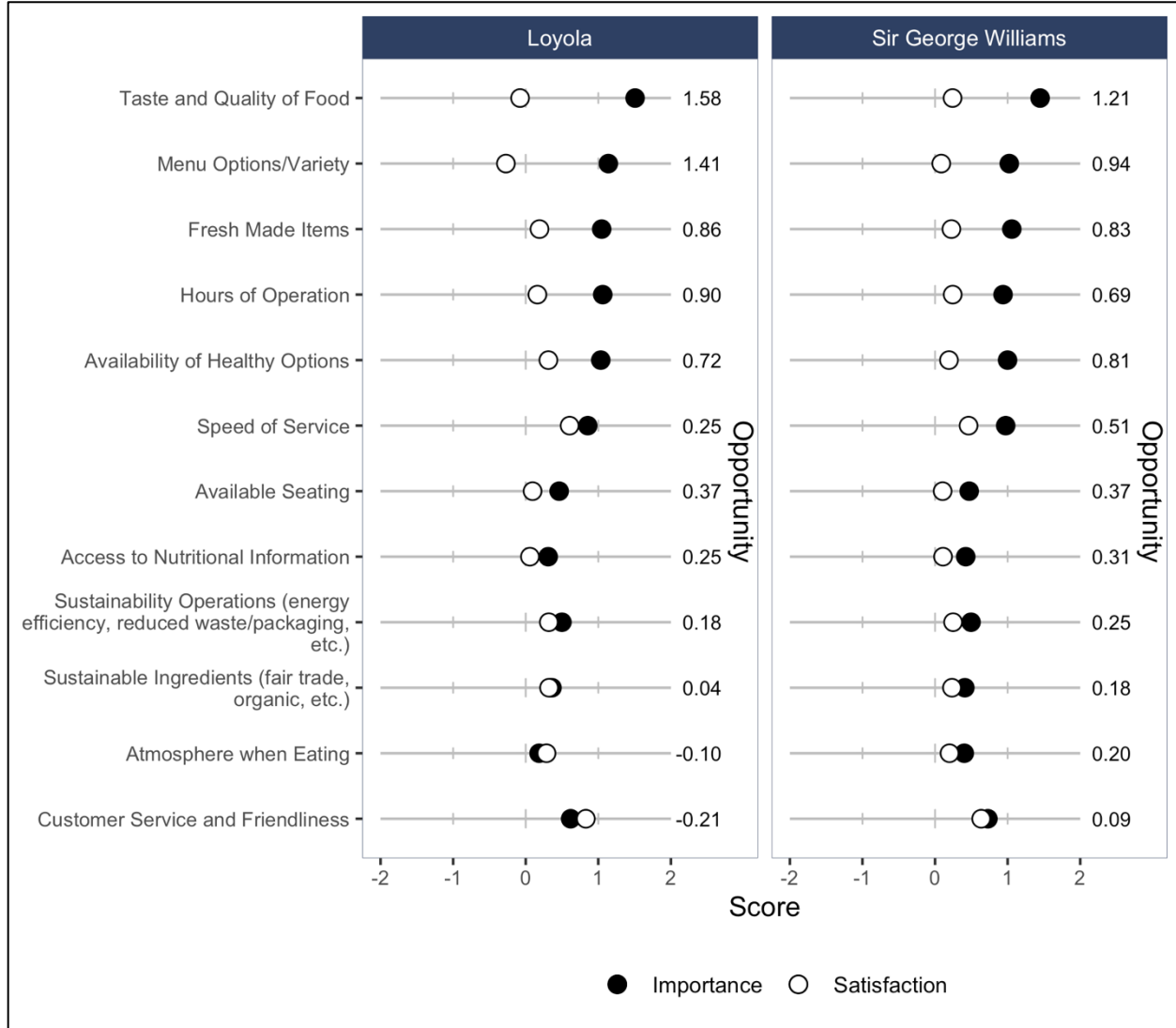
This section summarizes Survey results for all Population groups by campus, as this is the most actionable format. Summaries by respondents' primary role on campus may be found in Appendix 2 and raw data may be found in Appendix 3 as an external Excel file.

3.1 Importance of and Satisfaction with Campus Food Service Attributes

Respondents were asked to rate how important and how satisfied they were with various food service attributes on campus. The rating scale ranged from Very Unimportant/ Very Dissatisfied (-2) to Very Important/Very Satisfied (2) with a score of 0 being Neutral. The gap between importance and satisfaction may be used to prioritize opportunities.

Exhibit 3.1 summarizes the average importance (white dots), satisfaction (black dots) and opportunity scores for food service attributes.

Exhibit 3.1
Importance and Satisfaction of Food Service Attributes By Campus



Source: fsSTRATEGY Inc.

Note: The rating scale ranged from Very Unimportant/ Very Dissatisfied (-2) to Very Important/Very Satisfied (2) with a score of 0 being Neutral.

Taste and food quality represents the greatest opportunity for improvement on both campuses, having the greatest importance score (Important to Very Important) and also the second lowest satisfaction score at Loyola. Menu options and variety is the second greatest opportunity for improvement on each campus. At Loyola, menu options and variety received the lowest satisfaction score of any attributes.

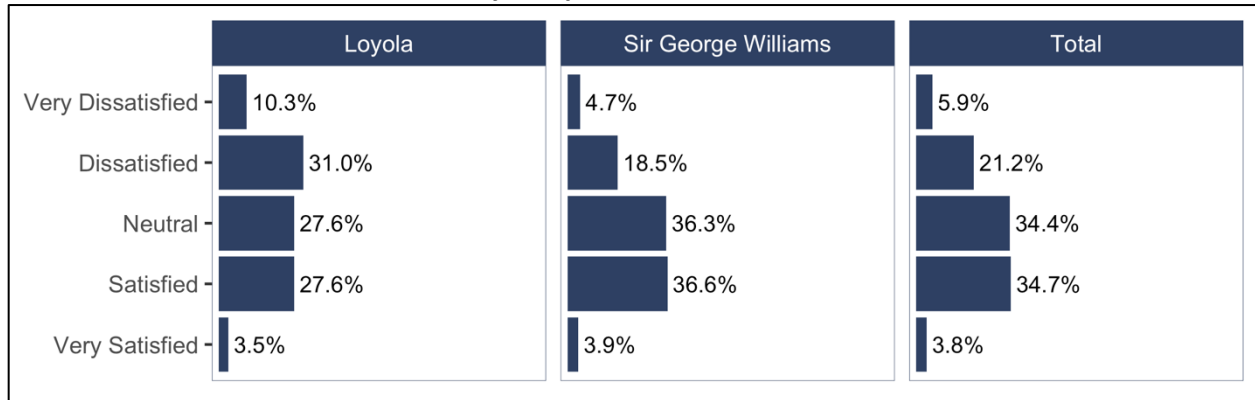
In general, menu options and variety, fresh made items, hours of operations, availability of healthy options and speed of service are seen as important. Other attributes are still Somewhat Important, but less so. Except for speed of service and customer service and friendliness, most satisfaction scores are relatively Neutral.

Based on these findings, initiatives to improve satisfaction should focus on the taste and quality of food, increasing menu variety, availability of freshly made items, extended hours of operation and availability of healthy options.

3.2 Food Service Experience Satisfaction

Exhibit 3.2 summarizes the overall satisfaction levels of food service experience by campus.

Exhibit 3.2
Overall Satisfaction with Food Service By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

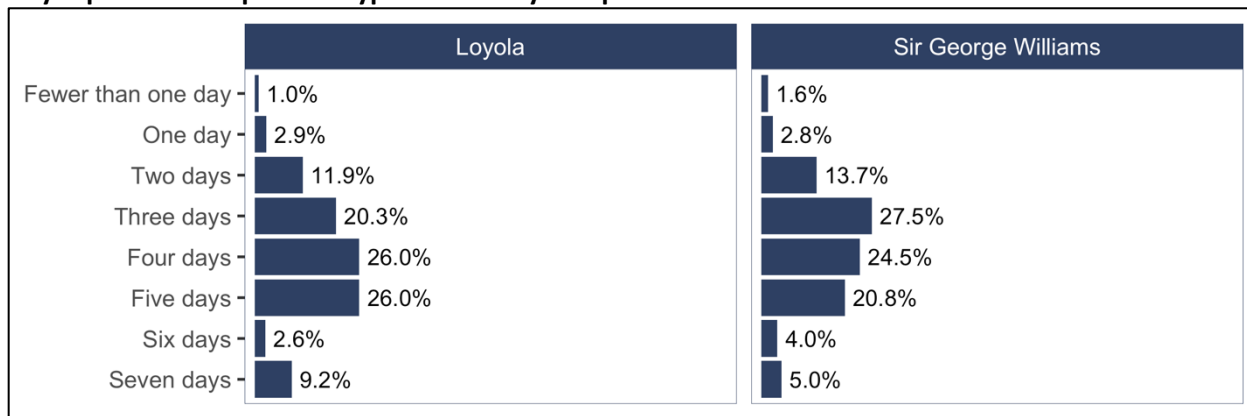
As shown, respondents at Loyola are generally less satisfied with campus food service than respondents at SGW. Just over 31% of Loyola respondents provided Concordia food service a positive satisfaction rating and 41.3% gave a negative satisfaction rating, for a negative net rating of -10.2%.³ By comparison, 41.5% of SGW respondents gave a positive satisfaction rating and 23.2% gave a negative satisfaction rating, for a positive net rating of 18.3%.

3.3 Campus Utilization

Exhibit 3.3 summarizes the number of days respondents spend on campus in a typical week.

³ A net rating take the percentage of positive responses (Satisfied or Very Satisfied) and subtracts the negative responses (dissatisfied or very dissatisfied), ignoring neutral responses.

Exhibit 3.3
Days Spent on Campus in a Typical Week By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

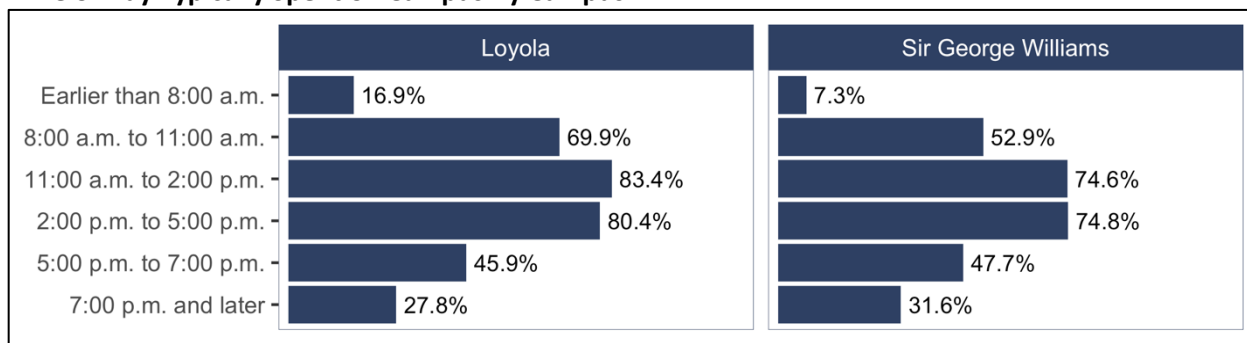
Most respondents (72% to 73%) are on campus three to five days per week.

SGW respondents are slightly more likely than Loyola respondents to use the campus three days a week. Loyola respondents are slightly more likely than SGW respondents to use the campus four to five days a week.

The weighted average days on campus are somewhat similar between Loyola (4.0 days) and SGW (3.7 days); however, the distribution by primary role varied significantly, Staff and Faculty at Loyola are more likely to attend the campus five days a week than those at SGW (42.5 % of respondents compared to 23.2%). Of students who live on campus, 76.6% spend seven days a week on campus at Loyola, while only 39.7% spend seven days on campus at SGW. Campus usage for students who live off-campus was similar on both campuses. Additional details may be found in Appendix 2 Exhibits A2.3 and A2.4.

Respondents were asked to select the times of day they are typically on campus. Exhibit 3.4 illustrates the percentage of respondents likely to be on campus at various times on a typical day.

Exhibit 3.4
Time of Day Typically Spent on Campus By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

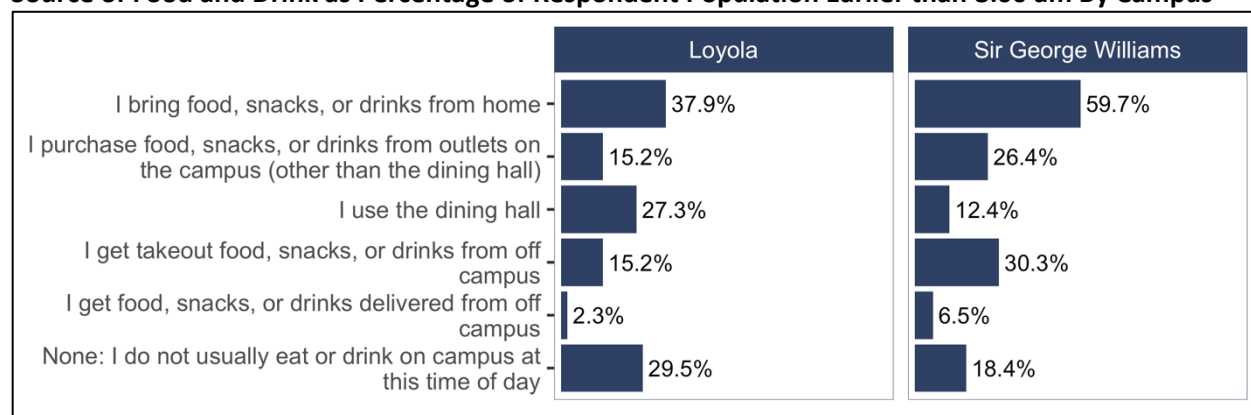
As shown, campus traffic peaks at mid-day (11:00 am to 2:00 pm) followed by 2:00 pm to 5:00 pm at both campuses. Loyola respondents are more likely to be on campus between 8:00 am to 11:00 am than SGW respondents, while respondents at SGW are more likely to be on campus between 5:00 pm to 7:00 pm than Loyola respondents.

3.4 Sources of Food and Drink While On Campus

Respondents were asked where they obtained food and drink while on campus at various times of day. Exhibit 3.5 summarizes the sources of food and drink by time of day by campus type. Percentages reflect the share of on-site respondent population for that day part. Respondents were invited to select more than one source of food and drink, so aggregated results will exceed 100%.

Exhibit 3.5

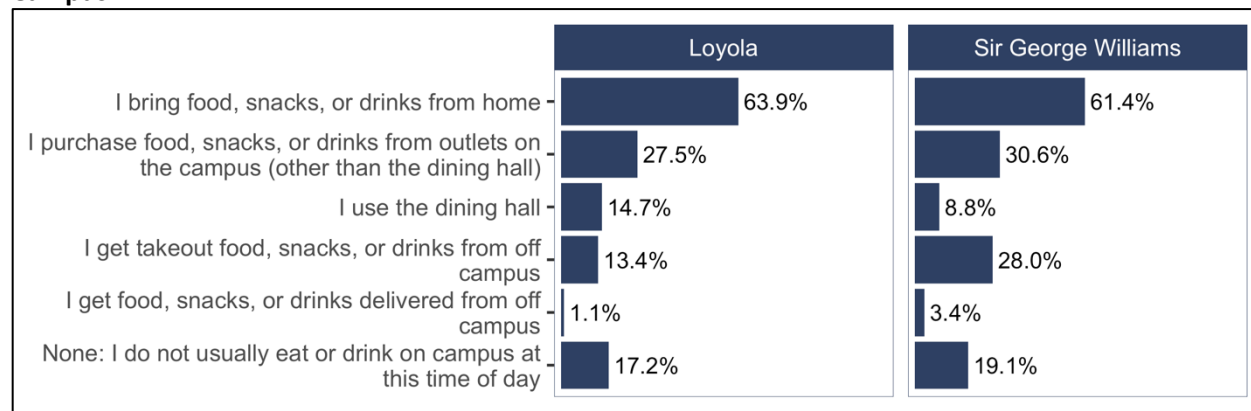
Source of Food and Drink as Percentage of Respondent Population Earlier than 8:00 am By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Bringing food from home was the most common source of food and drink before 8:00 am. Respondents at SGW are more likely to bring their food and drinks from home when on campus earlier than 8:00 am than respondents from Loyola. A significant number of respondents at SGW (30.3%) reported purchasing food or drinks from off-campus food outlets, while 27.3% of respondents at Loyola reported they use the campus dining halls. The number of respondents who reported they usually do not eat or drink on campus at this time of day ranged between 29.5% (Loyola) and 18.4% (SGW).

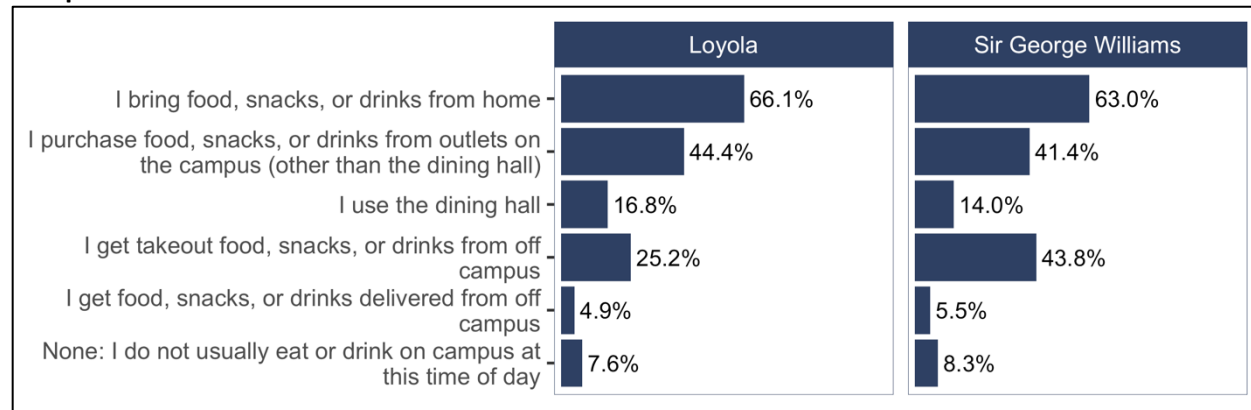
Exhibit 3.6
Source of Food and Drink as Percentage of Respondent Population from 8:00 am to 11:00 am By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

As shown, during the three hours between 8:00 am to 11:00 am, the majority of the respondents at both campuses indicated bringing their food and drinks from home. A significant percentage of respondents at SGW (30.6%) and Loyola (27.5%) purchase food and drinks from retail outlets on campus. Greater than a quarter of SGW respondents (28.0%) buy takeout from off-campus outlets.

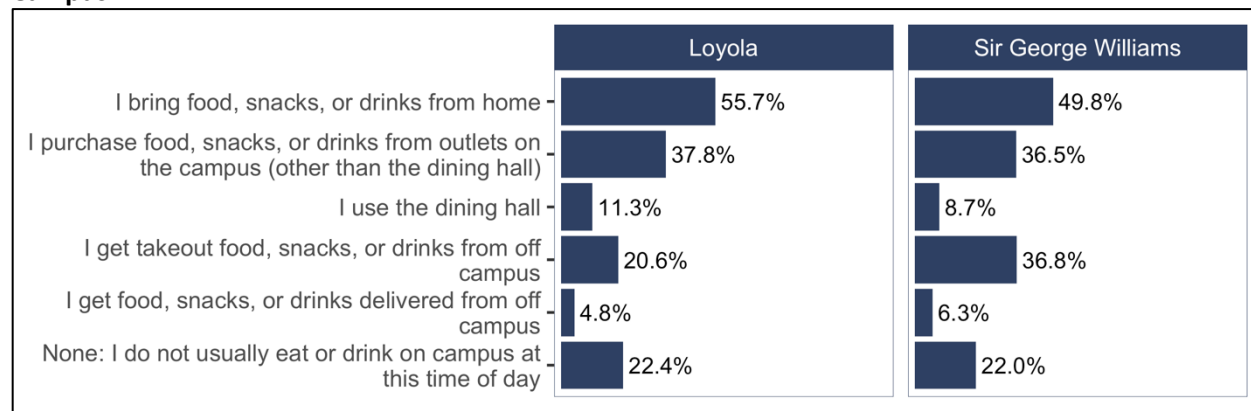
Exhibit 3.7
Source of Food and Drink as Percentage of Respondent Population from 11:00 am to 2:00 pm By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

During the peak daily meal periods (11:00 am to 2:00 pm), most respondents at both campuses indicated they bring food from home. Buying food from on-campus outlets during this time at both campuses have comparable response rates (over 40% of respondents). A significant percentage of respondents at SGW (43.8%) purchase takeout food and drinks from off-campus outlets, indicating a slightly greater probability than purchasing food from retail outlets on campus. Food delivery from off-campus outlets is the least reported option at both campuses.

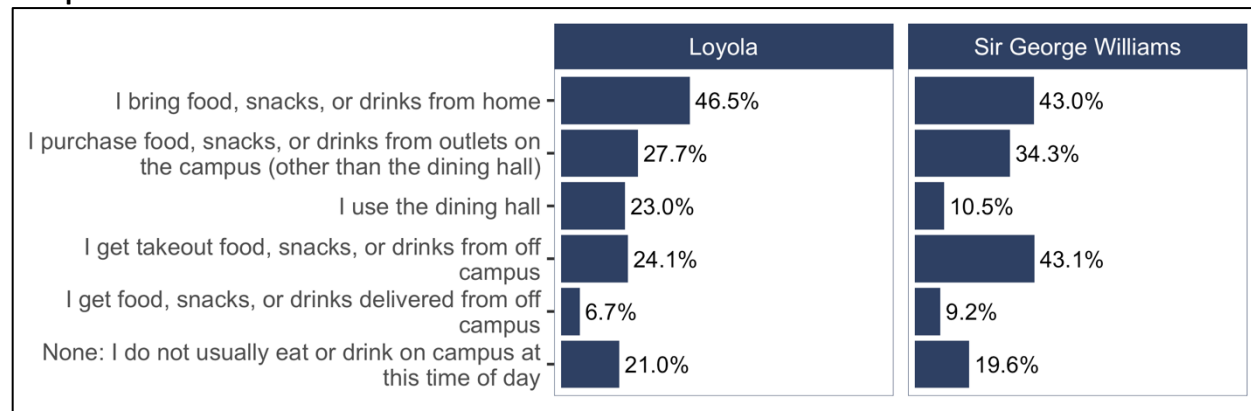
Exhibit 3.8
Source of Food and Drink as Percentage of Respondent Population from 2:00 pm to 5:00 pm By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

During the three hours between 2:00 pm to 5:00 pm, approximately half of the respondents at both campuses indicated they bring food from home. Buying food from on-campus retail and off-campus takeout outlets during this time have comparable response rates (approximately 37% of respondents). A significant percentage of respondents at Loyola (37.8%) reported they buy food on campus. Approximately 22% of respondents at each campus indicated they usually do not eat or drink on campus at this time of day.

Exhibit 3.9
Source of Food and Drink as Percentage of Respondent Population from 5:00 pm to 7:00 pm By Campus

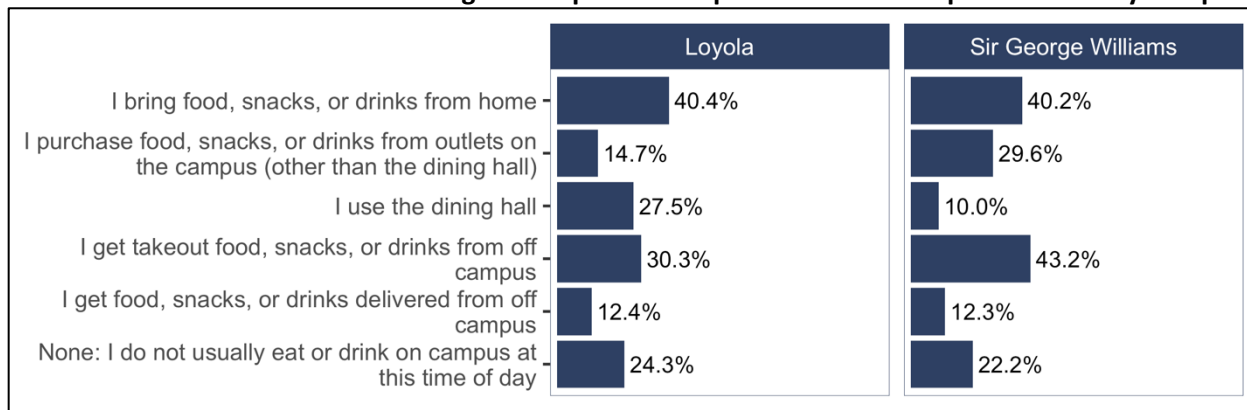


Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Bringing food from home is common for respondents at both campuses during the period from 5:00 pm to 7:00 pm. SGW respondents are as likely to bring food from home (43.0%) as to purchase takeout from off-campus competition (43.1%). Loyola respondents are more than twice as likely as SGW respondents to use the dining hall, but significantly less likely to use off-campus food services.

Exhibit 3.10

Source of Food and Drink as Percentage of Respondent Population from 7:00 pm Onwards By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Respondents at both campuses have comparable response rates for bringing food from home (approximately 40%) after 7:00pm. Respondents at SGW are approximately twice as likely than Loyola respondents to purchase food or drinks from campus retail food service. SGW respondents are also significantly more likely than Loyola respondents to purchase takeout from off-campus. Use of off-campus delivery is greater after 7:00 pm than any other time of day.

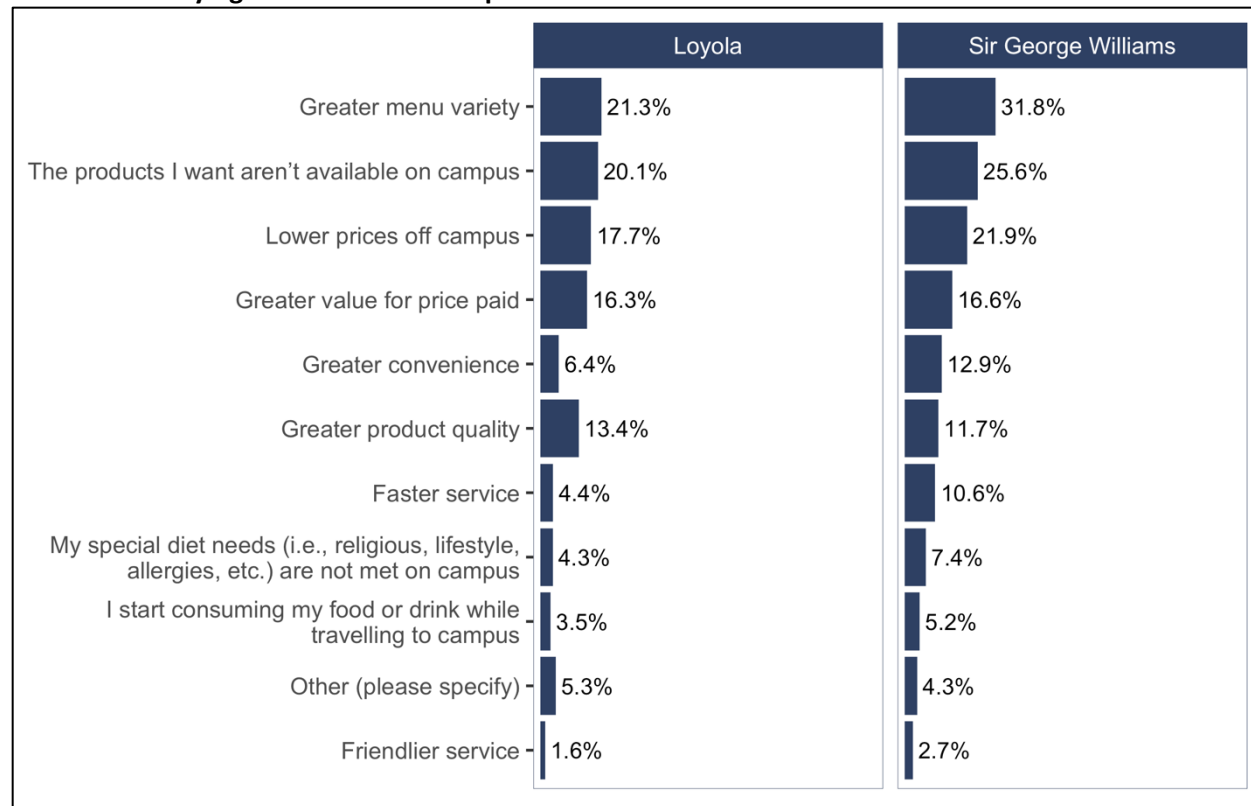
3.5 Reasons for Not Using Campus Food Services

Respondents were asked why they chose to buy food, snacks or drinks off-campus (either takeout or delivery) instead of from on-campus food services.

Exhibit 3.11 summarizes the reasons for not purchasing food, snacks or drinks on campus.

Exhibit 3.11

Reasons for Buying Food from Off-Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

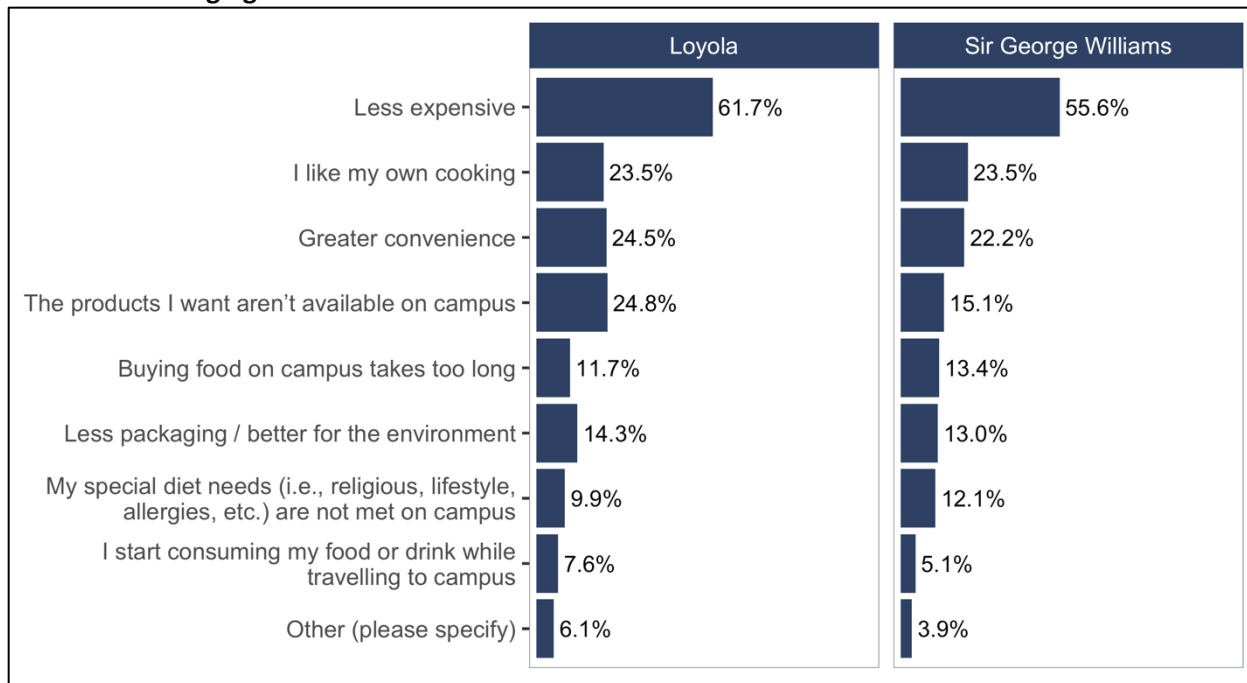
Greater menu variety, lack of desired products on campus and lower food prices were the most common reasons cited on each campus for buying food off-campus instead of on campus. SGW respondents are approximately 50% more likely than Loyola respondents to seek greater menu variety off-campus, 27% more likely to feel the products they want to buy are not available on campus and 24% more likely to report better prices off-campus than on campus. Respondents on both campuses are equally likely to seek better value for the price they pay off-campus. Loyola respondents are slightly more likely to purchase food off-campus due to product quality.

Other reasons for buying food off-campus include better ambiance, limited food options on campus, lack of healthy food options, limited hours of operation of food outlets and long waiting times at on-campus food outlets.

Exhibit 3.12 summarizes the reasons respondents choose to bring food, snacks and drinks from home.

Exhibit 3.12

Reasons for Bringing Food from Home



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

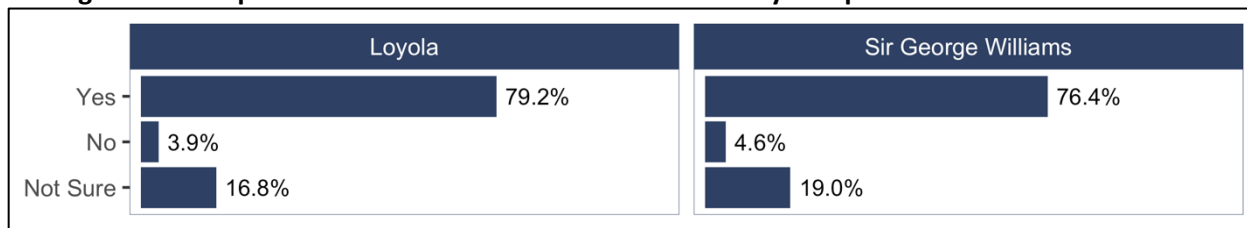
Lower cost was the top reason given for respondents bringing food from home at both campuses. Liking one’s own cooking have identical response rates at both campuses (23.5% of respondents). Convenience and lack of desired products were the most common other reasons cited by respondents at both campuses for bringing food from home.

Other reasons cited by respondents for bringing food from home include limited hours of operation of food outlets, lack of healthy food options (including vegan and gluten free foods), quality and taste of food, and long waiting times at on-campus food outlets.

Exhibit 3.13 summarizes the willingness to use campus food service if concerns were resolved.

Exhibit 3.13

Willing to Use Campus Food Service if Concerns are Resolved By Campus































Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Most respondents (79.2% at Loyola and 76.4% at SGW) indicated that they would use campus food services instead of alternates if their concerns were resolved.

Respondents were asked to list the three restaurants (on or off-campus) they used most often while at campus. The most popular responses are summarized in Exhibit 3.14.

Exhibit 3.14
Restaurants Most Often Visited By Campus

	Loyola Campus			Sir George Williams Campus			
Hive Café *	213	[35%]		Tim Hortons *	776	[34%]	
Second Cup	182	[29%]		Poulet Rouge	517	[23%]	
Faro Café	117	[19%]		Starbucks	453	[20%]	
Subway	72	[12%]		The Hive *	396	[17%]	
Tim Hortons	56	[9%]		McDonalds	306	[13%]	
Starbucks	35	[6%]		Cocobun *	156	[7%]	
Koyasun	27	[4%]		A&W *	139	[6%]	
McDonalds	26	[4%]		People's Potato *	130	[6%]	
Mon Ami	25	[4%]		Al Taib *	127	[6%]	
Cafe 92	25	[4%]		Myriade	114	[5%]	
AD Café *	19	[3%]		Boustan	98	[4%]	
Comptoir Koyajo	18	[3%]		Antep Kebab	92	[4%]	
Boustan	16	[3%]		Thai Express *	59	[3%]	
All Other	479	--	--	All Other	2,288	--	--
Total Respondents	617	[100%]		Total Respondents	2,272	[100%]	

Source: fsSTRATEGY

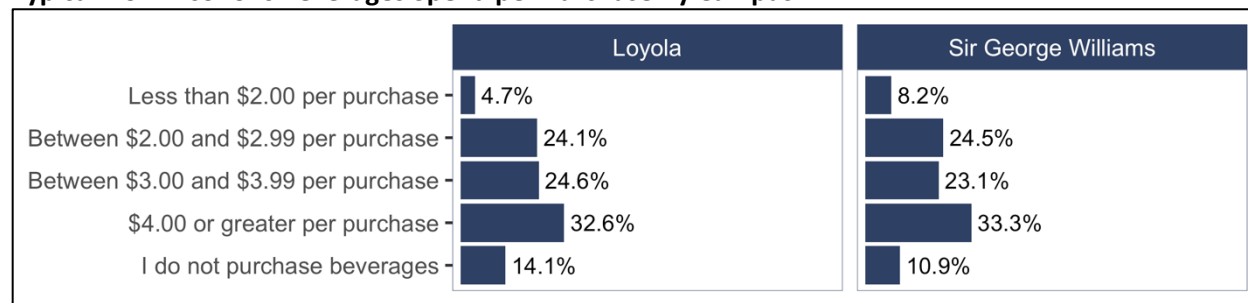
Note: *'*'* Indicates the restaurant is an on-campus retail food service outlet.

As shown, the most visited restaurants at Loyola include Hive Cafe, Second Cup and Faro Café, while respondents at SGW reported the most often visited restaurants were Tim Hortons, Poulet Rouge and Starbucks.

3.6 Food and Beverage Spending

Exhibit 3.15 summarizes the typical amount respondents spend on non-alcoholic beverages (e.g., tea, coffee and cold drinks) per purchase.

Exhibit 3.15
Typical Non-Alcoholic Beverages Spend per Purchase By Campus



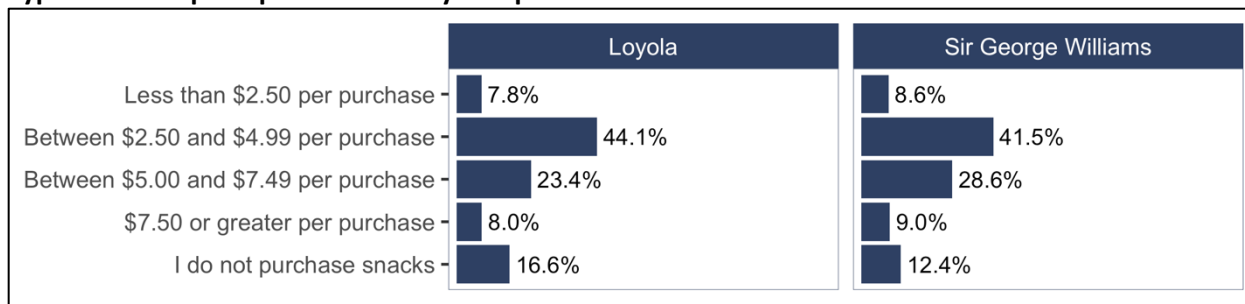
Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

As shown, the most commonly reported (33.3% of respondents at SGW and 32.6% of respondents at Loyola) purchase price for non-alcoholic beverages is greater than \$4.00. Approximately one quarter of the respondents at both campuses indicated they pay between \$2.00 and \$3.99 for a non-alcoholic beverage. Over 10% of respondents at both campuses reported they do not purchase a non-alcoholic beverage.

Exhibit 3.16 summarizes the typical amount respondents spend on snack per purchase.

Exhibit 3.16

Typical Snack Spend per Purchase By Campus



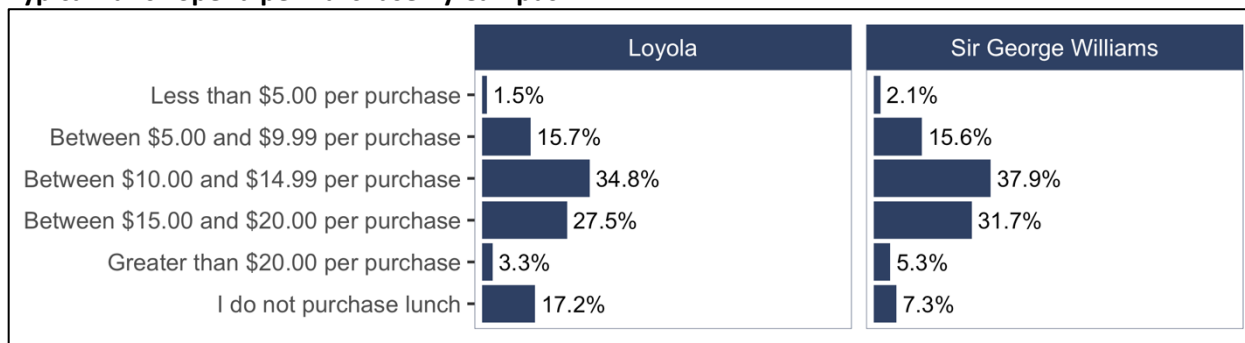
Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

As shown, 44.1% of respondents at Loyola and 41.5% of respondents at SGW spend between \$2.50 and \$4.99 per purchase on snack items. Greater than 23% of respondents at both campuses reported they spend between \$5.00 and \$7.49 per purchase on snack items.

Exhibit 3.17 summarizes the typical amount respondents spend on lunch per purchase.

Exhibit 3.17

Typical Lunch Spend per Purchase By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

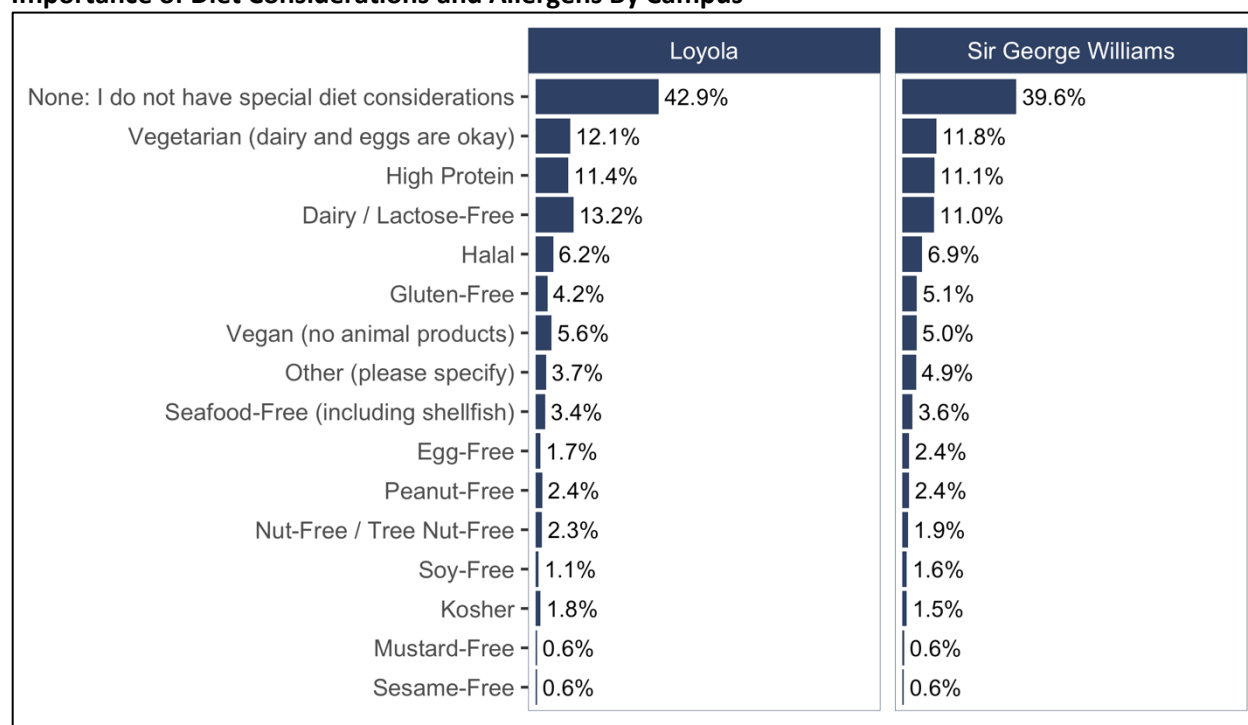
As shown, 34.8% of respondents at Loyola and 37.9% of respondents at SGW spend between \$10.00 and \$14.99 per lunch meal purchase. A greater number of respondents at SGW (31.7%) reported spending between \$15.00 and \$20.00 for lunch purchases than respondents at Loyola (27.5%).

3.7 Special Dietary Requirements

Respondents were asked to select specialty diets (i.e., allergies, religious or lifestyle, etc.) that influence the choice to purchase food on campus. Exhibit 3.18 summarizes the importance of diet considerations and allergens when choosing food, snacks and drinks.

Exhibit 3.18

Importance of Diet Considerations and Allergens By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

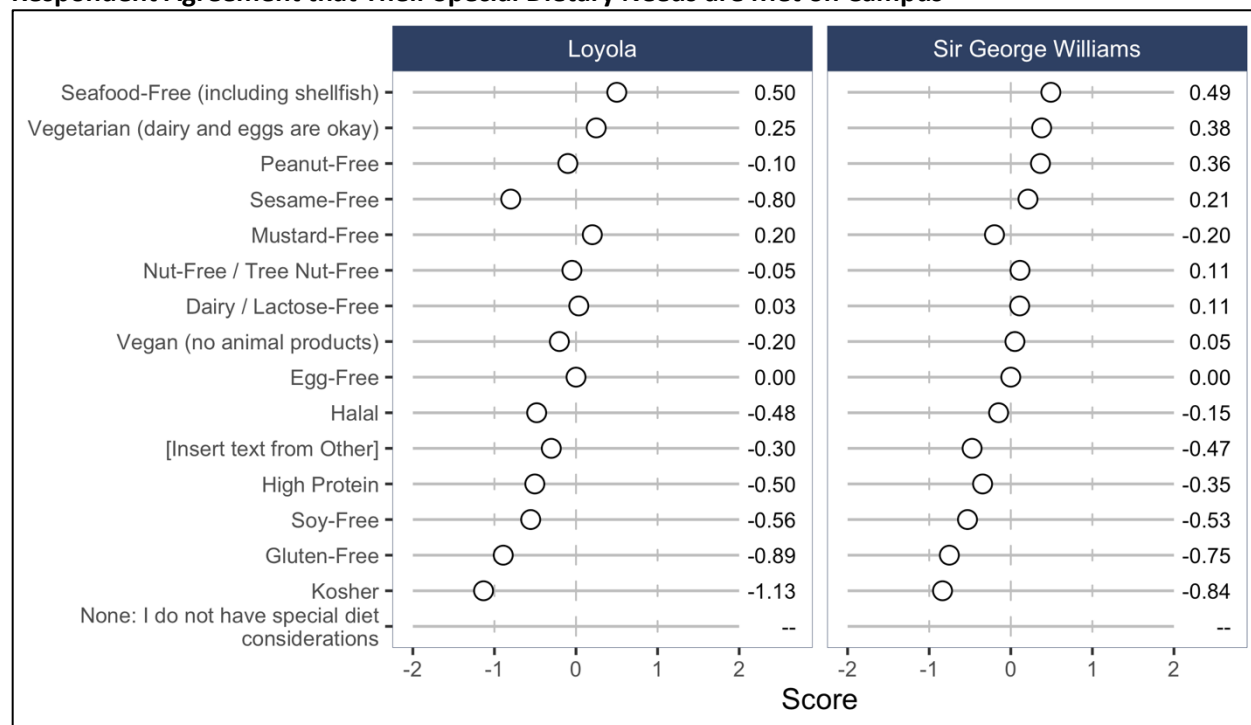
As shown, over 60% of respondents reported at least one special diet that affects their food purchase decisions.⁴ The top three dietary requirements at both campuses were vegetarian, high protein and dairy/lactose free. Halal is important to 6.2% to 6.9% of respondents. Gluten free and vegan diets affect about 5% of respondent’s choice in food.

Other common dietary requirements cited by respondents include sugar-free, greater variety in vegetarian food options and low carbohydrate foods.

Exhibit 3.19 summarizes the average score that dietary requirements are being met.

⁴ Inferred as the inverse of “None – I do not have special diet considerations.”

Exhibit 3.19
Respondent Agreement that Their Special Dietary Needs are Met on Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Notes: Satisfaction scores with diets being met based on the following scale: -2 Strongly Disagree, -1 Somewhat Disagree, 0 Neither Agree nor Disagree, 1 Somewhat Agree, 2 Strongly Agree.

Opportunities potentially exist to better meet the special dietary needs of the Population. The greatest opportunities for improvement at Loyola include Kosher, gluten-free and sesame-free foods, while at SGW, the greatest opportunities for improvement include Kosher, gluten-free, soy-free, high protein and mustard-free foods.

While the Population shares for some diet requirements appear relatively low, it is important to recognize that these requirements are more serious than a preference for certain foods. If a customer cannot safely determine that food services offer food that meets their needs, they must seek that food elsewhere. This is especially important for students who live on campus and rely on campus foodservice for day-to-day meals.

Where the perceived availability of specific diet offerings are low, the University should explore practical ways to increase those offerings. Often this does not require an entirely new offering, but revision of another offering that meets many dietary requirements at once.

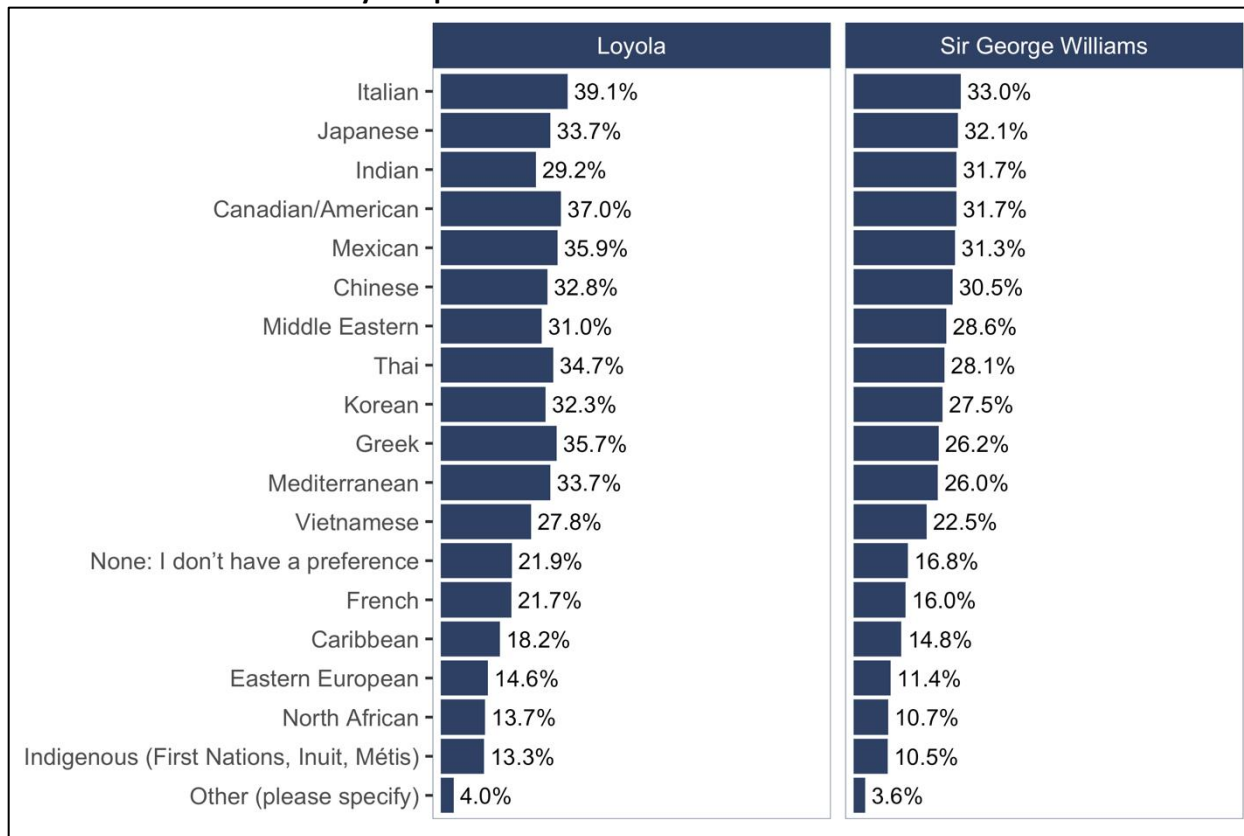
3.8 Food and Beverage Preferences

Respondents were asked to identify the types of food and drink they would like to purchase on campus.

Exhibit 3.20 summarizes respondents’ flavour profile preferences.

Exhibit 3.20

Flavour Profile Preferences By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

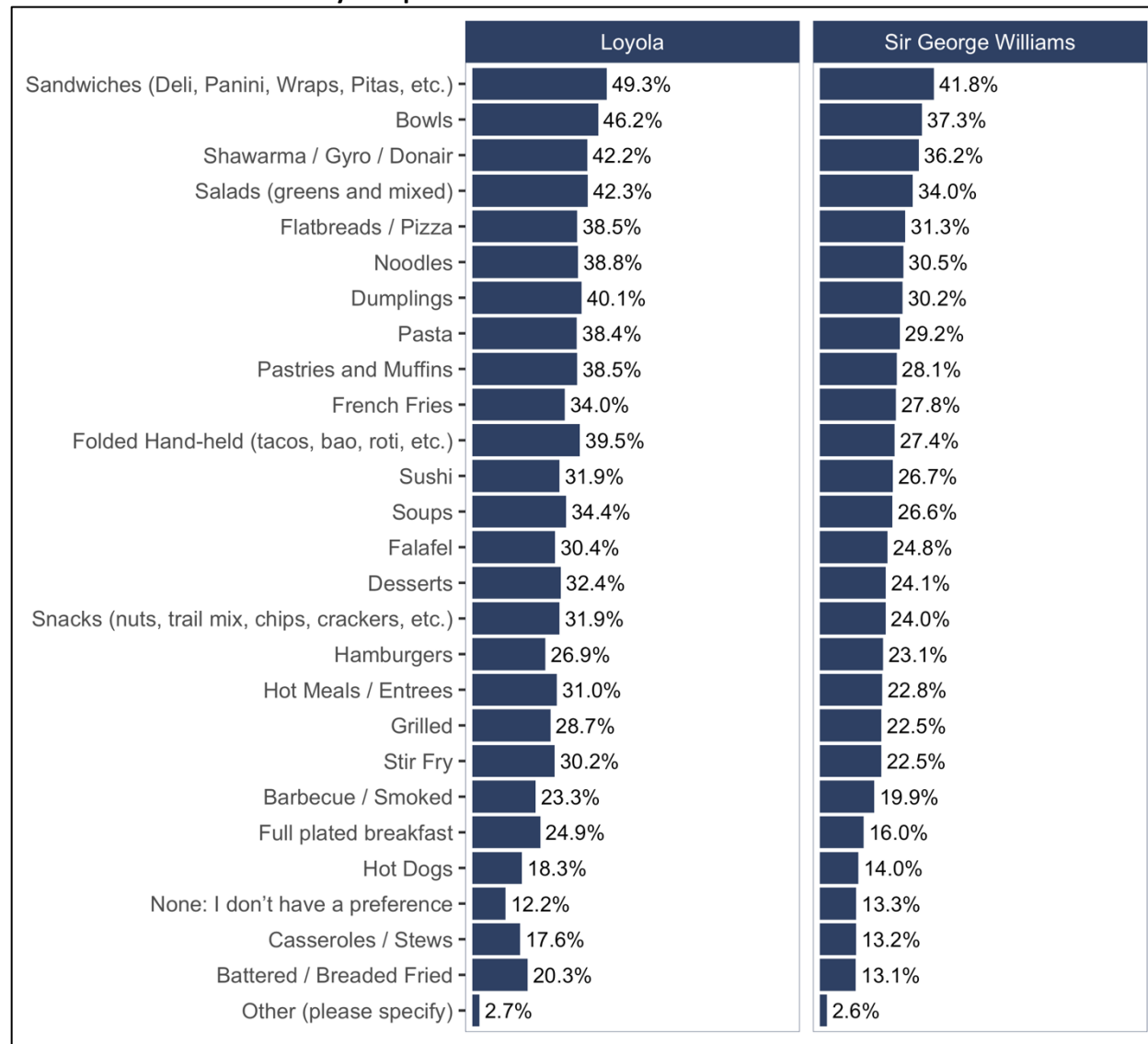
Italian flavour is the most popular flavour profile at both campuses, followed by Canadian/American, Mexican and Greek flavours at Loyola and Japanese, Indian and Canadian/American at SGW. All flavour options provided in the Survey were selected by at more than 10% of the respondents at both campuses. The top ten preferences are selected by at least 25% of the respondents, highlighting the desire for variety.

Other flavour preferences cited by respondents include African, Iranian, Sri Lankan, Brazilian and Portuguese foods.

Respondents were asked what types of food they would purchase on campus. Exhibit 3.21 summarizes respondents' food purchase preferences.

Exhibit 3.21

Food Purchase Preferences By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Sandwiches are the most popular food purchase preference, chosen by greater than 40% of the respondents at both campuses. Other common food purchase preferences at both campuses include bowls, shawarma, salads, flatbread pizza and noodles. A significant number of respondents at Loyola indicated folded hand-held foods such as tacos, bao and roti as a popular food purchase preference.

fsSTRATEGY conducted a gap analysis, summarized in Exhibit 3.22, on the flavour profile preferences by campus compared to what key flavour profiles were available on campus, through leased operations and by external competition within an immediate competitive market surrounding both campuses. The competitive market was defined by Concordia and detailed findings of the competitive inventory have been provided separately from this report).

Exhibit 3.22

Flavour Profile Preferences Compared to Existing Operations By Campus

	Loyola				Sir George Williams				
	Response	On Campus	External Competition	Total	Response	On Campus	Leased	External Competition	Total
Italian	39.1%	-	-	-	33.0%	-	-	6	6
Japanese	33.7%	-	-	-	32.1%	-	1	11	12
Indian	29.2%	-	-	-	31.7%	-	1	7	8
Canadian/American	37.0%	1	-	1	31.7%	1	-	9	10
Mexican	35.9%	-	-	-	31.3%	-	1	1	2
Chinese	32.8%	-	1	1	30.5%	-	1	13	14
Middle Eastern	31.0%	-	-	-	28.6%	-	2	8	10
Thai	34.7%	-	-	-	28.1%	-	1	1	2
Korean	32.3%	-	-	-	27.5%	-	-	5	5
Greek	35.7%	-	1	1	26.2%	-	-	1	1
Mediterranean	33.7%	-	-	-	26.0%	-	-	6	6
Vietnamese	27.8%	-	-	-	22.5%	1	-	-	1
French	21.7%	-	-	-	16.0%	-	-	-	-
Caribbean	18.2%	-	-	-	14.8%	-	-	1	1
Eastern European	14.6%	-	-	-	11.4%	-	-	-	-
North African	13.7%	-	-	-	10.7%	-	-	-	-
Indigenous	13.3%	-	-	-	10.5%	-	-	-	-

Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Loyola Campus provides primarily café and Canadian/American food service options and have and opportunity to fulfil the flavour profile gaps demanded by respondents with limited external competition meeting those needs.

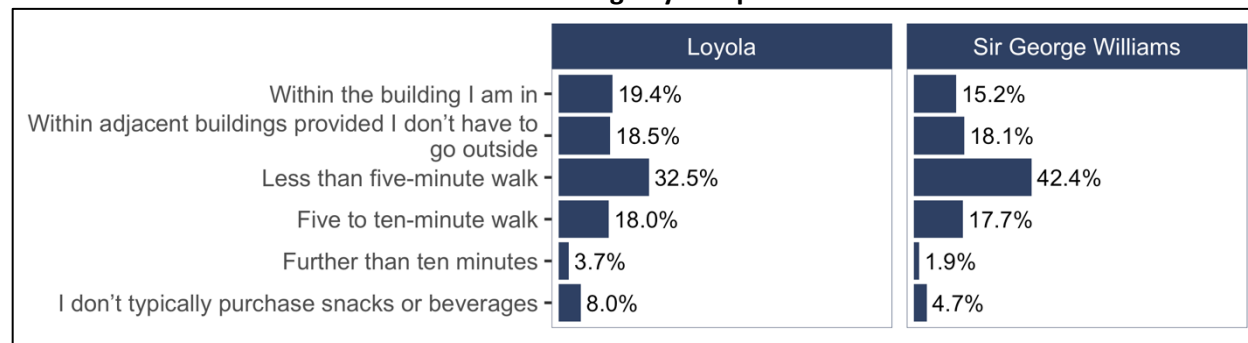
SGW Campus has a significant amount of the top ranked flavour profiles being met by external competition and leased operations. Some gaps with fewer options available include Mexican, Thai, Greek, Vietnamese and French flavour profile preferences.

3.9 Distance Respondents are Willing to Travel for Food and Beverages

Respondents were asked how far they would travel to purchase food, snacks and beverages on campus. Exhibit 3.23 summarizes respondents’ willingness to travel to purchase a snack or beverage while on campus.

Exhibit 3.23

Travel Preferences to Purchase a Snack or Beverage By Campus

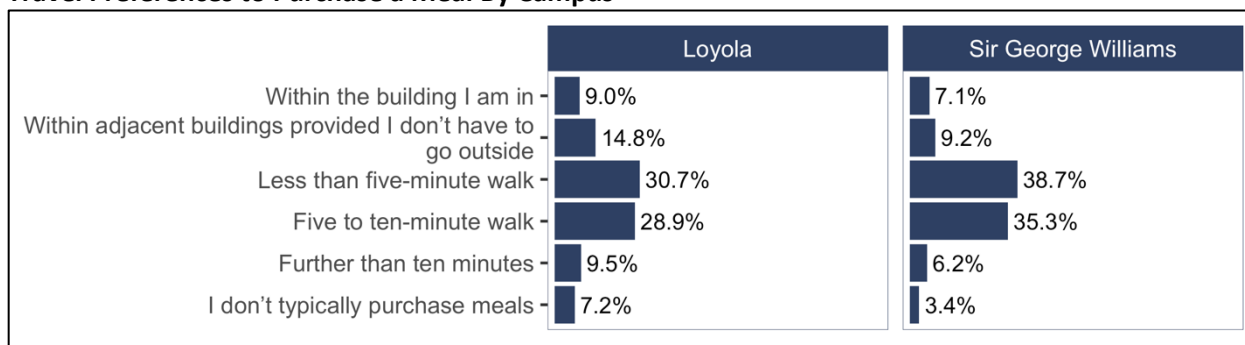


Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

A greater proportion of respondents at SGW (42.4%) are willing to walk less than five minutes to purchase a snack or beverage than at Loyola (32.5%). Some of the respondents at both campuses (approximately 18%) are either willing to travel within their building or up to ten minutes to purchase a snack or beverage.

Exhibit 3.24 summarizes respondents' the willingness to travel to purchase a meal while on campus.

Exhibit 3.24
Travel Preferences to Purchase a Meal By Campus

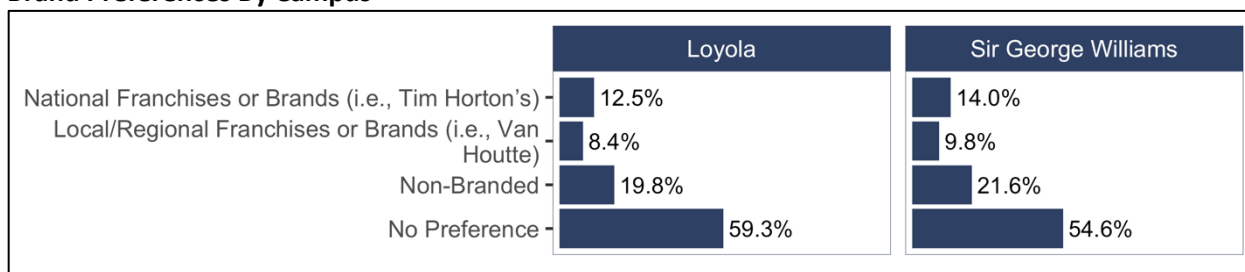


Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Similar to snacks and beverages, a greater percentage of respondents at SGW (38.7%) are willing to walk less than five minutes for a meal occasion than at Loyola (30.7%); however, on average, respondents are willing to walk farther for a meal than for a snack or drink. Respondents at SGW are twice as likely to be willing to walk up five to ten minutes for a meal than for a snack or beverage and three times as likely to walk greater than ten minutes for a meal than for a snack or beverage.

Exhibit 3.25 summarizes the responses for franchised/branded restaurants or non-branded (independent) restaurants preference.

Exhibit 3.25
Brand Preferences By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

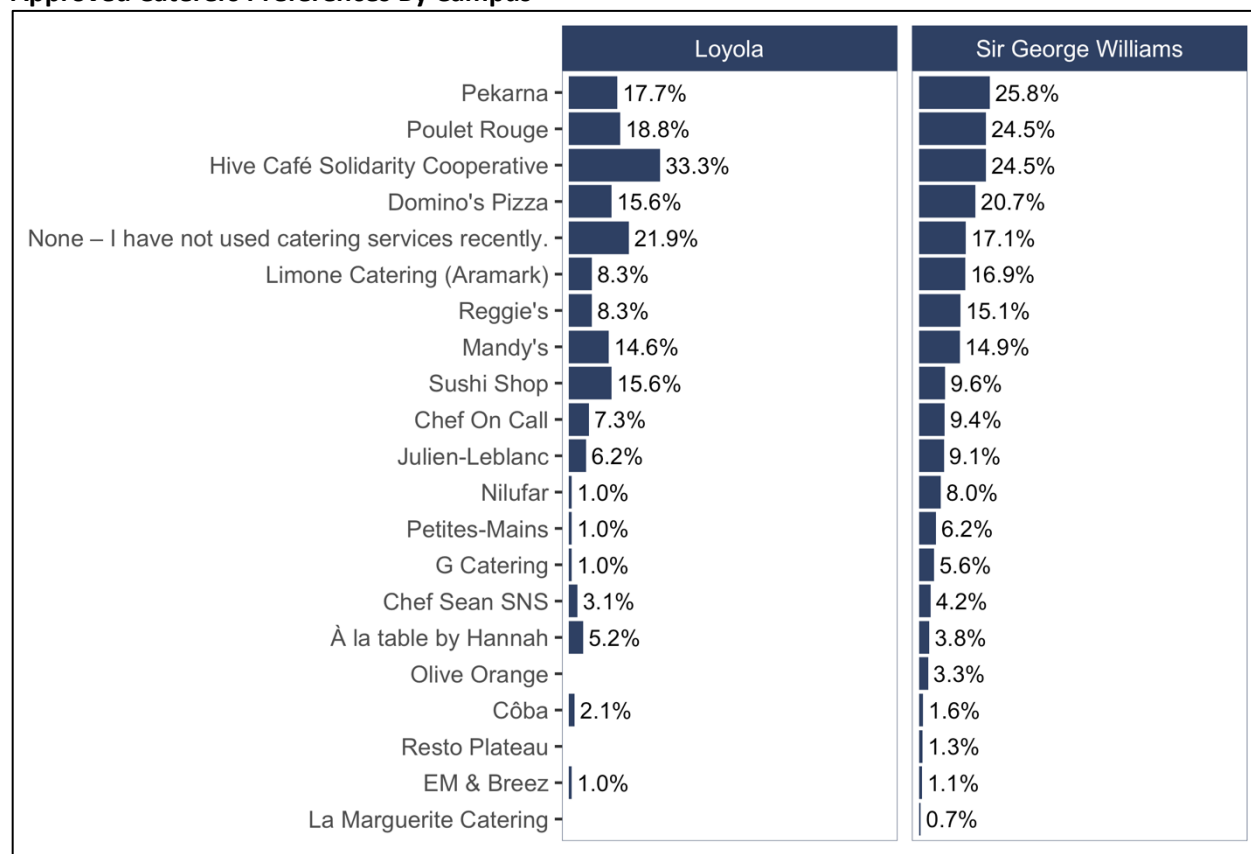
Greater than 54% of the respondents at both campuses did not have any preference for branded or non-branded food service restaurants. A similar number of respondents prefer branded (local or national) to non-branded. Of those reporting a preference for branded food services, a greater number of respondents preferred national brands over local/regional brands.

3.10 Catering Services

At both campuses, greater than 82% of respondents indicated they did not use campus catering services in the past 12 months.

Exhibit 3.26 summarizes which approved caterers respondents used in the last 12 months.

Exhibit 3.26
Approved Caterers Preferences By Campus

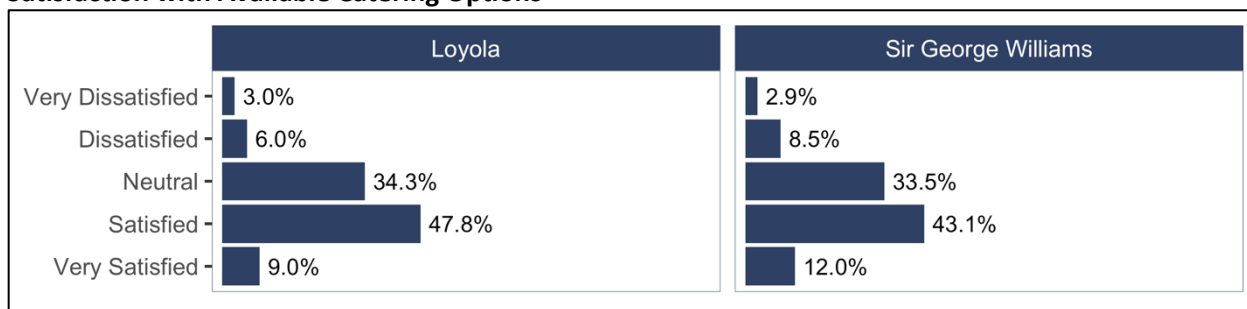


Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Pekarna, Hive Café Solidarity Cooperative and Poulet Rouge are the most preferred approved caterers among catering user respondents at both campuses. Other preferred approved caterers used at Loyola include Domino's Pizza, Sushi Shop and Mandy's, while at SGW, the other most preferred approved caterers used are Domino's Pizza, Limone Catering and Reggie's.

Exhibit 3.27 summarizes respondents' satisfaction with the catering options provided by the companies on the approved caterer list.

Exhibit 3.27
Satisfaction with Available Catering Options



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

As shown, respondents are generally satisfied with the options available on the approved cater list. At Loyola, 57% of respondents provided a positive satisfaction score, compared to 9% negative scores for a net positive satisfaction score of 48%. SGW, while still generally positive, earned a slightly lower net satisfaction score of 44%.

Exhibit 3.28 summarizes the list of businesses respondents felt should be added to the Approved Caterers List.

Exhibit 3.28
Businesses Respondents Would Like Added to the Approved Caterers List

	Total
Tim Hortons	19 [7%]
McDonald's	11 [4%]
Poulet Rouge	11 [4%]
Mandy's	9 [3%]
Boustan	7 [2%]
Subway	6 [2%]
Al Taib	5 [2%]
Starbucks	5 [2%]
Bawarchi	4 [1%]
Beatrice	4 [1%]
Comptoir Du Chef	4 [1%]
Indigenous Caterers	4 [1%]
Nilufar	4 [1%]
Pekarna	4 [1%]
Benny et Fils	3 [1%]
Parc Ex Curry Collective	3 [1%]
Parma Cafe	3 [1%]
All Other	177 [61%]
Total Respondents	290 [100%]


















Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Some respondents from both campuses reported Tim Hortons, McDonald's, Boustan, Subway and Starbucks should be added to the approved caterer's list.

Exhibit 3.29 summarizes the types of cuisine respondents would like to be added to the Approved Caterers List.

Exhibit 3.29

Type of Cuisine Respondents Would Like Added To The Approved Caterers List

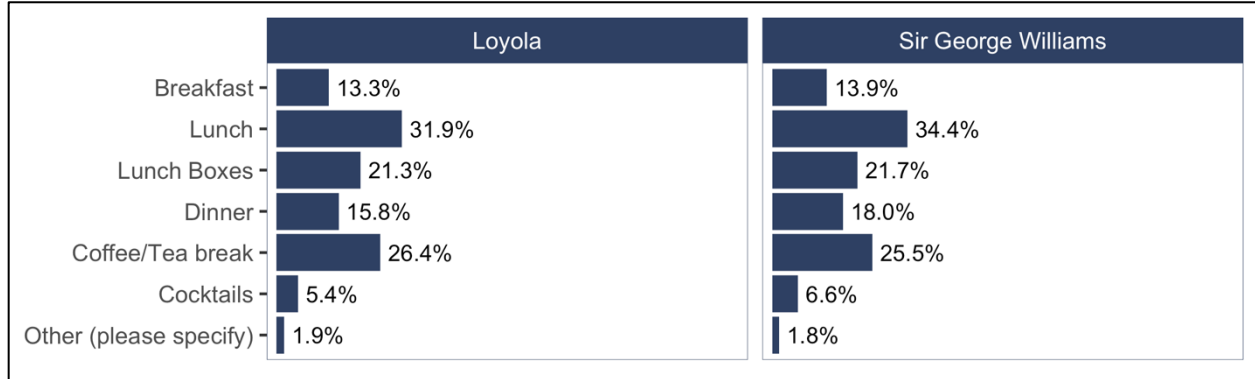
	Total	
Indian	72 [17%]	
Italian	29 [7%]	
Japanese	25 [6%]	
Caribbean	21 [5%]	
Middle Eastern	19 [5%]	
Mexican	18 [4%]	
Greek	17 [4%]	
Asian	16 [4%]	
Korean	14 [3%]	
Halal	12 [3%]	
Indigenous	12 [3%]	
Chinese	11 [3%]	
Mediterranean	11 [3%]	
Lebanese	8 [2%]	
Latin	7 [2%]	
All Other	132 [32%]	
Total Respondents	412 [100%]	

Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

The top three cuisines respondents would like to be added to the approved caterers list include Indian, Italian and Japanese.

Exhibit 3.30 summarizes user respondents for the type of menu option most required for catering.

Exhibit 3.30
Menu Options Required For Catering By Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Lunch is the most popular menu option cited by 31.9% of respondents at Loyola and 34.4% of respondents at SGW. In addition to standard lunch service, lunch boxes are also popular, used by approximately 21% of respondents who used catering in the last 12 months. Greater than one quarter of respondents at both campuses cite coffee/tea break as a menu option required for catering.

3.11 General Thoughts and Comments

Respondents were asked two open-ended questions designed to assess opportunities for the food services at Concordia’s Loyola and SGW campuses. The first question asked respondents what they liked most about the existing food services; these items represent attributes that should be preserved by Concordia to retain existing demand for campus food service. The second question asked what changes would increase respondents used of on-campus food service; these items represent potential opportunities to increase demand for campus food services.

Exhibit 3.31 summarizes the analyses for the question “What do you like most about food service on the Campus?”

Exhibit 3.31
What Respondents Like Most About Campus Food Service

	Loyola	Sir George Williams	Total
Accessibility/Convenience	68 [18%]	255 [24%]	323 [22%]
Variety On-Campus	49 [13%]	163 [15%]	229 [16%]
Quality of Service	78 [20%]	102 [10%]	180 [12%]
Hive Café	51 [13%]	92 [9%]	143 [10%]
Affordability	16 [4%]	83 [8%]	99 [7%]
Quality/Taste	43 [11%]	78 [7%]	121 [8%]
The People's Potato	1 [0%]	71 [7%]	72 [5%]
Healthy Options	23 [6%]	49 [5%]	72 [5%]
Atmosphere/Option of Seating	12 [3%]	43 [4%]	55 [4%]
Speed of Service	16 [4%]	43 [4%]	59 [4%]
Don't Use Services/Barely Use Services	5 [1%]	35 [3%]	40 [3%]
Sustainability	15 [4%]	29 [3%]	44 [3%]
Branded Coffee Shops	- [0%]	28 [3%]	28 [2%]
Vegan/Vegetarian Options	7 [2%]	25 [2%]	32 [2%]
Coffee/Café	25 [6%]	24 [2%]	49 [3%]
Le Frigo Vert	7 [2%]	22 [2%]	29 [2%]
Free Food	37 [10%]	19 [2%]	56 [4%]
Variety Off-Campus	- [0%]	20 [2%]	20 [1%]
Negative Feedback	44 [11%]	110 [10%]	154 [11%]
Other	47 [12%]	77 [7%]	124 [8%]
Total Respondents	388 [100%]	1,072 [100%]	1,460 [100%]

Source: fsSTRATEGY Inc.

The most popular attributes of campus food service include the accessibility and convenience of available outlets, the variety of food services on campus, the quality of service and Hive Café.

Many respondents appreciate the convenience of on campus outlets for a quick meals or snacks. A greater proportion of respondents at SGW reported satisfaction with the access or convenience of food services options compared to Loyola respondents. The extensive variety of food choices was also mentioned, ranging from different on campus outlets such as co-ops, cafeterias, and Reggie's Bar

Respondents also like the quality of service they receive from the staff of outlets at both campuses. They highlighted the friendliness and helpfulness of the staff. Customer service and positive feedback regarding student staff members was reported by a greater proportion of respondents at Loyola compared to SGW.

Respondents from both campuses expressed their satisfaction with the Hive Café, enjoying its free meal offerings, quality customer service, menu options, and pleasant ambiance.

Additional positive points noted by respondents included the availability of vending machines, the provision of microwaves for those who bring their own lunches, the presence of Starbucks in the library, and the overall organization of the food services.

Exhibit 3.32 summarizes the question "What would increase your use and improve your food experience on the Campus?"

Exhibit 3.32
Campus Food Service Improvements

	Loyola	Sir George Williams	Total
Price/Value	252 [52%]	601 [44%]	853 [46%]
Variety /Diversity	119 [25%]	251 [18%]	370 [20%]
Accessibility/Convenience	68 [14%]	185 [14%]	253 [14%]
Healthy Options	29 [6%]	172 [13%]	201 [11%]
Other	56 [12%]	170 [12%]	226 [12%]
Quality/Taste	81 [17%]	148 [11%]	229 [12%]
More outlets on Campus	53 [11%]	88 [6%]	141 [8%]
More seating/Better Ambiance	14 [3%]	77 [6%]	91 [5%]
Marketing	13 [3%]	61 [4%]	74 [4%]
Hours of Operation	35 [7%]	60 [4%]	95 [5%]
Vegan/Vegetarian Options	15 [3%]	56 [4%]	71 [4%]
Speed of Service	15 [3%]	55 [4%]	70 [4%]
Dietary Restriction Options	19 [4%]	48 [4%]	67 [4%]
Coffee/Café	17 [4%]	45 [3%]	62 [3%]
Sustainability	9 [2%]	35 [3%]	44 [2%]
No Suggestion	6 [1%]	29 [2%]	35 [2%]
More Independent Student Run Outlets/Less Corporations	2 [0%]	29 [2%]	31 [2%]
Halal/Kosher Options	5 [1%]	23 [2%]	28 [2%]
Total Respondents	483 [100%]	1,364 [100%]	1,847 [100%]

Source: fsSTRATEGY Inc.

The greatest opportunities for improvement across both campuses involve enhancing affordability/value, increasing the diversity of the menu offered, increasing the accessibility or convenience of food services, expanding the availability of healthier meal choices, improving the taste or quality of food offered. Increasing seating capacities and improving advertising strategies for the various outlets and their menus.

Respondents frequently suggested the need for more cost-effective options or enhancing the value of meals to justify the price increases. These suggestions included incorporating budget-friendly choices such as simpler meal options like wraps, soups, and sandwiches.

Regarding healthier food preferences, most respondents expressed a desire for a broader selection of nutritious meals incorporating diverse proteins, increased salad offerings, and a greater variety of fruits and vegetables. At the Loyola Campus, a greater proportion of responders indicated a need for improved menu prices/value, menu variety, food quality or taste and hours of operation. Additionally, respondents at both campuses indicated a need for expanded seating areas across campuses and to have areas that are more suitable for studying.

Respondents highlighted a lack of awareness about on-campus offerings. Suggestions included providing menus in advance with prices for better planning and creating maps showcasing outlet locations along with published menus.

Additional improvement opportunities reported by respondents included advocating for more student-run outlets, expanding the usability of flex dollars, increasing cafeteria-style options and introducing quicker meal choices.

4 Key Takeaways

Opportunities for Improvement

- The greatest opportunities for improvement in the food services at both campuses (the gap between the attribute importance and satisfaction scores) include food taste and food quality, additional variety in menu options, increased freshly made items, extended hours of operation and increased availability of healthy options. At Loyola, menu options and variety received the lowest satisfaction score of any attributes. At SGW menu options or variety, available seating and access to nutritional information (or ensuring the Community is aware of how to access such information) received the lowest scores.
- Overall, 38.5% of respondents at both campuses were either satisfied or very satisfied with the food services while another 34.4% were neutral and 27.1% were unsatisfied or very unsatisfied with food services.
- Respondents bring food from home most often in most dayparts. Purchasing food and beverages from off campus is more common among respondents at SGW Campus compared to Loyola for all day parts.
- The main reasons for respondents bringing food from home instead of purchasing food on campus include lower cost, preferring one's own cooking, convenience, lack of desired products available on campus and long wait times at the food service outlets.
- Most respondents buying food off-campus instead of on campus reported doing so because of greater menu variety, lack of desired products on campus and lower food prices at off-campus outlets.
- The reasons respondents purchase food off campus or bring food from home should be considered significant opportunities as respondents at both campuses (79.2% at Loyola and 76.4% at SGW) indicated that they would use campus food services instead of alternates if their concerns were resolved.
- The most visited restaurants at Loyola include Hive Cafe, Second Cup and Faro Café.
- The most visited restaurants at SGW include Tim Hortons, Poulet Rouge and Starbucks.
- The most commonly reported purchase price for a beverage (coffee, tea, cold drink) at both campuses is above \$4.00, while approximately one-fourth of the respondents at both campuses indicated they pay between \$2.00 and \$3.99 for a beverage.
- Greater than 40.0% of respondents at both campuses spend between \$2.50 and \$4.99 per purchase on snack items, while at least 25.0% of respondents at both campuses spend between \$10.00 to \$20.00 per lunch meal purchase.

Special Dietary Requirements

- The most common dietary requirements of respondents are vegetarian, high protein and dairy/lactose-free.

- The greatest opportunities for improvement with respect to special dietary requirements at Loyola include Kosher, gluten-free and sesame-free foods. At SGW, the greatest opportunities for improvement include Kosher, gluten-free, soy-free, high protein and mustard-free foods.

Food and Beverage Preferences

- Flavour Profiles: Italian flavour is the most preferred, followed by Canadian/American, Mexican and Greek flavours at Loyola and Japanese, Indian and Canadian/American at SGW.
- Food Purchase Preferences: Top-ranked food purchase preferences among respondents included sandwiches, bowls, shawarma, salads, flatbread pizza and noodles.
- SGW Campus has a significant amount of the top ranked flavour profiles being met by external competition and leased operations. Some gaps with fewer options available include Mexican, Thai, Greek, Vietnamese and French flavour profile preferences.
- Loyola has an opportunity to fulfil the top ranked flavour profiles identified and demanded by respondents with limited external competition meeting those needs.

Catering

- Greater than 55% of respondents at both campuses who have ordered catering in the last 12 months were satisfied or very satisfied with catering services.
- The most preferred approved caterers among catering user respondents include Pekarna, Hive Café Solidarity Cooperative and Poulet Rouge at both campuses.
- Top ranked requested caterers to be added to the approved caterer's list include Tim Hortons, McDonald's, Boustan, Subway and Starbucks.
- The top cuisines respondents would like to be added to the approved caterers list include Indian, Italian and Japanese.
- Lunch is the most popular menu category required for catering at both campuses followed by coffee/tea break and lunch boxes.

Other

- Respondents at SGW are more willing to walk less than five minutes for snacks, beverages and meals than at Loyola.
- Most respondents had no preference between branded and non-branded food service outlets. A similar proportion of respondents with a stated preference prefer branded (local or national) to non-branded restaurants.
- Open ended responses indicated the most popular positive food service attributes reported include the accessibility and convenience of available outlets, the variety of food services on campus, the quality of service and Hive Café.
- Open ended responses indicated the greatest opportunities for improvement across both campuses involve enhancing affordability/value, increasing the diversity of the menu offered, increasing the accessibility or convenience of food services, expanding the availability of

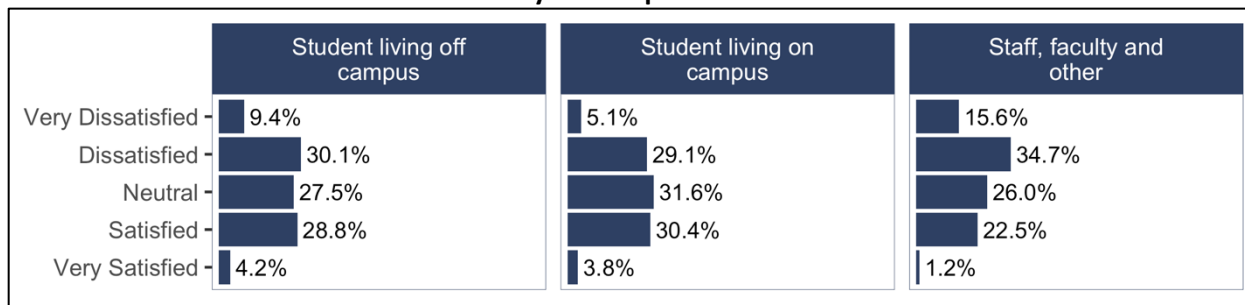
healthier meal choices, improving the taste or quality of food offered. Increasing seating capacities and improving advertising strategies for the various outlets and their menus.

Appendix 1—Survey Questionnaire

Appendix 2 – Results by Primary Role on Campus

Exhibit A2.1

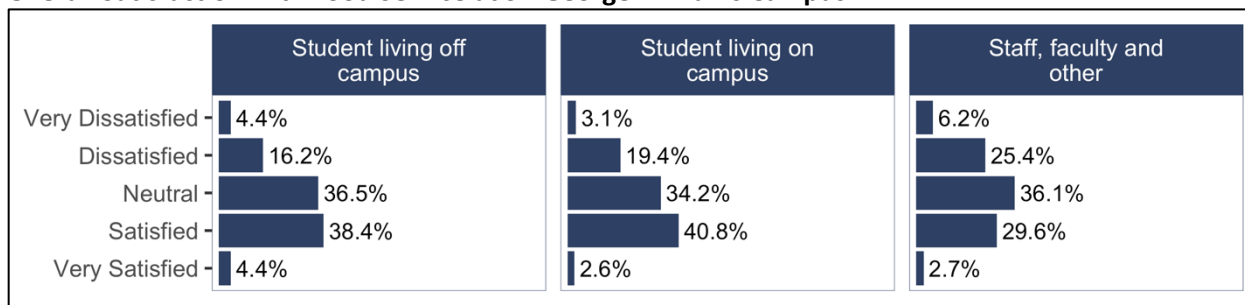
Overall Satisfaction with Food Service at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.2

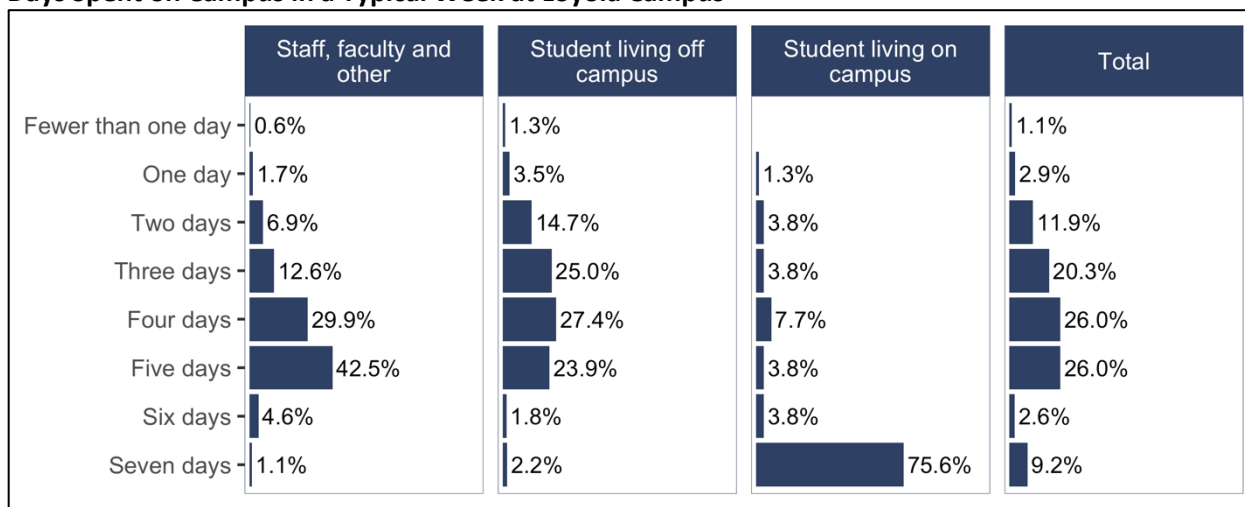
Overall Satisfaction with Food Service at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.3

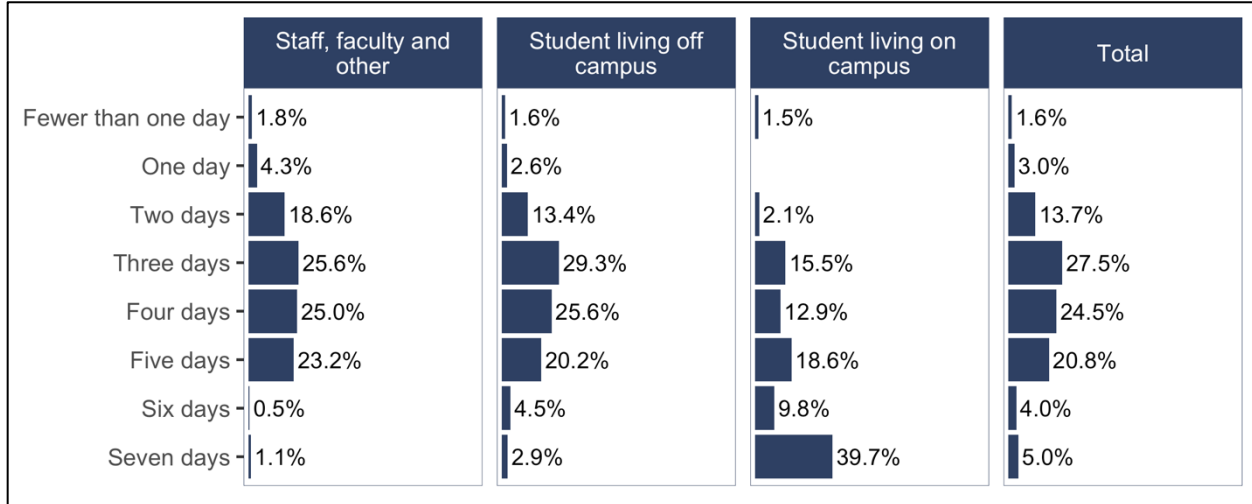
Days Spent on Campus in a Typical Week at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.4

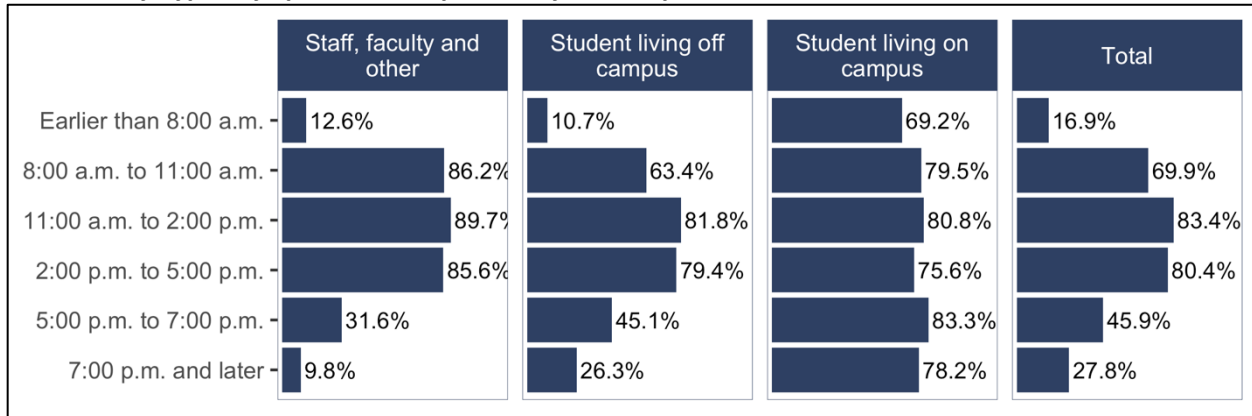
Days Spent on Campus in a Typical Week at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.5

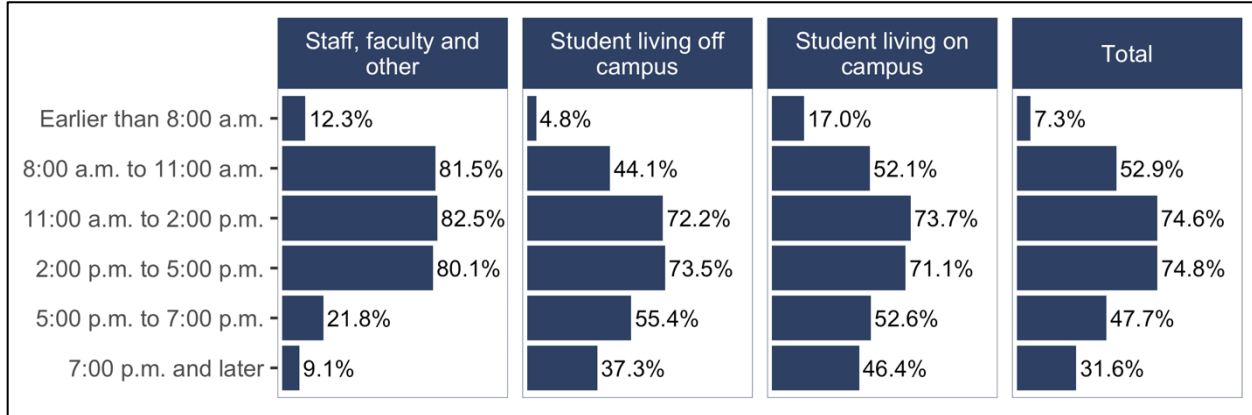
Time of Day Typically Spent on Campus at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.6

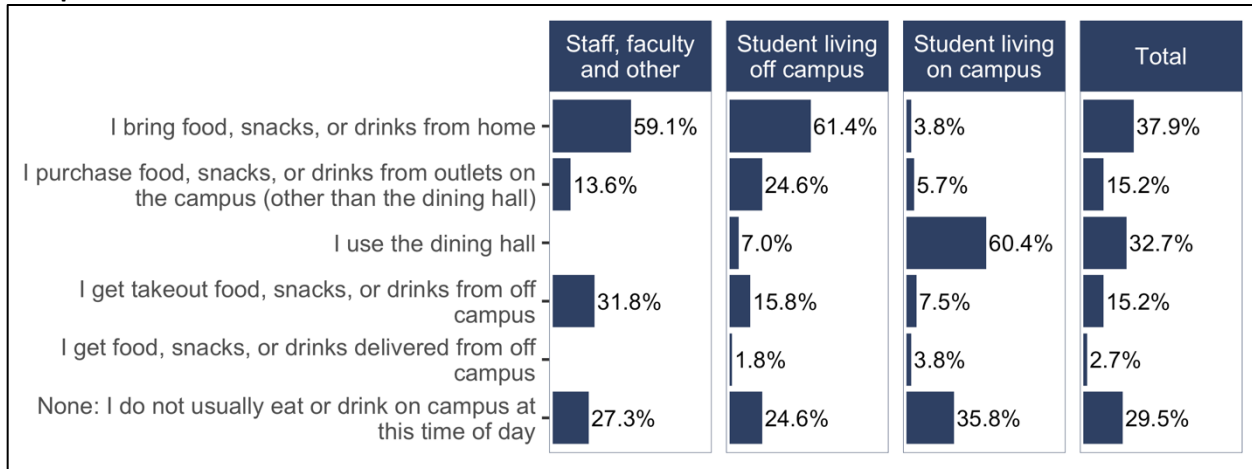
Time of Day Typically Spent on Campus at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.7

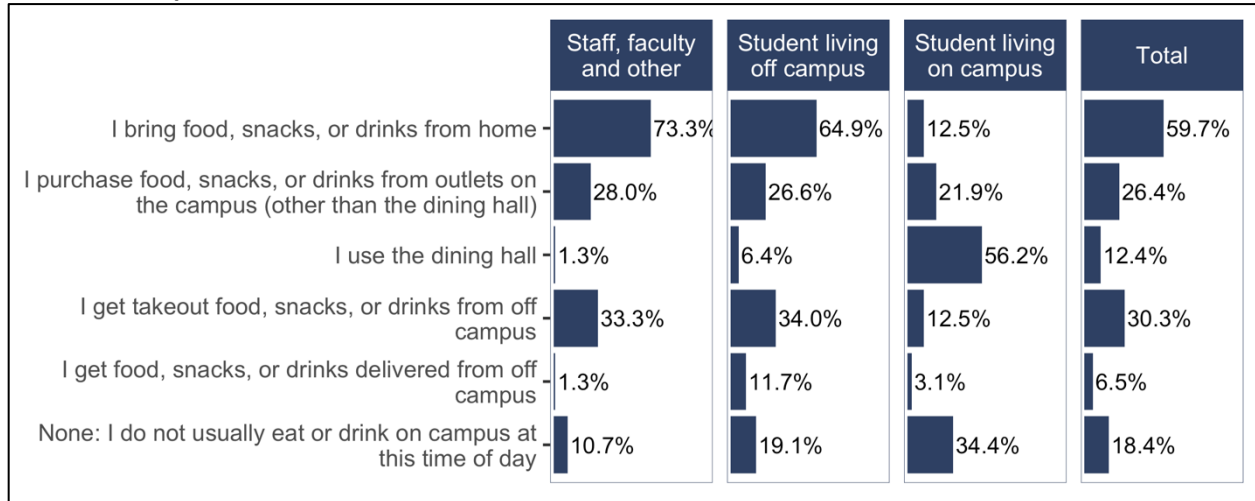
Source of Food and Drink as Percentage of Respondent Population Earlier than 8:00 am at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.8

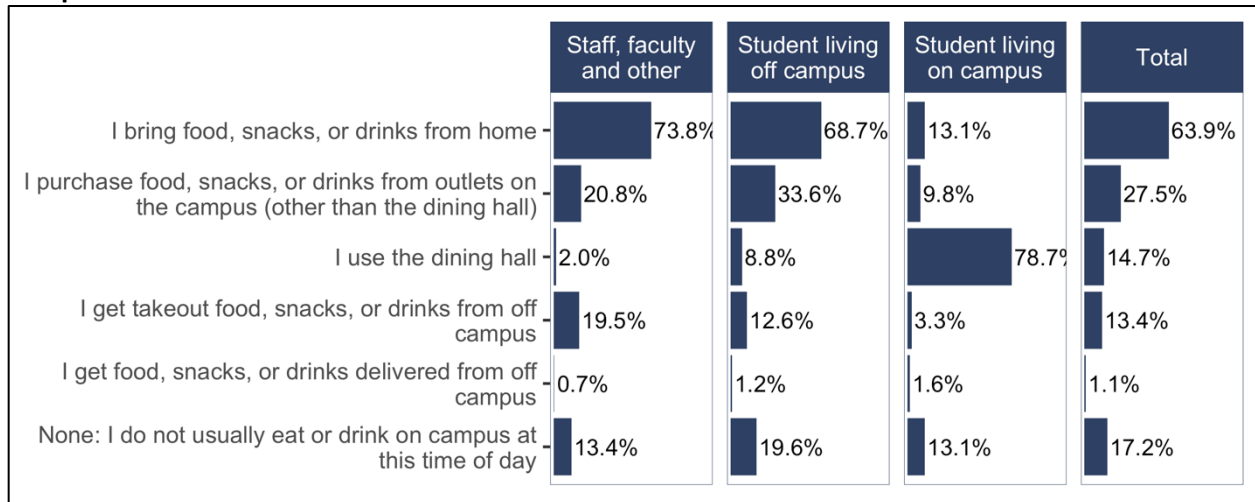
Source of Food and Drink as Percentage of Respondent Population Earlier than 8:00 am at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.9

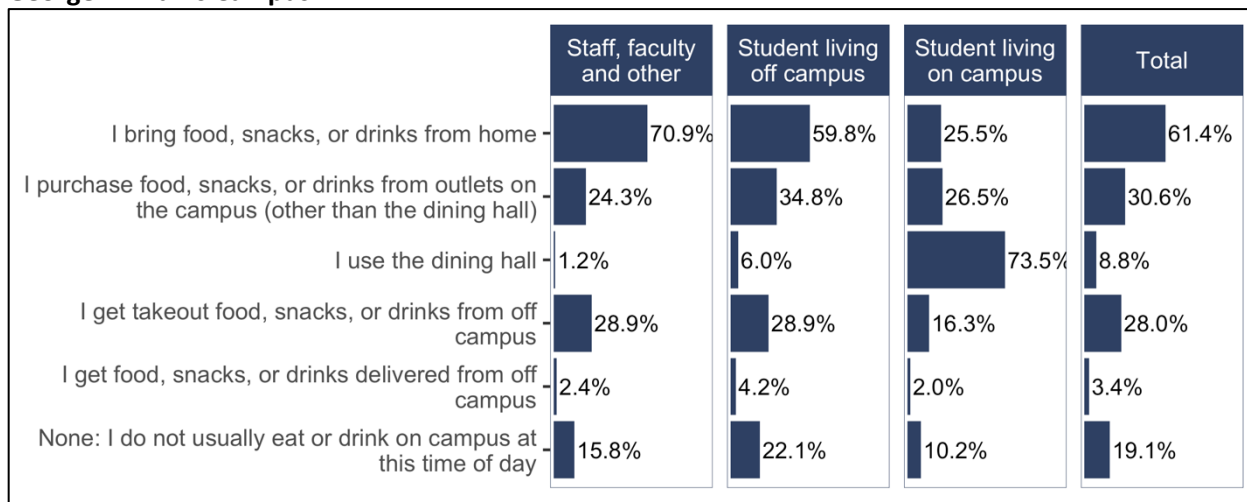
Source of Food and Drink as Percentage of Respondent Population from 8:00 am to 11:00 am at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.10

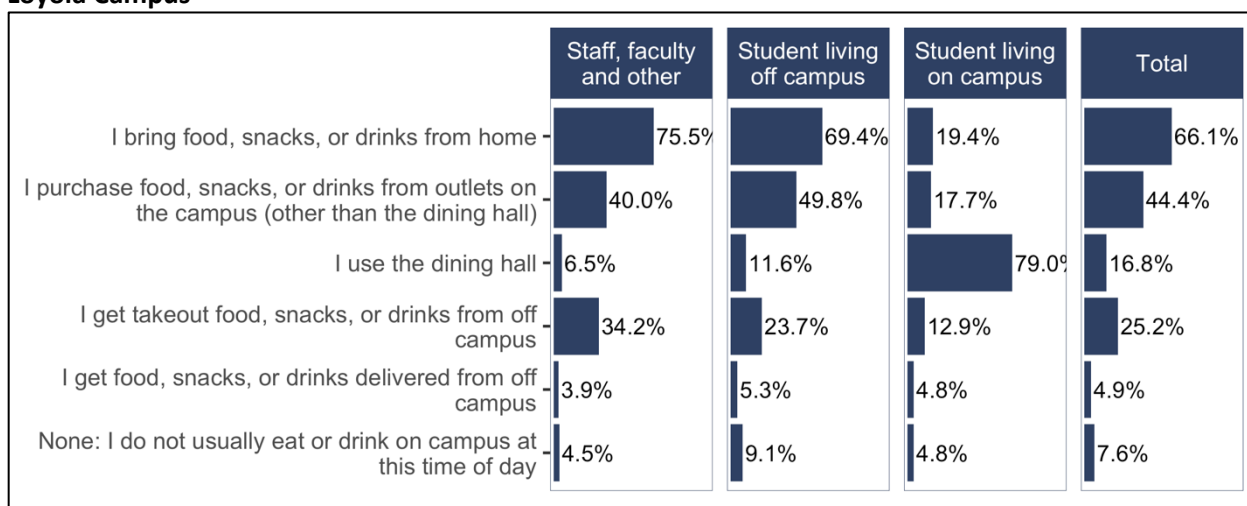
Source of Food and Drink as Percentage of Respondent Population from 8:00 am to 11:00 am at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.11

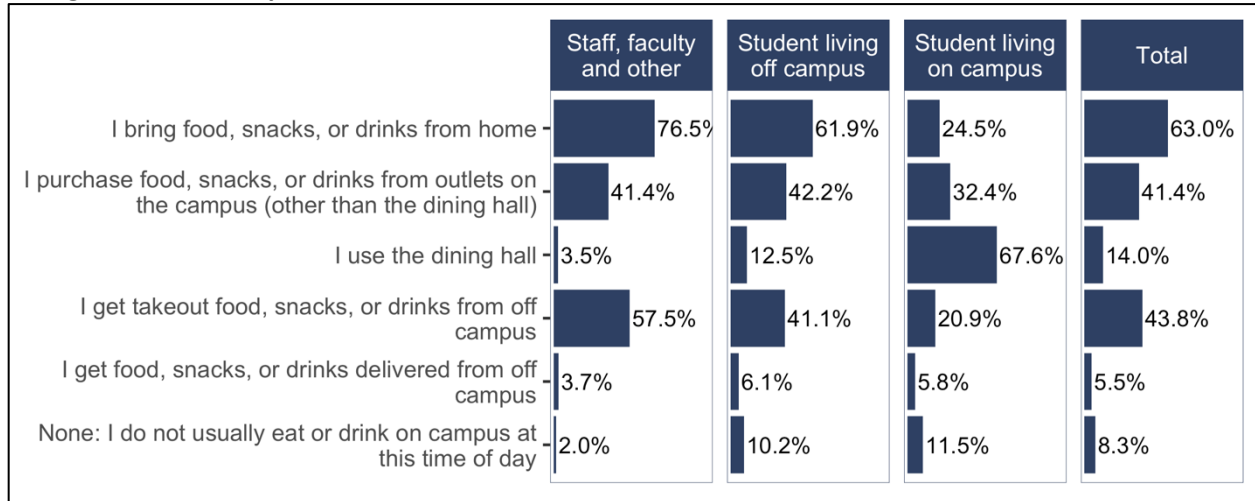
Source of Food and Drink as Percentage of Respondent Population from 11:00 am to 2:00 pm at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.12

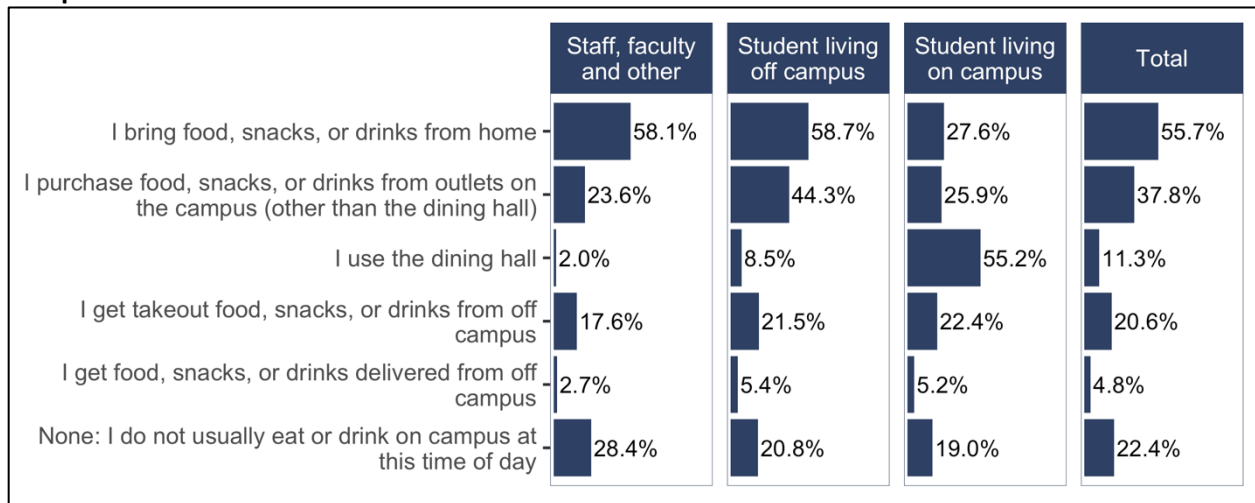
Source of Food and Drink as Percentage of Respondent Population from 11:00 am to 2:00 pm at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.13

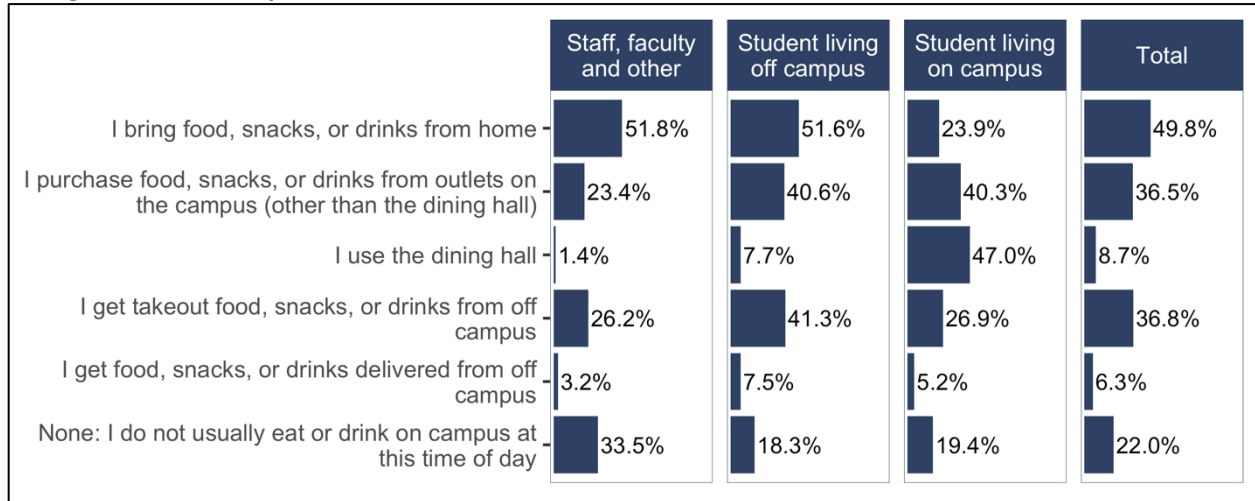
Source of Food and Drink as Percentage of Respondent Population from 2:00 pm to 5:00 pm at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.14

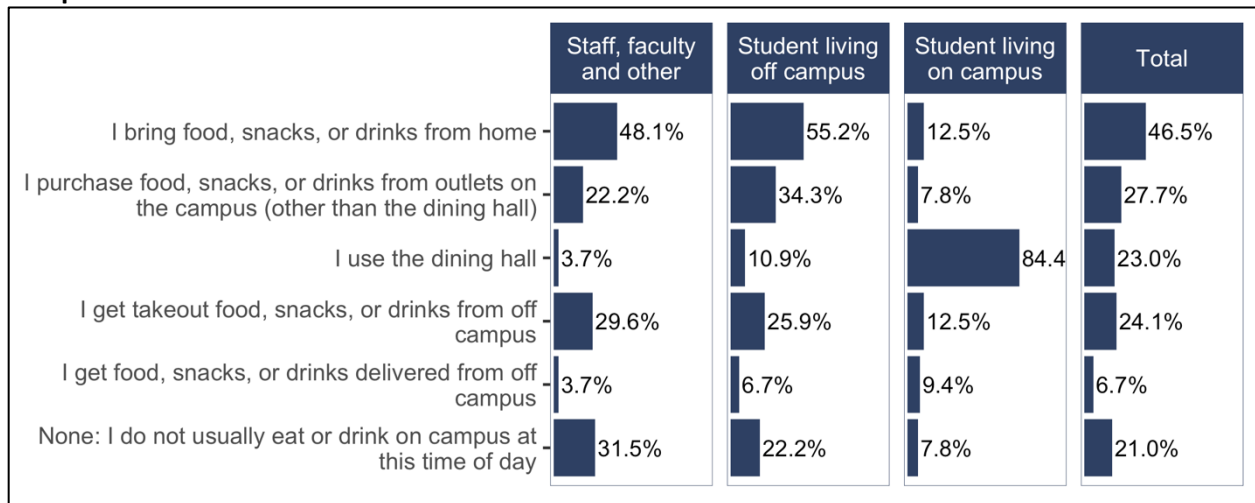
Source of Food and Drink as Percentage of Respondent Population from 2:00 pm to 5:00 pm at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.15

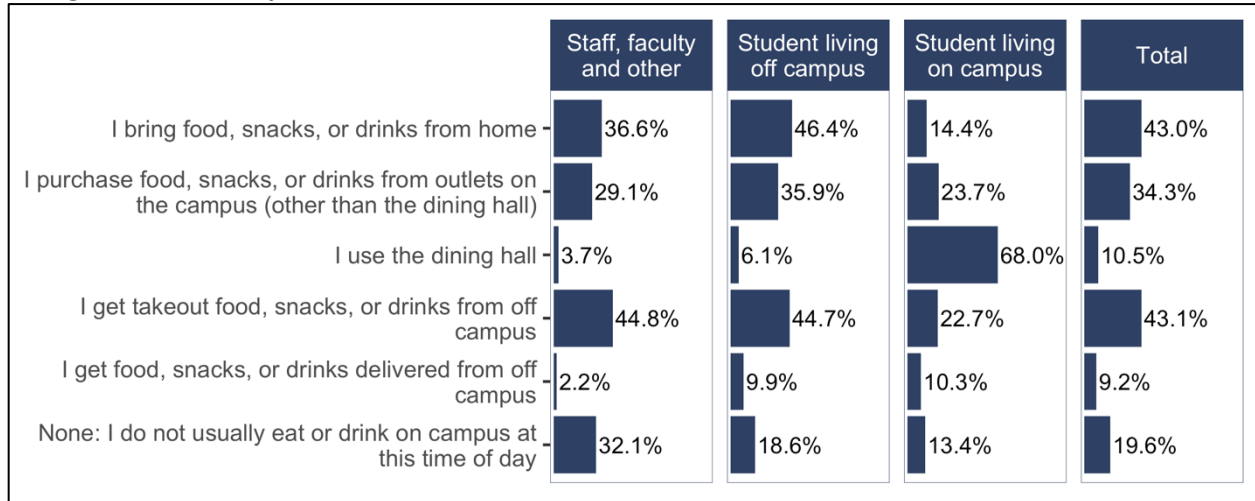
Source of Food and Drink as Percentage of Respondent Population from 5:00 pm to 7:00 pm at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.16

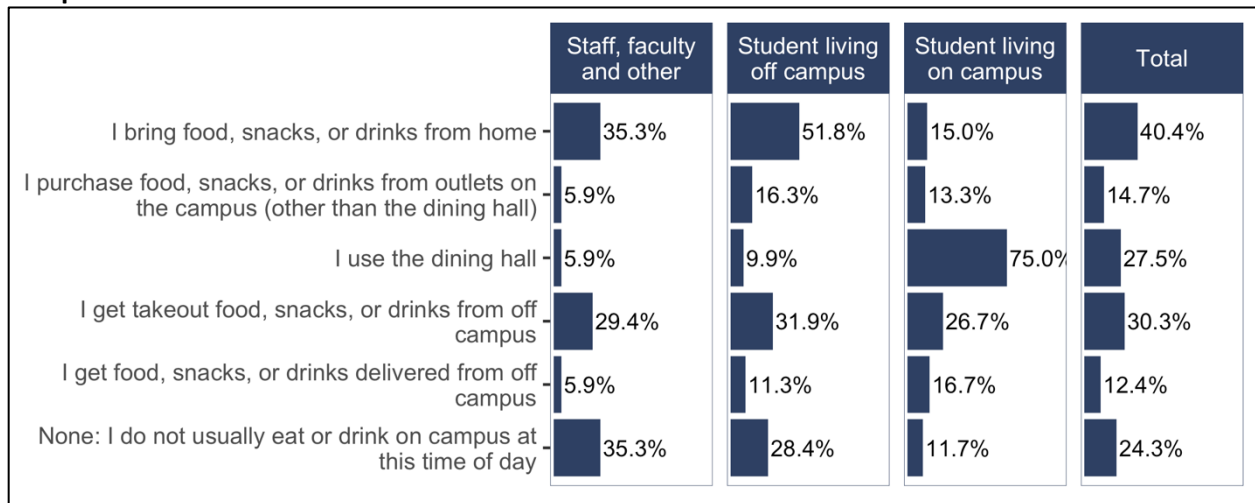
Source of Food and Drink as Percentage of Respondent Population from 5:00 pm to 7:00 pm at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.17

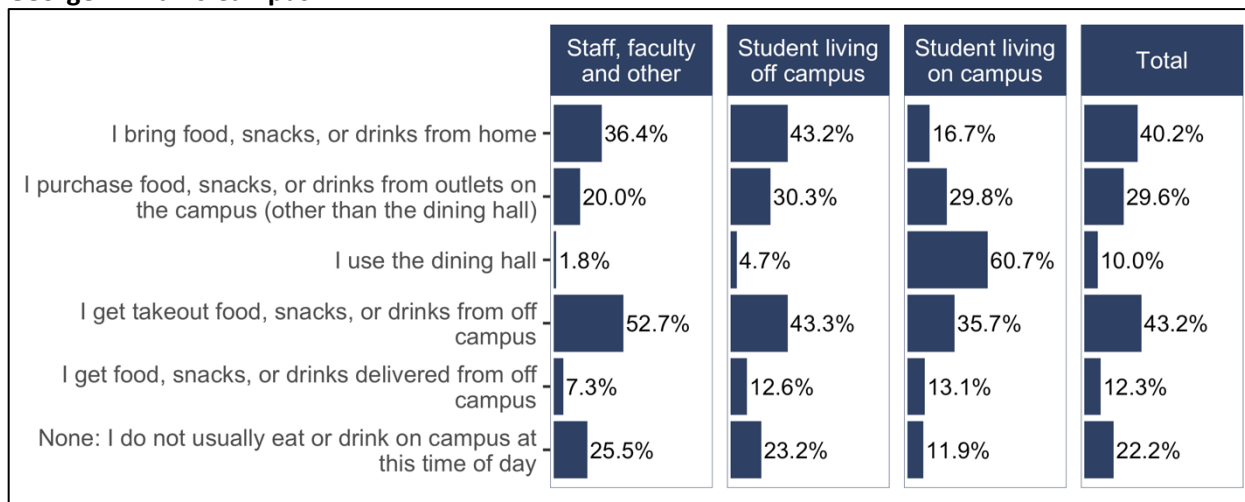
Source of Food and Drink as Percentage of Respondent Population from 7:00 pm Onwards at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.18

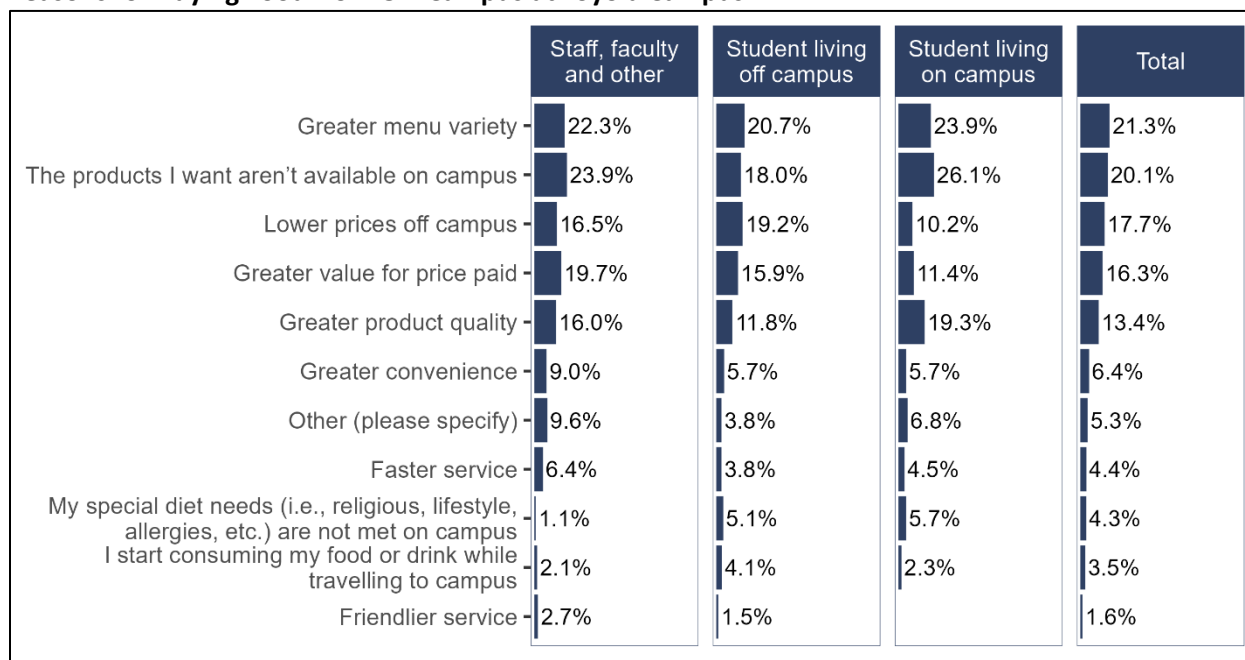
Source of Food and Drink as Percentage of Respondent Population from 7:00 pm Onwards at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.19

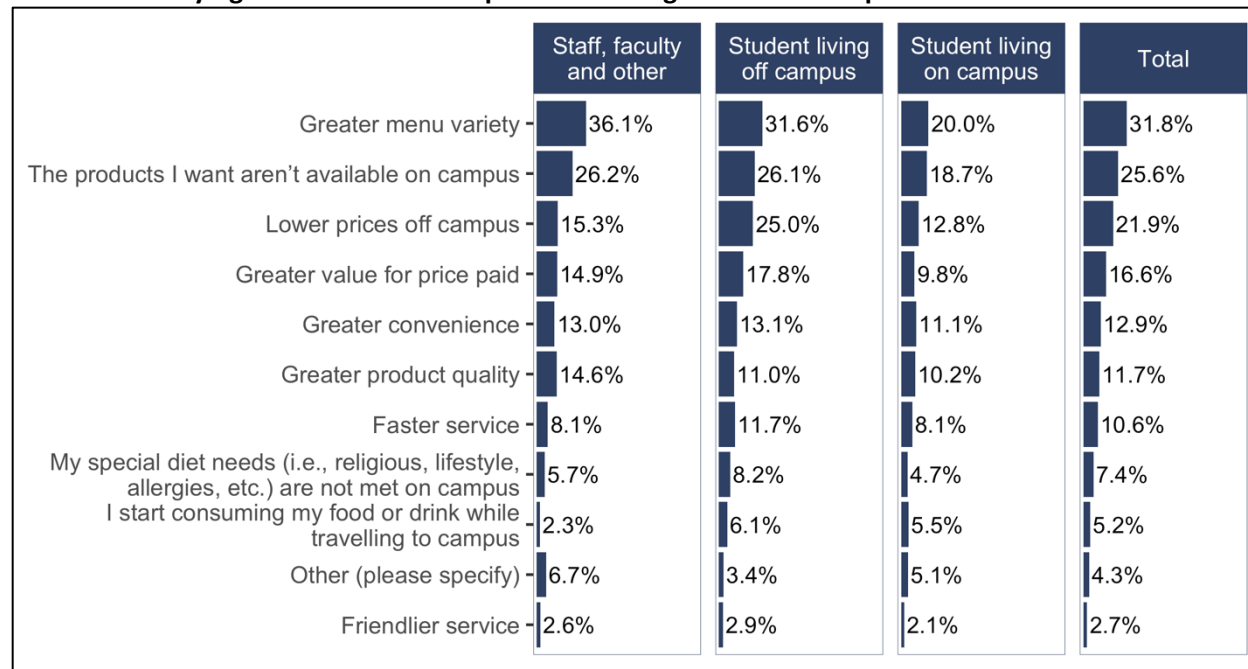
Reasons for Buying Food from Off-Campus at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.20

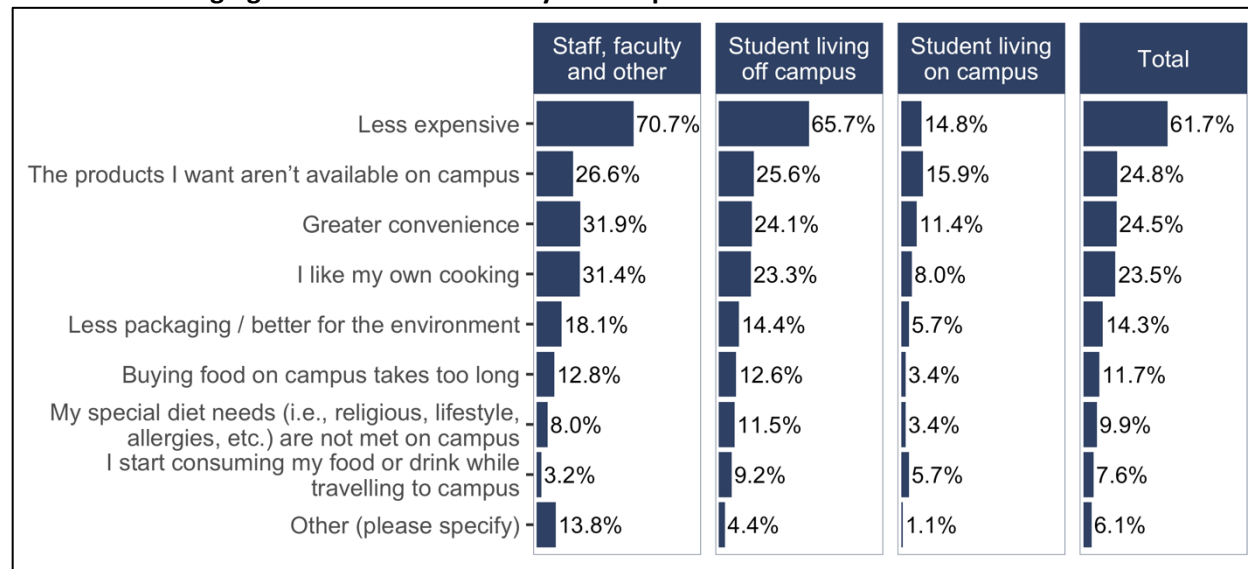
Reasons for Buying Food from Off-Campus at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.21

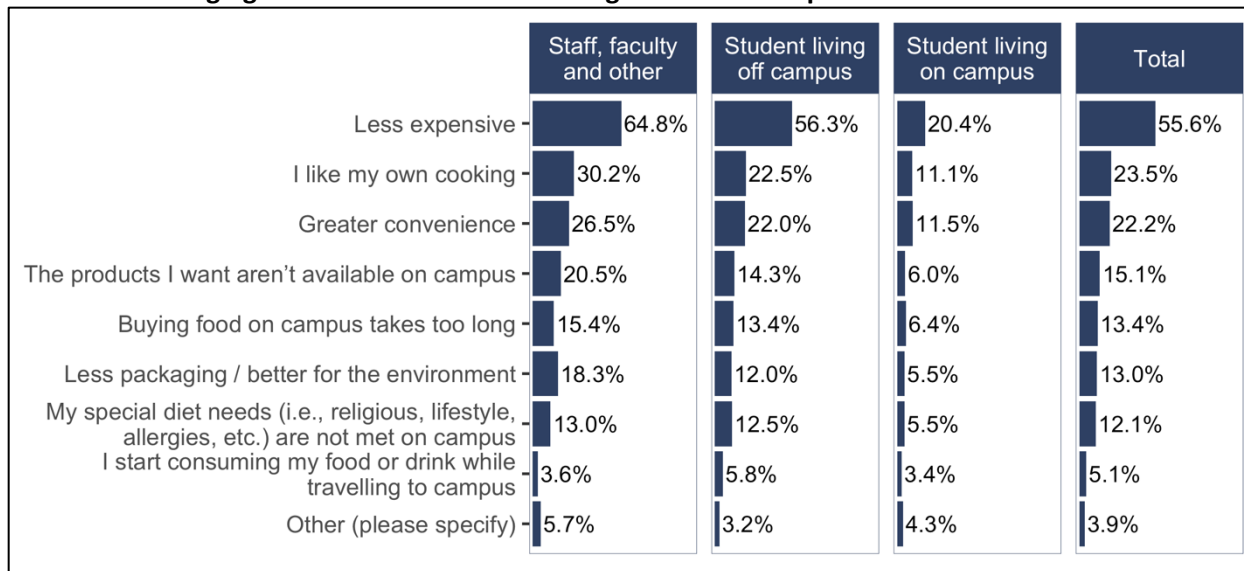
Reasons for Bringing Food from Home at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.22

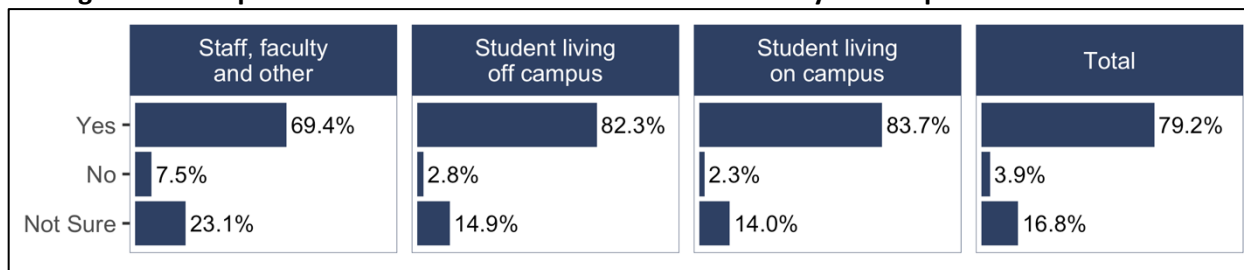
Reasons for Bringing Food from Home at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.23

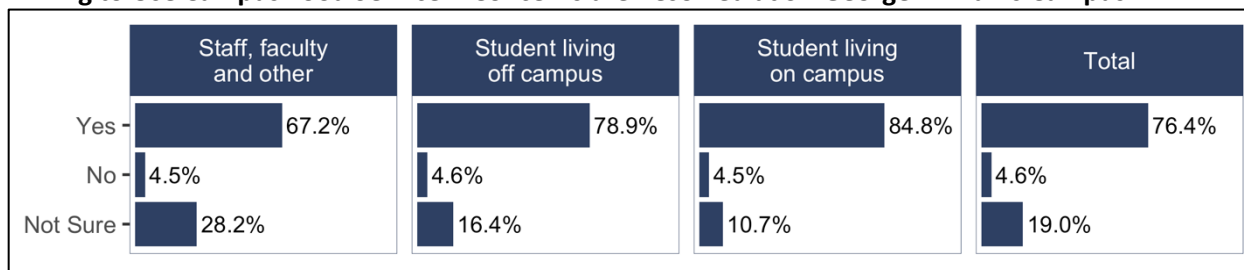
Willing to Use Campus Food Service if Concerns are Resolved at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.24

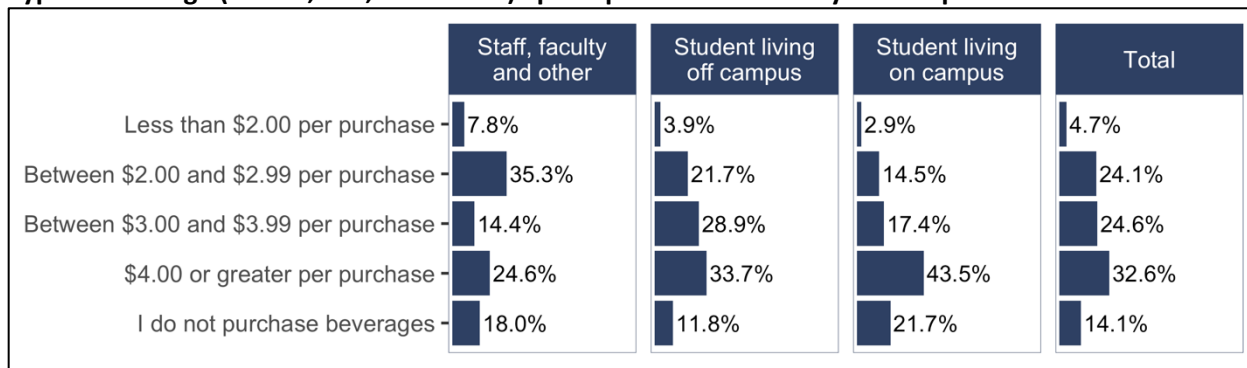
Willing to Use Campus Food Service if Concerns are Resolved at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.25

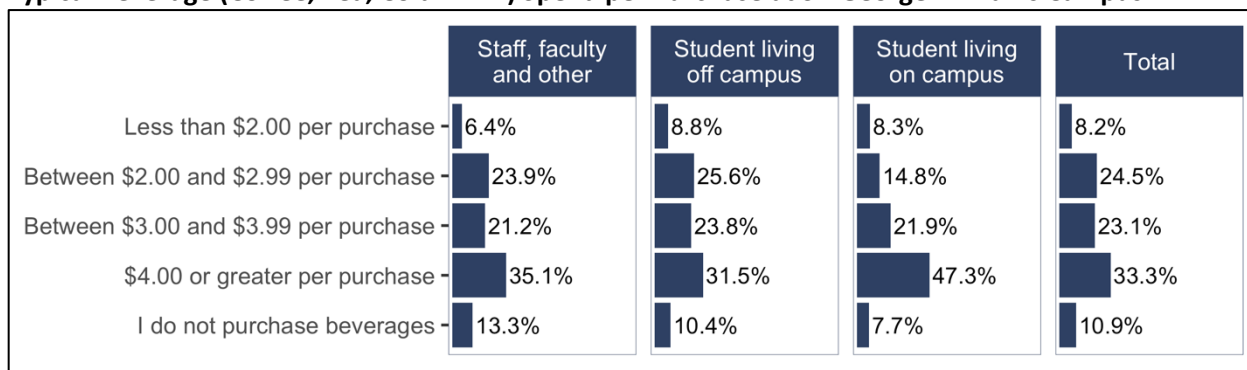
Typical Beverage (Coffee, Tea, Cold Drink) Spend per Purchase at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.26

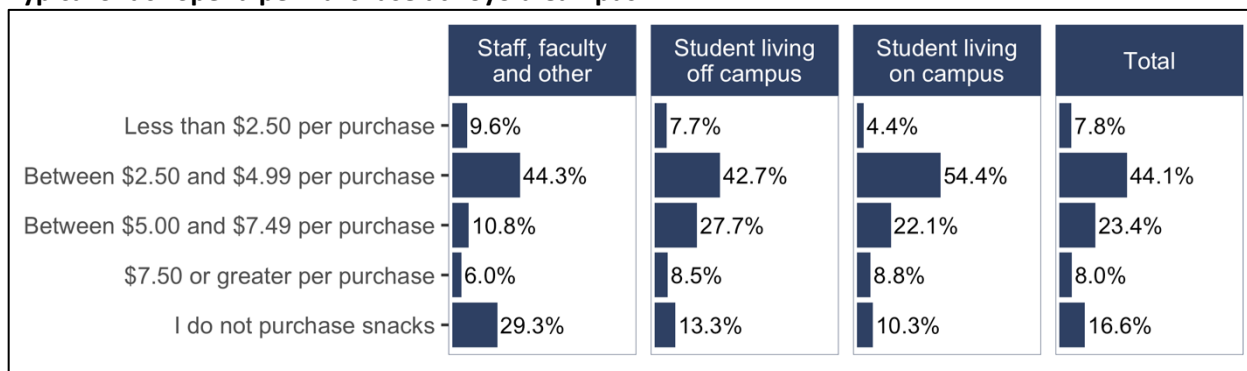
Typical Beverage (Coffee, Tea, Cold Drink) Spend per Purchase at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.27

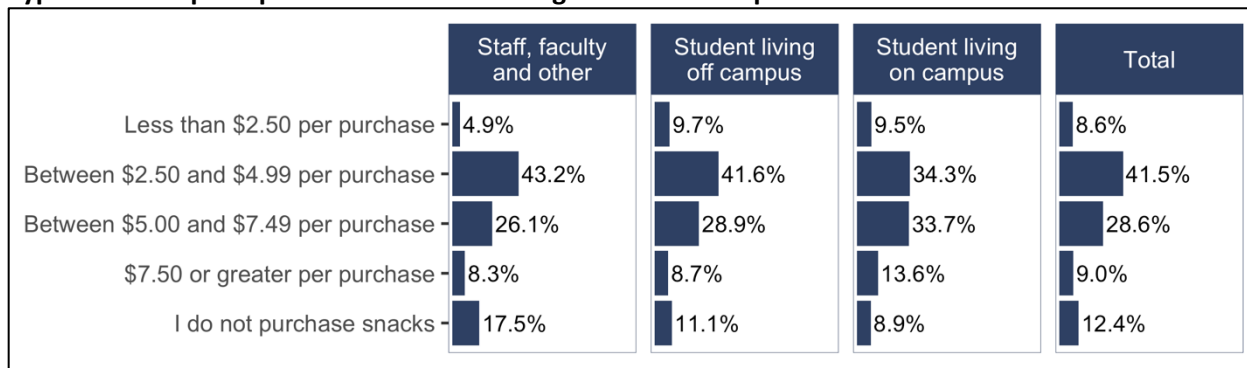
Typical Snack Spend per Purchase at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.28

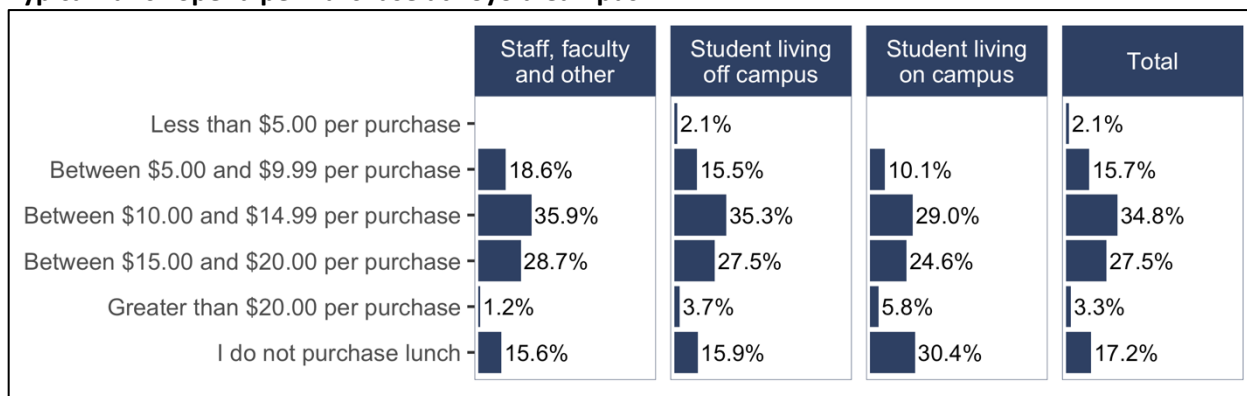
Typical Snack Spend per Purchase at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.29

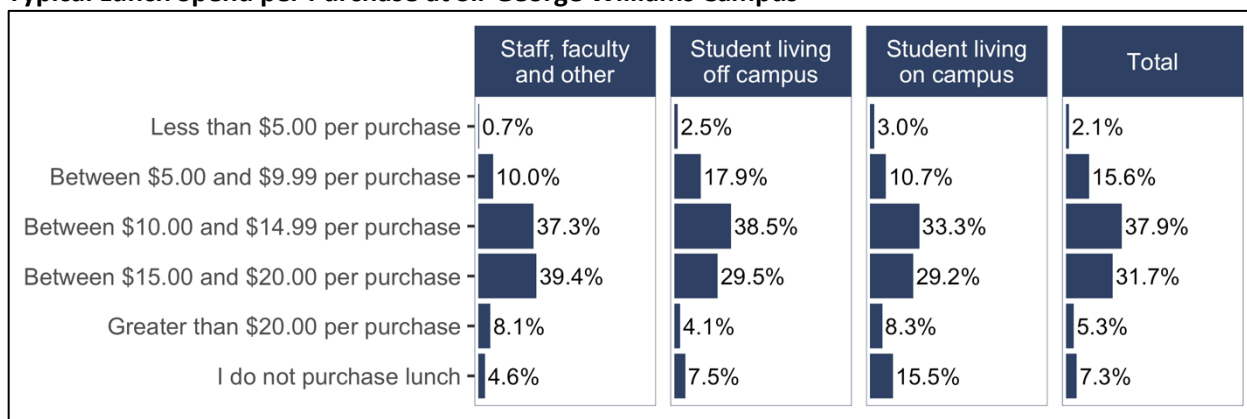
Typical Lunch Spend per Purchase at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.30

Typical Lunch Spend per Purchase at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.31
Importance of Diet Considerations and Allergen at Loyola Campus

	Staff, faculty and other	Student living off campus	Student living on campus	Total
None: I do not have special diet considerations	53.2%	40.7%	36.4%	42.9%
Dairy / Lactose-Free	10.6%	14.1%	12.5%	13.2%
Vegetarian (dairy and eggs are okay)	13.3%	11.6%	12.5%	12.1%
High Protein	5.9%	13.0%	12.5%	11.4%
Halal	0.5%	8.0%	5.7%	6.2%
Vegan (no animal products)	5.3%	5.9%	4.5%	5.6%
Gluten-Free	2.7%	4.8%	3.4%	4.2%
Other (please specify)	6.4%	3.3%	1.1%	3.7%
Seafood-Free (including shellfish)	4.3%	3.3%	2.3%	3.4%
Peanut-Free	2.1%	2.3%	3.4%	2.4%
Nut-Free / Tree Nut-Free	1.6%	2.5%	2.3%	2.3%
Kosher	1.1%	2.3%		1.8%
Egg-Free	0.5%	2.0%	2.3%	1.7%
Soy-Free	1.6%	1.0%	1.1%	1.1%
Sesame-Free	0.5%	0.5%	1.1%	0.6%
Mustard-Free		0.7%	1.1%	0.6%

Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

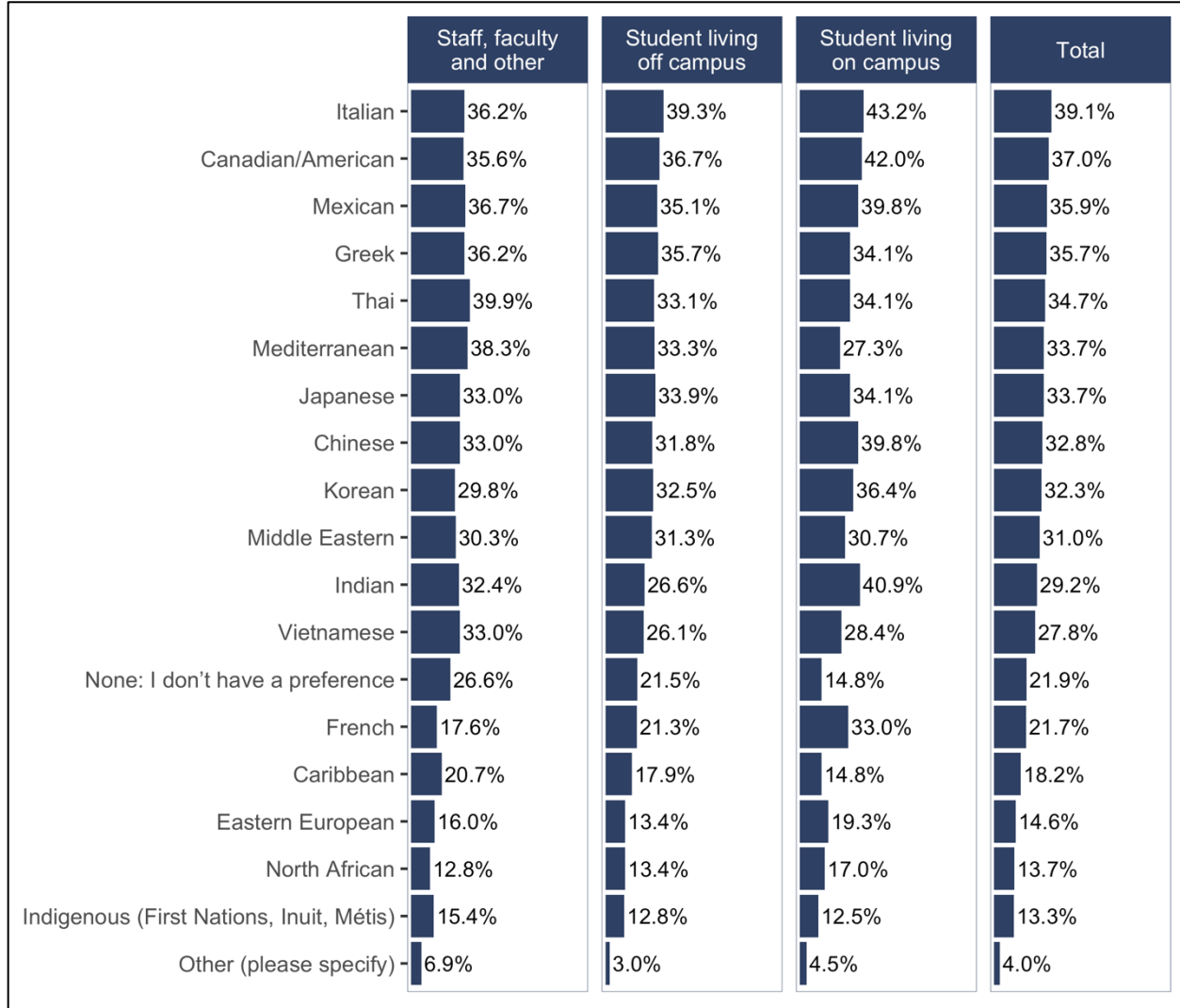
Exhibit A2.32

Importance of Diet Considerations and Allergen at Sir George Williams Campus

	Staff, faculty and other	Student living off campus	Student living on campus	Total
None: I do not have special diet considerations	43.9%	38.9%	34.0%	39.6%
Vegetarian (dairy and eggs are okay)	13.7%	11.3%	10.6%	11.8%
High Protein	8.3%	12.2%	9.8%	11.1%
Dairy / Lactose-Free	9.3%	11.5%	11.1%	11.0%
Halal	1.9%	8.6%	6.4%	6.9%
Gluten-Free	6.0%	4.7%	5.5%	5.1%
Vegan (no animal products)	4.4%	5.1%	5.5%	5.0%
Other (please specify)	7.2%	4.4%	1.7%	4.9%
Seafood-Free (including shellfish)	2.9%	3.6%	5.5%	3.6%
Egg-Free	0.8%	3.1%	1.3%	2.4%
Peanut-Free	1.8%	2.5%	3.0%	2.4%
Nut-Free / Tree Nut-Free	1.8%	1.9%	2.6%	1.9%
Soy-Free	1.9%	1.4%	1.7%	1.6%
Kosher	1.8%	1.4%	2.1%	1.5%
Mustard-Free	0.3%	0.7%	0.9%	0.6%
Sesame-Free	0.1%	0.8%	0.4%	0.6%

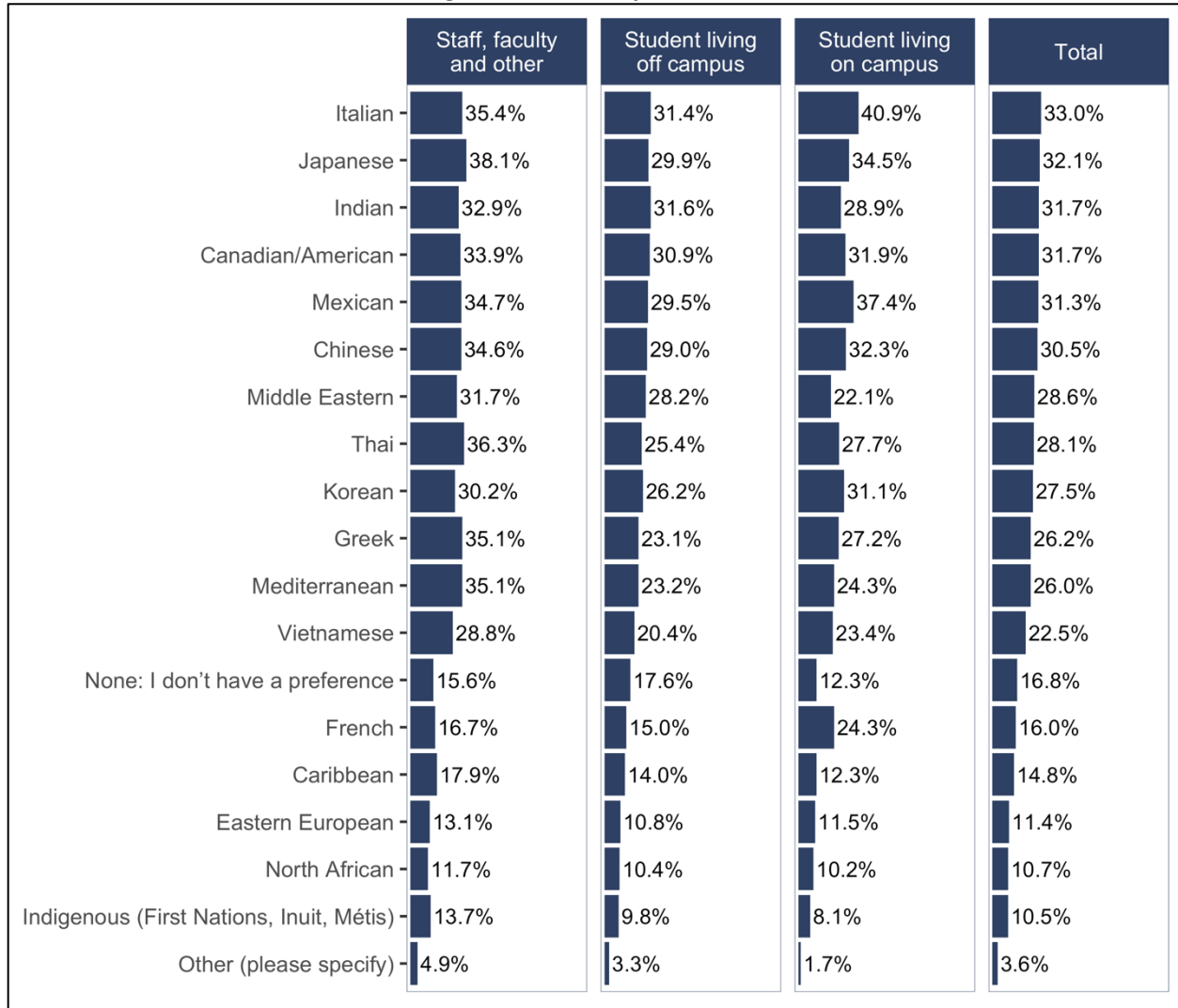
Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.33
Flavour Profile Preferences at Loyola Campus



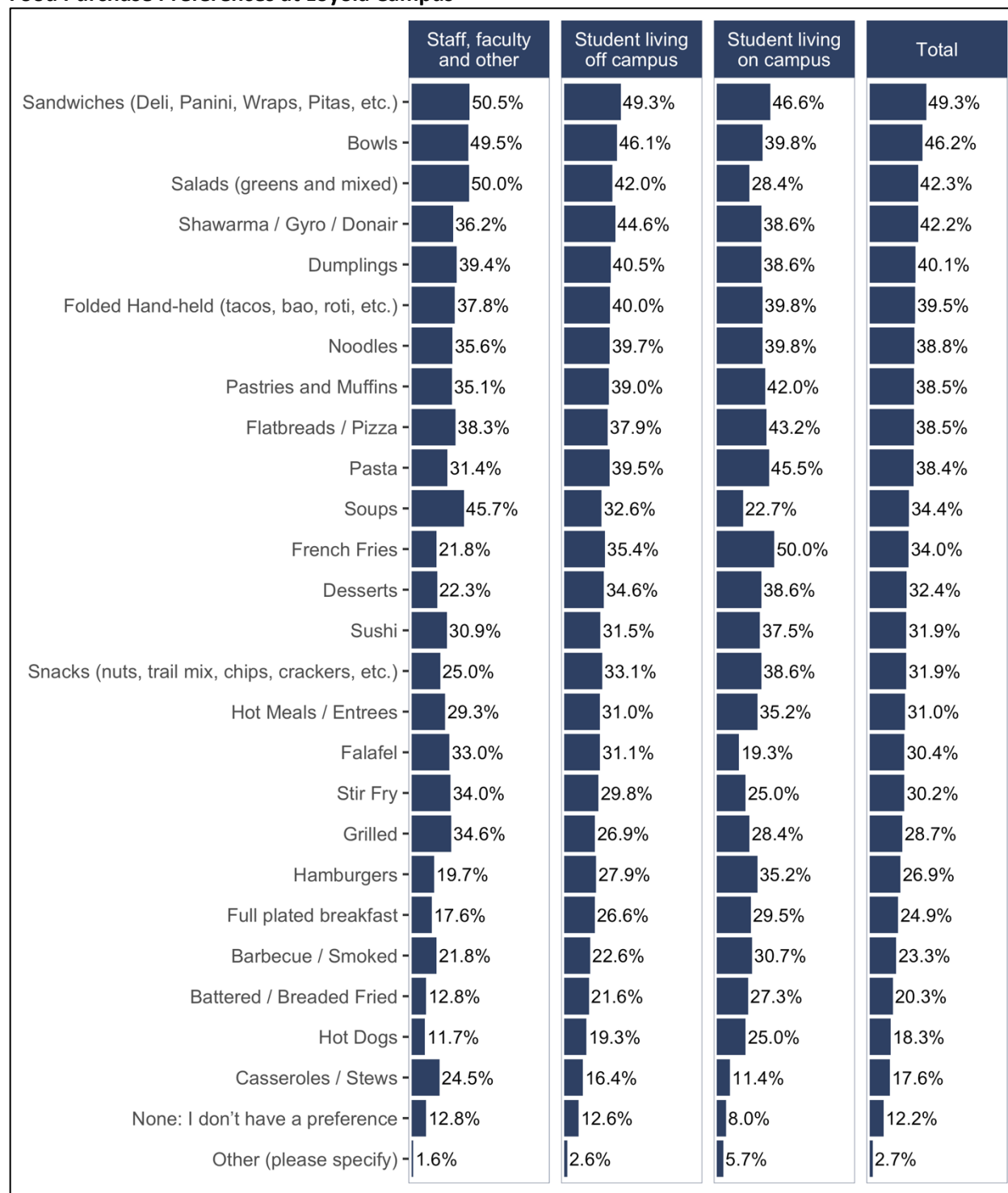
Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.34
Flavour Profile Preferences at Sir George Williams Campus



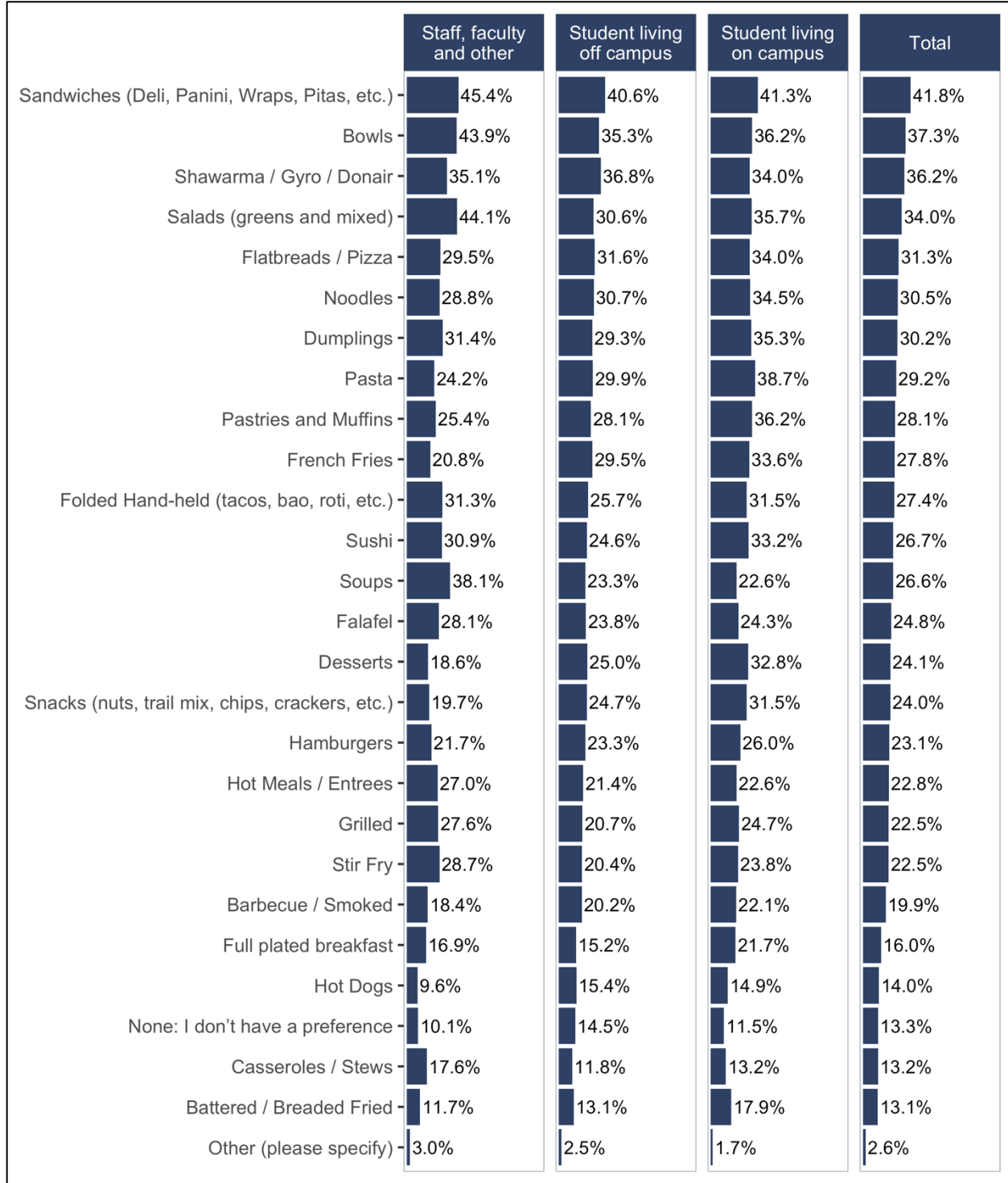
Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.35
Food Purchase Preferences at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.36
Food Purchase Preferences at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.37

Travel Preferences to Purchase a Snack or Beverage at Loyola Campus

	Staff, faculty and other	Student living off campus	Student living on campus	Total
Within the building I am in	17.1%	20.3%	17.6%	19.4%
Within adjacent buildings provided I don't have to go outside	22.0%	18.7%	8.8%	18.5%
Less than five-minute walk	26.8%	34.3%	32.4%	32.5%
Five to ten-minute walk	18.3%	16.8%	26.5%	18.0%
Further than ten minutes	3.0%	3.4%	7.4%	3.7%
I don't typically purchase snacks or beverages	12.8%	6.5%	7.4%	8.0%

Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.38

Travel Preferences to Purchase a Snack or Beverage at Sir George Williams Campus

	Staff, faculty and other	Student living off campus	Student living on campus	Total
Within the building I am in	14.8%	15.0%	18.1%	15.2%
Within adjacent buildings provided I don't have to go outside	18.8%	18.4%	12.7%	18.1%
Less than five-minute walk	41.1%	43.3%	37.3%	42.4%
Five to ten-minute walk	18.6%	17.0%	22.3%	17.7%
Further than ten minutes	1.9%	1.6%	4.8%	1.9%
I don't typically purchase snacks or beverages	4.8%	4.6%	4.8%	4.7%

Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.39

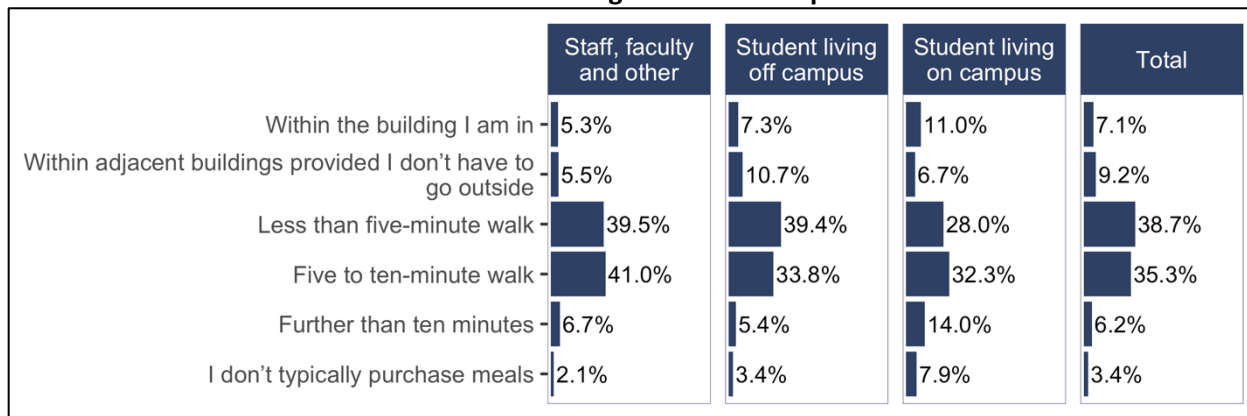
Travel Preferences to Purchase a Meal at Loyola Campus

	Staff, faculty and other	Student living off campus	Student living on campus	Total
Within the building I am in	7.3%	9.3%	10.3%	9.0%
Within adjacent buildings provided I don't have to go outside	15.2%	15.6%	7.4%	14.8%
Less than five-minute walk	22.6%	33.1%	32.4%	30.7%
Five to ten-minute walk	31.1%	27.5%	33.8%	28.9%
Further than ten minutes	14.0%	8.1%	8.8%	9.5%
I don't typically purchase meals	9.8%	6.3%	7.4%	7.2%

Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.40

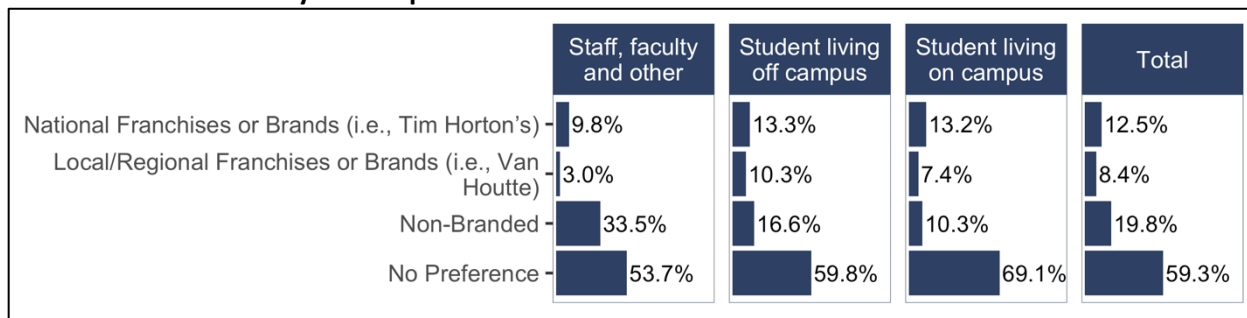
Travel Preferences to Purchase a Meal at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.41

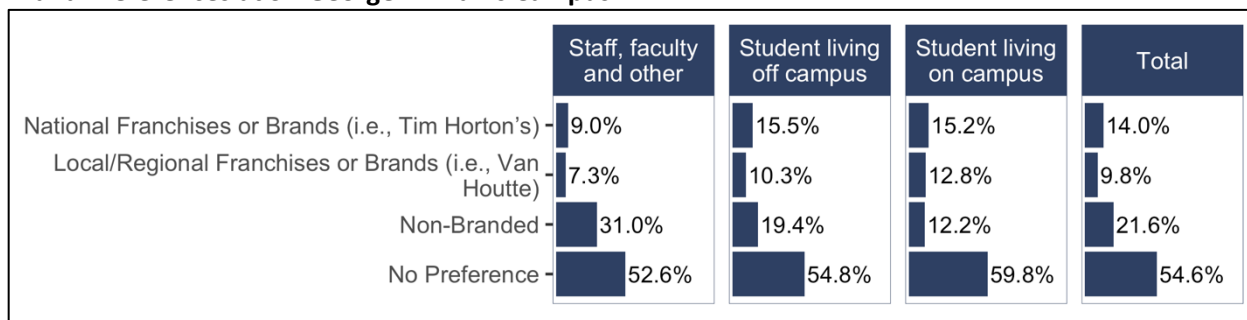
Brand Preferences at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.42

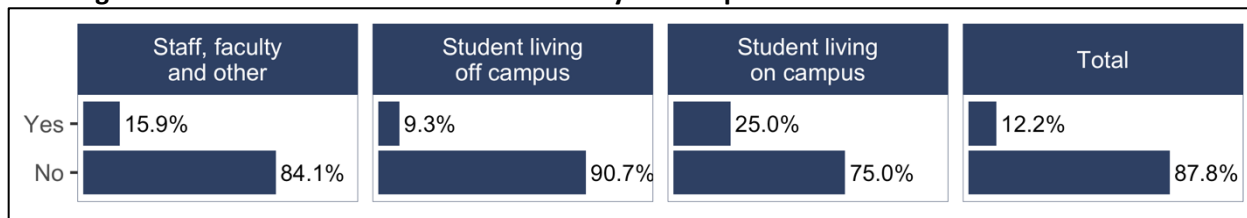
Brand Preferences at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.43

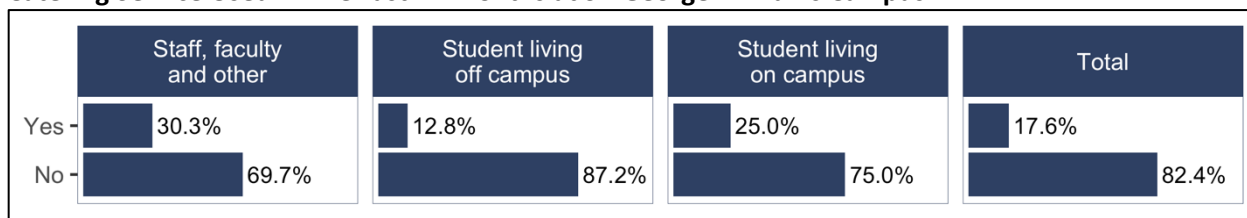
Catering Service Used In The Last 12 Months at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.44

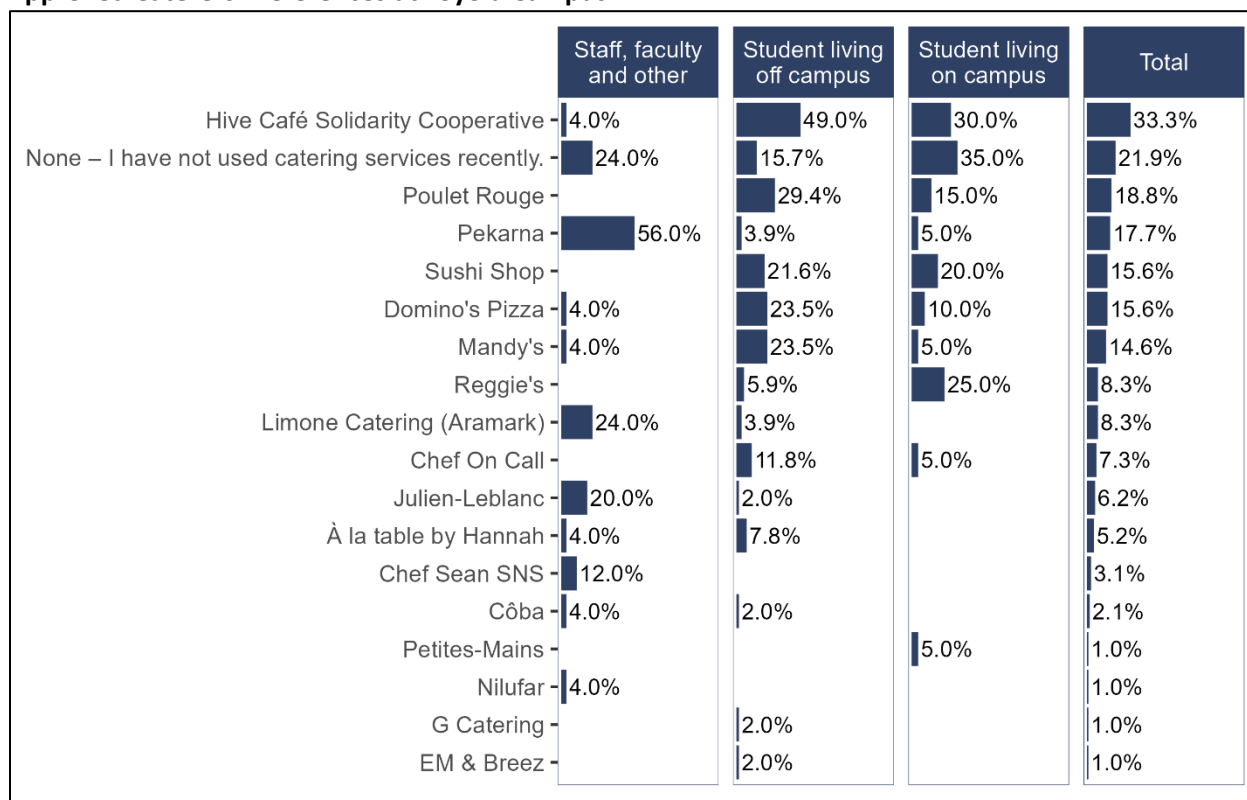
Catering Service Used In The Last 12 Months at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

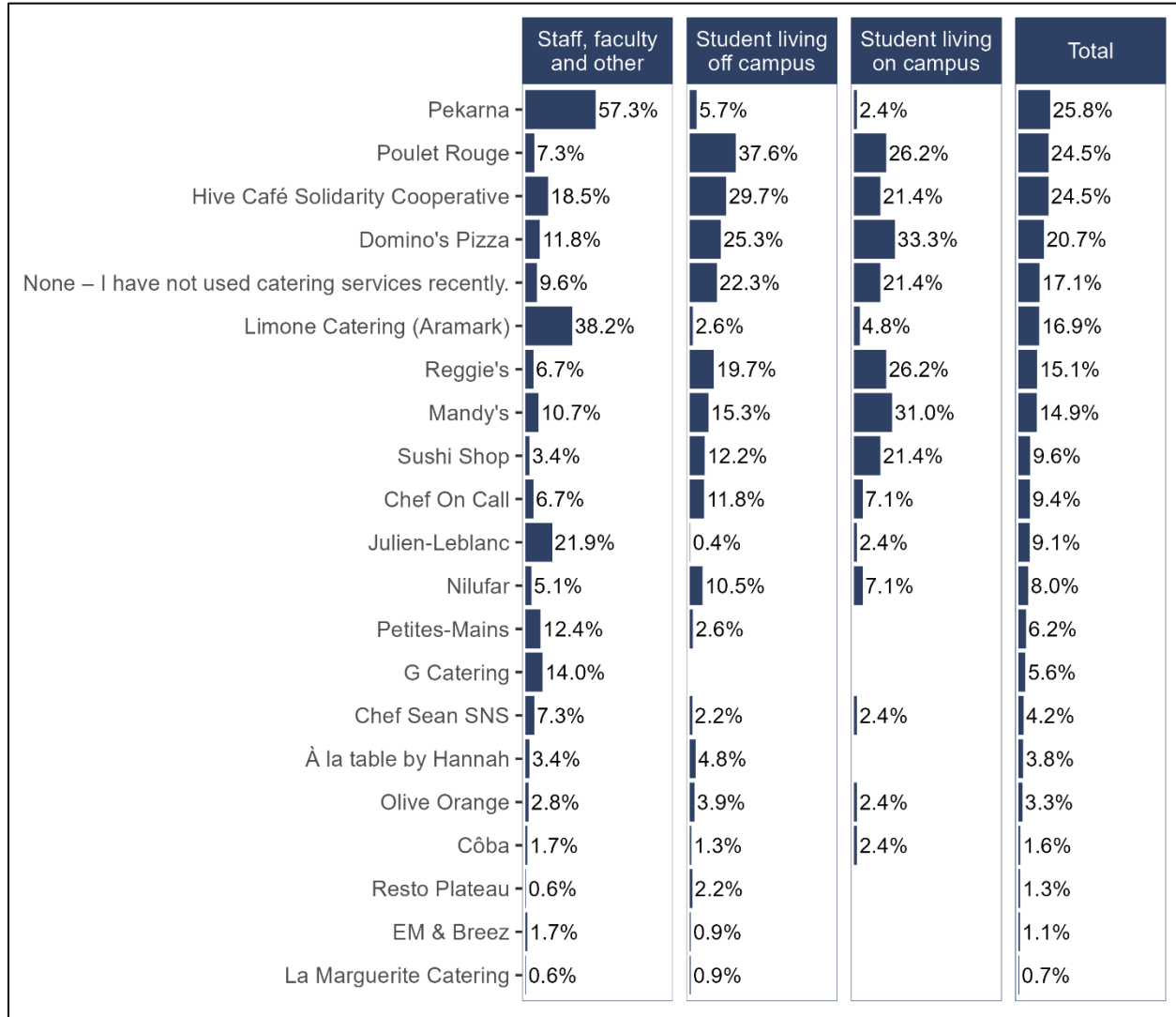
Exhibit A2.45

Approved Caterers Preferences at Loyola Campus



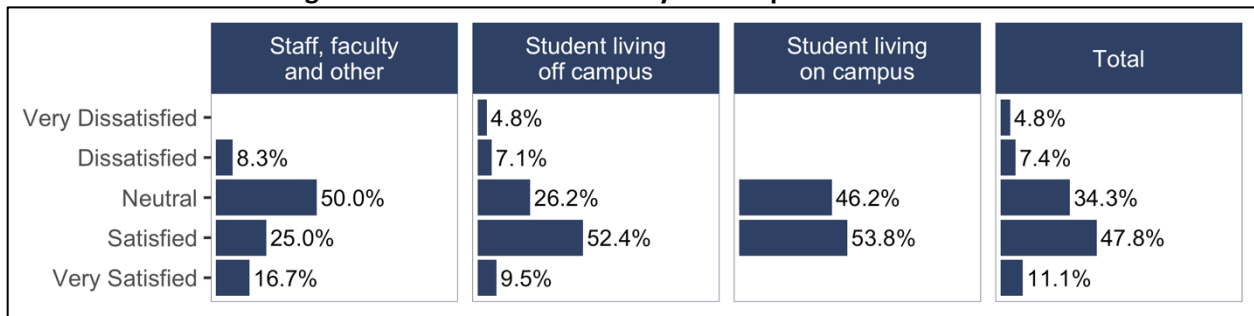
Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.46
Approved Caterers Preferences at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

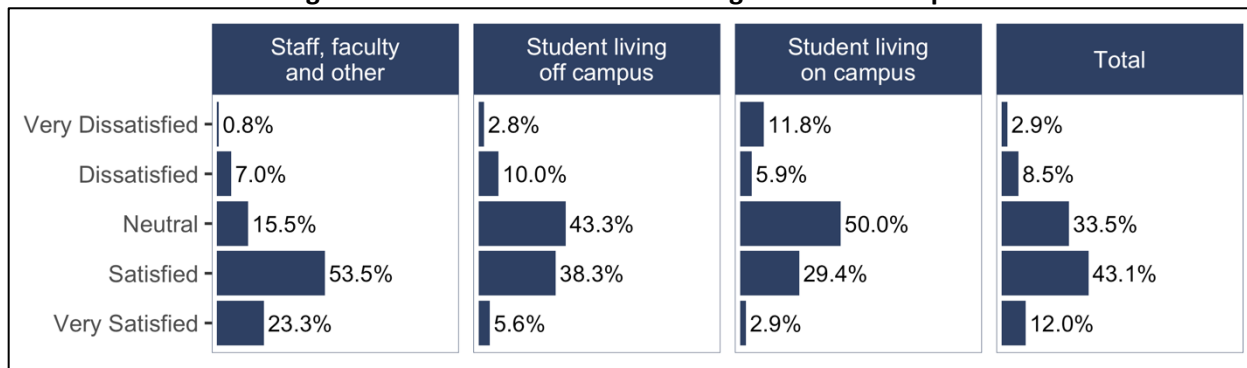
Exhibit A2.45
Satisfaction with Catering in the Past 12 Months at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.46

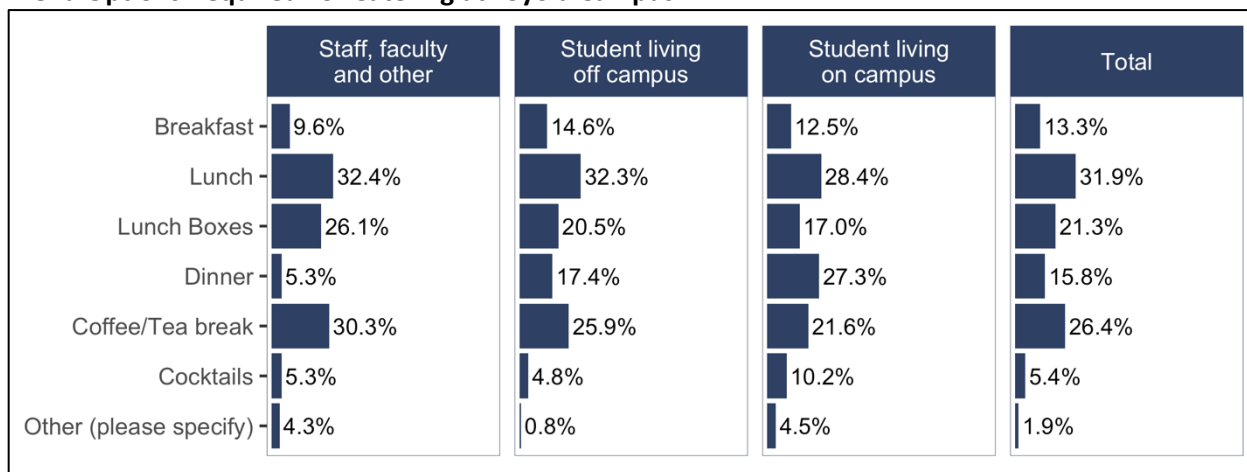
Satisfaction with Catering In the Past 12 Months at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.47

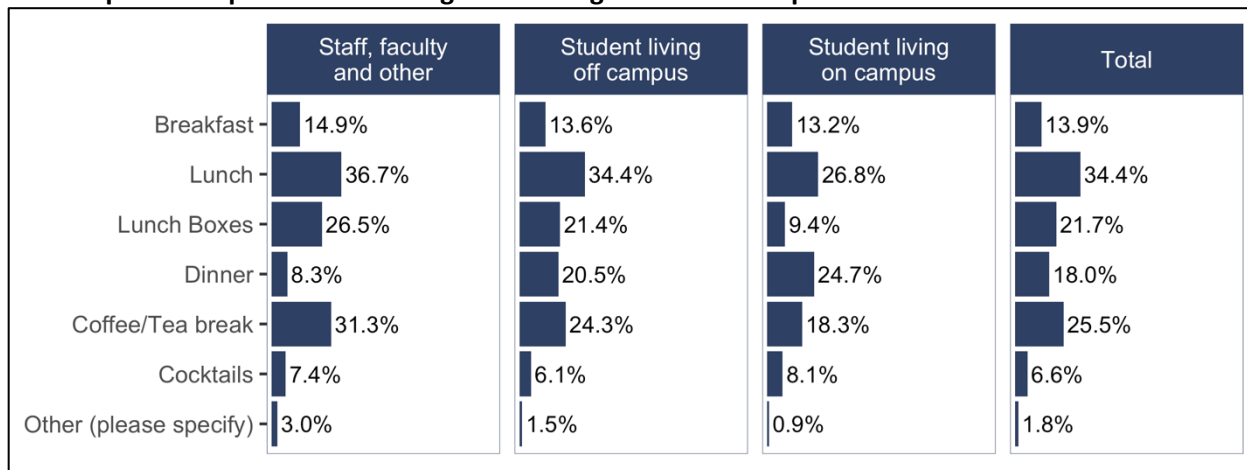
Menu Options Required For Catering at Loyola Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Exhibit A2.48

Menu Options Required For Catering at Sir George Williams Campus



Source: fsSTRATEGY Inc. Electronic Survey of Students, Staff and Faculty

Appendix 3 – Raw Survey Results

Appendix 3 is an external Microsoft Excel Workbook file: “Appendix 3 – Raw Survey Data.xlsx”