C&U DINING
POST-COVID

OmniNOW (August 2020)
OBJECTIVES

✓ Understand C&U students’ plans for housing and dining in the fall 2020 semester
✓ Determine how C&U operators can best meet student needs and address concerns about COVID-19 in their campus dining operations

METHOD

✓ Online survey of 1000 consumers representing the general population, of which 248 qualified
✓ 97 full-time C&U students
✓ 58 part-time C&U students
✓ 93 with a C&U student in household

// fielded 08.2020

DEMOGRAPHICS

Gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>49%</td>
</tr>
<tr>
<td>Female</td>
<td>50%</td>
</tr>
</tbody>
</table>

Generation

<table>
<thead>
<tr>
<th>Generation</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z</td>
<td>21%</td>
</tr>
<tr>
<td>Millennial</td>
<td>38%</td>
</tr>
<tr>
<td>Gen X</td>
<td>33%</td>
</tr>
<tr>
<td>Boomer+</td>
<td>8%</td>
</tr>
</tbody>
</table>

Income

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$25K</td>
<td>12%</td>
</tr>
<tr>
<td>$25K - $49K</td>
<td>14%</td>
</tr>
<tr>
<td>$50K - $74K</td>
<td>19%</td>
</tr>
<tr>
<td>$75K - $99K</td>
<td>13%</td>
</tr>
<tr>
<td>$100K +</td>
<td>40%</td>
</tr>
</tbody>
</table>

Ethnicity

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>70%</td>
</tr>
<tr>
<td>Black</td>
<td>10%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>10%</td>
</tr>
<tr>
<td>Asian</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>West</td>
<td>25%</td>
</tr>
<tr>
<td>Midwest</td>
<td>19%</td>
</tr>
<tr>
<td>South</td>
<td>31%</td>
</tr>
<tr>
<td>N. East</td>
<td>25%</td>
</tr>
</tbody>
</table>
1. Expect a resurgence in C&U dining soon. Students are ready to return to campus, with most believing they'll do so in the coming school year. Plans for where to live in the fall have been largely unimpacted by COVID. Meal plan enrollment is still common, and those who will not use a meal plan cite other reasons besides cleanliness concerns. If dining services are available, students are ready to use them.

2. Eating on campus is a calculated risk. Although students are coming back to school and using meal plans, they realize that campus dining is still not entirely safe. Dining halls and campus bars & restaurants are more worrisome than retail, as students may be recognizing the risk in group-dining format locations.

3. Reassure students by distancing tables and sanitizing surfaces. These are the top precautions that would make students more comfortable. Enforcing social distancing, deep-cleaning common areas, and requiring sick staff to get tested before they return would also help reassure students of their safety.

4. Grab-and-go will be an important offering this fall. In addition to implementing safety measures, increasing grab-and-go options may be a great way to connect students to dining services. Students are interested in increased options, and these options work well as students are hesitant about eating in large groups.
C&U dining
Most students plan to return to campus soon. Those in rural areas are more likely to do so, with 78% planning to come back in fall 2020.

### Timing for Returning to Campus In-Person

<table>
<thead>
<tr>
<th></th>
<th>Fall 2020</th>
<th>Spring 2021</th>
<th>Even Later</th>
<th>Undecided</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>53%</td>
<td>25%</td>
<td>9%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Among households with students, 77% plan to return in the upcoming school year.

A1: When do you or the student in your household currently plan to return to campus for in-person attendance? (n=248)
And the pandemic has had negligible impact on housing plans for the fall semester.

### HOUSING PLANS

**among households with students**

<table>
<thead>
<tr>
<th>Pre-COVID Ideal</th>
<th>Fall 2020 Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live at home with parents/family</td>
<td>48%</td>
</tr>
<tr>
<td>Live on campus at a location that provides your meals</td>
<td>26%</td>
</tr>
<tr>
<td>Live off campus but not with parents/family</td>
<td>19%</td>
</tr>
<tr>
<td>Live on campus at a location where food is not provided</td>
<td>5%</td>
</tr>
</tbody>
</table>

31% plan to live on campus in the fall.

A2: Which best describes your / the student in your household’s living situation while at college? (n=248)
Most students have some sort of meal plan, with household income influencing how they eat.

**DINING PLANS**

among households with students who do not plan to live with family in the fall

- **30%**
  - Greater among high-income consumers (53%)
  - Meal-based plan with set items as part of each meal

- **27%**
  - Greater among middle-income consumers (45%)
  - Partial meal-based plan: a combination of set meals as well as credit to be used on purchasing different food or beverages

- **9%**
  - No set meals but a set amount pre-paid to be used at campus dining

- **31%**
  - don’t have a meal plan

- **66%**
  - have a meal plan

- **2%**
  - other / not sure

- **15%**
  - Greater among low-income consumers (38%)
  - No meal plan, but sometimes choose to eat on campus

- **16%**
  - No meal plan, and never eat on campus

A3: As of TODAY, which of the below best describes the plan you / the student in your household are on with regards to the college’s dining services for this coming fall 2020? (n=128)
Students who skip meal plans generally are not doing so because they think campus food is unsanitary.

- Cost is more of a factor, and not all colleges are offering dining options in the fall
- Some students simply choose to make food at home

A4: You mentioned earlier that you / the student in your household are NOT on a meal plan. Why is that? (n=40)

REASONS NOT ON MEAL PLAN

- No longer live on campus and prefer to make my food at home: 35%
- Too expensive: 20%
- Dining options will not be available fall 2020 due to COVID-19: 15%
- Can’t afford to pay up front at the start of the semester: 13%
- Locations are not open when I need them: 10%
- Dining options are not conveniently located: 10%
- Don’t like the available food options or don’t fit special dining needs: 10%
- Dining rooms won’t be open / can’t socialize so it isn’t worth it to me: 10%
- Worried the food won’t be as fresh since it’s all served to-go: 10%
- Options will be pre-packaged and not as appealing: 8%
- Don’t trust the cleanliness and / or safety of campus offerings: 8%
- Worried menus are going to be smaller / more limited: 8%
- Meal options are not customizable enough: 5%
That said, many students still believe it's risky to get food on campus.

### Risky Places to Get Food on Campus

<table>
<thead>
<tr>
<th>Place</th>
<th>Risk Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus pub / bar</td>
<td>62%</td>
</tr>
<tr>
<td>Dining hall</td>
<td>56%</td>
</tr>
<tr>
<td>On-campus restaurants</td>
<td>53%</td>
</tr>
<tr>
<td>Student dorms with full kitchens</td>
<td>52%</td>
</tr>
<tr>
<td>Campus coffee shop</td>
<td>47%</td>
</tr>
<tr>
<td>Grocery stores run by dining services</td>
<td>45%</td>
</tr>
<tr>
<td>Campus convenience stores</td>
<td>43%</td>
</tr>
<tr>
<td>Kiosks with grab-and-go food</td>
<td>41%</td>
</tr>
<tr>
<td>Campus delivery services</td>
<td>40%</td>
</tr>
</tbody>
</table>

Among households with students | top 2 box, 5-pt. scale (extremely / very risky)

In general, foodservice venues like dining halls and restaurants are riskier than retail locations like c-stores and kiosks.

A5: How risky do you / does the student in your household consider each of the following ways to get food on campus as it relates to coronavirus / COVID-19? (n=248)
Spacing tables six feet apart and sanitizing surfaces can help address these concerns.

A6: Which of the following safety measures would make you / the student in your household feel most comfortable with their college’s dining options? Select up to 5. (n=248)

- 6 feet or more between tables
- Sanitizer / wipes at every table
- Surfaces sanitized after every meal
- 6 feet or more restrictions in common areas
- Common areas deep-cleaned daily
- Sick staff need to be tested for COVID-19 before returning
- Only sealed / wrapped utensils used
- Staff visibly wearing food safety apparel
- Staff must take temperature
- Pre-order so food is ready when you arrive
- Only serve sealed beverages
- Contactless payment
- Disinfect or dispose of menu each time
- Double-wash dishes, glasses, and utensils
- More food covers / sneeze guards / enclosed cold cases, etc.
- Visible food safety inspection results
- No shared condiment bottles
- Staff member at door to manage traffic
- No cloth napkins used
- None of these

CRITICAL

- 35%
- 35%
- 32%
- 27%
- 25%
- 25%
- 22%
- 22%
- 25%

REASSURING

- 27%
- 25%
- 22%
- 21%
- 22%
- 21%
- 20%
- 20%
- 18%
- 18%

NICE TO HAVE

- 20%
- 18%
- 14%
- 14%
- 14%
- 12%
- 10%

LESS IMPORTANT

- 6%

Greater in the Northeast (30%)
Group size also plays a role – interest in on-campus dining goes up as the size of group goes down.

INTEREST IN DINING ON-CAMPUS

among households with students | top 2 box, 5-pt. scale

Dining in **LARGE** groups

- Regular meals: 40%
- Special events / promotions: 43%

Dining in **SMALL** groups

- Regular meals: 48%
- Special events / promotions: 48%

Dining **SOLO**

- Regular meals: 59%
- Special events / promotions: 54%

A7: How interested are you / is the student in your household interested in the following types of dining on-campus in the fall of 2020? (n=248)
In addition to Mexican dishes, students are most interested in options they can take and eat outside of the dining hall.

### INTEREST IN DINING OPTIONS

*among full-time or part-time students | top 2 box, 5-pt. scale*

<table>
<thead>
<tr>
<th>Cuisine Type</th>
<th>Format</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexican dishes</td>
<td>Greater among high-income consumers (84%)</td>
<td>68%</td>
</tr>
<tr>
<td>Increased hot grab-and-go options</td>
<td>Greater in the West (85%)</td>
<td>67%</td>
</tr>
<tr>
<td>Take-and-bake meals</td>
<td>Greater in urban areas (77%)</td>
<td>66%</td>
</tr>
<tr>
<td>Ready-to-heat meals</td>
<td>Greater among men (77%) and in the West (80%)</td>
<td>64%</td>
</tr>
<tr>
<td>Wings</td>
<td>Greater in the West (78%)</td>
<td>63%</td>
</tr>
<tr>
<td>Burgers</td>
<td>Greater among high-income consumers (73%)</td>
<td>62%</td>
</tr>
<tr>
<td>Increased cold grab-and-go options</td>
<td>Greater among high-income consumers (67%)</td>
<td>62%</td>
</tr>
<tr>
<td>Asian dishes</td>
<td>Greater in the West (71%) and in urban areas (63%)</td>
<td>61%</td>
</tr>
<tr>
<td>Fish / Seafood</td>
<td>Greater among high-income consumers (67%)</td>
<td>52%</td>
</tr>
<tr>
<td>Plant-based foods</td>
<td>Greater in the West (71%) and in urban areas (63%)</td>
<td>50%</td>
</tr>
<tr>
<td>Sushi</td>
<td>Greater in the West (71%) and in urban areas (63%)</td>
<td>49%</td>
</tr>
</tbody>
</table>
X2a: Are you currently enrolled as a STUDENT at a college or university? (n=1000)
A0: Is anyone in your household currently enrolled as a STUDENT at a college or university? (n=845)

- Full-time student: 10%
- Part-time student: 6%
- Not a student: 85%

11% have a student in household among those who are NOT students...