



Campus Dining Survey

May, 2017



Massachusetts
Institute of
Technology

envision
strategies

Overview

- Purpose of the Study
- Survey Demographics
- Dining Locations & Operating Hours
- Undergraduate Results
- Graduate Results
- Opportunities



Purpose of the Dining Study



- Create a residential and retail dining landscape that maximizes choice, provides value, and addresses the needs of undergraduates and graduate students.
- Enhance the undergraduate residential dining experience that include options for flexibility and portability.
- Explore the potential of using meal plans across campus.
- Improve food quality.
- Foster community building.
- Increase dining participation.
- Identify a potential financial model that generates a sustainable and strong dining program.

Survey Demographics

Administered by Envision Strategies*	March 13-26, 2017
Invited	All Enrolled Students
Response Rate	31%
Total N	3,404
Undergraduate	1,694
Graduate	1,704
Did not identify	6

* <http://www.envstrategies.com/>

Survey Demographics

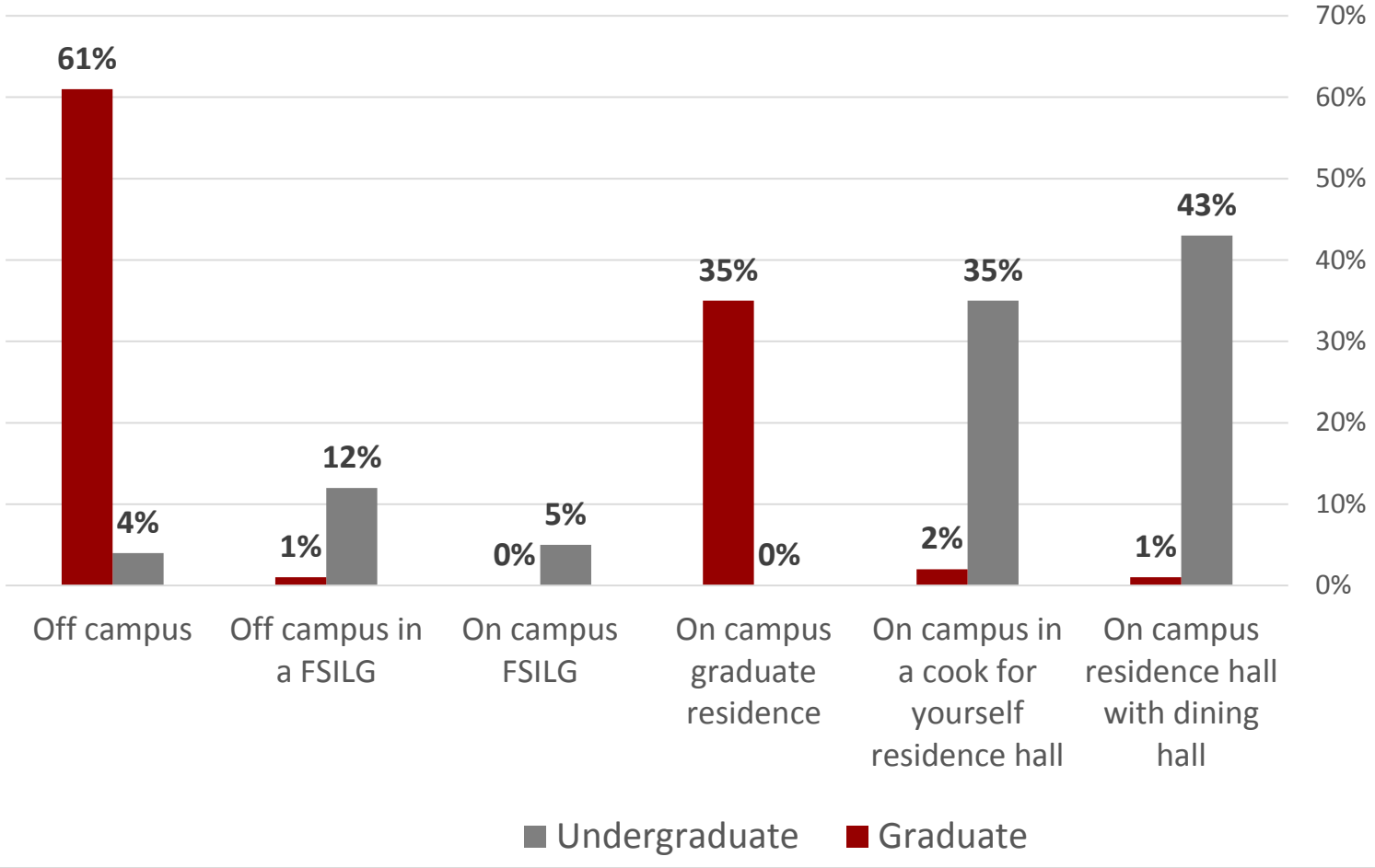
Academic Classification of Respondents

Undergraduate 50%

1st Year 29%
 2nd Year 28%
 3rd Year 22%
 4th Year 21%
 5th+ Year 1%

Graduate 50%

Where survey respondents live



Existing MIT-Run Dining Locations

West of Mass. Avenue (17):

- Student Center:
 - La Verde's Convenience Store (Tenant)
 - Subway (Tenant)
 - Café Spice (Indian, Tenant)
 - Shinkansen Japan (Tenant)
 - Schwarma Shack (Middle Eastern, Tenant)
 - Anna's Taqueria (Tenant)
 - Dunkin Donuts (Tenant)
 - Cambridge Grill/Pizza (Tenant)
- Pacific Café (Tenant)
- Thirsty Ear Pub (No-food, Self-op)
- 5 Residential Dining Venues (BonAppetit)
- 1 Convenience Store (Tenant)
- Zigo Café (Grab 'n Go, Tenant)

East of Mass. Avenue (13):

- Bosworth's Café (Coffee, Aramark)
- Café 4 (Grab 'n Go, Aramark)
- Steam Café (Sandwiches, Aramark)
- Stata:
 - Forbes Family Café (Aramark)
 - Starbucks (Aramark)
 - R&D Pub (Night only, Aramark)
- Koch Café (Aramark)
- 100 Main Marketplace (Aramark)
- 3 Food Trucks (Tenants)
- Muddy Charles Pub (No-food, Self-op)

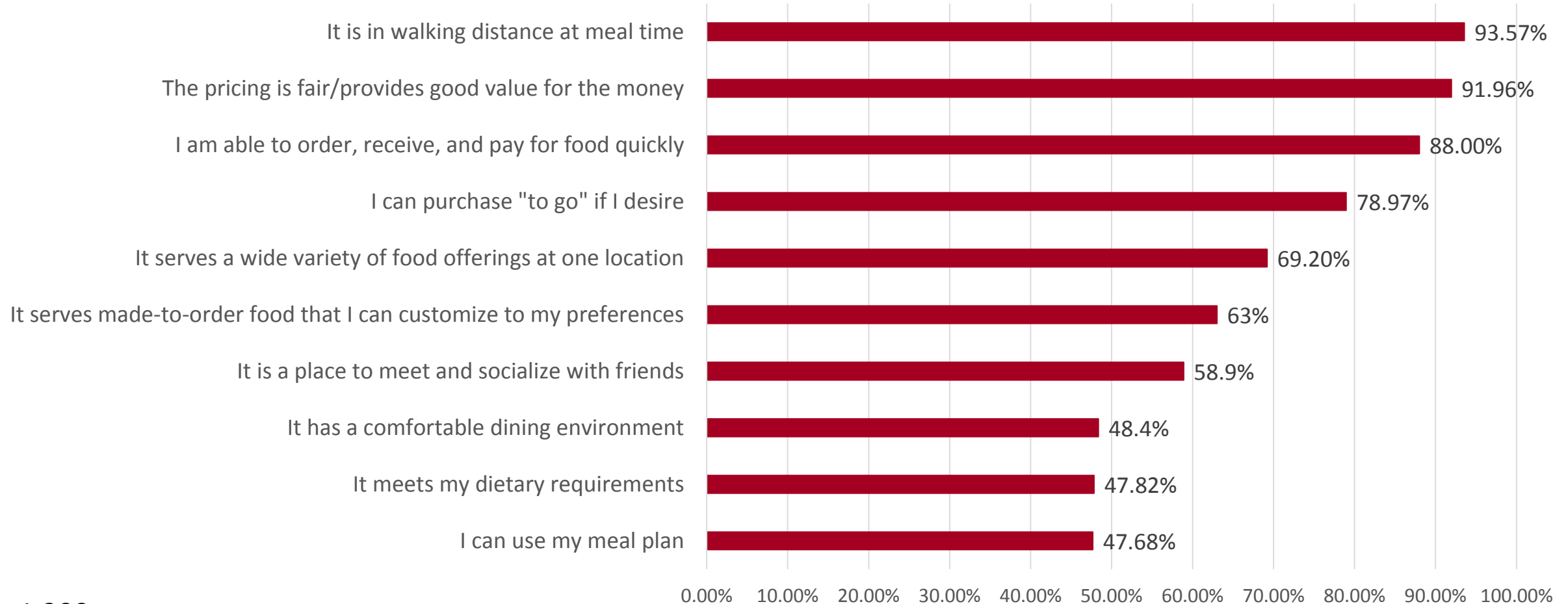


Undergraduate Results



Deciding Where to Eat - Most Important Factors for Undergraduates

Please rate each attribute with regard to its importance to you when deciding where to go for a meal or snack.
"Very important" or "Somewhat Important"



N~1,300

Deciding Where to Eat - Least Important Factors for Undergraduates

Please rate each attribute with regard to its importance to you when deciding where to go for a meal or snack.
"Very important" or "Somewhat Important"

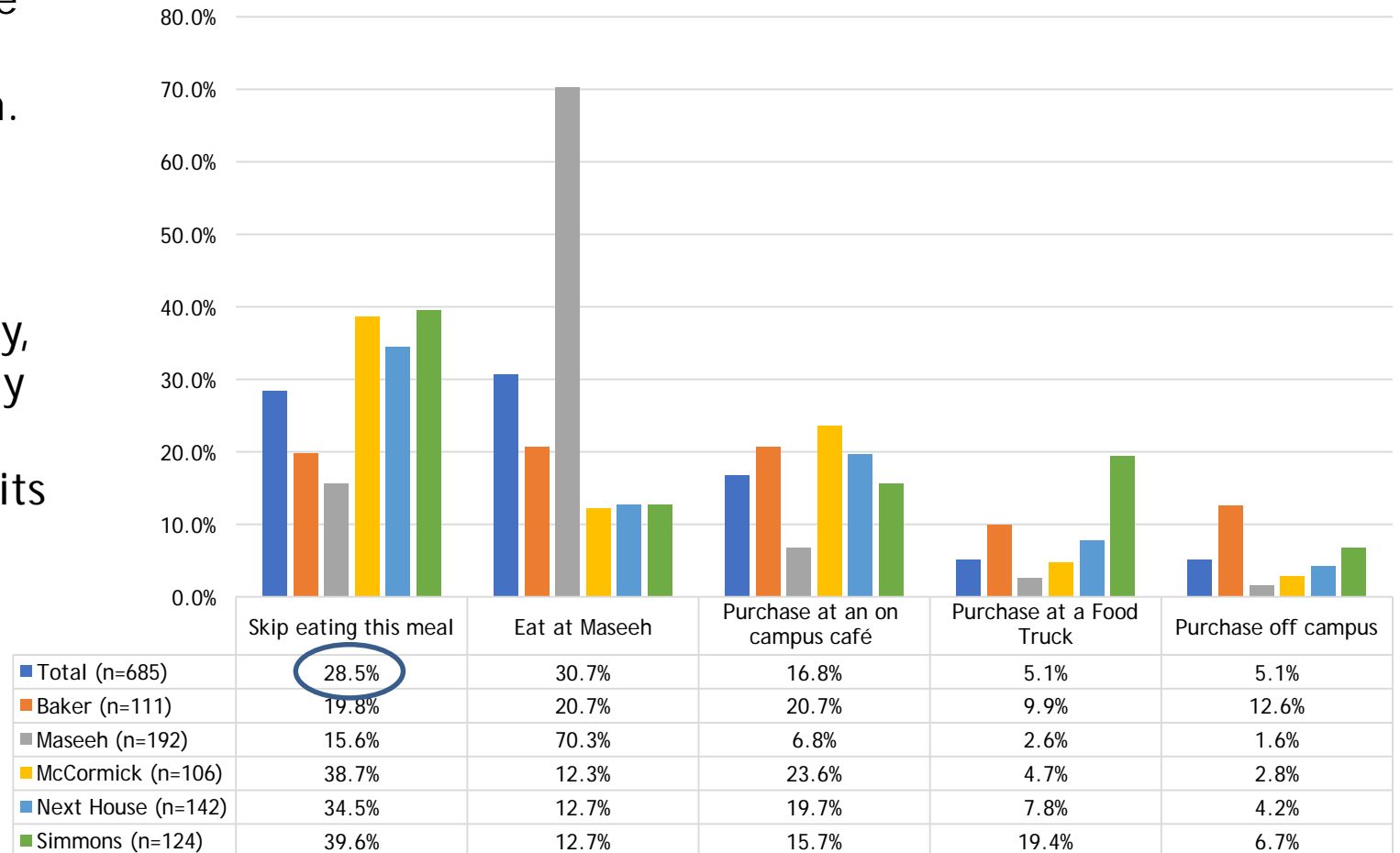


N~1,300

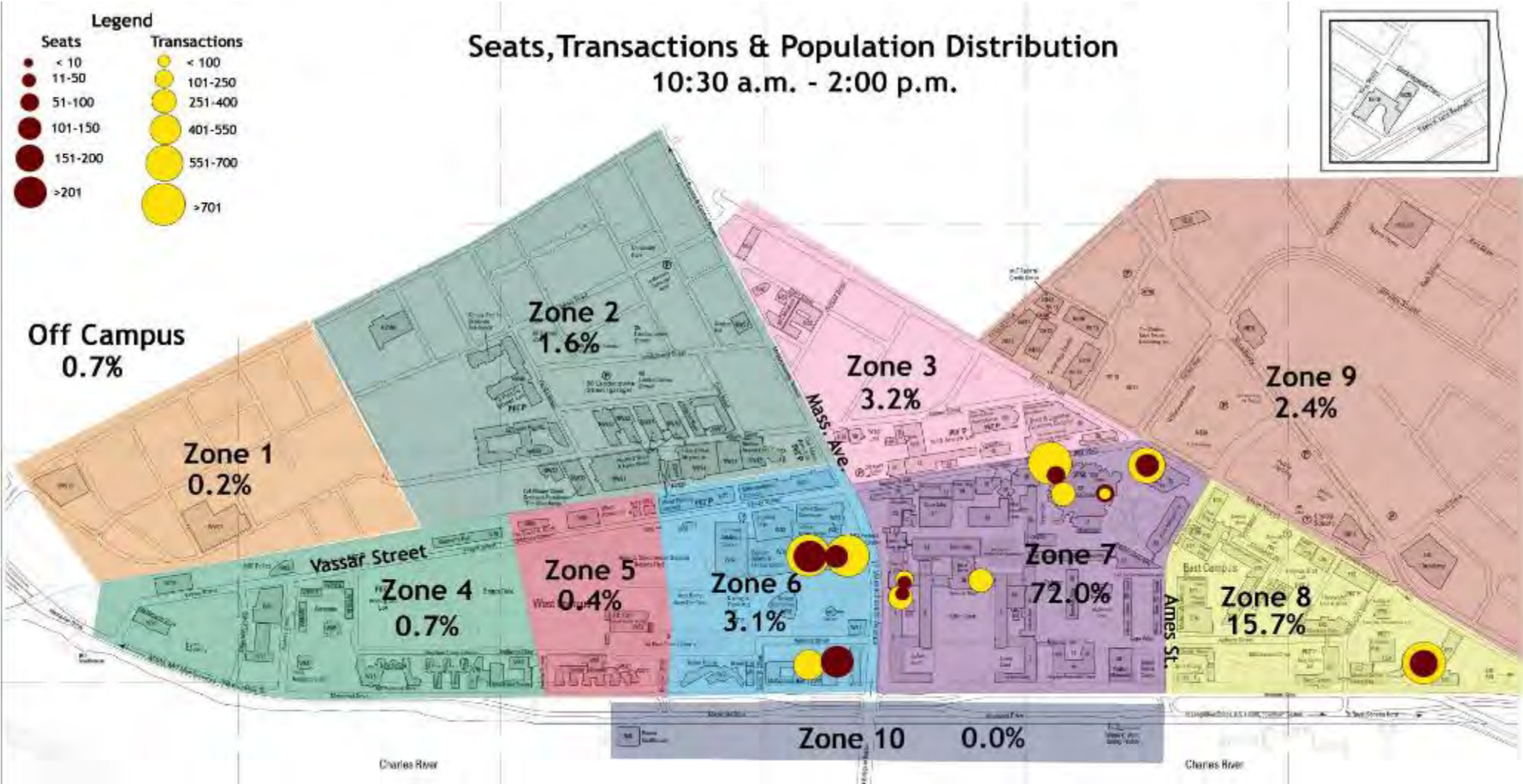
Where students eat- House Dining Residents

- 88.4% of Survey Residents with House Dining indicated they are in Zone 7 most of the time between 10:30 a.m. - 2:00 p.m.
- Approximately 50% of meal plan holders purchase a meal plan that does not provide lunch. Consequently, is it not surprising that approximately 29% of survey respondents that are Undergrads living in House Dining units tend to skip lunch.

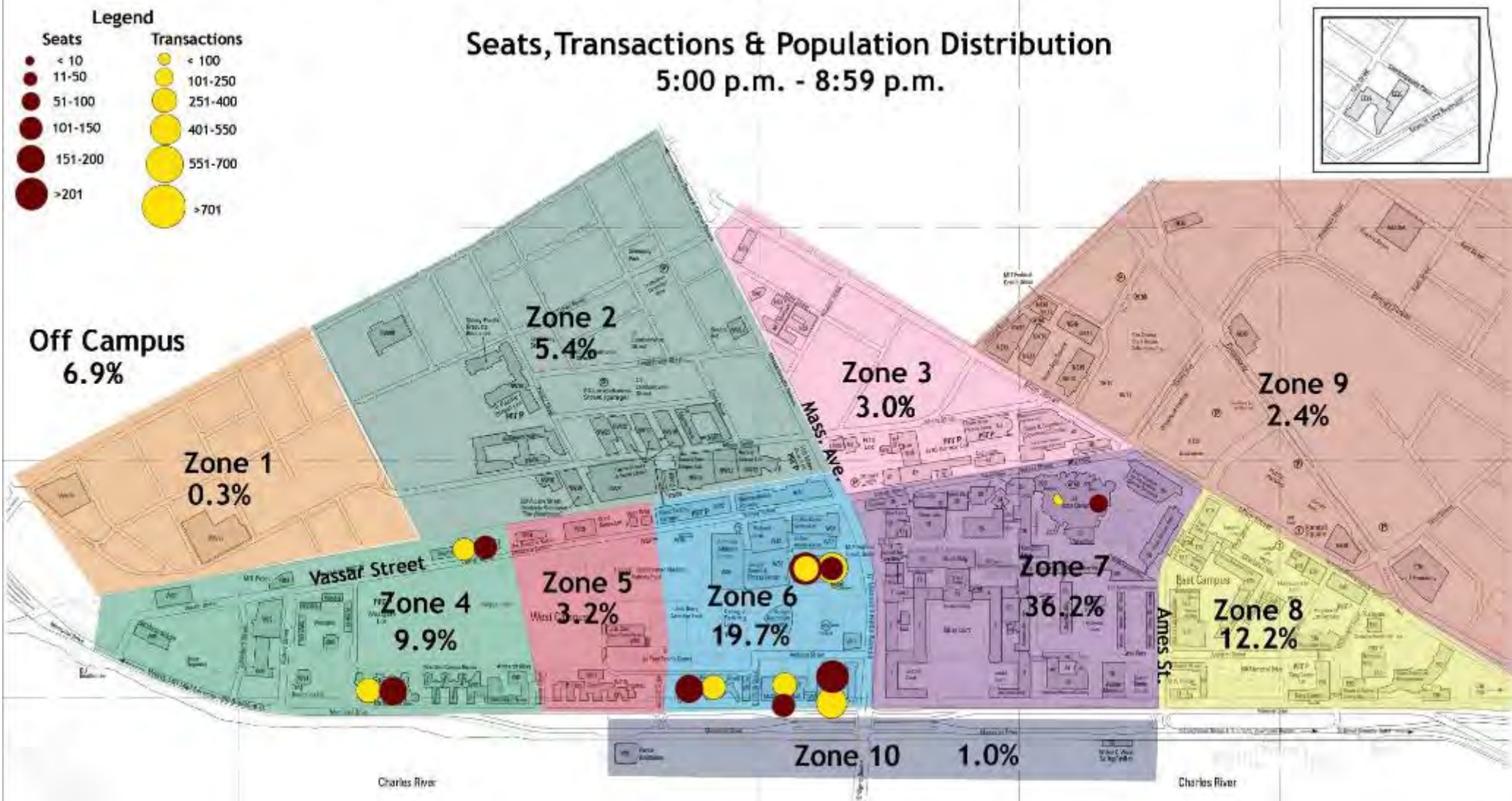
What Residents with House Dining typically do for a meal or snack between 10:30 a.m. - 2:00 p.m.?



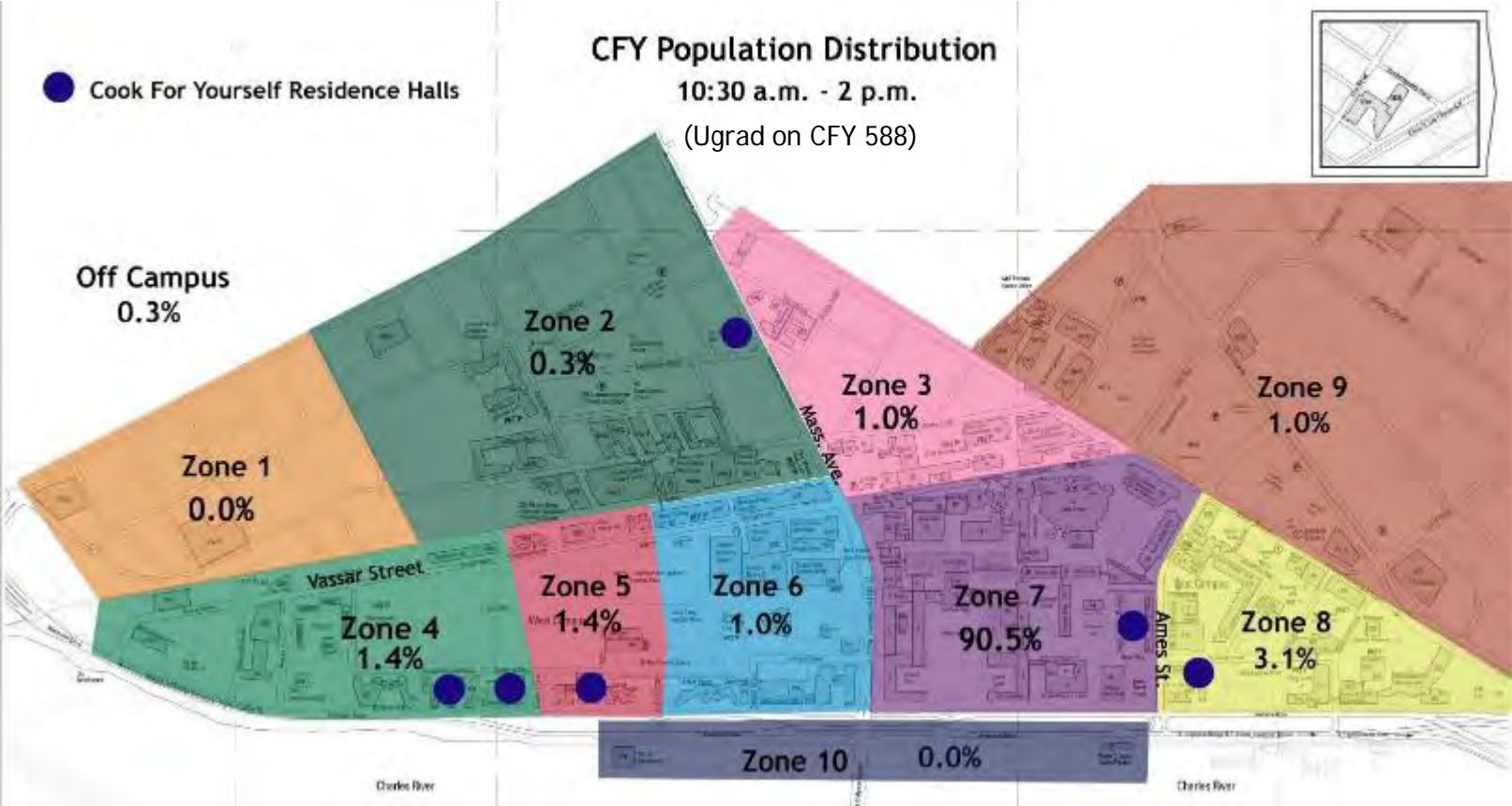
Where students are and eat - Daytime



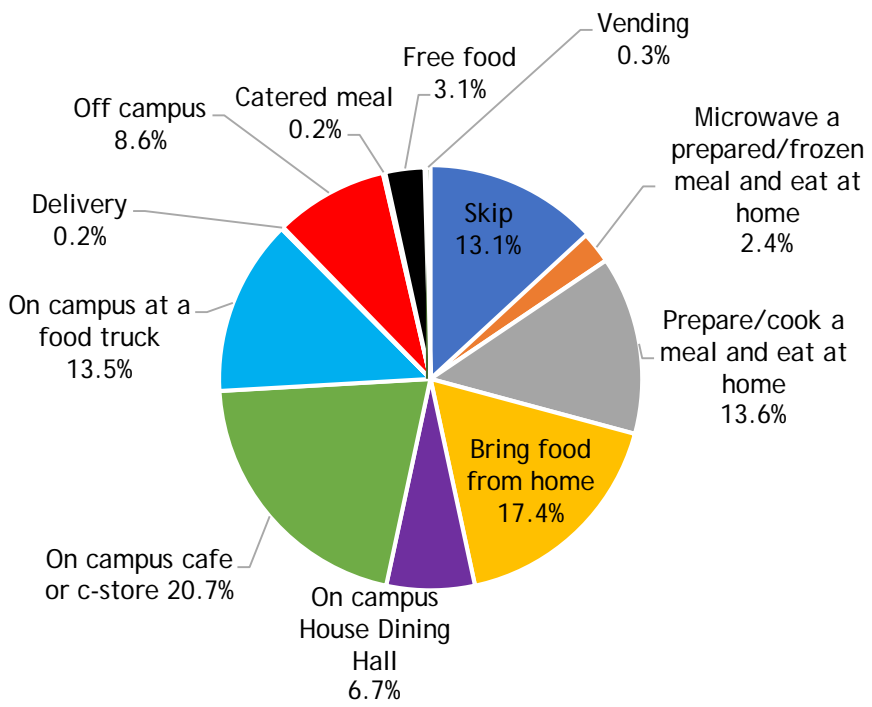
Campus Dining Serves - Evening



Where students eat - Cook For Yourself - Daytime

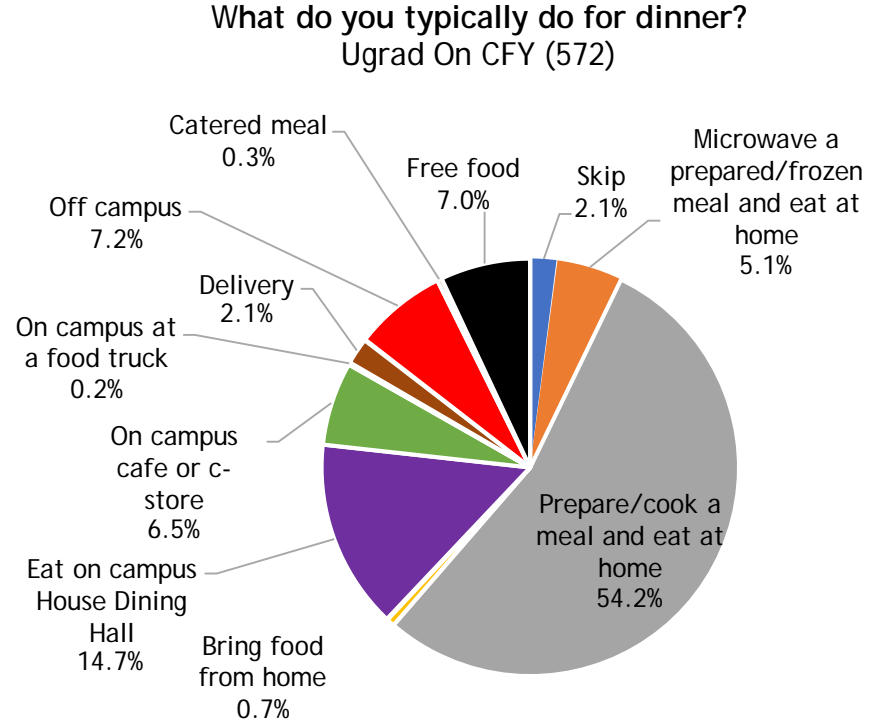
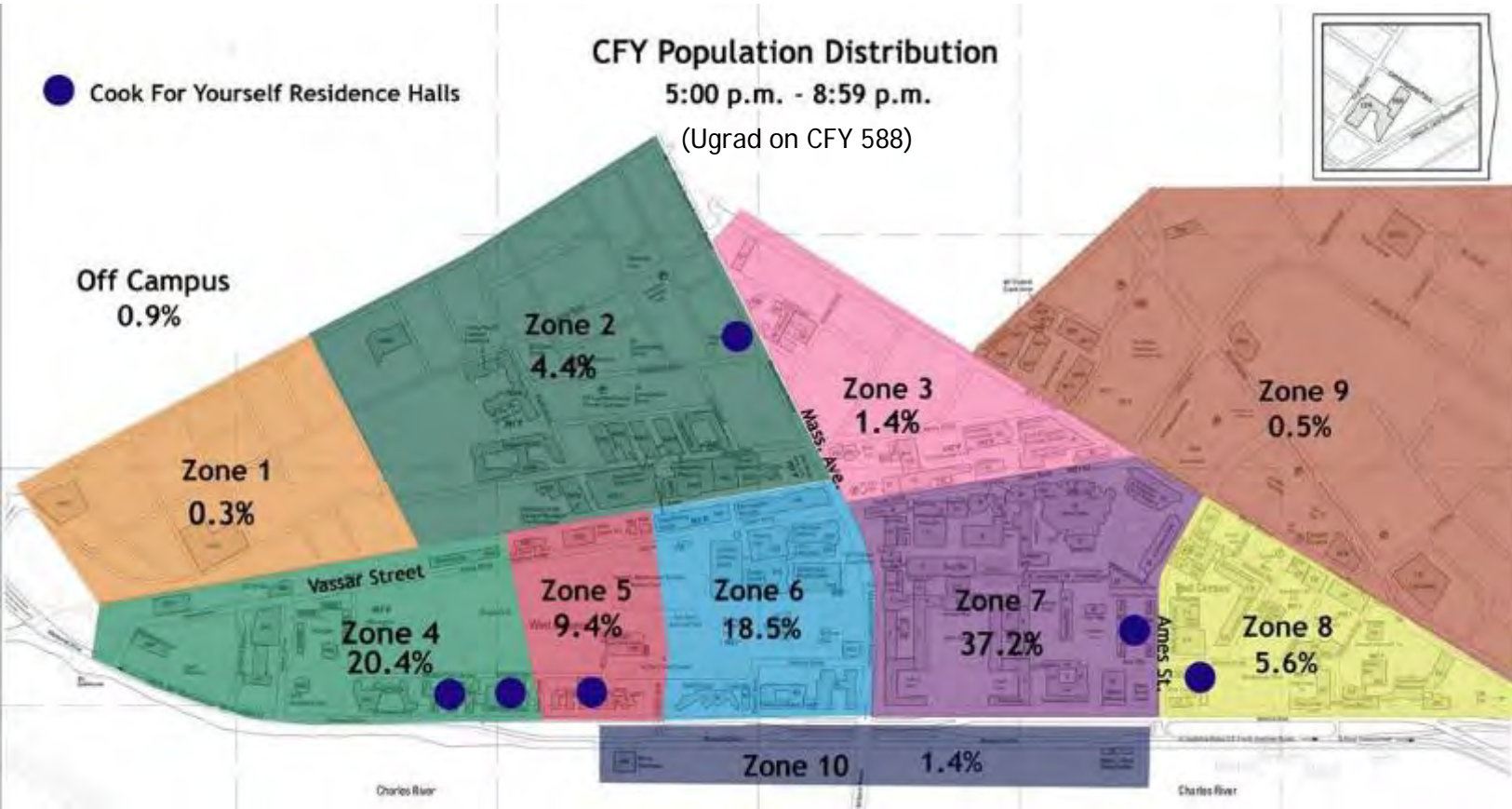


What do you typically do for meal or snack between 10:30am - 2:00p.m. (Ugrad on CFY 704)



- 40.9% Purchase on campus or food truck
- 33.4% Obtain their meal from home

Where students eat - Cook For Yourself - Evening



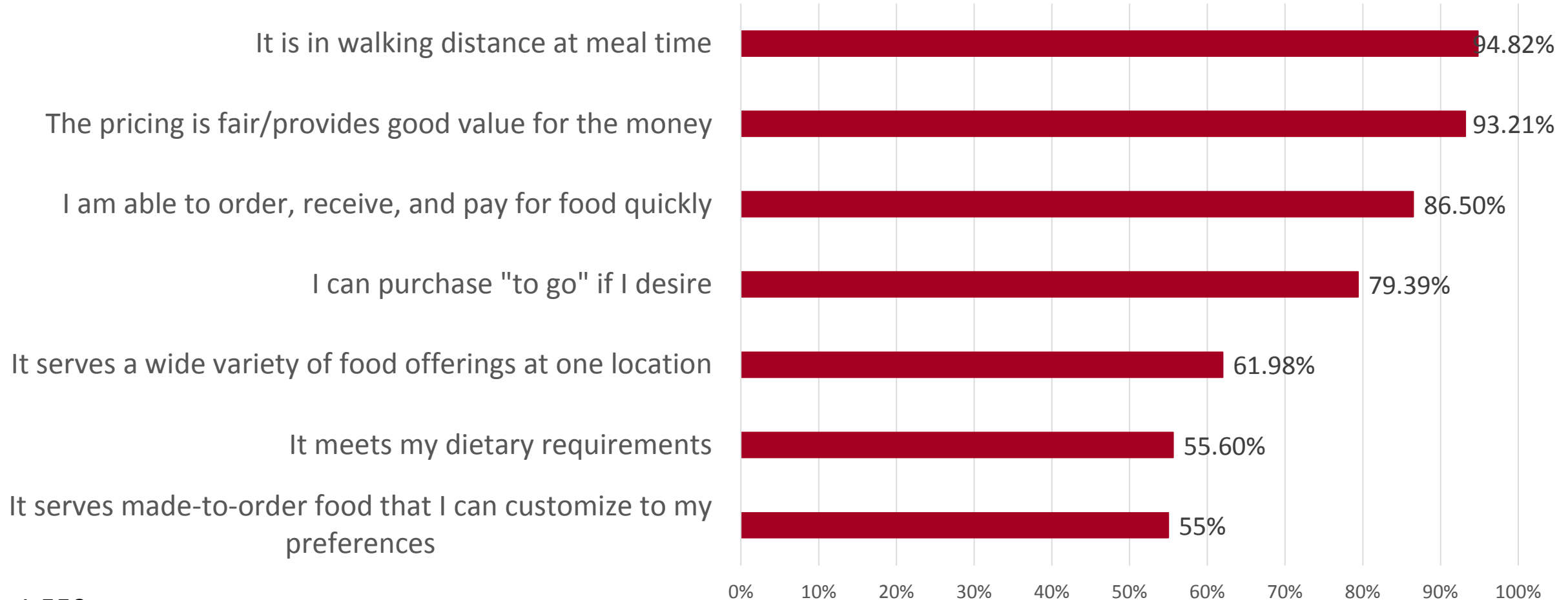
- 21.2% Purchase on campus
- 60.0% Obtain their meal from home

Graduate Results



Deciding Where to Eat - Most Important Factors for Graduate Students

Please rate each attribute with regard to its importance to you when deciding where to go for a meal or snack.
"Very important" or "Somewhat Important"



N~1,559

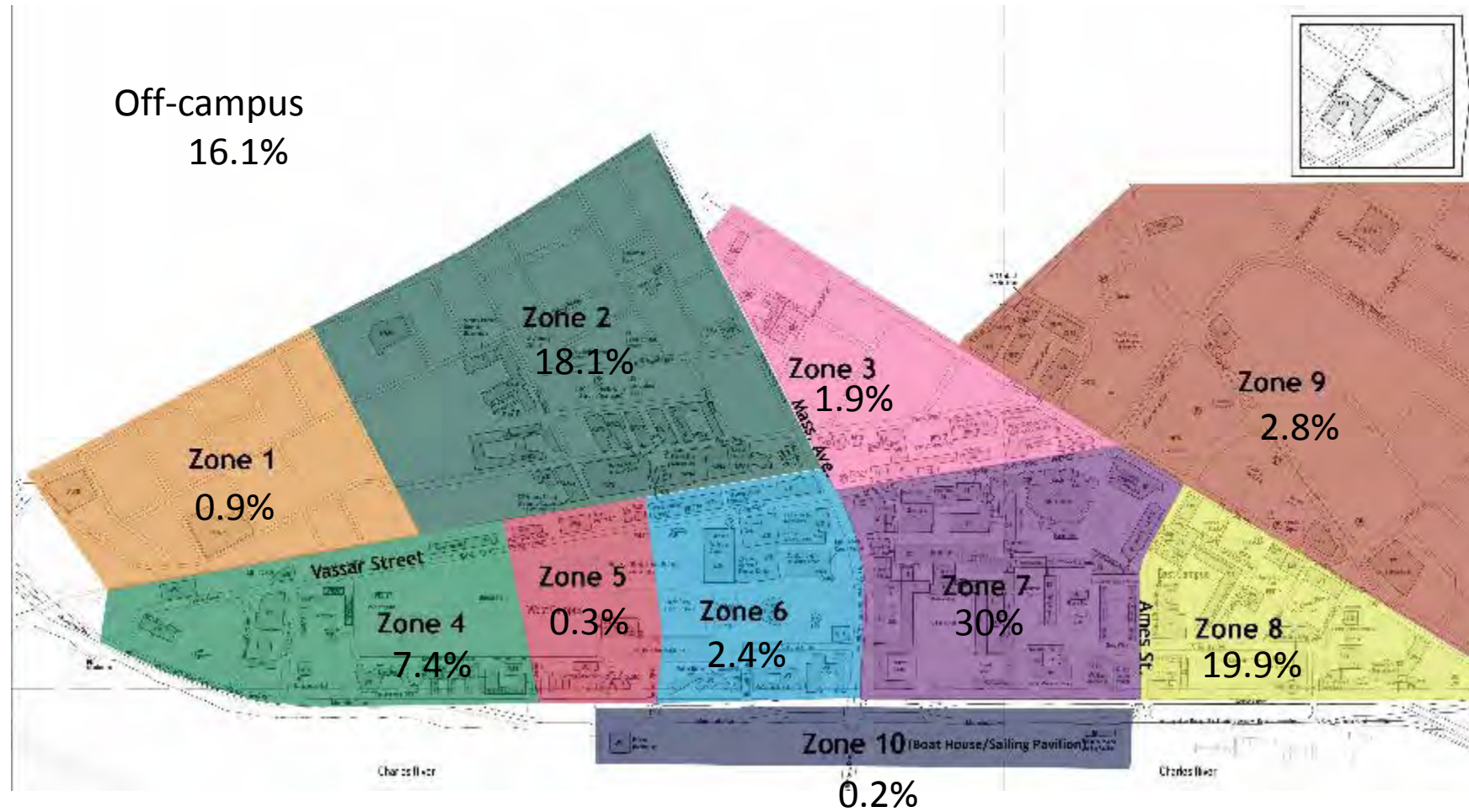
Deciding Where to Eat - Least Important Factors for Graduate Students

Please rate each attribute with regard to its importance to you when deciding where to go for a meal or snack.
"Very important" or "Somewhat Important"



N~1,559

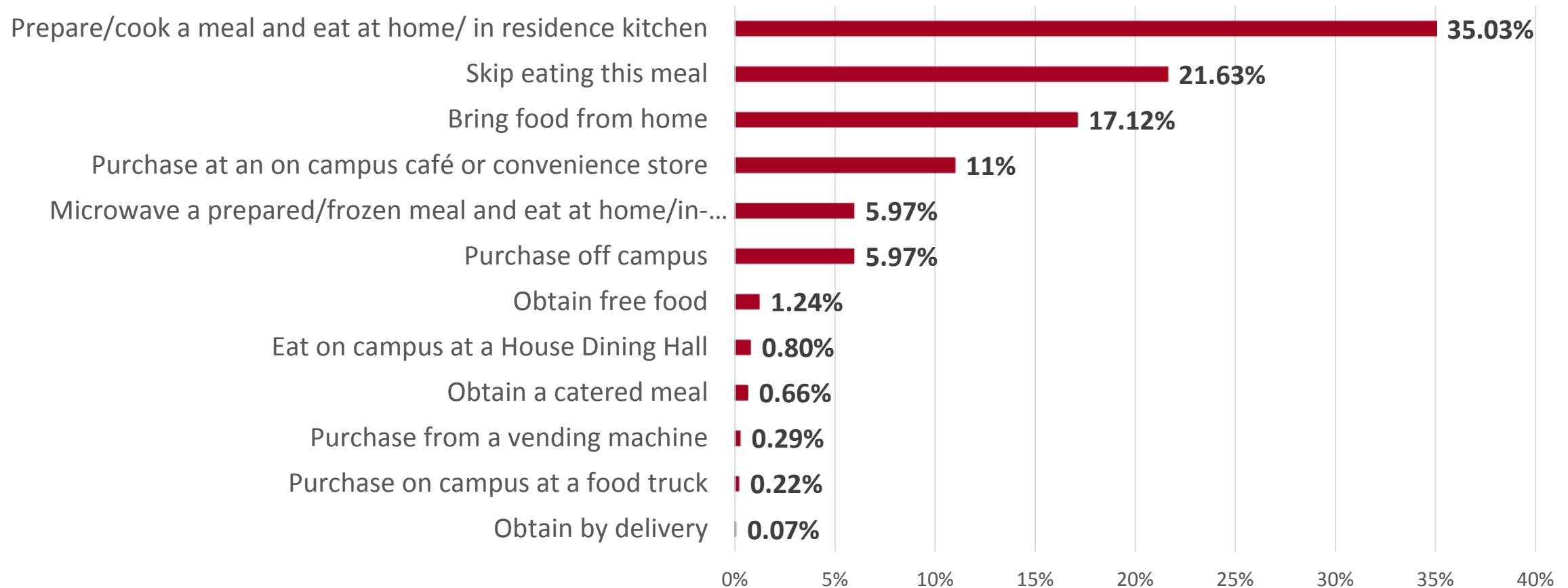
Where Graduate Students Are: 7am - 10:29am



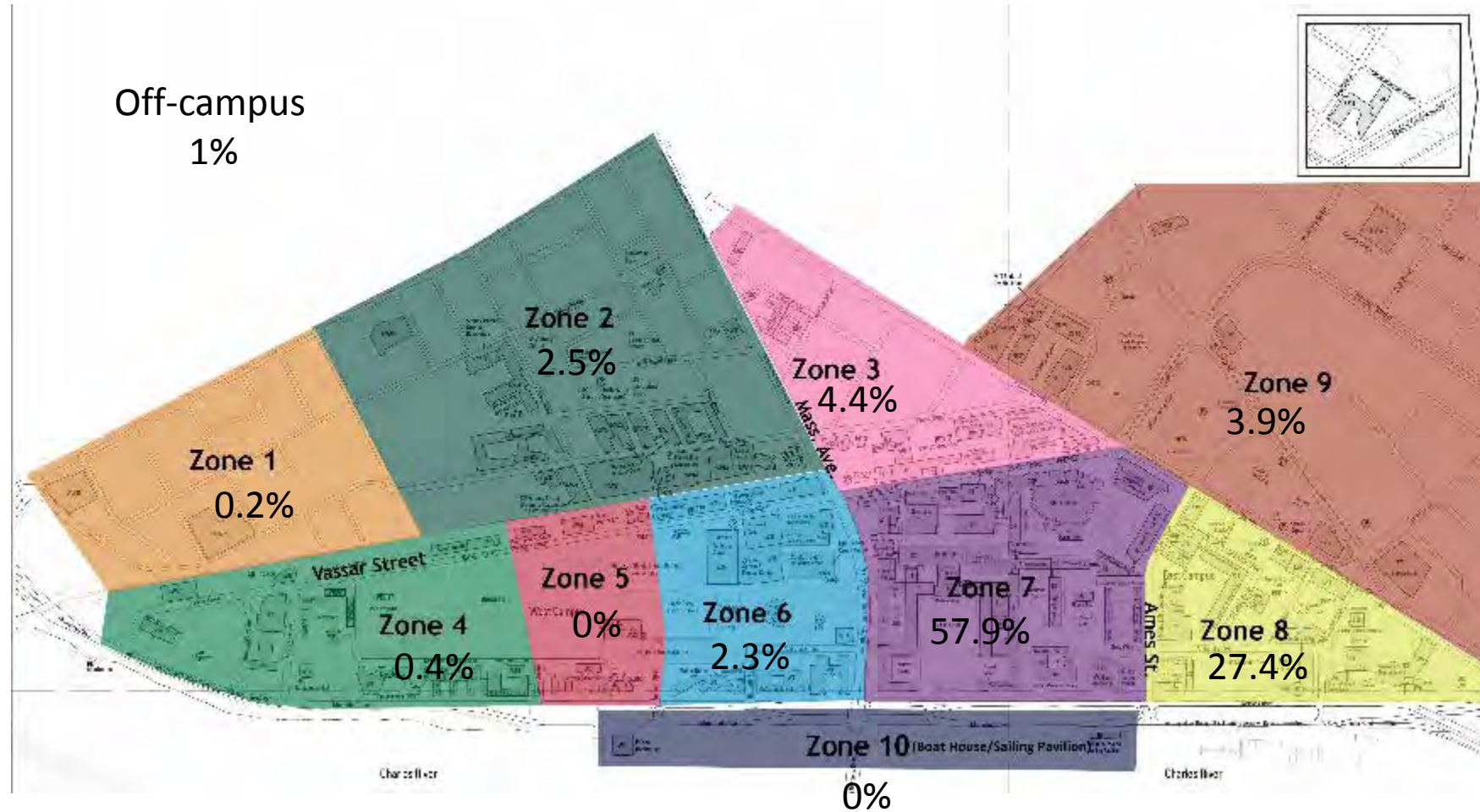
N=1,655

What Graduate Students Eat : 7am - 10:29am

Thinking about this semester: When you are on campus, what do you typically do for a meal or snack between 7a.m. - 10:29 a.m.? (N=1,373)



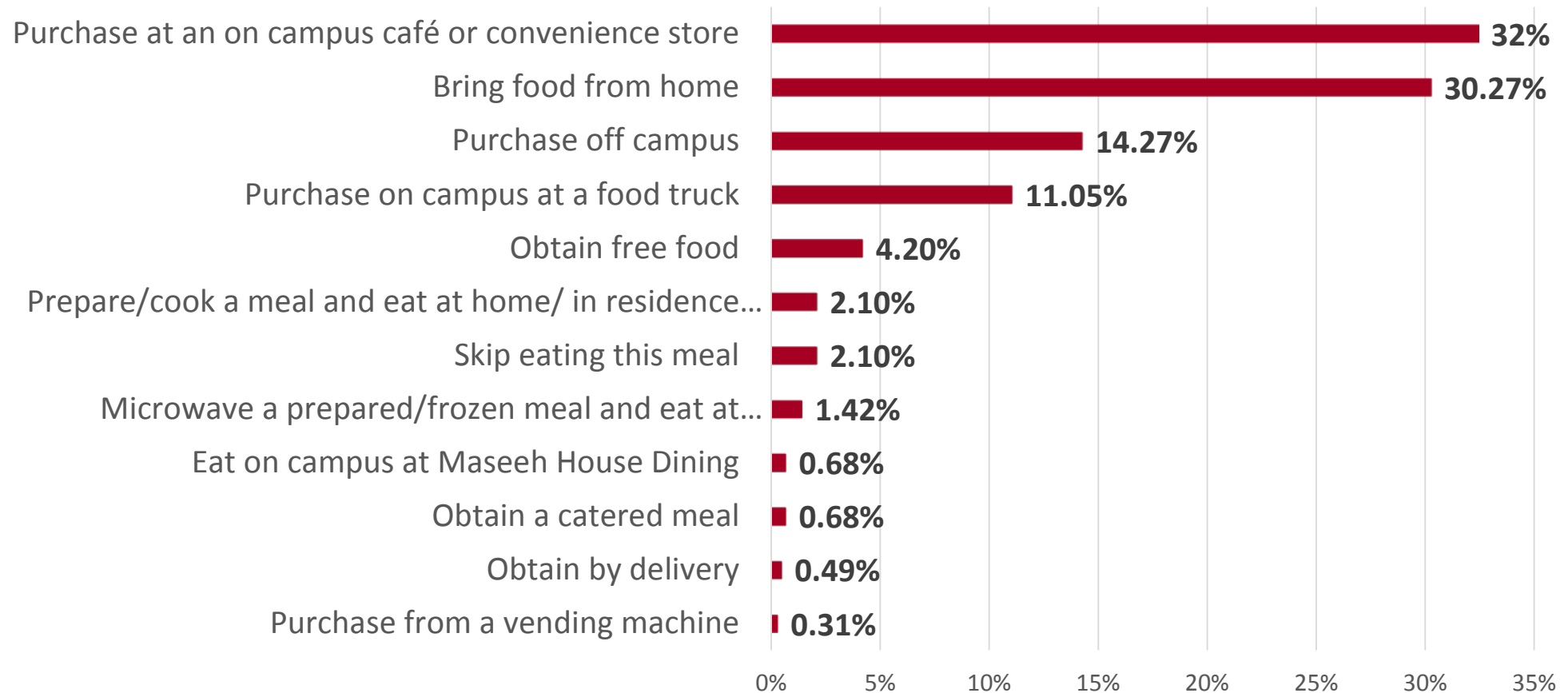
Where Graduate Students Are: 10:30am - 2pm



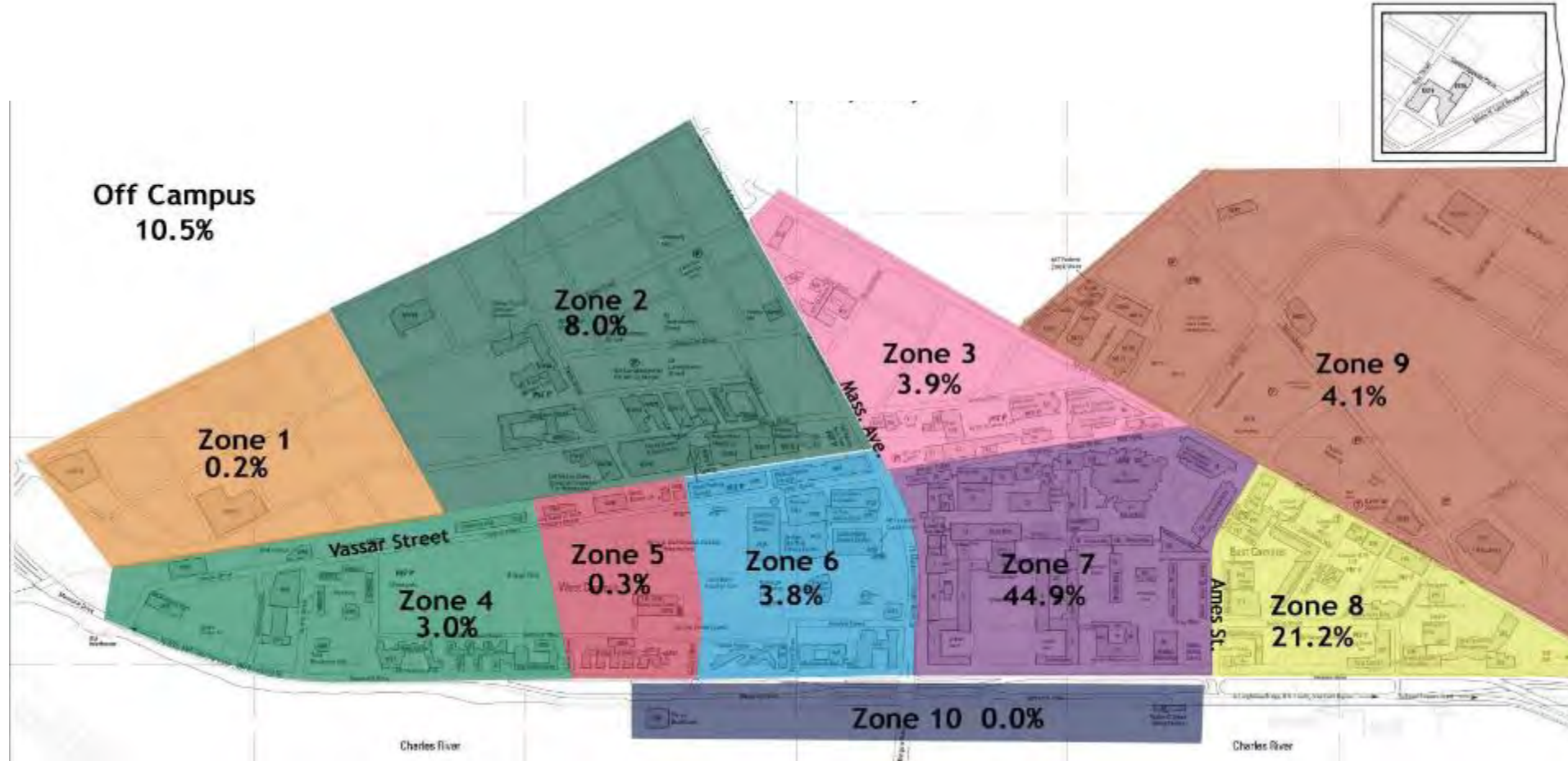
N=1,660

What Graduate Students Eat : 10:30am - 2pm

Thinking about this semester, When you are on campus, what do you typically do for a meal or snack between 10:30a.m. – 2p.m.? (N=1,619)



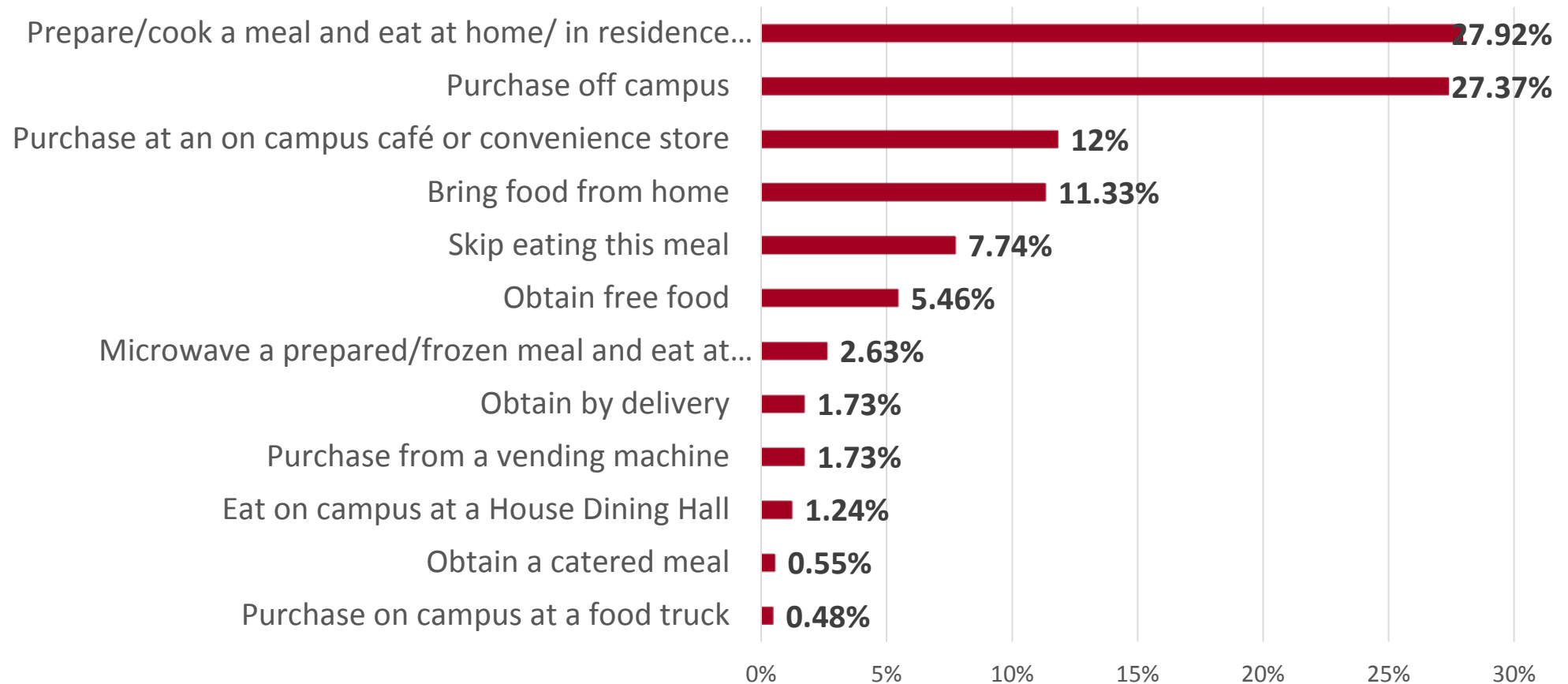
Where Graduate Students Are: 5pm - 8:59pm



N = 1,654

What Graduate Students Eat : 5pm - 8:59pm

Thinking about this semester, When you are on campus, what do you typically do for a meal or snack between 5:00p.m. – 8:59p.m.? (N=1,447)



Opportunities

- Meal Plan Concepts
- Residential Dining Program
- Retail Dining
- Cook for Yourself
- Grab 'n Go
- Late Night – 24/7



Meal Plan Concepts

Opportunities:

- CFY Meal Plans**
 - Smaller block meal plans with Dining \$
 - Dinner only plans
 - Lunch only plans
- Residents in House Dining
 - Hybrid plans with Dining \$
 - Block plans with Dining \$
 - Unlimited Access
 - Consider having the 19 meal plan a voluntary option for Maseeh first year students, instead of mandatory.

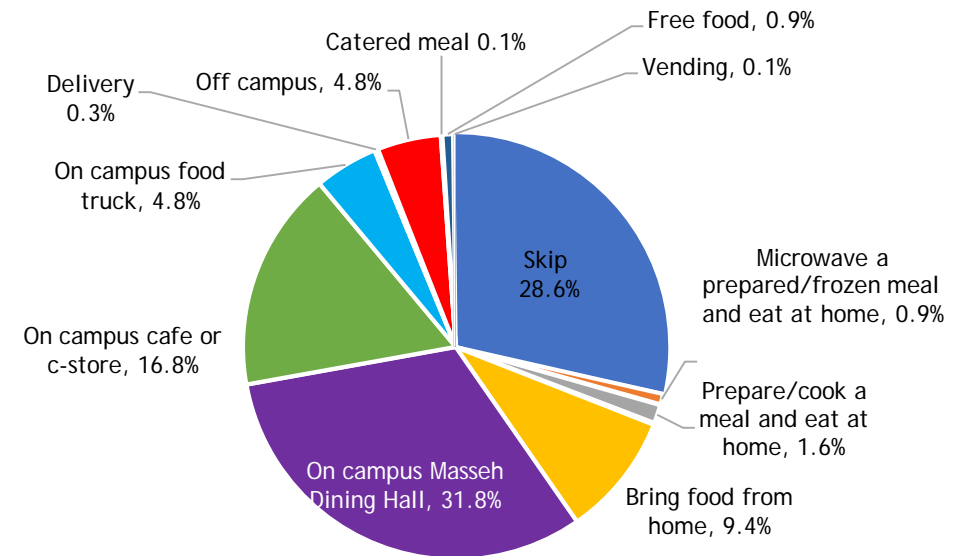
** NOTE: In response to a question at the DormCon meeting, it was clarified that these plans would be optional.



Residential Dining Program

- Approximately 50% of meal plan holders purchase a meal plan that does not provide lunch. Consequently, is it not surprising that approximately 29% of survey respondents that are Undergrads living in House Dining units tend to skip lunch.
- Of those dining in an on-campus café, 44.7% of the Ugrad On Res with Dining are patronizing a café in Zone 7, which as noted earlier, most of these venues may have insufficient seating for its guests.
- 59% of meal plan holders positively indicated that they would like a lunch option that provided 4 or 5 select items from a Grab & Go Station on Main Campus (east of Mass Ave).
- Approximately 58% of meal plan holders expressed an interest for Dining Dollars to be included with their meal plans.

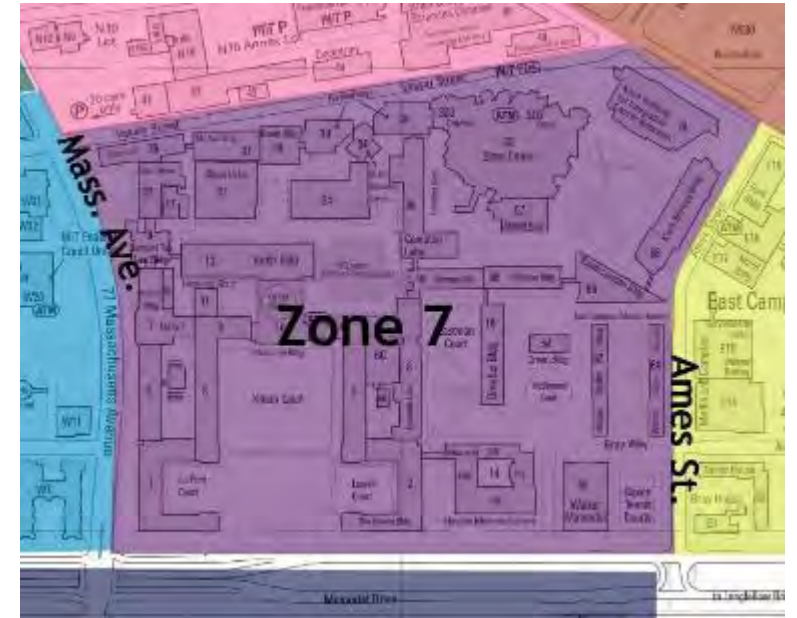
What do you typically do for meal or snack between 10:30am - 2:00p.m.
(Ugrad On Res with Dining 704)



Retail Dining

Opportunities

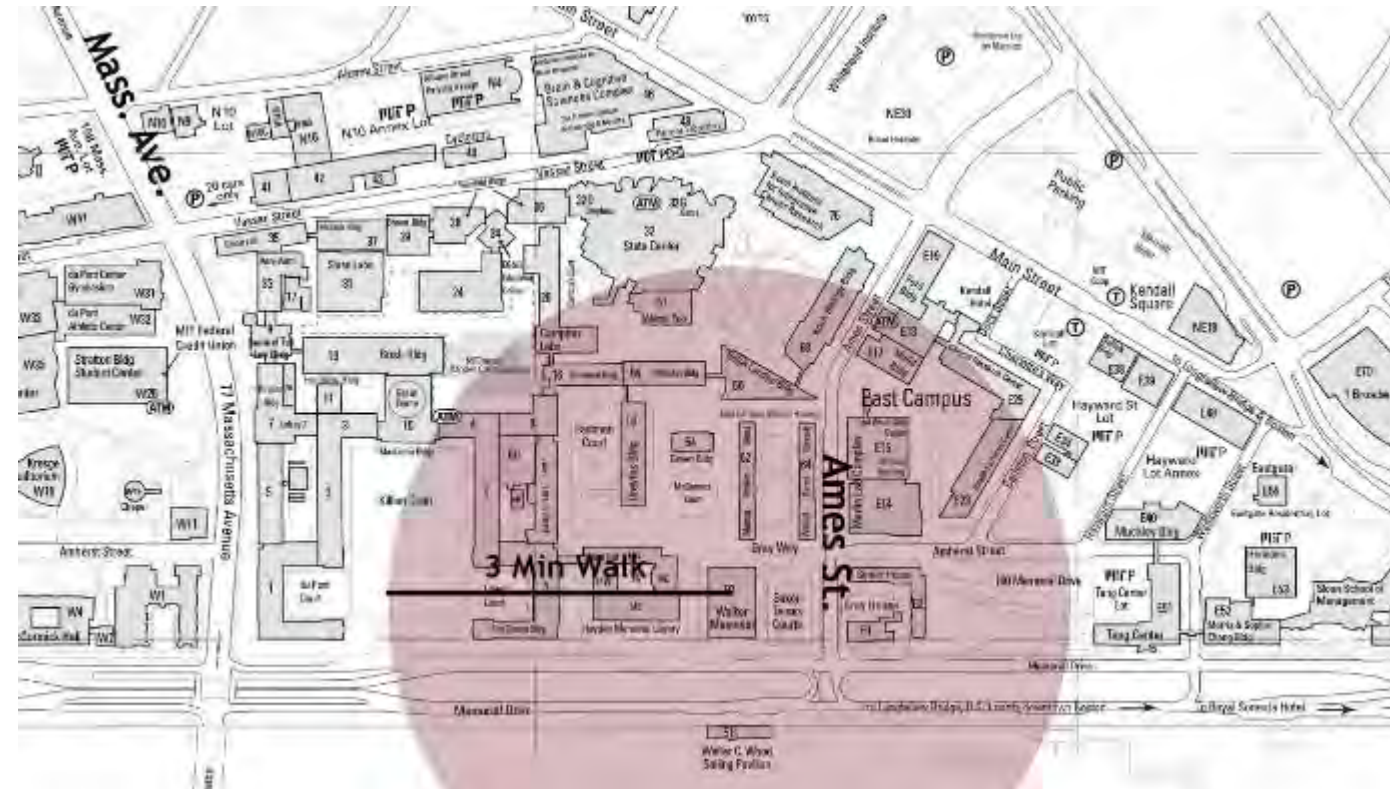
- The 2008 and 2017 surveys, showed that 71% and 72% (respectively) of the Total Respondents are in Zone 7 the majority of the 10:30 a.m. - 2:00 p.m. timeframe. Although there are now 7 retail locations in Zone 7, excluding the Food Trucks, one is for faculty only, and there is not enough seating capacity for the demand.
- 40% of the Survey Respondents (n=3,196) indicated that a 24-hour dining location on campus would best meet their needs if located in Zone 7. It would be used the most on weekdays throughout the day, but many would use it after 9:00 p.m.
- 80% of the respondents (n=360) that typically eat lunch off campus are doing so because they *'prefer the quality/taste of the food available off campus in comparison to food available on campus'*. Of these respondents, 62% are Graduate Students.
- 45% of Graduate Students respondents are in Zone 7 for the majority of the 5:00 p.m.- 8:59 p.m. timeframe when there are no campus retail locations open in this zone.



Retail Dining

Opportunities

- For MIT students, the top motivating factors for deciding where to purchase a meal are *'It is within walking distance at meal time'* (94.2%) and *'The pricing is fair/provides good value for the money'* (92.6%).
- Based on its location and with some dining infrastructure in place, consideration should be given to creating a new dining location at Walker to serve the midday and evening uncaptured markets.

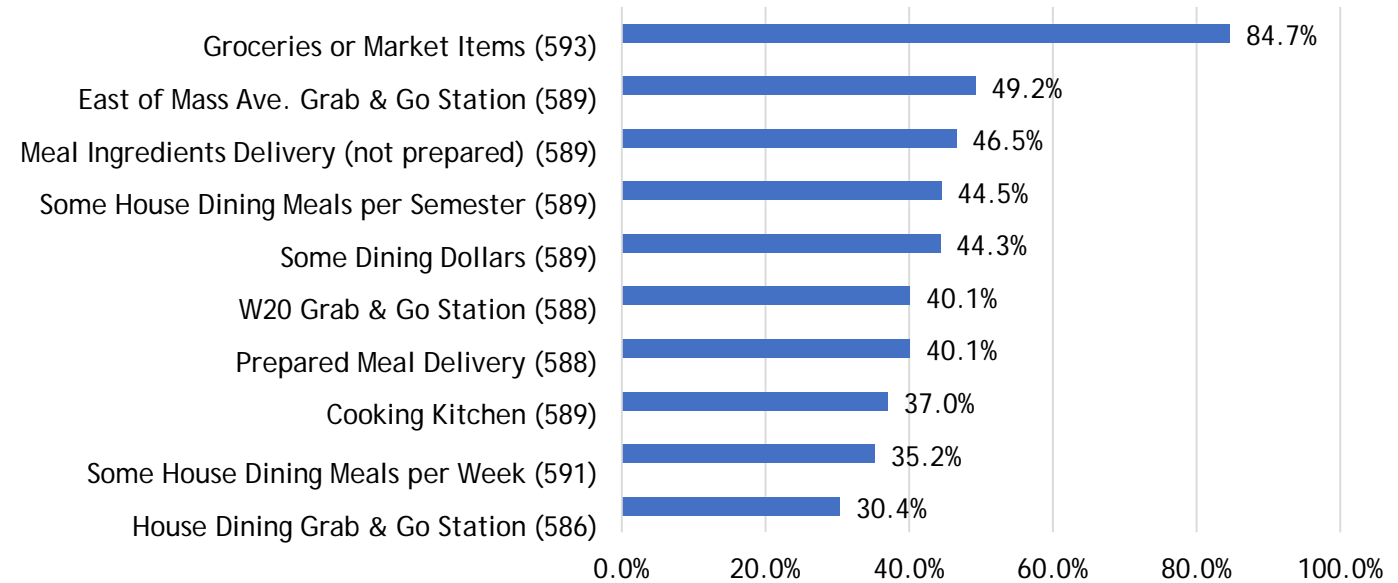


Cook For Yourself

Opportunities:

- Cook For Yourself (CFY) survey respondents would use a pantry where they could purchase *Grocery or Market Items* to prepare their own meal.
- 49.2% of the CFY respondents indicated they would use a Grab & Go Station that provides 4-5 items for a fixed price or swipe if it is located east of Mass Ave.

How likely would you be to use the following features if they were available on campus this semester? *
(Ugrad On Campus in CFY House Respondents)



* Responded “very likely” or “somewhat likely”

Grab 'n Go

- Meal Plan Grab 'n Go concept for a swipe or fixed price for lunch only, on Main Campus, east of Mass. Ave., which the vendor could operate as part of the residential dining program.

Pros:

- Minimizes the need for students to skip lunch and provides an opportunity for CFY residents to purchase a complete meal.
- This venue may serve between 1,100 - 1,200 Undergrads during a peak meal.
- Does not require dedicated seating.
- Satisfies the desire to have a convenient dining location at meal time for Housing Dining residents.

Cons:

- Finding an appropriate and large enough space on east campus for this desired service.
- Will require some additional staffing and card readers or registers.
- Real estate will only be used for one meal period, unless a breakfast option becomes available.



Grab 'n Go Opportunity Space Requirements

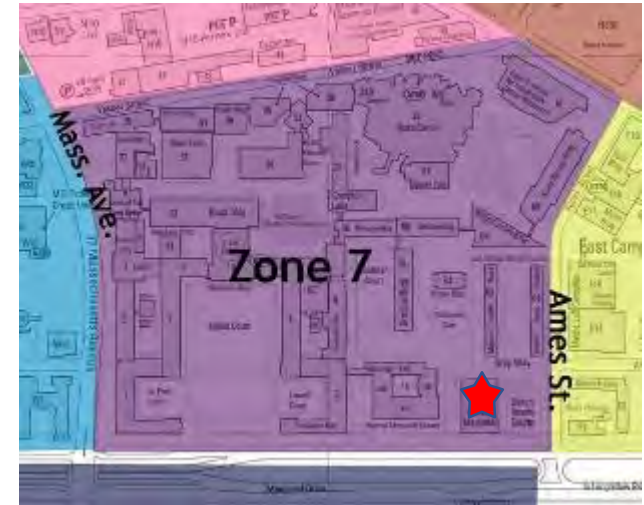
- Meal Plan Grab 'n Go lunch concept assumptions:
 - 30% House Dining Residents use for lunch (Approx. 725; 30% use Maseeh, 30% use Retail)
 - Since 59% of CFY survey respondents expressed interest, estimate around 30% of CFY residents may use on any given day, if allowed to pay cash, credit, or debit. (Approx. 433)
 - Fresh product is produced in one of the House Dining kitchens and transported over daily
 - Some storage is provided on site to keep products at the proper temperatures.
 - Dedicated seating is not provided.
 - All product is served on disposables or in re-usable containers.
 - Service is available 10:30 a.m. - 2:30 p.m. Monday through Friday
 - Menu selection will consist of a minimum of 4 items - one each from the following categories:
 - Entrée: Sandwich, entrée salad or other item
 - Side: Small side salad, composed salad, chips, bread/roll, or carrots/celery sticks, etc.
 - Dessert: Cookie, brownie, fresh fruit, or other item
 - Beverage: Fountain Soda - perhaps freestyle machines, iced tea, coffee
- Estimated space requirements are 2,000 Net Square Feet (NSF)
- Discussion points that may affect space requirements:
 - Should only students with meal plans be allowed to use this venue?
 - If not, what will be the interest from FSILG, off-campus Undergrads, graduate students, faculty and staff?
 - Bottled beverages vs. fountain drinks



Late Night - 24/7 Dining Program

Opportunities:

- Respondents who live in a house with dining indicated the meal plan options for late night (after 9:00 p.m.) that would best meet their needs:
 - Grab & Go Station (near house dining checker station) to select 4 to 5 items for a meal swipe and take it to go (50.3%)
 - Inclusion of Dining Dollars to purchase in on campus retail locations (48.1%)
- Meal plan holders indicated they would be willing to spend \$24.88 (mean) per semester to have a 24 hour location on campus where they could use their meal plan.
- Building 50, Walker, contains an abandoned food service facility that has some infrastructure in place and is located in the desired Zone 7.
 - Further discussion and analysis is merited to determine if an additional dining venue/market that will be patronized daily, throughout the day, serves the campus community better than using Morss Hall for periodic events.



24/7 Venue Space Requirements

- 24/7 Emporium/Pantry concept assumptions:
 - Approximately 50% of the student survey respondents indicated they would use it mid-day, while over 60% would use it after 9:00 p.m.
 - Self-contained venue with production, serving area, and support spaces.
 - Survey respondents estimated mean spend is \$7.00 per meal or snack.
 - If it can capture 10% CFY residents and 5% of graduate students, may serve 720 during a peak meal
 - Dedicated seating is provided - perhaps 232 seats, if one assumes 25% take their meal to go and a 70% seating efficiency.
 - All menu items are served on disposables or in re-usable containers.
 - Service may be available Monday through Friday, initially.
 - Menu items available will likely include:
 - Grill and Soup station
 - Hot and cold beverages
 - Popular convenience items (chips, power bars, etc.)
 - Select groceries and produce
- Estimated space allocation may be 8,600 NSF, of which 3,700 NSF is for seating.
- Discussion points that may affect space requirements:
 - Who is the target market and anticipated capture rate?
 - Type of seating and will it also serve as study space?





Additional Information



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Existing Dining Locations

