

FOODBYTES

MARCH 2016 | ISSUE 27 | YOUR FREE DATASENTIAL TREND REPORT



COLLEGES & UNIVERSITIES

DATASENTIAL'S NEWEST REPORT UNCOVERS THE
LATEST INSIGHTS IN THIS \$17 BILLION SEGMENT

*Café Bon Appetit
at Eckerd College*

79%

OF COLLEGE OPERATORS SAY CAMPUS DINING PLAYS A ROLE IN STUDENT RECRUITMENT

DATASSENTIAL C&U KEYNOTE REPORT



"Micro dining" concepts scattered throughout the new dining hall at Endicott College, in Beverly, MA, "create a market style sense of discovery" and highlight choice and interaction, according to design firm Connor Architecture.

GET SCHOOLED ON THE LATEST C&U INSIGHTS

At Yale University, students can download the Fast Track dining app to check out menus, provide real-time feedback, find nutritional information, order "2Go" meals, and even track open seats in the dining room. The university's "Reality Bites" program teaches students about topics ranging from mixology to wine pairings to dining etiquette, the Yale Sustainable Food Program includes two farms on campus (spearheaded by famed chef Alice Waters), and the university's "plant-based protein program" has resulted in more than half of Yale students choosing at least one vegetarian dish a week (though vegans and vegetarians comprise just 3%-4% of the school's population).

College and university (C&U) dining has come a long way, and it continues to evolve at a breakneck pace. C&U has a unique challenge in trying to keep up with the trends that resonate with up-and-coming generations of students who become more interested in new food experiences every day, while also running operations that can include a seemingly endless variety of concepts – today's college campus may include food hall-like cafeterias, huge catering operations, a robust retail component, and even a food truck or two.

Students spend over \$17 billion a year on campus dining. To help you understand this segment, Datassential's brand new **Keynote Report: Colleges & Universities** includes data and insights from 135 C&U operators and over 1,000 current students. We profile the C&U operator – who they are, what they purchase, and what they want; uncover opportunities beyond traditional campus dining; dive deep into cuisine types, specific menu items, and trends that both operators and students like and want to see; review student dining behaviors, perceptions, and motivators; and examine student views on food, from spending habits to where they get their information.

In this month's FoodBytes, Datassential is giving you a sneak peek at this in-depth, comprehensive report. Begin planning your C&U strategy with this foundational research – call Brian Darr at 312-655-0594 or email brian@datassential.com and order your copy today.

OPERATORS SAY

"In the future we hope to upgrade our international station so that we can change the menu on a daily basis in order to not only offer Asian infusions, but also other international fusions like Mediterranean or Italian-inspired dishes."

IN THE REPORT

Find out the cuisines and foods that operators are already offering and plan to offer in the future.

1 in 5

university operators without a **food truck** would like to offer one on campus

IN THE REPORT

In the full report, find out the dining and retail options that colleges currently offer and plan to offer, plus operator interest in unique offerings (farmers' markets, food halls).



TREND IN ACTION

Michigan State University's food truck offers options like a signature Michigan beef burger with smoked cheddar from the on-campus "Dairy Store" (a dairy research center and learning lab operated by the Department of Food Science and Human Nutrition), plus a late-night menu with house-smoked chicken tacos and macaroni and cheese topped with white cheddar crackers. Last year the university completed a multimillion dollar revamp of eight dining halls, noting that great dining facilities are one way to attract students to stay in campus housing longer.



CREATIVE CONCEPTS

For more on innovative C&U operators across the country, ask about our issue of **Creative Concepts: Colleges & Universities**.

STUDENTS SAY

"I had never tried brussels sprouts until I came to college and now they're my favorite food."

IN THE REPORT

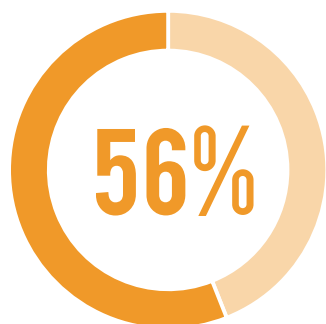
For many students, college is a time when they may be making their own food choices for the first time, developing their tastes and preferences for foods, flavors, cuisines, and brands. Understanding this segment is not only a key barometer for the future, but can also be an important part of your long-term brand strategy. In the full report, discover the types of foods students find appealing, what motivates them to try something new, their most-loved cuisines, and student brand satisfaction.

**“WE OFFER WILD GAME AND
OFFAL SUCH AS TONGUE,
HEART, AND LIVER. WE USE
THEM IN A VARIETY OF WORLD
CUISINE APPLICATIONS.”**

C&U OPERATOR ON THEIR
MOST UNIQUE MENU ITEM

DATASSENTIAL C&U KEYNOTE REPORT

OPERATORS SAY THEIR FOOD COSTS HAVE RISEN – AND THEY EXPECT THEM TO KEEP RISING IN THE FUTURE.



OF OPERATORS SAY THEY ARE MAXIMIZING INGREDIENTS TO CUT FOOD COSTS

IN THE REPORT

Find out all of the cost-cutting techniques that C&U operators are using, plus insights into labor cost changes.

OPERATORS SAY

"Our c-store is the most profitable area on our campus. Grab-n-go is HUGE."

IN THE REPORT

Find data on retail options including expected changes, retail success, and the options available on today's campuses.

88%
OF COLLEGES OFFER CATERING

IN THE REPORT

Find information on off-site catering, catering success, and planned catering changes.

BEYOND CAFETERIAS

Nearly 9 out of 10 colleges and universities offer catering services, and most plan to offer more catering services in the future. Today's universities host a huge number and variety of events in any given school year – conference breakfasts, staff luncheons, outdoor picnic award ceremonies, alumni weddings, and more. Catering not only serves as an additional revenue and marketing opportunity for a university, but the resources, skill, and variety necessary for a successful catering operation can also translate into improved student offerings.

OPERATORS SAY

"We are a preferred provider to a local convention center that does not have its own kitchen. We provide online catering procurements and tastings for potential customers."

27%

OF COLLEGE OPERATORS SAY THEY ARE MORE DRIVEN BY STUDENT SATISFACTION THAN PROFIT

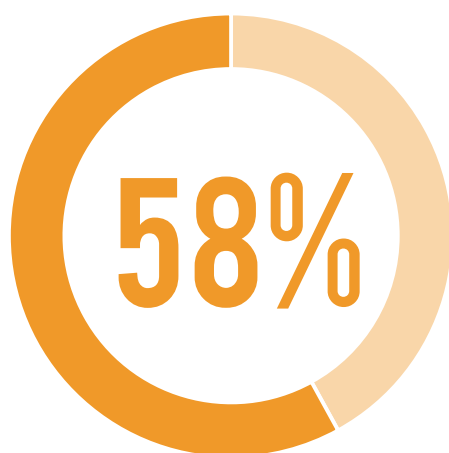
DATASSENTIAL C&U KEYNOTE REPORT

STUDENTS SAY

“Spending money on food is way too easy to do because in college people are really social eaters. My friends will ask me to go out on a late night burrito run, and if I say no then I’m out of the loop.”

IN THE REPORT

You’ll find student income sources, eater types, food budgets and spending habits, experience appeal, sought after attributes, and last meal reports.



OF COLLEGE OPERATORS HAVE DIGITAL MENU BOARDS

IN THE REPORT

You’ll find menu information offerings (online, social media) and a complete technology overview, including operator social media, blog, and app use, plus planned technology investments.



KEYNOTE INSIGHT

Ask about our **Menu Board Keynote Report** and fully understand the menu board’s impact on the bottom line, with in-depth consumer and operator surveys covering effectiveness, satisfaction, wants, and more.



37%
OF COLLEGE STUDENTS WATCH FOOD TV SHOWS

IN THE REPORT

We uncover the top food TV shows students watch, the food magazines and blogs they read, plus social media and app usage.

OPERATORS SAY

“We host a vendor tasting every couple of months to get students’ feedback on new menu items. Based on results we add to our menu or take away.”

IN THE REPORT

We look at how operators gather student feedback, operator perceptions of students, and operator unmet needs from suppliers.

95%
**OF COLLEGE STUDENTS SAY THEY ARE
EITHER EXCITED BY FOOD OR WOULD
CLASSIFY THEMSELVES AS A ‘FOODIE.’**

DATASSENTIAL C&U KEYNOTE REPORT

GET THE FULL REPORT

This is just a tiny sample of Datassential's full, in-depth research report. Purchase your copy today and start planning your college and university strategy.

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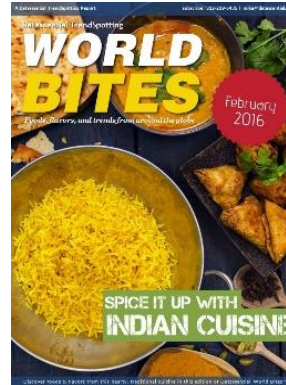
LAST MONTH'S TRENDSPOTTING



DINE AROUND

We sampled fresh-caught quahogs, classic hot wieners, grilled pizza, Asian-inspired small plates, and so much more in Providence, RI.

IN APRIL: Pittsburgh, PA



WORLD BITES

We explored the authentic cuisine and flavors of India, from naan to butter chicken, to find out what consumers want to try at restaurants and retail.

IN APRIL: French Cuisine



ON THE MENU

Last month we looked at Native American cuisine, hush puppies, non-alcoholic beverages on tap, coconut milk, Aleppo pepper, and egg white dishes.

IN APRIL: Arepas, Galangal, General Tso-style Proteins, Alternative Oils, Baja Cuisine, Pretzel Crusts



INTERNATIONAL CONCEPTS

Last month we started to switch it up and looked at a single menu category around the world, starting with sandwiches, from smørbrød in Norway to tripetas in Puerto Rico.

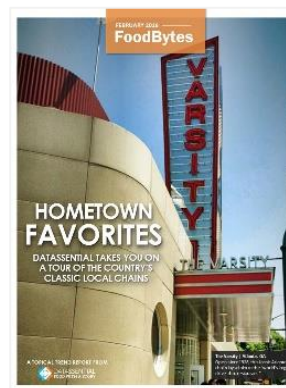
IN APRIL: Fried Chicken Around the World



CREATIVE CONCEPTS

With patient satisfaction scores driving reimbursement rates, hospitals cross the country are revamping their dining programs.

IN APRIL: Business & Industry



FOODBYTES

Datassential took you on an immersion tour of the country's classic restaurant chains, seeking out the signature menu items that keep locals coming back.

IN APRIL: TrendSpotting Redesigns

For information about an issue or to subscribe to a title, contact
Datassential Senior Publications Manager Mike Kostyo
at **312-219-6435** or **mike@datassential.com**.

Datassential releases its latest report in the Topical Keynote series.

Colleges & Universities

We've asked the questions and mined the data,
presenting the insights on:

Colleges & Universities

- **Profile of the C&U operator**-- Who they are by demographic and experience in addition to how, what, and why they purchase, as well as what they desire in the purchasing process, and how students influence their initiatives and choices.
- **Opportunities at C&U beyond traditional on-campus dining**-- We explore what operators menu and how they innovate, their wants, gaps, motivations and challenges, additional foodservice and retail measures beyond traditional campus dining employed to increase revenue streams, and the competition from off-campus options.
- **Operator current & future offerings and processes**-- Including cuisine types and specific menu items, menu planning, dining hall and retail re-designs and renovations, equipment and technology usage, and marketing methodologies.
- **Role of the student in the campus dining and on-site retail environment**-- With input from current students, we review student dining behaviors, satisfaction levels, perceptions, expectations, and primary motivators (besides hunger!).
- **Student views on food**-- We examine student dining and spending habits along with their food attitudes, how and where they source information for their dining options, and how the C&U experience shapes future food preferences and choices.
- **Includes an IDEA tabulation and analysis tool.**

Topical Keynote Reports are
priced at **\$6,500 per topic.**

Package pricing is available
with the purchase of
multiple topics.

Across nearly 5,000 colleges and universities, operators purchase nearly \$7 billion in food and beverage, with student consumers spending over **\$17 billion per year on campus dining.** Learn what inspires students' on-campus and retail food purchasing decisions and understand operators' plans and processes, respond to their existing needs, and uncover opportunities for satisfying future wants.

Topical Keynotes combine the opinions and behaviors of consumers with insights from operators polled using Datassential's OPERA panel, the industry's largest, with over 30,000 restaurant, retail and on-site operators.



Topical
Keynote Reports

For questions or to purchase the report, please
contact **Brian Darr** at **312.655.0594** or
brian.darr@datassential.com



TRENDSPOTTING

With 70 issues released each year, Datassential's TrendSpotting Report series turns you into the **trend expert**, giving you real-world context for every step of the **product development process**, from ideation to marketing to reconcepting. You won't find another industry resource covering these topics with this **detail**, all combined with Datassential's unparalleled **market research** and **industry insights**. And it's all searchable in Datassential's SNAP! – data and research on every trend, dish, and flavor you can imagine is **only a click away**.



DINE AROUND

Support or replace your immersion tours around the country with *Dine Around*. These are the **trends to know in a single market**, ready to inspire your next product or concept.



WORLD BITES

Truly understand **global flavors**, with U.S. menu examples and a full page of demographic data on dishes, flavors, and ingredients from countries and regions around the world.



ON THE MENU

The easiest way to understand trends – **six trends every month**, complete with data and real-world context. Plus keep an eye on the industry with our monthly news roundup.



INTERNATIONAL CONCEPTS

No other industry resource covers **the global chain restaurant scene** like *International Concepts*, with issues covering both single countries and menu categories.



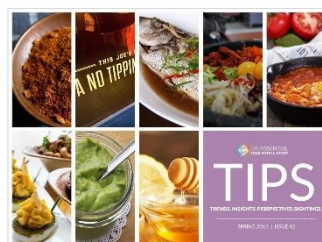
CREATIVE CONCEPTS

Understand the **industry concepts behind the trends** and you'll discover new ideas and ways to market and position products and menu items.



FOODBYTES

Ask us about subscribing to Datassential's **free industry TrendSpotting Report**, a monthly resource covering the latest market research, trends, and concepts.



TIPS

The most **in-depth trend publication** in the industry, covering eight trends across Datassential's Menu Adoption Cycle, from the cutting edge to the well-known. You'll find a trend prognosis, menu and retail examples to provide real-world context, and both consumer and operator data.

To begin your TrendSpotting subscription, contact Datassential Senior Publications Manager Mike Kostyo at **312-219-6435** or **mike@datassential.com**.

Datassential releases its latest report in the MenuTrends Keynote series

Alcoholic Beverages

Discover all of the following insights on
Alcoholic Beverages

- **Details on the current alcoholic beverage landscape for beer, wine, spirits, and cocktails** - menu penetration, recency and frequency, varieties consumers are drinking, consumption by meal part, and where they are consumed, at-home or away-from-home
- **Alcohol drivers and barriers both at-home and away-from-home** - as well as alcohol perceptions, attribute importance, and affinity by category
- **Extensive menu detail** - covers top menued beers, wines, spirits, and cocktails along with menu adoption cycles for alcohol categories, with fastest-growing ingredients and flavors
- **Flavor deep dives** - extensive detail on top flavor trends by region, restaurant segment, chain and independents. Also includes alcohol MegaTrends, seasonal flavors, and a spotlight and time trend on noteworthy ingredients
- **Operator usage detail** - which products and formats operators are using, brand importance for those formats and challenges to selling
- **Innovation and Opportunities** - products, flavors, and platform innovations for foodservice and retail
- Includes an **IDEA** tabulation and analysis tool



Datassential is proud to release the latest report in the **MenuTrends Keynote** series delving into alcoholic beverage consumption and trends. **MenuTrends Keynotes** combine the extensive detail of **MenuTrends** with the opinions and behaviors of over 1,000 consumers nationwide and insights from hundreds of operators from **Datassential's** OPERA panel, the industry's largest with over 30,000 restaurant, retail and on-site operators.

MenuTrends Keynote

Reports are priced at
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Package pricing is available
with the purchase of
multiple topics.



DATASSENTIAL
FOOD WITH A STORY

MENUTRENDS
KEYNOTE REPORTS

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