



FOODSERVICE

Breakfast Brief



College & University

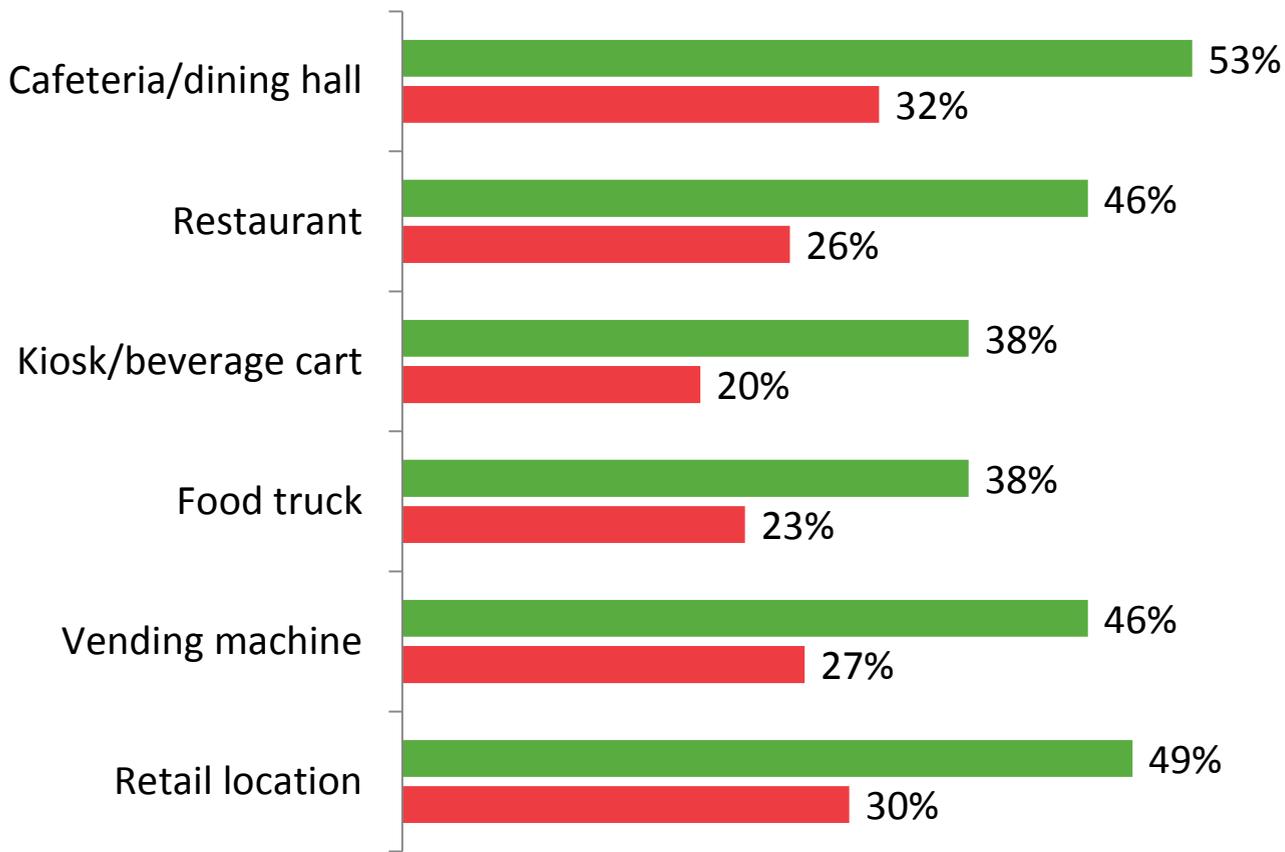
At college and university campuses, creativity is found not only in the classrooms but also in the foodservice. Every year, college campus dining facilities are at the forefront of innovation, setting trends such as transparency and social awareness for the rest of the foodservice industry to follow. Because of this, operators and suppliers closely monitor this segment for forward-thinking trends that can be implemented in their own businesses.

Breakfast Behaviors

Students have a plethora of dining venues to consider on college campuses. About two in five respondents say that they order prepared foods and beverages for breakfast at least 50% of the time at a cafeteria/dining hall (42%) and retail location (39%). Cafeterias and dining halls are most likely to offer students the majority of options within their meal plan and the biggest variety of foods and beverages to appease the widest demographic. Slightly trailing are restaurants and vending machines, where 36% of respondents say they order prepared meals for breakfast at least half the time. Further, only 30% of respondents order from a food truck at least half of the time, and even less (28%) say the same regarding kiosk/beverage carts. This is not too surprising as many of the food trucks or kiosks often found on campus focus on offering prepared foods and beverages for lunch, dinner and snacks over breakfast.



% of consumers who order prepared foods/beverages from their on-campus _____ at least half of the time.



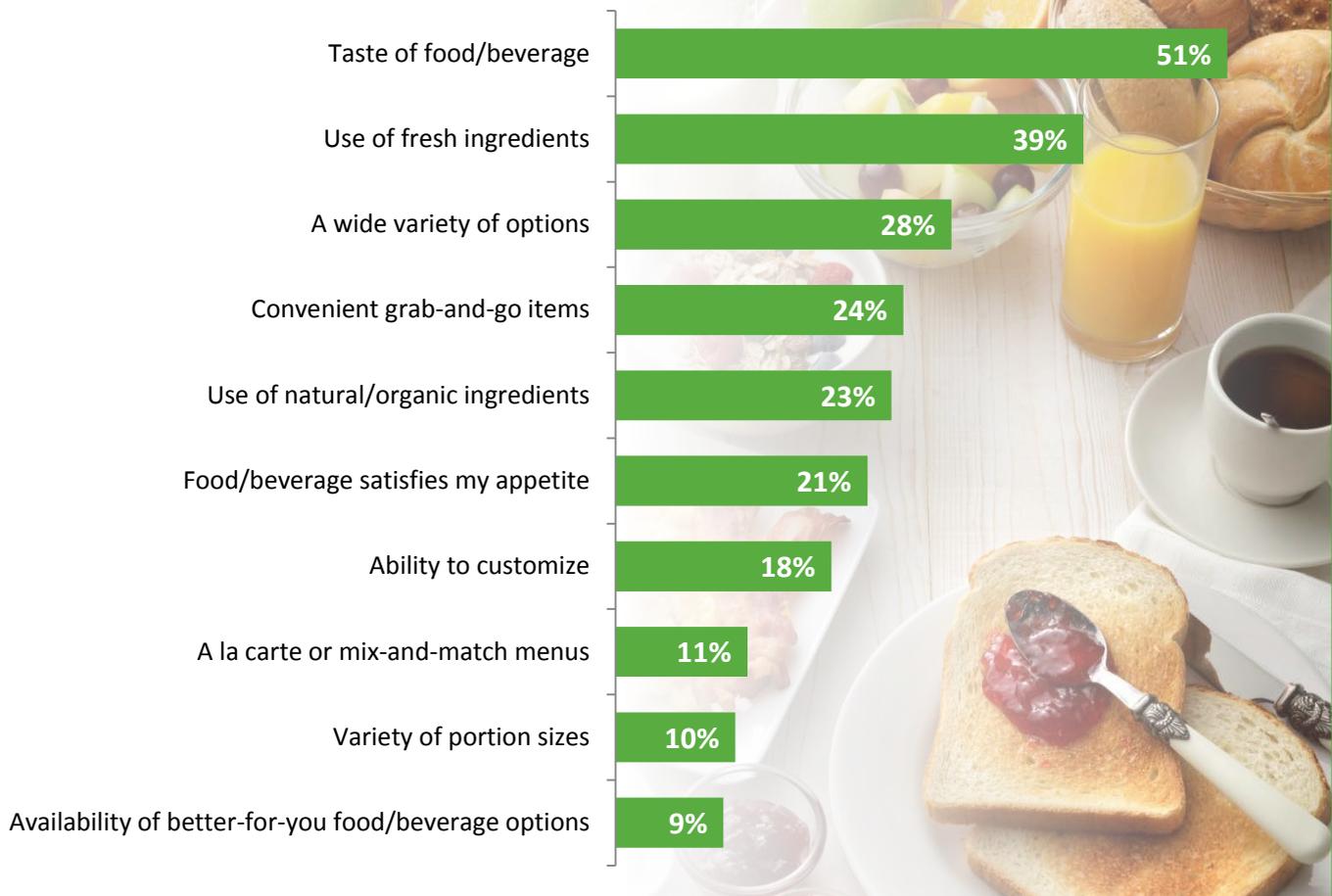
■ Male ■ Female

Base: 306 consumers who have been enrolled as a student at a college or university either full- or part-time in the past three years



Consumers were also asked to think more specifically about menu attributes that would be most important for breakfast occasions at a college or university. Taste of food and beverage is a given: of course people want food to taste good. But health is also top of mind. And although each consumer defines health in different ways, many say the use of fresh ingredients, natural/organic ingredients and better-for-you fare — each of which shows up in the top 10 responses — equate to health. Variety of options (including the ability to customize and variety of portion sizes) is also important to consumers, as well as convenience. All of these factors work together to create the greatest consumer appeal at colleges.

Which of the following menu attributes are most important to your breakfast ordering decisions when dining on your college campus?
Select up to three. (Top 10 responses shown)



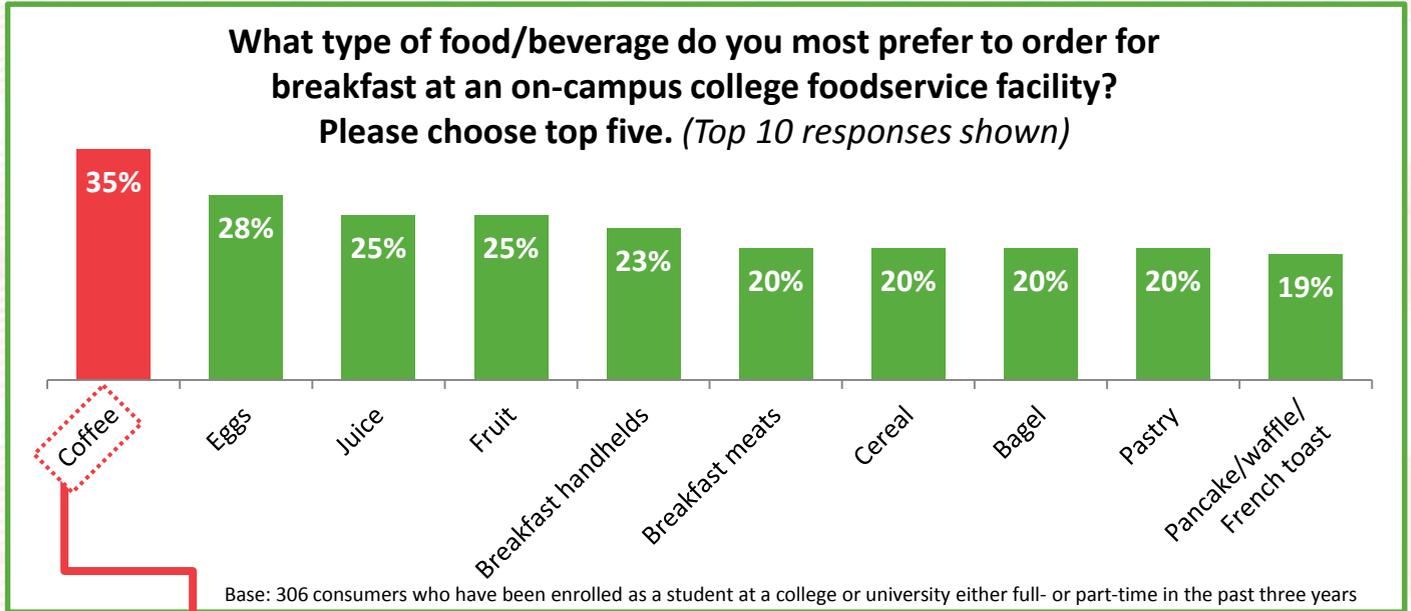
Although consumers overall did not rank familiar brand names as high as other menu attributes for their breakfast ordering decisions on college campuses (6%), it is interesting to note that Hispanic consumers in particular place a markedly higher importance on this attribute (12%) than consumers of other ethnicities.

Base: 306 consumers who have been enrolled as a student at a college or university either full- or part-time in the past three years



Breakfast Food/Beverage Preferences

When asked what type of food or beverage is most preferred for breakfast at an on-campus college foodservice facility, more than one in three consumers (35%) selected coffee, followed by eggs any style (28%). Other favored breakfast items include fruity options like juice and fruit (each 25%) and traditional breakfast starches like cereal (20%), bagel (20%), pastry (20%) and pancake/waffle/French toast (19%).



Top Specialty Coffee Flavors at Colleges and Universities

- 1 Mocha
- 2 Caramel
- 3 Chai
- 4 Chocolate
- 5 Vanilla

Base: Q1 2016 MenuMonitor, Technomic



There were a number of interesting findings when breaking out breakfast preferences by various demographics. Some takeaways include:

- With the exception of smoothie/protein drink and coffee, men have a higher preference for all other breakfast beverages (including juice, tea, water, milk, hot cocoa, energy drink and soft drink) compared to women. On the flip side, women’s preference for coffee (41%) greatly exceeds that of men (27%).
- Interesting regional callouts: Preferences in the South, Midwest and West considerably outpaced Northeast consumer preferences for bagels; Midwesterners prefer eggs far greater than any other region; and pastries are favored by those in the West significantly more than in other regions.
- Although the top preference for breakfast at an on-campus college foodservice facility is coffee, only 14% of Asian consumers prefer it. Instead, top responses for Asians include eggs (29%) followed by equal preferences for fruit, breakfast meats, pancake/waffle/French toast, pastry, tea and water (each 21%).



Emerging Trends

As previously noted, college and university foodservice facilities are teeming with menu innovation. Let's take a look at three emerging trends we're seeing on menus:

- **Local/regional fare**

The college and university segment equals if not surpasses the overall industry's enthusiasm for local sourcing. Some campuses are going as far as developing entire venues that serve only local or regional fare, whereas other colleges are simply switching to having select ingredients provided by a local supplier.



The University of Texas at Austin's student-run farm stand sells produce from local farms and baked goods from a local bakery



University of Massachusetts - Amherst's Chef's Table serves plated meals often featuring repurposed scraps from other food stations, such as croutons made from pizza crusts or pudding prepared with leftover breakfast oatmeal

- **Authentic ethnic**

Students increasingly want their schools' dining facilities to offer more ethnic foods and beverages. College and university operations are responding by touting the authenticity of globally influenced restaurants and food stations.

- **Waste reduction**

The "use it all" mindset is not just a trend at restaurants. Campuses are going green by implementing trayless dining to reduce waste, repurposing food scraps for specially marketed food waste meals and highlighting other awareness plans to bring trash to treasure.



Michigan State University in East Lansing is working with Chinese chefs from Beijing Normal University to provide insight into preparing authentic Chinese cuisine



FEATURED RECIPE

Ingredients

- 1 tablespoon granulated sugar
- ½ teaspoon ground cinnamon
- 2 (8-inch) flour tortillas
- Crisco® Butter Flavor No-Stick Cooking Spray
- ¼ cup Jif® Creamy Reduced Fat Peanut Butter Spread
- 1 large banana, peeled and sliced ¼ inch thick
- 1 tablespoon brown sugar

Directions

Step 1: Combine cinnamon and granulated sugar. Set aside.

Step 2: Spray one side of tortilla generously with butter cooking spray. Place spread side down in 10-inch skillet. Spread topside with peanut butter, top with banana slices, sprinkle with brown sugar and top with remaining tortilla. Spray top of tortilla generously with butter cooking spray and sprinkle with half of the cinnamon and sugar mixture.

Step 3: Cover skillet. Cook over medium-high heat until the bottom is golden brown. Turn tortilla with a wide spatula. Sprinkle top with remaining cinnamon and sugar. Continue cooking covered until bottom is golden brown. Remove to cutting board and slice into 8 wedges. Serve warm.

Nutrition

Serving Size (1/4), Calories 220 (Calories from Fat 80), Total Fat 10g (Saturated Fat 1.5g), Cholesterol 0mg, Sodium 230mg, Total Carbohydrate 30g (Dietary Fiber 3g, Sugars 12g), Protein 6g; Percent Daily Value*: Vitamin A 0%, Vitamin C 4%, Calcium 4%, Iron 4%.

**Percent Daily Values are based on a 2,000 calorie diet.*

Banana Nut Quesadilla Wedges



PREP TIME: 10 min
COOK TIME: 5 min
YIELD: 4 servings

There is a growing population of non-Caucasian college students:

15.7% of college students polled are Hispanic and 12.7% are Black/African American.





Technomic Takeaway:

3 Areas of Opportunity for College & University Breakfast

#1

VARIETY IS THE SPICE OF LIFE

Taste and freshness are table stakes: of course students want food that is fresh and tastes good! Consumers are placing the heartiest emphasis on variety. More than a quarter of consumers say they prefer a wide variety of options for breakfast on a college or university campus. This is where multiple food stations in dining halls come into play: Operators should get creative by testing new ethnic cuisines and mashups to keep students and staff engaged. In addition, varying sauces and condiments is an easy and inexpensive way to add diversity to menus.



#2

GET TO KNOW YOUR STUDENTS

Two things we know for certain about students: no two are alike and they are very vocal about their opinions. It can be highly beneficial for operators to find creative ways to get students involved in menu creation and recipe development. Also, because there are vastly different dining preferences among gender, ethnicity and region demographics, knowing your student makeup is essential. Operators should consider offering customizable menus to appeal to the widest range of students.

#3

BETTER-FOR-YOU STANDARDS

Health may not always be top-of-mind for college students, but they're still asking for better-for-you menu attributes, including fresh, natural, organic and allergen-free fare. Some colleges and universities are responding by building entire campus restaurants and dining hall stations around these attributes, including gluten-free venues.

