Supplemental Document
Qualitative and Quantitative Research

Updated September 27, 2019

Queen's University

KAIZEN
FOODSERVICE PLANNING & DESIGN INC.

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1.0 Background

KAIZEN Foodservice Planning & Design was engaged by Queens University in October 2018 to provide dining services consultation. As part of the dining services consultation, qualitative and quantitative customer research was undertaken in the form of town hall sessions and an online survey. The primary objective was to gain insight on future desires and opportunities for both resident dining and on-campus retail food service offering.

The process for facilitation of customer research was as follows:

Open House / Town Halls

- Develop key discussion topics Jan- Feb 2019
- Co-ordinate schedule and locations Feb 2019
- Facilitate Town Halls Mar 4-6, 2019
- Collect data and summarize findings April-June 2019

Customer Survey

- Develop online survey Jan- Feb 2019
- Release via campus communications Mar 4, 2019
- Provide opportunity for response Mar 4-22, 2019
- Collect data and summarize findings April-June 2019

Key findings of the qualitative and quantitative customer research have been summarized in the document that follows.

2.0 Qualitative Research: Town Hall Events

A total of six (6) two-hour town hall sessions were conducted over three days March 4th, 5th, and 6th. Sessions were held at high-traffic dining locations and strategically timed around meal periods to maximize feedback and participation.

Locations included: Leonard Dining Hall, Ban Righ Dining Hall, Jean Royce Dining Hall, Mackintosh Corry Hall, Queens Centre and Botterell Hall.

A total of 775 unique comments, interactions or feedback events were provided by the Queen's campus community throughout the three-day period, with Leonard Dining Hall, Ban Righ Dining Hall, and Queens Centre having the greatest participation, as noted in figure 2.1.

2.1 Location and Response Volume

Location	Responses
Leonard Dining Hall	223
Ban Righ Dining Hall	162
Queens Centre	159
Jean Royce Dining Hall	95
Botterell Hall	83
Mackintosh Corry Dining Hall	53

2.0 Qualitative Research: Town Hall Events

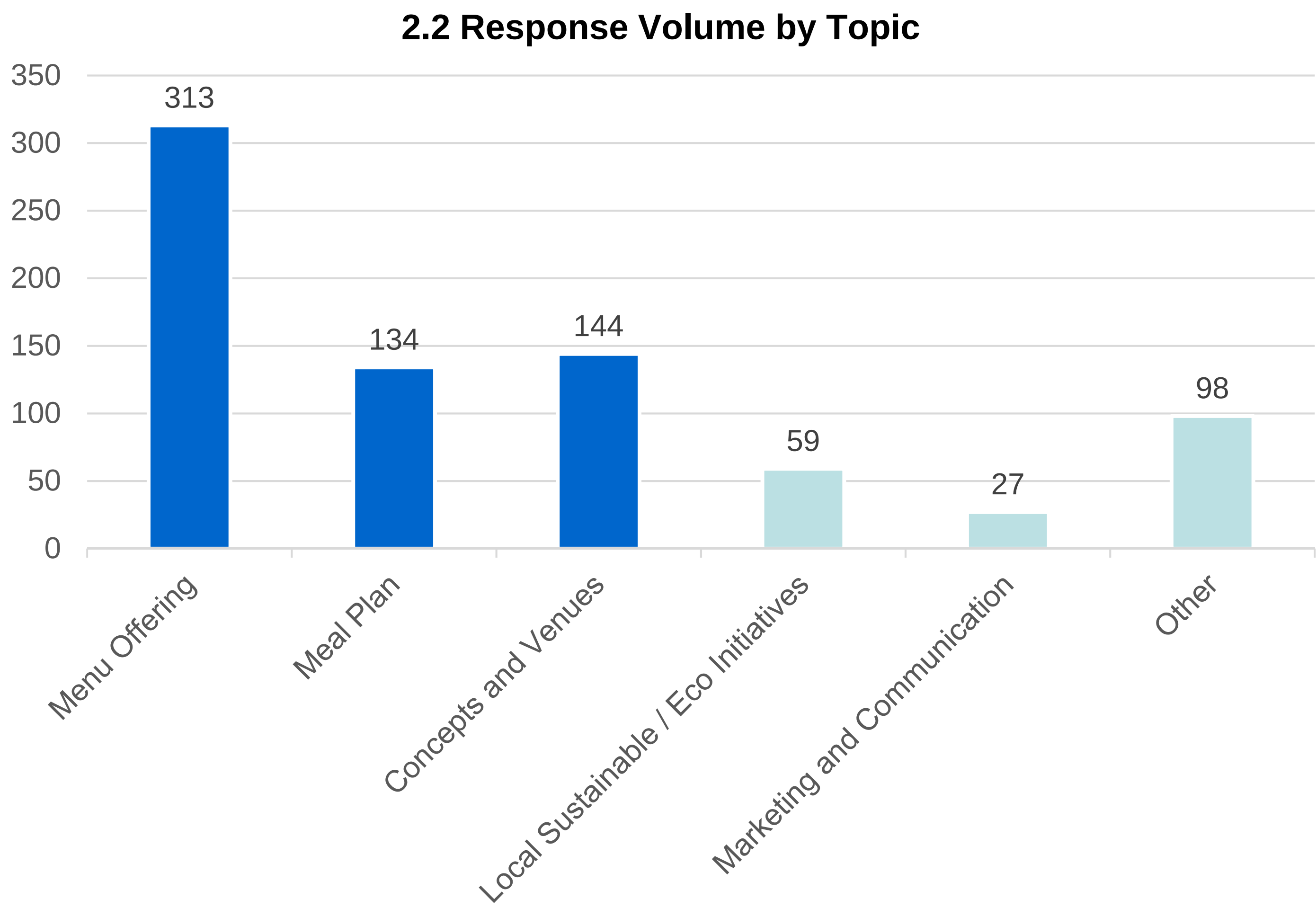
The Town Hall format consisted of a themed board for each topic, whereby individuals were encouraged to add comments to the boards and/or engage in discussion with consultants about the topics.

Key Topics for discussion were as follows:

- Concepts and Venues
- Menu Offering
- Local, Sustainable / Eco Initiatives
- Meal Plan Considerations
- Marketing, Technology and Communication
- Other Considerations

2.0 Qualitative Research: Town Hall Events

The most popular topic for discussion was Menu Offering which generated over 300 comments from the campus community. Concepts and Venues and Meal Plan were also high generators of discussion with 144, and 132 comments respectively.



2.0 Qualitative Research: Town Hall Events

Menu Offering

With respect to Menu Offering, the majority of feedback was centered around healthy offerings.

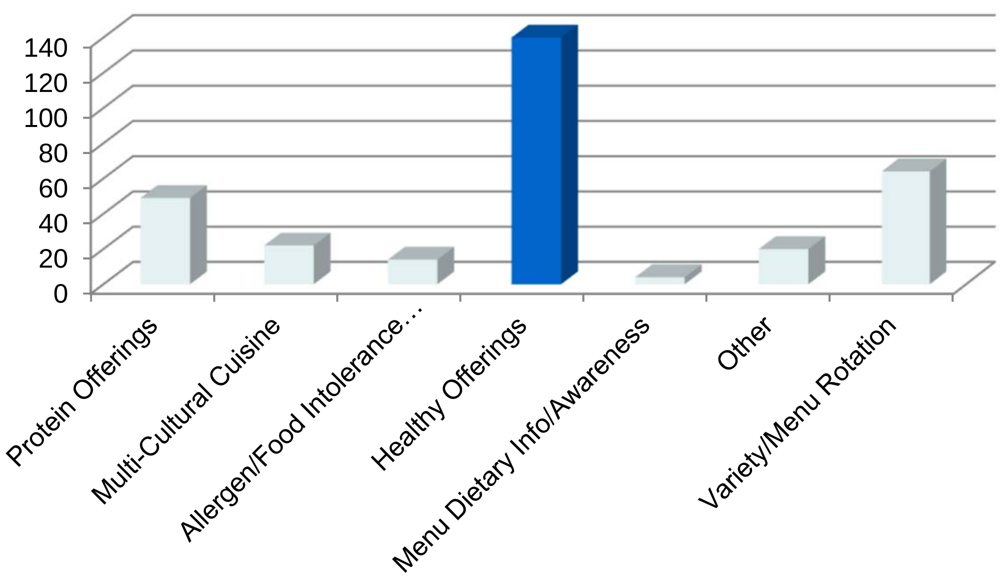
Many of the comments indicated a desire for increased fresh minimally processed offerings such as fruits, vegetables, lean proteins, and plant-based options.

Local and sustainable menu options were also noted as highly important factors (e.g. antibiotic free meat or organic produce).

The word cloud below provides a visual representation of the Healthy Offering feedback at the highest traffic location, Leonard Hall.

2.3 Healthy Offering Word Cloud Leonard Hall

2.4 Desired Menu Offerings



2.0 Qualitative Research: Town Hall Events

Menu Offering

There was also a desire for diverse protein options, cultural authenticity and variety, and overall menu diversity.

Of note, healthy offerings were a strong desire in both resident and retail areas.

Variety and diversity of offerings was strongly desired in resident dining locations.

2.5 Menu Offering Feedback Summary

MENU OFFERING	TOTALS	Resident Dinin Halls	% of RDH	Retail Venues	% of RV
Protein Offerings	49	44	20%	5	6%
Multi-Cultural Cuisine	22	14	6%	8	9%
Allergen/Food Intolerance Offerings	14	11	5%	3	3%
Healthy Offerings	140	91	41%	49	55%
Menu Dietary Info/Awareness	4	4	2%	0	0%
Other	20	6	3%	14	16%
Variety/Menu Rotation	64	54	24%	10	11%
	313	224	100%	89	100%

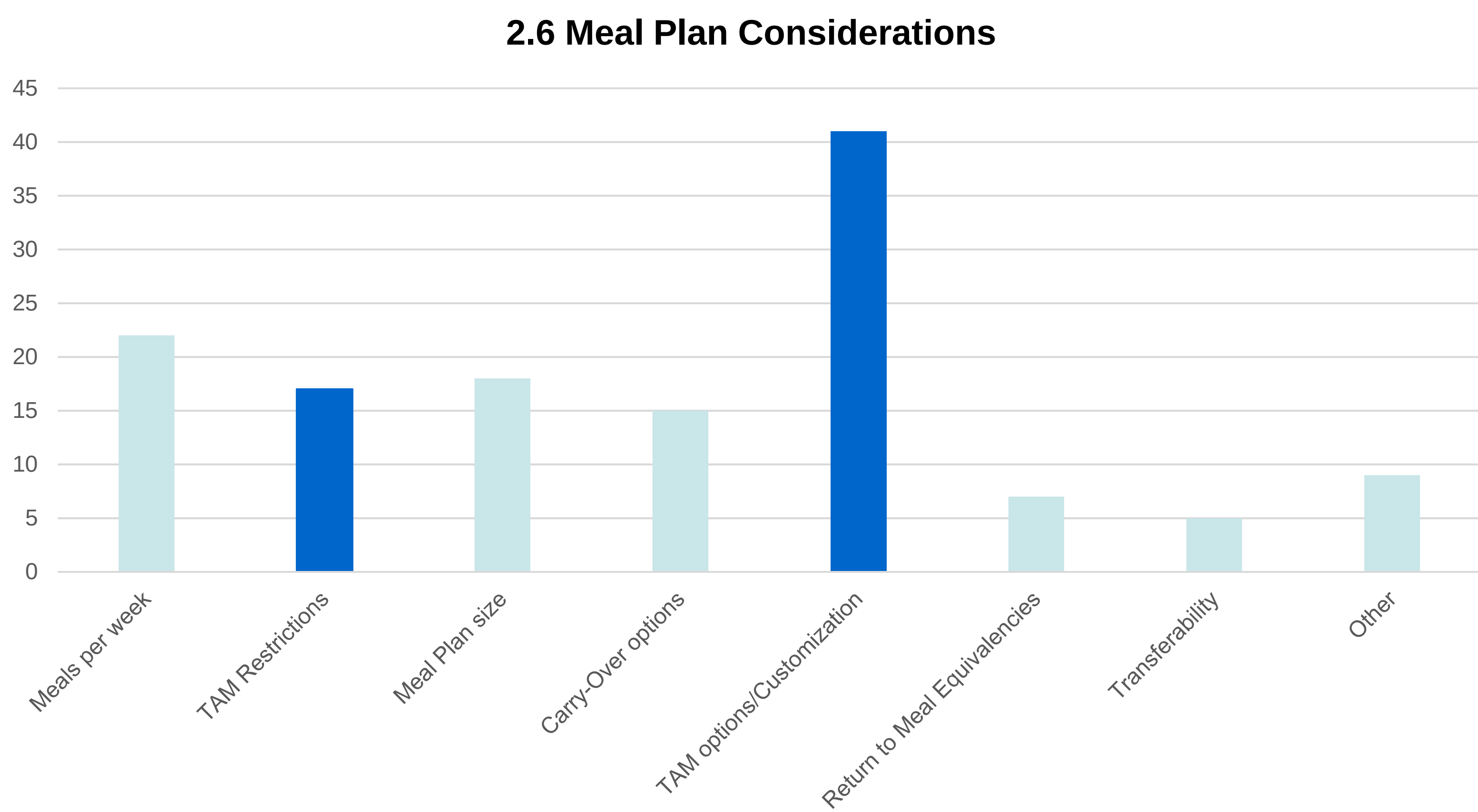
A summary of key themes within each menu offering topic is provided below:

Protein Offerings	• Plant based protein, Halal, lean protein options, high quality meat, less pork
Cultural Variety	• Asian, Middle Eastern, Indian, Italian, spicy food
Menu Diversity	• Smoothies, 'build your own' concepts, soup/salad variety, late night options, less menu repetition

2.0 Qualitative Research: Town Hall Events

Meal Plan Considerations

The majority of meal plan feedback received was focused on customizability and flexibility of TAM's (Trade a Meal). This included a desire to carry over TAM's to the next academic year, offer TAM's as a guest meal to visitors, and for less restrictive TAM options at venues (i.e. access to full menu beverage selection such as milk).



2.0 Qualitative Research: Town Hall Events

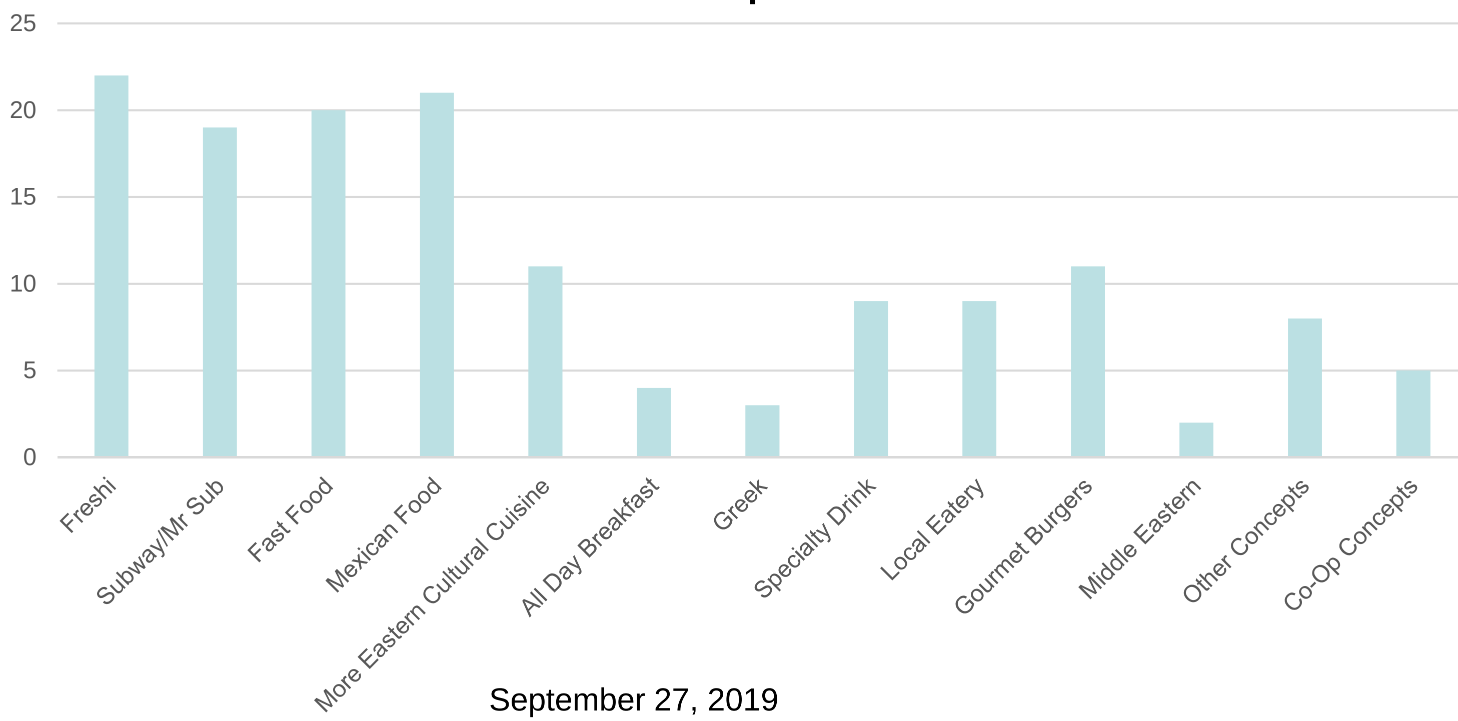
Concepts and Venues

Feedback received around desired concepts and brands was highly diverse, which aligns with the earlier noted feedback regarding increased variety and diversity of menu offering overall.

Of the concepts noted, fresh ‘build your own’ sandwich/salad concepts (i.e.. Freshii and Subway) were highly desirable, along with ethnic offerings such as Mexican and Eastern cuisine (Asian, Indian, Sushi, etc.)

In contrast to some of the healthier options noted, quick serve/ popular fast food concepts were also strongly desirable. Brands noted included McDonalds, Wendy’s, Dairy Queen, and Popeyes.

2.7 Concepts Desired



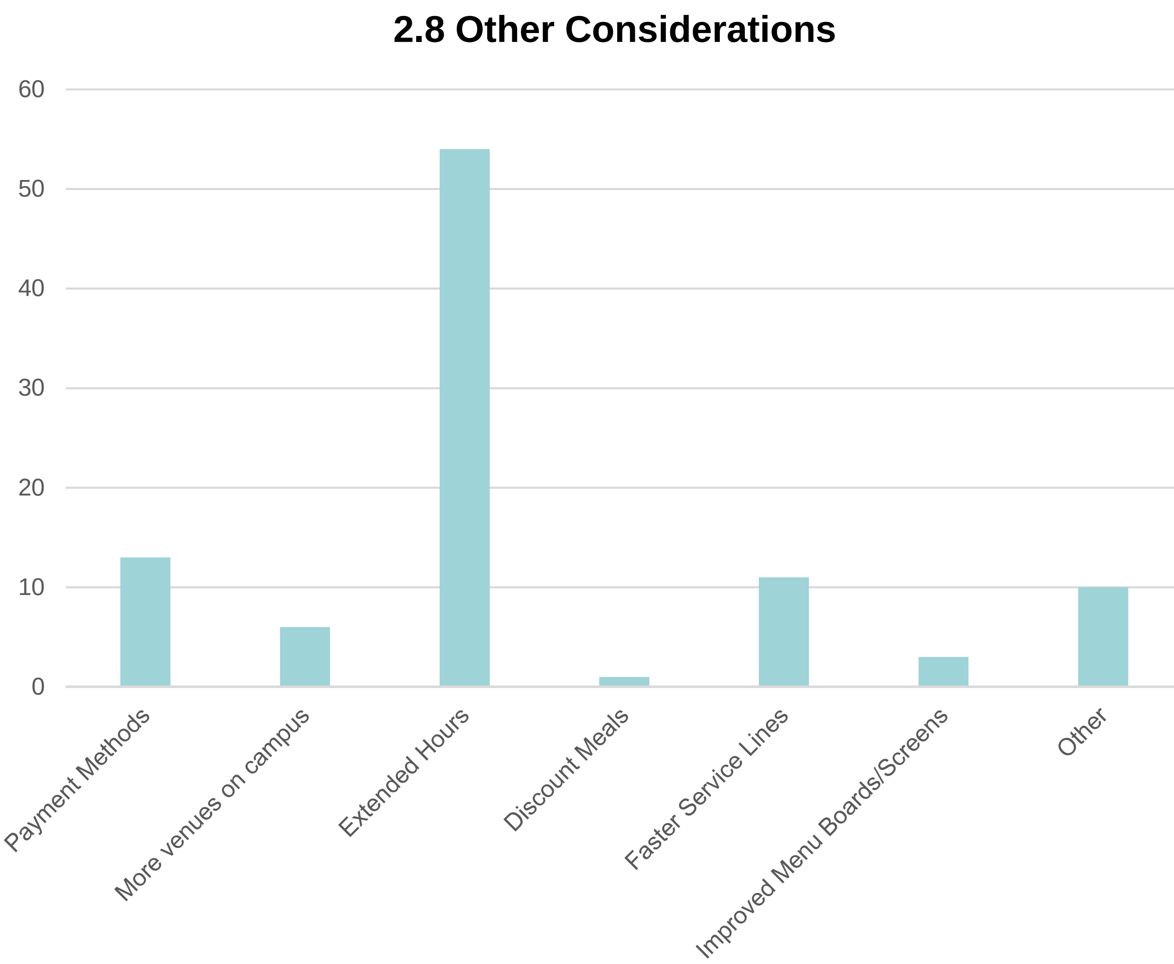
2.0 Qualitative Research: Town Hall Events

Other Considerations

When asked to provide feedback about any other areas or topics related to dining services, extended hours were the most notable desire.

This included both extended meal periods in residence and earlier opening/later closing times in retail venues.

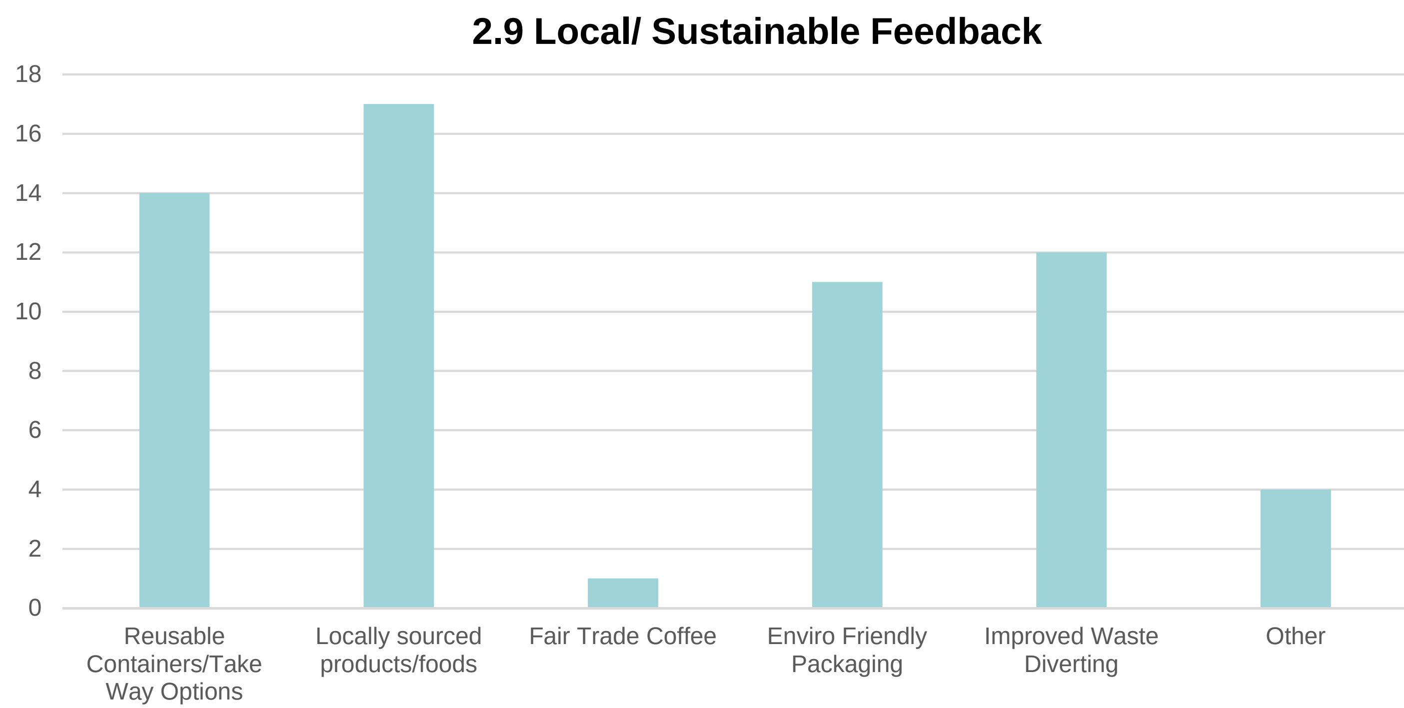
A desire to use alternative payment methods at venues (i.e. credit card), as well as enhanced service were also noted as key themes.



2.0 Qualitative Research: Town Hall Events

Local Sustainable / Eco Initiatives

With respect to local, sustainable and eco initiatives, increased local options was the most notable feedback received. Environmentally friendly containers were also a strong focus. This included both a desire for reusable mug or container programs with incentives (i.e. discounts) and eco-friendly (compostable) take away containers, cutlery and lids. Improved waste diversion, particularly around composting was also noted in several comments.



3.0 Quantitative Research: Customer Survey

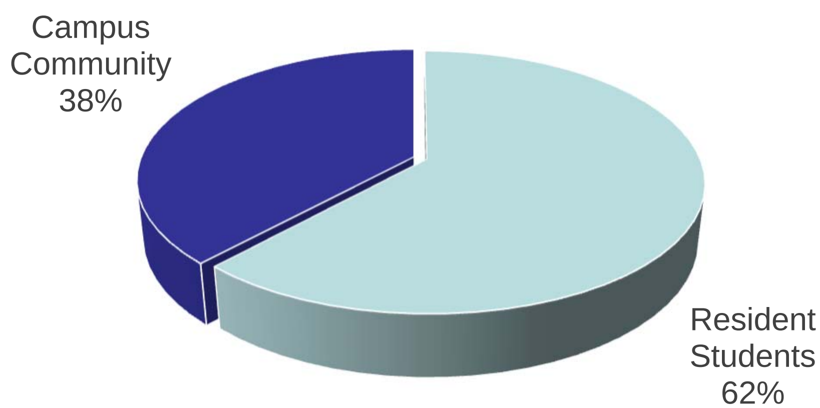
An electronic customer survey was released to the campus community through campus communications on March 4th and closed on March 22nd, 2019. The survey was widely distributed across resident and non-resident students, staff and faculty.

The survey included opportunity for feedback on several topics including level of satisfaction with current meal plan and concept offering, purchasing habits, future desires and factors that impact food choices.

A total of 1,062 survey responses were received and analyzed. Over one third (38%) of respondents identified as members of the campus community with the remaining 62% of respondents coming from the resident student population.

The remaining slides have tabulated results of the Campus Community and Resident Student responses independently.

3.1 Survey Response



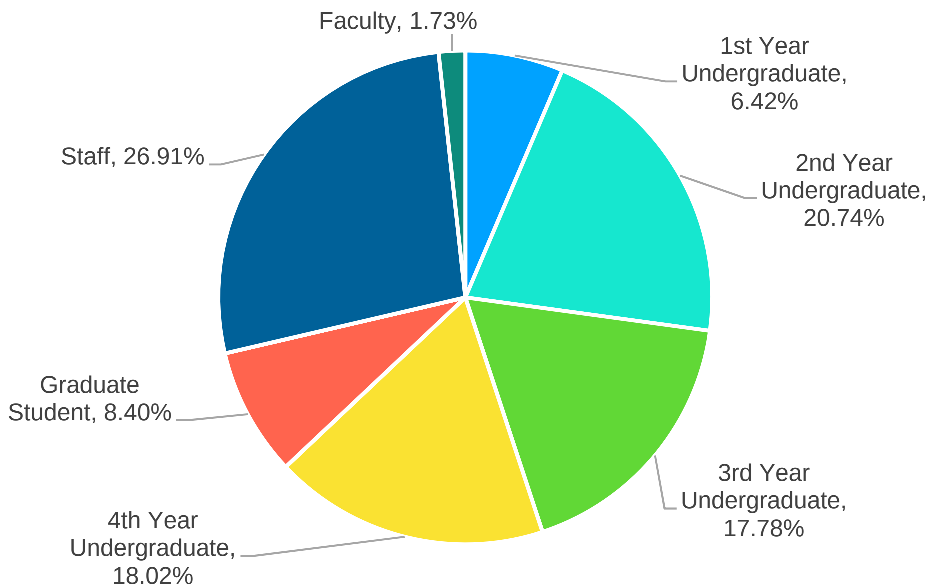
3.1 Quantitative Research: Campus Community Survey

The demographics of the campus community survey respondents were highly diverse and included students from all year of study, as well as graduate students, faculty and staff.

Over half of responses, 63%, were non-resident undergraduate students, approximately 29% were staff or faculty, and 8% were graduate students.

The majority of respondents, over 85% were full-time students, faculty or staff.

3.1 Campus Community Demographics



3.2 Number of Days on Campus per Week

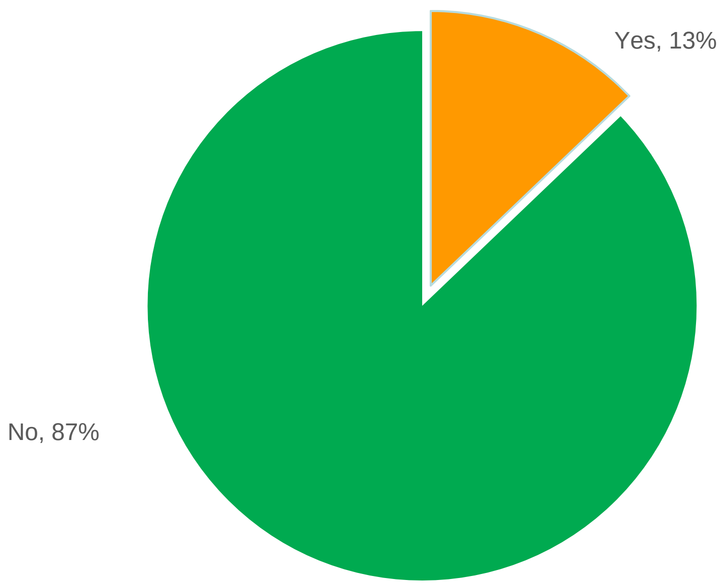
Response	%	Count
1 day per week	1.25%	5
2 day per week	2.00%	8
3 day per week	2.75%	11
4 day per week	6.75%	27
5 day per week	45.00%	180
6 day per week	18.75%	75
7 day per week	23.50%	94
Total	100%	400

3.1 Quantitative Research: Campus Community Survey

The majority of the campus community respondents had not purchased a meal plan for the current academic year.

When asked what factors would influence a future meal plan purchase, availability of smaller plans as well as financial incentives including loyalty programs and discounts were most influential. Convenience of food location relative to work space/ office and the ability to have flexible plans (i.e. TAM only plan or increased flex dollars) were also noted as desirable.

3.3 Campus Community Meal Plan Holders



3.4 Factors that contribute to purchasing a plan

Answer	%	Count
Smaller plans	18.19%	147
Increased number of TAMs	8.66%	70
TAM only plan	9.28%	75
More flex dollars	11.63%	94
Financial incentives (i.e. discounts, loyalty program)	26.24%	212
Use of flex dollars in vending machines	3.71%	30
Another food outlet location more convenient to you	11.26%	91
Other:	3.59%	29
Nothing	7.43%	60
Total	100%	808

3.1 Quantitative Research: Campus Community Survey

Over 45% of respondents from the campus community noted bringing meals from home 3 days per week or more. Approximately 30% of respondents also noted that they rarely (a few times per month) or never bring meals from home.

Of note, while many respondents noted bringing meals from home, almost 50% of respondents noted supplementing food from home with a purchase on campus ‘Often’ or ‘Always.’ While specific supplementation purchases were not analyzed, this could be a snack, beverage, or side dish to complement a home brought meal.

3.5 Frequency of Bringing Meals From Home

Answer	%	Count
Daily	15.52%	61
3-4 Times per week	32.06%	126
1-2 Times per week	22.90%	90
A few times per month	10.69%	42
Never or very rarely	18.83%	74
Total	100%	393

3.6 Level of Supplementation with Purchase on Campus

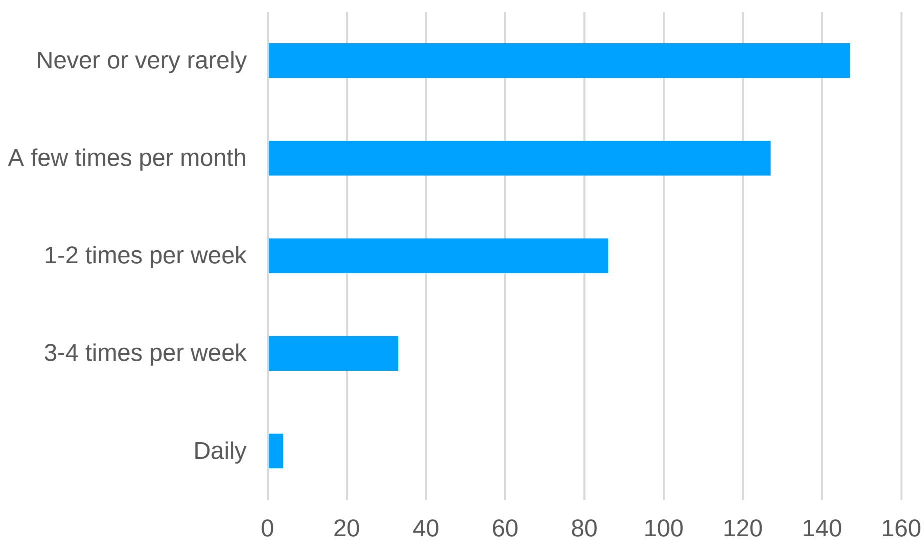
Answer	%	Count
Always	6.28%	25
Often	43.22%	172
Rarely	39.70%	158
Never	10.80%	43
Total	100%	398

3.1 Quantitative Research: Campus Community Survey

When asked how often respondents left campus to purchase food, it was noted that frequency was low, with only 9% of respondents making off campus purchases 3 times per week or more. 70% of respondents noted they do not regularly make off campus purchases (Never or very rarely / A few times per month).

There was, however, some interest in using flex dollars to make purchases at off campus venues, particularly for delivery options such as pizza (31% of responses) or fast food (18% of responses).

3.7 Frequency of Purchasing Food Off Campus



3.8 Interest in Using Flex Dollars off Campus

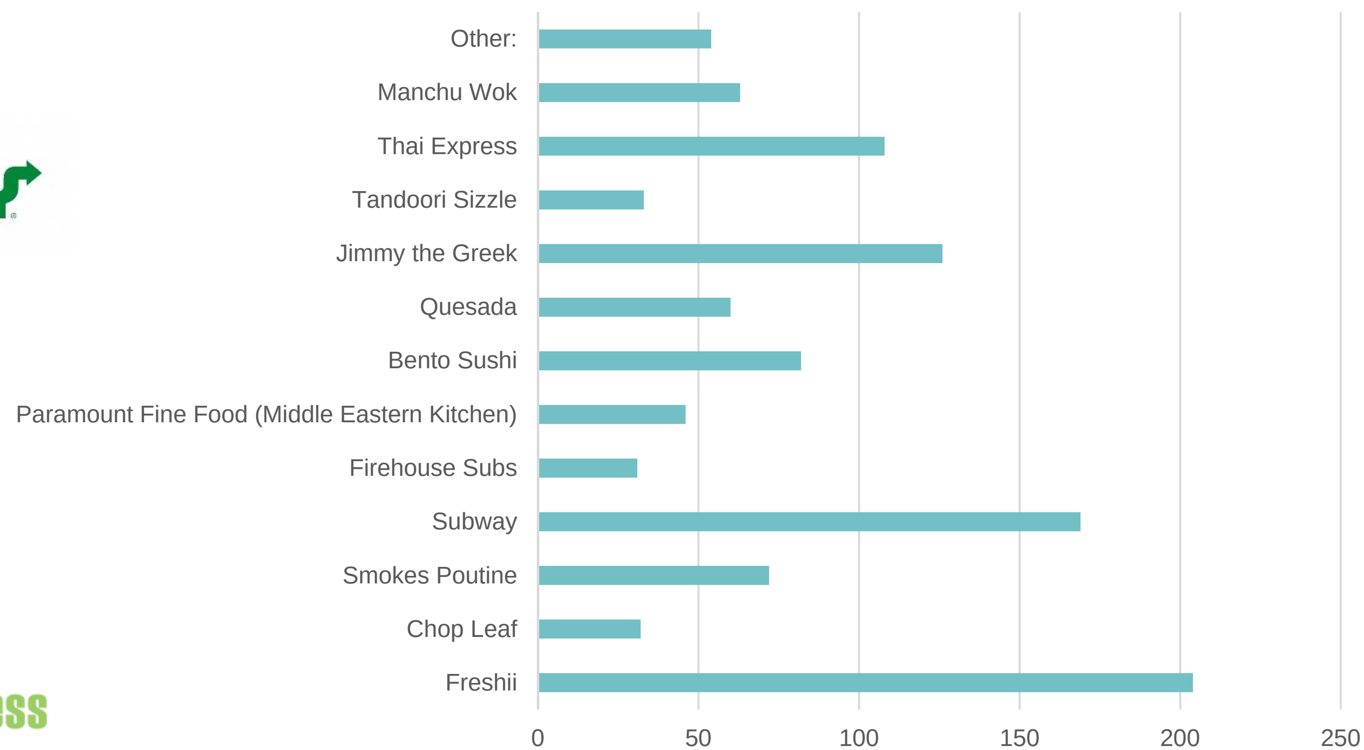
Answer	%	Count
Yes	45.15%	177
No	54.85%	215
Total	100%	392

3.1 Quantitative Research: Campus Community Survey

When asked what brands and concepts were most desired on campus, there was a strong desire for ‘build your own’ salad and sandwich concepts such as Freshii (18%) or Subway (15%)

Other popular concepts included more ethnic cuisines such as Jimmy the Greek (11%), Thai Express (9%), and Bento Sushi (7%).

3.9 Concepts Desired

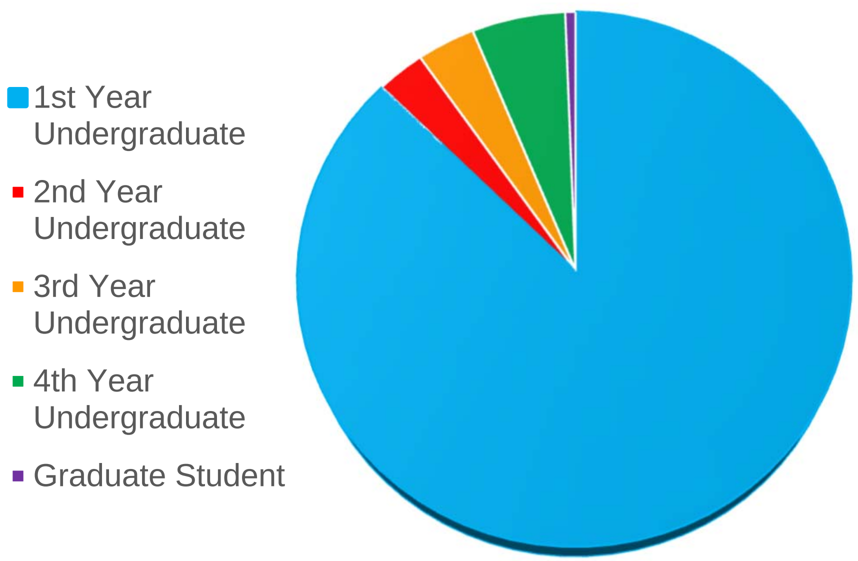


3.2 Quantitative Research: Resident Student Survey

A majority of respondents in the resident student survey were first year students (87%), half of which were on a meal plan. Of those on meal plans, 97.5% had the 'Weekly 19' residence plan.

Locations of residence were highly varied, with the most students living in Victoria Hall (19.9%), followed by Jean Royce Hall (13.8%), and Gordon/Brockington House (9.7%).

3.10 Resident Student Demographics



3.11 Location of Residence

Answer	%	Count
Adelaide Hall	2.96%	18
Ban Righ Hall	1.81%	11
Brant House	5.76%	35
Chown Hall	3.95%	24
David C. Smith House	1.48%	9
Gordon/Brockington House	9.70%	59
Graduate Residence (JDUC)	2.63%	16
Harkness Hall	3.62%	22
Jean Royce Hall	13.82%	84
Leggett Hall	5.76%	35
Leonard Hall	6.91%	42
McNeill House	5.43%	33
Morris Hall	4.28%	26
Victoria Hall	19.90%	121
Waldron Tower	8.39%	51
Watts Hall	3.62%	22
Total	100%	608

3.2 Quantitative Research: Resident Student Survey

Resident students were asked to rate their level of satisfaction with the current meal plan. Highest levels of satisfaction were noted around flexibility of the meal plan and TAM's.

Approximately 78% of respondents were somewhat satisfied, satisfied or very satisfied with the flexibility of their meal plan, and 72% were satisfied or very satisfied with TAM's.

The perceived value of the meal plan was also notable, with almost half of respondents reporting somewhat satisfied, satisfied or very satisfied with the value of the meal plan.

The highest level of dissatisfaction was noted around the availability of meal choices, with approximately 35% of respondents reporting being somewhat dissatisfied or very dissatisfied.

3.12 Level of Satisfaction with the Meal Plan

Question	Very Satisfied (5)		Satisfied (4)		Somewhat Satisfied (3)		Somewhat Dissatisfied (2)		Very Dissatisfied (1)	
Value of Meal Plan	13.80%	82	30.47%	181	31.65%	188	16.16%	96	7.07%	42
Flexibility of Meal Plan	19.36%	115	32.66%	194	25.93%	154	14.65%	87	7.07%	42
Availability of Meal Choices	10.12%	60	22.60%	134	31.87%	189	24.28%	144	10.96%	65
TAMs (Trade A Meals)	41.08%	244	31.82%	189	14.81%	88	7.58%	45	4.71%	28

3.2 Quantitative Research: Resident Student Survey

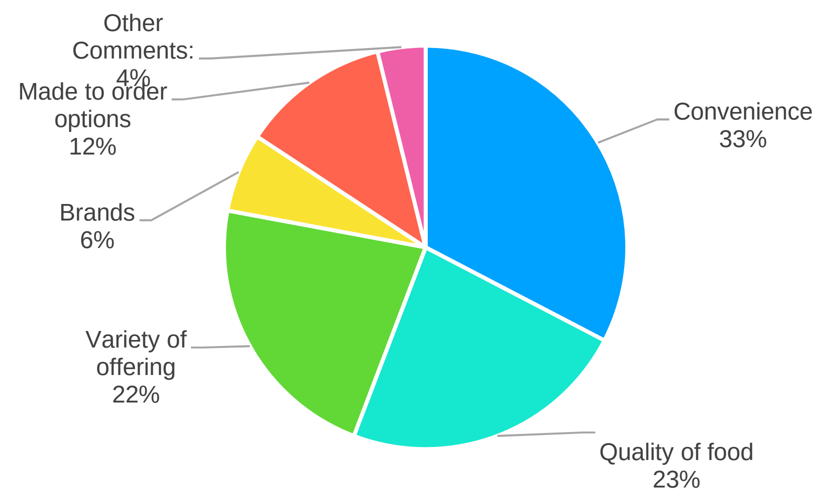
When asked about TAM usage, the most common reason for using a TAM was convenience.

Variety of offering and perceived quality were also a key influencer of TAM usage, with over 20% response rate. Of note, brands were not rated as a strong influencer of TAM usage.

With regards to overall satisfaction with TAM's, there was strong satisfaction with the number of TAM's available, convenience or ease of access and perceived meal value.

There was some dissatisfaction noted around the number of options available and variety of TAM's at each location, as illustrated in figure 3.14 below.

3.13 Reasons for Using TAM's



3.14 Level of Satisfaction with TAM's

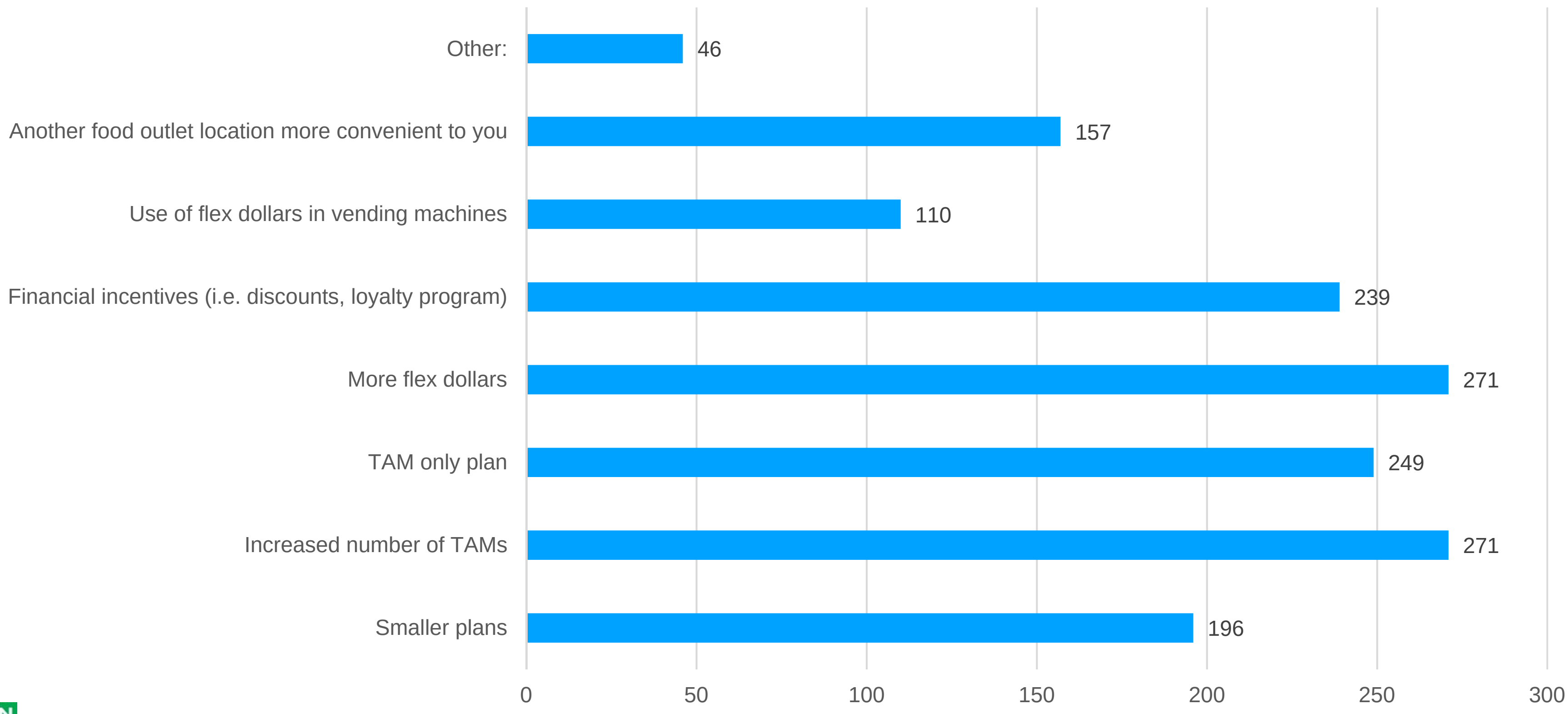
Question	Very Satisfied (5)		Satisfied (4)		Somewhat Satisfied (3)		Somewhat Dissatisfied (2)		Very Dissatisfied (1)	
Number of TAMs available with plan	45.97%	268	31.39%	183	12.69%	74	5.49%	32	4.29%	25
Number of options with a TAM	29.50%	172	37.91%	221	18.18%	106	10.12%	59	4.12%	24
Variety of TAMs at each location	28.60%	167	33.22%	194	25.34%	148	8.39%	49	4.11%	24
Convenience and ease of access	51.98%	302	30.29%	176	11.88%	69	4.48%	26	1.03%	6
Value of an individual TAM	36.43%	212	31.96%	186	19.59%	114	8.59%	50	3.09%	18

3.2 Quantitative Research: Resident Student Survey

When asked what factors would be most influential in purchasing a future meal plan, increased flex dollars and number of TAM's were highest rated, each with 271 responses.

Other factors that were noted to be influential were: the potential for a TAM only plan (249 responses), financial incentives (239 responses), and availability of smaller meal plans (196 responses).

3.15 Factors that will most influence future meal plan purchase



3.2 Quantitative Research: Resident Student Survey

Respondents were asked to provide feedback on a number of elements of the overall dining hall offering. High satisfaction levels were noted around location, atmosphere, cleanliness, community experience and customer service. All of the factors listed above received a ranking of 'satisfied' or 'very satisfied' in 60% or more of the responses.

Potential opportunities are in variety, greater level of healthy and multicultural options and presentation. In particular, availability of healthy options, multicultural options and variety of offering received the lowest ratings with approximately 1/3 of respondents noting they were somewhat dissatisfied or dissatisfied with each of the above factors.

3.16 Satisfaction with Resident Dining Halls

Question	Very Satisfied (5)		Satisfied (4)		Somewhat Satisfied (3)		Somewhat Dissatisfied (2)		Very Dissatisfied (1)	
Location relative to your Residence	58.43%	343	18.23%	107	8.52%	50	4.77%	28	9.88%	58
Quality of food	3.75%	22	22.70%	133	43.34%	254	19.97%	117	10.24%	60
Presentation of food	7.17%	42	25.43%	149	38.40%	225	19.97%	117	8.19%	48
Variety of offerings	7.34%	43	22.53%	132	36.18%	212	23.38%	137	10.58%	62
Multicultural food options	7.18%	42	20.00%	117	30.94%	181	20.85%	122	15.04%	88
Availability of healthy options	8.36%	49	22.53%	132	30.03%	176	24.40%	143	14.33%	84
Accommodate special needs or diets	14.73%	86	20.21%	118	22.95%	134	14.38%	84	5.65%	33
Locally-sourced menu options	9.22%	54	27.30%	160	32.25%	189	16.04%	94	5.97%	35
Cleanliness	21.33%	125	39.59%	232	27.65%	162	8.36%	49	3.07%	18
Community experience	25.13%	147	36.75%	215	27.69%	162	7.18%	42	1.88%	11
Customer service	29.35%	172	37.03%	217	23.89%	140	6.83%	40	2.73%	16
Operating hours	12.99%	76	24.62%	144	27.52%	161	22.05%	129	12.65%	74
Atmosphere of seating area	26.93%	157	40.14%	234	25.39%	148	5.83%	34	1.37%	8

3.2 Quantitative Research: Resident Student Survey

When asked what factors were most important when dining on campus, 70% of respondents ranked variety of menu items and availability of healthy options as 'very important.'

Other key factors included: environmentally friendly (48% ranked as very important), vegetarian/vegan offerings (47% ranked very important), speed of service (46% ranked very important), and allergies/special diets (each with 45% ranked very important).

3.17 Important factors are when eating at Jean Royce, Leonard or Ban Righ Dining Halls:

Question List	Very important		Somewhat important		Neutral		Not very important		Not at all important	
Availability of healthy options	67.15%	419	21.79%	136	8.65%	54	1.76%	11	0.64%	4
Locally-sourced menu options	20.39%	127	28.89%	180	28.25%	176	16.53%	103	5.94%	37
Options for those with allergies	45.19%	282	19.71%	123	23.40%	146	6.25%	39	5.45%	34
Special diets	45.35%	283	18.11%	113	24.68%	154	6.89%	43	4.97%	31
Vegetarian and vegan offerings	46.95%	292	21.22%	132	21.38%	133	5.95%	37	4.50%	28
Posted nutritional Information	44.71%	279	29.17%	182	16.51%	103	6.57%	41	3.04%	19
Variety of menu items	71.18%	442	21.26%	132	5.31%	33	2.09%	13	0.16%	1
Made to order options	35.21%	219	34.57%	215	22.19%	138	6.75%	42	1.29%	8
Speed of service	46.47%	290	37.50%	234	12.18%	76	3.21%	20	0.64%	4
Promotions, incentives, special offers	27.29%	170	29.05%	181	27.77%	173	12.68%	79	3.21%	20
Events/activities	17.17%	107	24.88%	155	30.50%	190	20.39%	127	7.06%	44
Comfort of seating areas	31.51%	196	42.60%	265	17.52%	109	6.91%	43	1.45%	9
Sustainable food sources	40.42%	251	30.27%	188	20.77%	129	6.28%	39	2.25%	14
Environmentally-friendly	48.55%	302	28.14%	175	16.24%	101	4.50%	28	2.57%	16

3.2 Quantitative Research: Resident Student Survey

When asked how often meal plan holders left campus to purchase meals, the majority of respondents noted that off campus purchases were infrequent. Almost 70% of respondents purchase food off campus ‘never or very rarely’ or ‘a few times per month.’

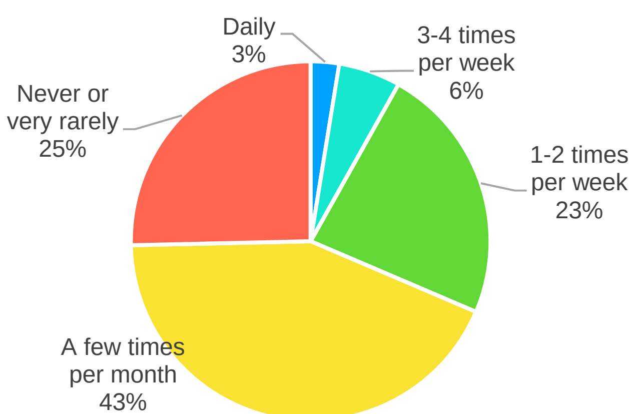
Of the remaining 30% of respondents who do make off campus meal purchases, the most common reasons for leaving campus are variety (21%), quality (22%), healthy options (13%) or to frequent a specific brand not available on campus.

The most common off campus locations visited were local downtown restaurants or a nearby grocery store.

3.19 Reasons for Leaving Campus

Answer	%	Count
Convenience	7.81%	119
Variety	21.13%	322
Speed of service	1.31%	20
Brand not available on campus	16.27%	248
Local concept	1.97%	30
Price	4.92%	75
Quality	22.18%	338
Ethnic options	7.48%	114
Healthy options	13.06%	199
Other (please specify):	3.87%	59
Total	100%	1524

3.18 Frequency of Off Campus Meal Purchases



3.20 Off Campus Locations Frequented

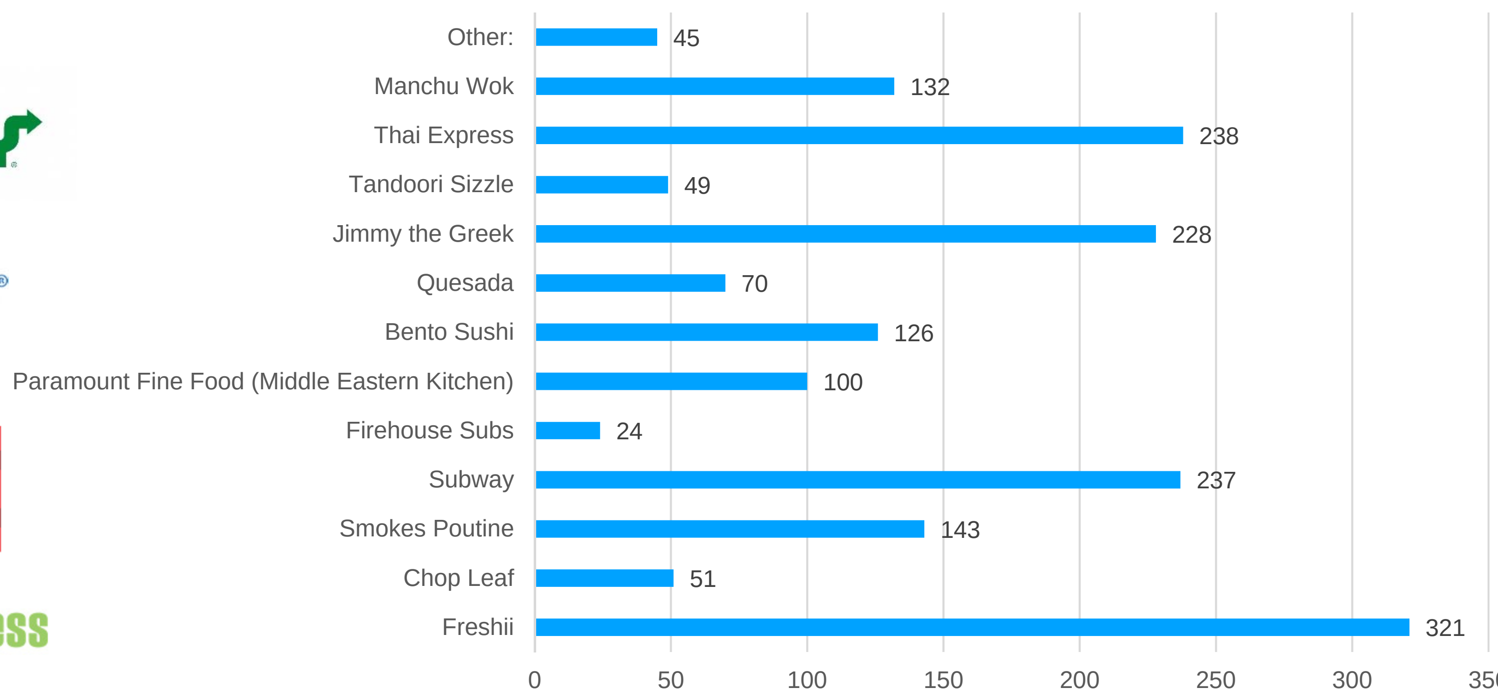
Where do you go:	Responses	%
Grocery (Metro most prevalent)	170	33%
Pizza	34	7%
Asian (Sushi, Thai Express)	64	13%
Downtown Restaurants	212	42%

3.2 Quantitative Research: Resident Student Survey

When asked what brands and concepts were most desired on campus, there was a strong desire for 'build your own' salad and sandwich concepts such as Freshii (321 responses) or Subway (237 responses)

Other popular concepts included more ethnic cuisines such as Jimmy the Greek (228), Thai Express (238), and Smokes Poutine (143). Of note, many of the desired brands in the resident survey were aligned with those in the campus community survey results.

3.21 Desired Brands

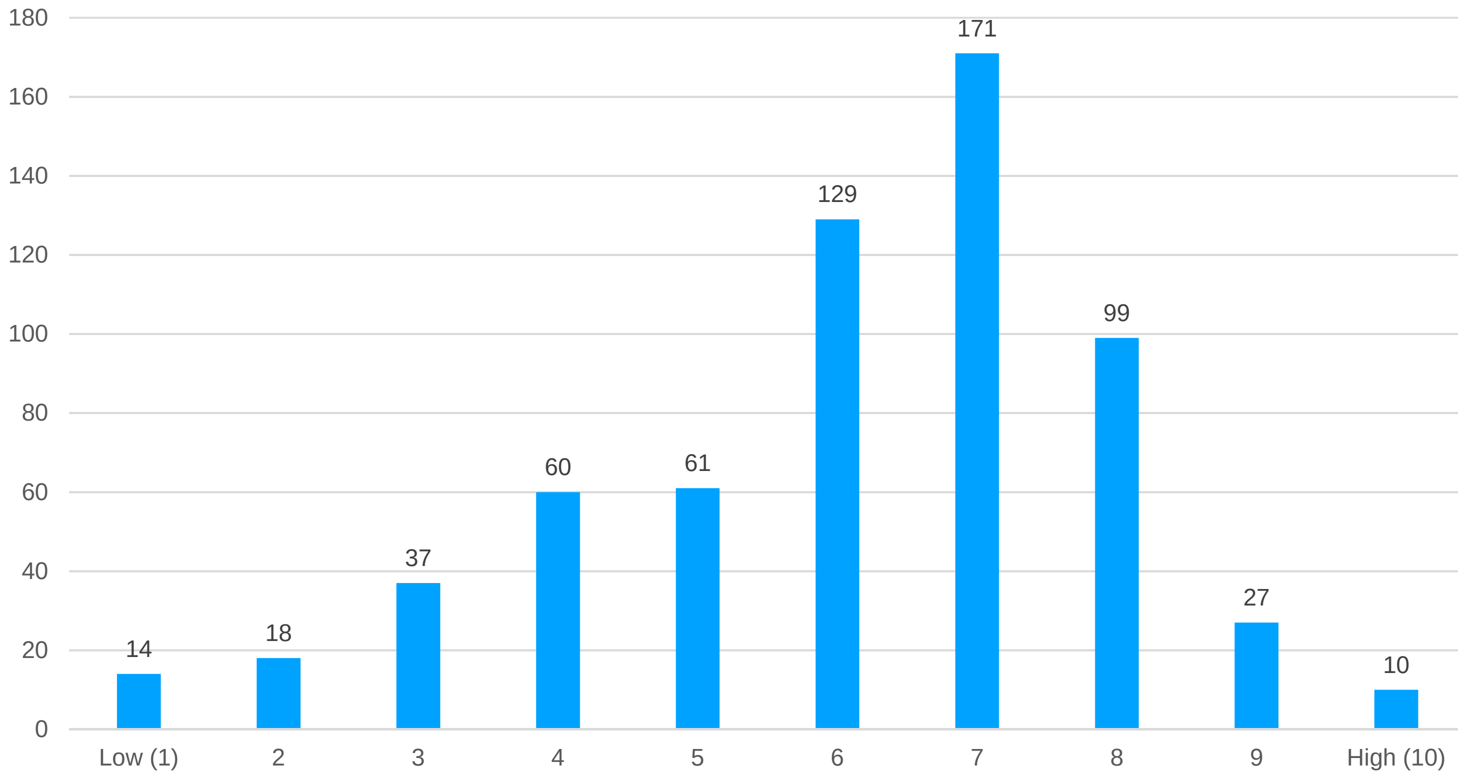


3.2 Quantitative Research: Resident Student Survey

When asked to rate overall satisfaction with campus dining on a scale of one to ten, 70% of respondents reported being moderately satisfied with a numerical rating of 6,7 or 8.

Very few respondents (12%) reported low satisfaction (rating of three or less).

3.22 Overall Satisfaction



4.0 Summary of Market Research

The next several slides provide a summary of the overall feedback received through the dining services market research conducted.

Below is a visual summary which encompasses key themes from both the town hall sessions and campus survey.

The Dining Experience-Qualitative Factors

- Cultural Variety
- Healthy Options
- Diverse Menu
- High Food Quality
- Flexible Meal Plan
- Local/ Sustainable

Future Desires and Opportunities

Concepts

- freshii
- SUBWAY
- Thai express
- Smoke's POUTINERIE
- bento SUSHI
- JIMMY THE GREEK

Meal Plan Options

- Flexible & Customizable
- TAM Options
- Guest Meals
- More Flex $
- Carryover

Customer

- Financial Incentives
- Payment Options (Credit)
- Sustainable programs
- Off campus partners
- Convenient locations

4.0 Summary of Market Research

Summary of key themes identified in town hall sessions

Menu Offering	Concept and Venues	Local, Sustainable / Eco Initiatives	Meal Plan	Other
• Healthy choices • Fresh minimally processed • Protein options (lean meat/ plant-based) • Local/ sustainable • Dietary accommodation • Cultural variety • Menu diversity	• Fresh ‘build your own’ sandwich/ salad • Ethnic offerings such (Mexican / Eastern) • Quick serve/ popular fast food concepts	• Locally sourced foods/ transparent sourcing • Reusable container program/ incentives • Eco-friendly disposables	• TAM flexibility/ customizability/ • Options for carry over, guest meals • More meal plan offerings (smaller plans, TAM/ Flex plans)	• Extended hours/ meal periods • Alternative payment methods (i.e. credit card) • Enhanced customer service

4.0 Summary of Market Research

Summary of Customer Survey Findings

Meal Plan Participation (Resident and Community Survey)

- Key influencers for future meal plan purchases among both groups were centered around availability of smaller plan options (this despite the fact that Queens offers a weekly 5 plan which simply may reflect need for greater marketing and education of plan options), financial incentives (i.e. loyalty program/discount), and increased flexibility of plans (i.e. TAM / Flex dollars)
- While a large proportion of the campus community brings meals from home, supplementation of a home brought meal with campus offerings was common

Off Campus Locations (Resident and Community Survey)

- Frequenting off campus locations during the academic day was low with only 9% of respondents leaving campus 3 times per week or more
- When making a food purchase off campus the largest influencers were increased variety, quality, and healthy options
- Most frequented off campus locations included local downtown restaurants and nearby grocery stores
- Some desire to use meal plan dollars at off campus venues to order food (i.e. pizza)

Concepts / Brands (Resident and Community Survey)

- Most desired concepts/brands included: Freshii, Subway, Thai Express, Jimmy the Greek, Bento Sushi and Smoke's Poutine

4.0 Summary of Market Research

<u>Summary of Customer Survey Findings</u> *(continued)*

TAM's (Resident Survey)

- Primary reasons for using TAMs included convenience and increased variety
- Overall satisfaction with TAM offering, specifically the number of TAM's available, convenience, and perceived meal value.
- Some dissatisfaction noted around the number of options available and variety of TAM's at each location

Level of Satisfaction with Dining (Resident Survey)

- 70% of respondents reported being moderately satisfied with current campus dining.
- High satisfaction levels were noted around location, atmosphere, cleanliness, community experience and customer service
- Potential opportunities for improvement: variety, healthy options, culturally diverse options and presentation
- The most important rated factors when eating on campus were variety of menu items and availability of healthy options
- Other key factors included: environmentally sustainability, vegetarian/vegan offerings, speed of service, and dietary accommodation