



COLLEGE & UNIVERSITY

TREND REPORT

**Ways to Exceed Students'
Foodservice Expectations**



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Ways to Exceed Students' Foodservice Expectations



EXECUTIVE SUMMARY

Today's college and university students have very different foodservice habits from their predecessors. They prioritize taste while seeking better-for-you options as well as demand convenience and around-the-clock food and beverage options to fit their lifestyles. In this report, you'll learn tips to help keep students' foodservice spend on-campus by:

- Promoting familiar comfort foods that tout healthy attributes
 - Offering more pre-packaged, grab-and-go and delivery items
 - Ramping up all-day snacking, including coffee as a between-meal and late-night option
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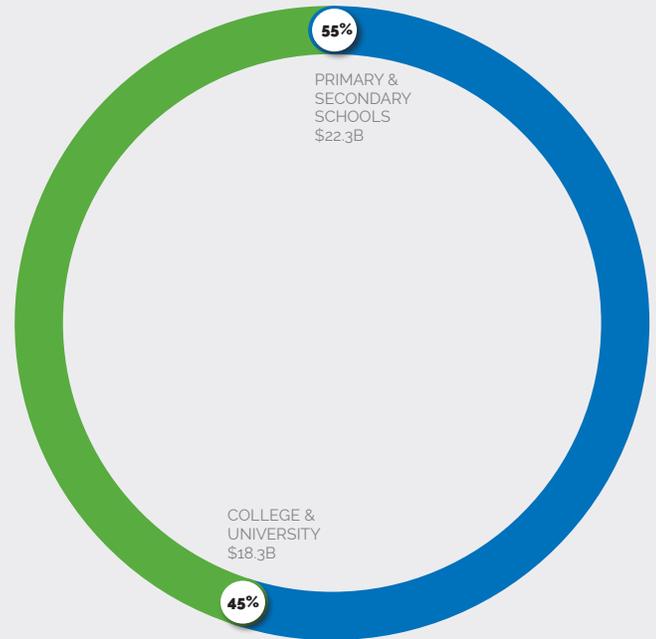
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Foodservice programs at colleges and universities bring in significant revenue and have a tremendous opportunity to grow.

In 2019, the foodservice retail sales equivalent for the education sector made up \$40.6 billion. Of that, the college and university channel comprised \$18.3 billion, with the remaining falling under primary and secondary schools.

Although this channel's foodservice sales are substantial, there are still challenges to maintaining and growing a successful food and beverage program, mainly due to younger generations' shifting demands and behaviors. Since most enrolled students belong to Gen Z—the most ethnically diverse generation yet, born between the years 1993 and 2001—it is more important than ever to find solid solutions that fit easily into your program to meet the foodservice needs of today's youth.

2019 Education Foodservice RSE: \$40.6B



Source: Technomic Jan. 2019 U.S. Foodservice Industry Wallchart



Let's start by identifying some of those challenges you're up against. To begin, the foodservice industry as a whole is frantically scrambling to cater to healthy eating cues thought to be the top driver of younger consumers' foodservice purchases. It's likely you're especially feeling pressure to promote better-for-you options as the majority of enrolled students fall within Gen Z.

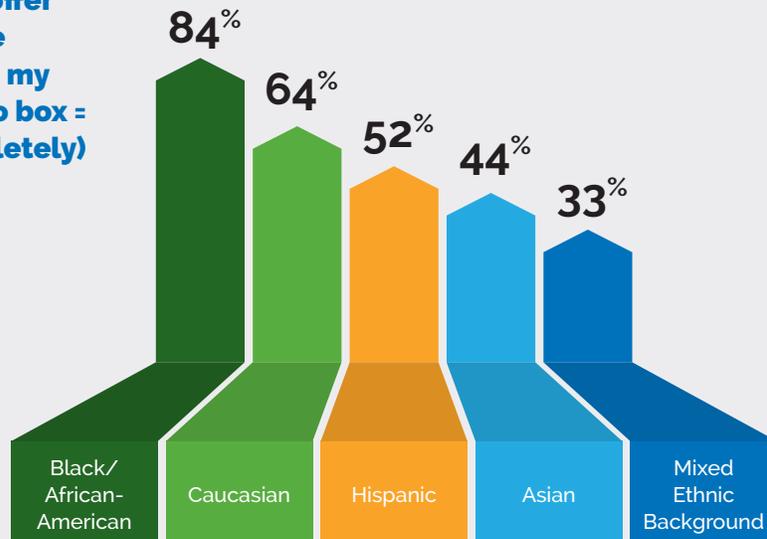
What's more, getting students to visit on-campus foodservice facilities can be difficult when there are numerous other food and beverage options for today's students, such as nearby off-site restaurants and third-party delivery services that bring food to their doorstep. Campus housing with embellished kitchen areas are also resulting in only a third of students (36%) preferring to eat in their dining hall or other on-campus facilities over their dorm or house.

On top of that, you have hundreds or thousands of different eating schedules to cater to, which require a never-ending

supply of food and beverage options to keep students satisfied. Nearly two-thirds of students say it is important for their college or university to offer foodservice around the clock to accommodate their eating habits. Since **fewer than half of college students say they still eat three traditional meals a day (48%)**, offering breakfast, lunch and dinner alone is no longer enough in today's snack-fueled world. To attract the 56% of students who agree to snacking more today compared to two years ago, you'll have to offer more options than what's previously sufficed.

With these challenges come great opportunity to not only meet the foodservice needs of your students, but to also go above and beyond their expectations. And while this feat may seem difficult, there are easy steps you can take to make your foodservice program more widely enjoyed across your student body.

"It is important for my college/university to offer foodservice around the clock to accommodate my eating habits." (Top two box = agree and agree completely)



Q: For each statement regarding food and beverage options at your college or university, please indicate how much you agree or disagree on a scale from 1–5, where 1 = disagree completely and 5 = agree completely.

Base: 200 consumers who are currently enrolled in a college/university or have attended a college/university in the past two years

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Tackling the common misconception that healthy options are the most important items for you to offer younger diners may help ease your mind.

While health cues are growing in importance across the industry, they are not the leading driver of foodservice purchases among college and university students. Above all attributes, the taste of food and beverage ranks as most important, beating out other attributes such as fresh ingredients and the availability of better-for-you options. Taste is also an attribute where men and women align on the importance, whereas large portion sizes skew significantly more toward men and health finds more favor with women.

So how do you maintain the focus on taste without alienating health concerns? The answer is to spotlight ingredients that marry taste and health. Items such as protein-packed peanut butter and other nut butters, real honey and sugar-free breakfast syrups will appeal to the three out of four students who say that they are into health trends but still seek comfort foods and flavors that they love.

Staying on top of shifting trends is essential for any operator.

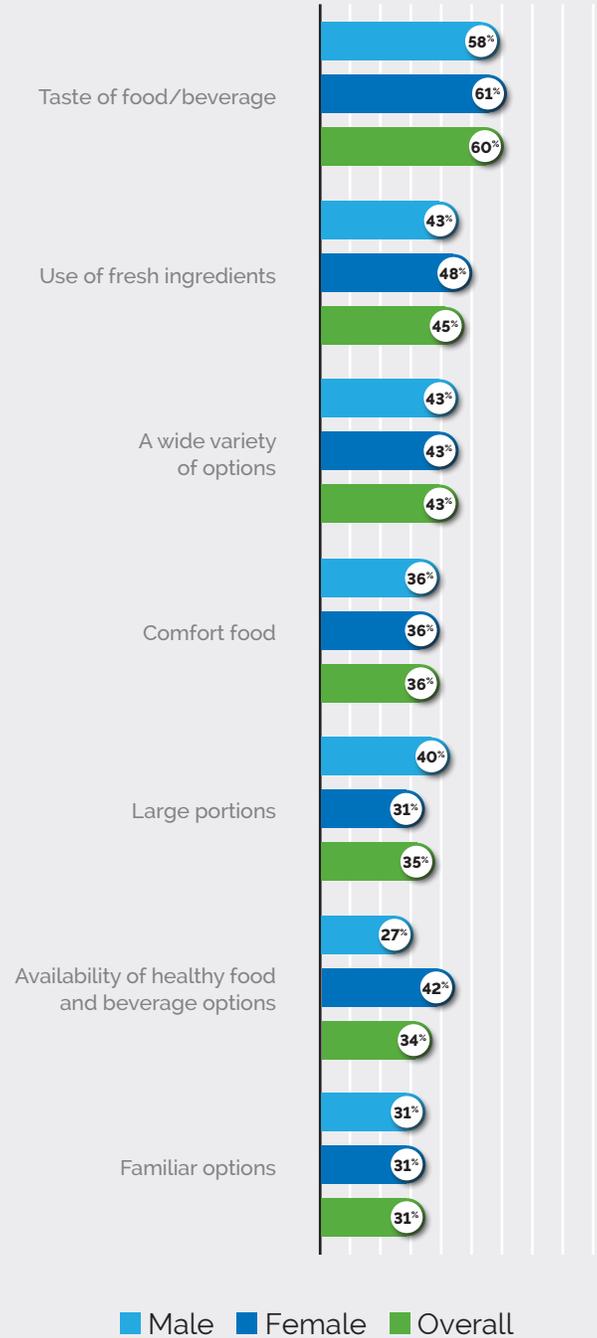
How many of these leading college and university trends do you currently feature in your program?

- Customization
- Local sourcing
- Allergy-friendly options
- Kosher and halal fare
- Global influences
- Bowl presentations
- Plant-based dining
- No-waste kitchens
- Meal swipe donation programs
- Eco-friendly packaging

Trend in action:  **HENDRIX COLLEGE**

Hendrix College in Conway, Ark., rolled out a build-it-yourself oatmeal bar featuring toppings such as honey, fresh and dried fruit, chocolate chips and pecans.

Most Important Attributes for Food/Beverage Purchases On/Off Campus



Q: Which of the following restaurant and menu attributes are most important to your purchasing decisions at on- or off-campus foodservice? Select up to five.

Base: 1,500 students ages 18+

Source: Technomic College & University Consumer Trend Report

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When trying to entice students to use your foodservice facilities over off-site restaurants or dorm room options, there is more you can do beyond emphasizing taste and health. Since nearly two-thirds of students (63%) agree to often eating their meals on the go, having a plethora of ready-to-eat, grab-and-go items is key to driving on-campus purchases. Prepackaged meals and snacks that are easy to carry, open and eat without making a mess while walking to or sitting in class will make your foodservice offerings more attractive than off-site restaurants that don't cater to students' busy lifestyles. In fact, half of students say that more grab-and-go options would encourage them to visit on-campus foodservice facilities more often.

Beyond grab-and-go, consider offering dorm room delivery service from at least one of your foodservice facilities in order to compete with third-party delivery companies that make it easy for students to stay in their room during long study periods, bad weather and bouts of illness. Boston University and George Mason University in Fairfax, Va., are among the schools that currently deliver food right to campus doorsteps using student couriers and robots, respectively.

When thinking of how to round out your foodservice offerings with more between-meal options, note that taste is not only the leading snack attribute among students, but it has also nearly double the importance placed on it compared to overall nutritional value. This means that while students may think about and express an interest in healthy snacks, most of all they want options that they know they'll enjoy. Snacks that abate hunger are also important to students, with approximately two-thirds (67%) saying they want between-meal options that satisfy their appetites and over a third (36%) noting that protein content is important.

Additionally, nearly half of consumers (46%) say that it is important for snacks to be familiar. You can accomplish this by featuring items that are already widely popular, such as peanut butter and jelly sandwiches, or by highlighting trusted household brand names that convey quality and taste to consumers.

CONSIDER
THESE
FILLING,
FAMILIAR
AND
PORTABLE
SNACKS



Sandwiches



Nuts/Trail Mix



Nut Butter



Granola Bars

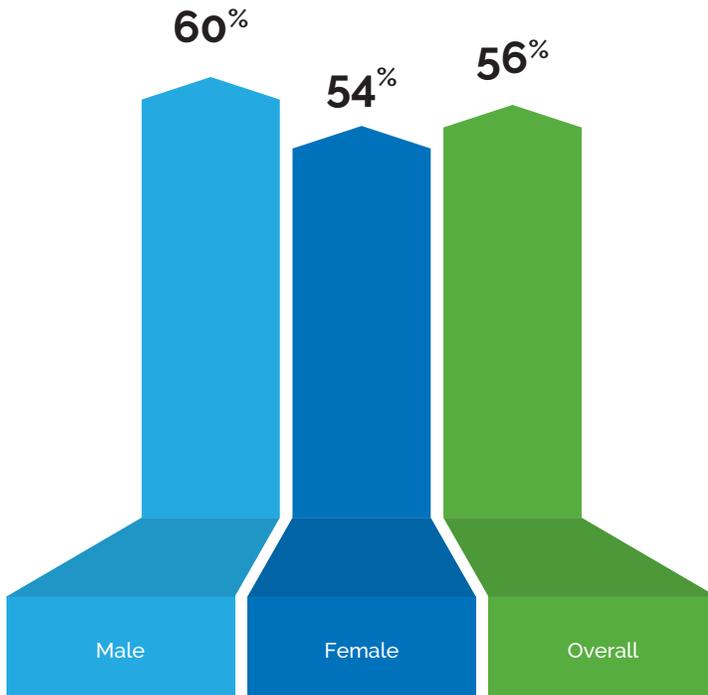


Bagels/Toast with Fruit Spreads

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One snack that you should serve throughout the day, including late-night hours, is beverages. Over half of college and university students say they are drinking more beverages as snacks compared to two years ago. Beverages that serve well as filling snacks are smoothies, juices, hot chocolates and coffees, the latter of which over half of students (58%) would like to see more on campus.

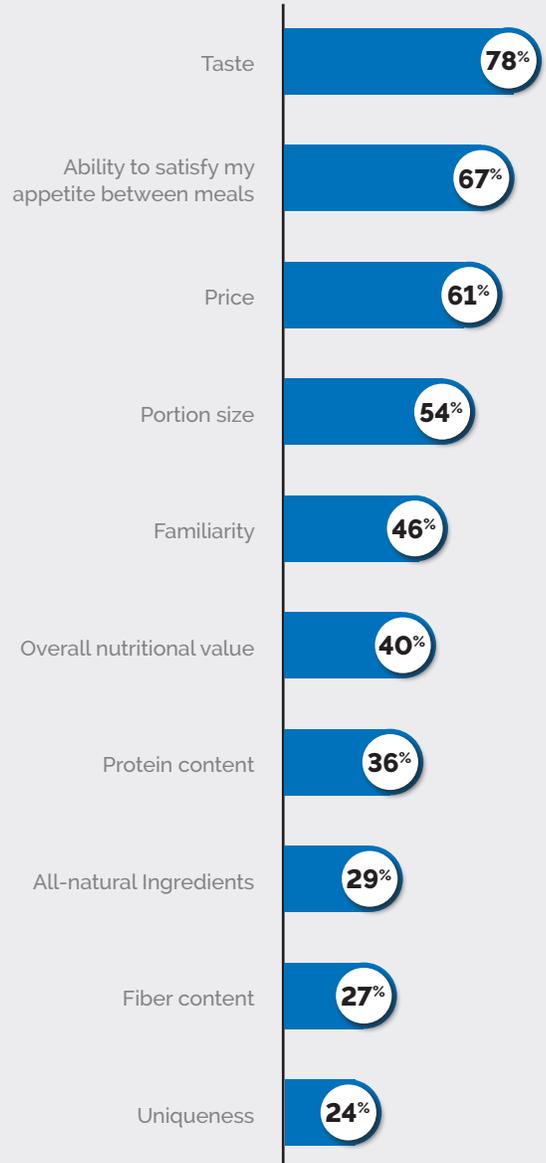
"I am drinking more beverages as snacks compared to two years ago." (Top two box = agree and agree completely)



Q: For each statement below regarding food and beverage options at your college or university, please indicate how much you agree or disagree on a scale from 1–5, where 1 = disagree completely and 5 = agree completely.

Base: 200 consumers who are currently enrolled in a college/university or have attended a college/university in the past two years

Leading Snack Attributes (Top two box = important and extremely important)



Base: 696 students ages 18+ who eat snacks at least once a week

Q: How important or unimportant are the following when choosing a snack?

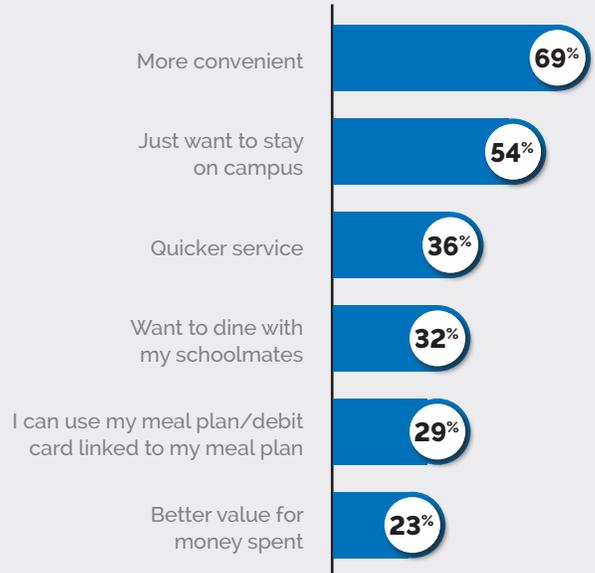
Source: Technomic College & University Consumer Trend Report

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The leading reasons students cite for purchasing food and beverage from on-campus facilities are convenience (69%) and because they just want to stay on campus (54%), which means the accessibility of your foodservice options already gives you an edge over off-campus competition. The quicker service provided at your foodservice venues also makes you more attractive to students compared to off-campus options, but keep in mind that providing more ready-to-eat meals and snacks will further your speedy and convenient positioning.

Nearly a quarter of students (23%) also say they purchase from on-campus facilities to have better value for the money spent. Beyond pricing, you can increase your value positioning by highlighting offerings that provide both taste and health and by making your foodservice available throughout the day with snacks. These few tweaks to your product line will help your program stay modern and flourish in the years to come.

Reasons for Purchasing Food/Beverage from On-Campus Foodservice Facilities



Base: 1,346 students ages 18+ who ever eat on campus

Q: What are your main reasons for purchasing food/beverage from on-campus food-service facilities versus off-campus restaurants or retail locations? Please select your top five reasons.

Source: Technomic College & University Consumer Trend Report



01

Grow Enrollment with Foodservice. College and university foodservice programs are becoming a greater draw for students when selecting which school to attend. Staying on top of trends and connected to the needs of today's students is crucial.

02

Convenience Matters. Gen Zers comprise the majority of students enrolled in colleges and universities today, and their foodservice preferences are distinct from previous generations. Taste, quality, health, convenience and value must all be present in your foodservice program to meet the high demands of this younger cohort.

03

Convenience Matters Portability is an important attribute for on-the-go students who value convenience. Offering more prepackaged, ready-to-consume food and drink items will show students that you understand their foodservice needs.

04

Stand Out with Snacks. Increase your snacking options between main meals (including late-night hours) to appeal to the dining habits of today's youth. Coffee beverages, protein-heavy nut butters and breakfast options such as bagels and fruit spreads are among the snacks that promote daypart flexibility and speak to students' love of familiarity and taste.

05

Taste Trumps All. Since students rank taste as the most important food and beverage attribute for overall foodservice, flavor-forward solutions are essential. As students also place importance on healthy options, finding ingredients that are both tasty and better-for-you will find the biggest wins on campus.



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Smucker Away From Home has the solutions you need to run a widely accepted foodservice program at colleges and universities. Keep students purchasing foods and beverages on campus with Smucker Away From Home's extensive portfolio of products that cater to taste and health demands, on-the-go dining, snacking and more. For more information, contact your Smucker Away From Home representative or visit www.SmuckerAwayFromHome.com



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