

Surveying the College Foodservice Market

FSD's 2012 College and University Census reports institutions made an average of nearly \$10 million in foodservice revenue in 2010-2011.

COLLEGE FOODSERVICE SNAPSHOT

■ The 2012 College & University Census provides information from a mix of **50** large, medium and small institutions. **Sixty-eight percent** of the universities in our survey are self-managed; **30%** contract their foodservice; while **2%** run a mix of self-op and contract-managed accounts.

■ The 2010-2011 school year's average enrollment was **11,047**, a nearly **3%** increase from last year. The majority of students—**61%**—are commuters. **Eighteen percent** are commuter-only campuses.

■ **Eighty-two percent** of colleges in our survey offer a meal plan. On average **2,394** students are on a meal plan, which accounts for an average of **\$8.5 million** in revenue.

■ The institutions averaged **\$9.7 million** in foodservice revenue last year. **Ninety-four percent** operate retail outlets; **84%** catering; **56%** vending; and **20%** concessions. The average revenues for these services were: cash operations, **\$2.7 million**; catering, **\$105,076**; vending, **\$494,450**; and concessions, **\$952,893**.

■ University foodservice departments averaged nearly **\$8 million** in total foodservice costs. Of that, on average **\$3.6 million** was spent on labor, including benefits. Food purchases averaged **\$3.2 million**.

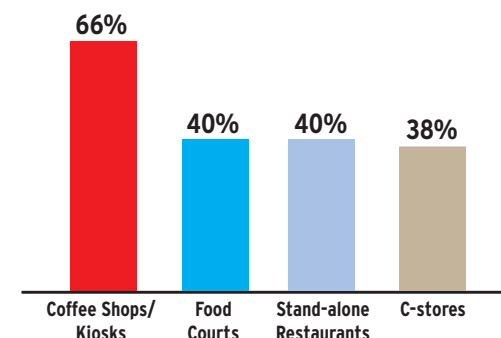
■ Executive chefs are employed at **70%** of campuses. **Forty-eight percent** operate a market-style servery, with **75%** of these located in a residence/dining hall.

■ **Fifty-two percent** purchase organic food, with an average of **6%** of their food purchases being organic.



CASHING IN

The majority of colleges in our survey operate a coffee shop/kiosk. The percentage of respondents who offer cash operations include:



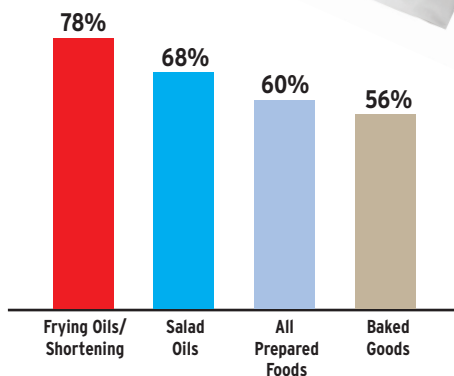
COLLEGE & UNIVERSITY CENSUS-2010 2011 SCHOOL YEAR

COLLEGE/UNIVERSITY (Location)	Food Purchases	Labor Costs	Foodservice Expenses	Foodservice Revenue	Enrollment 2010	Enrollment 2011	Students on Meal Plan
ANNUAL FOOD PURCHASES MORE THAN \$1 MILLION							
Brigham Young University (Provo, Utah)	\$19,010,245	\$14,293,650	\$42,732,463	\$43,565,946	32,947	32,935	4,800
Harvard University (Cambridge, Mass.) SOD, RA	\$13,000,000	\$27,200,000	\$52,525,000	\$51,077,000	19,800	21,000	7,371
University of Georgia (Oxford, Ga.)	\$12,000,000	\$13,000,000	\$29,000,000	\$41,000,000	34,000	35,000	8,300
North Carolina State (Raleigh, N.C.)	\$10,810,000	\$9,735,000	\$25,940,000	\$31,327,000	34,376	34,400	8,600
University of Minnesota (Minneapolis) ARA	\$10,400,000	\$13,000,000	\$23,600,000	\$33,700,000	55,000	55,000	8,250
West Virginia University (Morgantown, W.Va.)	\$9,200,000	\$10,000,000	\$24,500,000	\$31,500,000	29,500	30,000	7,800
ANNUAL FOOD PURCHASES \$300,000-\$1 MILLION							
Carl Albert State College (Poteau, Okla.)	\$663,000	\$90,000	\$773,000	\$650,000	4,000	4,500	300
Herkimer County Community College (Herkimer, N.Y.) AFV	\$655,000	\$845,000	\$1,500,000	\$1,700,000	3,200	3,600	700
Fox Valley Technical College (Appleton, Wis.)	\$650,000	\$750,000	\$1,400,000	\$1,400,000	10,500	15,000	0
St. John's College (Santa Fe, N.M.) ARA	\$600,000	\$600,000	\$1,200,000	\$1,600,000	573	530	286
Union College (Lincoln, Neb.)	\$600,000	\$475,000	\$1,100,000	\$1,100,000	900	900	450
Salt Lake City Community College (Salt Lake City)	\$520,000	\$450,000	\$1,090,000	\$1,100,000	NA	NA	0
ANNUAL FOOD PURCHASES \$100,000-\$299,999							
Texas State Technical College (Harlingen, Texas)	\$250,000	\$55,000	\$368,000	\$379,000	6,000	6,000	2,700
Christ the King Seminary (East Aurora, N.Y.) PTF	\$250,000	\$300,000	\$550,000	\$600,000	18	15	15
Purdue University North Central (Westville, Ind.)	\$225,000	\$225,000	\$450,000	\$500,000	4,600	5,000	0
Webb Institute College (Glen Cove, N.Y.) CUL	\$200,000	\$290,000	\$495,000	\$541,000	83	83	83
Waukesha County Tech. College (Pewaukee, Wis.) FSI	\$180,000	\$400,000	\$600,000	\$1,000,000	25,000	25,000	0
Colorado Northwestern Comm. College (Rangely, Colo.) SOD	\$150,000	\$160,000	\$430,000	\$680,000	400	400	200
MEAN	\$3,160,831	\$3,590,858	\$7,999,449	\$9,729,088	10,760	11,047	2,394

Key: NA = Not available; AFV = American Food & Vending; ARA = Aramark; CUL = Culinary Management; CRH = CRH Catering; FSI = Food Service Inc.; PTF = Personal Touch Foodservice; RA = Restaurant Associates; SOD = Sodexo

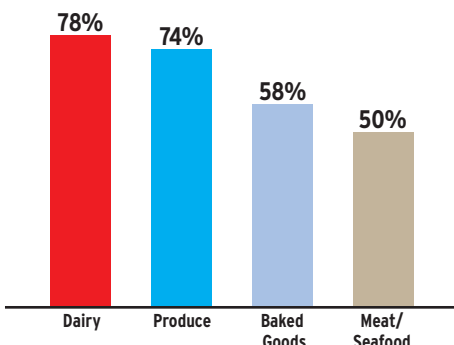
TRIMMING THE FAT

Only 8% of respondents haven't taken steps to reduce trans fat. Among those campuses that have eliminated trans fat, where they've cut it out:



FOCUS ON LOCAL

Eighty-eight percent of respondents buy local. The products most often sourced locally include:



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Behind the Numbers

Costs, revenues increase in 2010-2011 school year.

NEW YORK—Nearly 80% of our college and university census respondents this year (2010-2011 school year) were the same as those who answered last year's survey, which included data from the 2009-2010 school year. Among those colleges that reported for both years, average food purchases increased 6%, average labor costs grew nearly 5%, average total food-service expenses rose 6% and average foodservice revenue increased nearly 9%. Here's the story behind the numbers at four universities in our survey.

North Carolina State University: At this 34,400-student college in Raleigh, N.C., meal plan counts increased by nearly 700 in the 2010-2011 school year from the 2009-2010 school year. Randy Lait, senior director of hospital-ity services, attributes that growth to retention from year to year and to creating value.

"What we've done a really good job at is retention on students who were on the meal plan the previous year," Lait says. "We've really tried to tweak the meal plans so that they become a great value for people. We've created a nice culture that [eating on campus] is the thing to do."

One tweak Lait says has been very successful is the Freedom Pass plan, which combines unlimited visits to

the dining halls with a meal equivalency that can be used at retail locations. Students can purchase the equivalent of \$5.85 at lunch and dinner and \$4.75 at breakfast in a retail location. Nearly 4,000 students are on the Freedom Pass meal plan, the department's most expensive plan to purchase. "[This plan has] driven our top-end revenue up, and our traditional usage on it is still maintained to be about 14 meals per week," Lait adds.

Lait is making changes to the Freedom Pass plan this fall to ensure that students can't take advantage of the system. This fall a fourth meal period is being added, and the number of equivalencies on the plan will be capped at 10 per week so the department doesn't lose money on the program.

The university has also seen a 12% increase in food-service revenue from the 2009-2010 to the 2010-2011 school years. Lait says the majority of that comes from the increase in the number of students on meal plans. He says other factors include increasing the quality of food and service and renovating or adding locations.

The department also decreased total foodservice expenses by \$45,000

from last year's survey. Lait says much of that was accomplished by taking a hard look at the products purchased. The department joined a group purchasing program and started taking better advantage of its computer systems to analyze its retail locations.

"We set up some key performance indicators," Lait says. "Every location knows what their targets are specific to that unit. Pretty quickly we found that we weren't making the money we needed to make on this item or that. Sometimes it was a price increase or a portion change. Our coffee shops were about a point and a half over where they should have been on their target, and we went through and found the individual shop that had caused it. We're digging into that one shop because we know where to look now."

University of North Texas: Food purchases are up 8% in this most recent study as compared to last year's study, to \$5.2 million, at this 36,000-student university in Denton, Texas. Shohreh Sparks, operation director, says there are a couple of reasons behind the increase.

One is the cost of food is increasing.

"The other part, and I think I should be happy about it, is improvement to our food," Sparks says. "I think we have higher attendance for meals than we had during the fall of 2011, so that might also affect [food costs]." There are 8,000 students on the meal plan this year, 500 more than last year.

Some of the changes the department has made to increase the quality of food include adding more options and using fresh ingredients.



UNT's Bruce Cafeteria now offers more options and higher quality food items.



Food costs increased after serving lines doubled at Bruce Cafeteria.

For example, Bruce Cafeteria offers fresh pasta daily, and the number of pasta dishes increased from two to four. A hot, housemade dessert is now offered daily. Pizza at Bruce has also seen a change. Three to five types of pizza are offered daily. All pizza is made from scratch, and the department is now offering items like fresh mozzarella and herbs on its pies, which Sparks says affected food costs. The number of vegan entrées served at Bruce increased, from four to six. A vegan salad bar is also offered.

The number of serving stations at Bruce also increased. "We went from five serving wells to 10 in each line, so we basically have 20 serving lines," Sparks adds.

Herkimer County Community College: This 3,600-student institution in New York went from self-op to contract last year. Once Liverpool, N.Y.-based American Food & Vending took over, students were able to purchase a meal plan, an option not previously available. It is now mandatory for students living on campus to have a meal plan, and 700 students have purchased one.

The department's revenue increased 88% for the school year ending in 2011 versus 2010. Jim Vair, general manager for American Food & Vending at the university, attributes the increase to offering meal plans.

Another change was adding the dinner meal period, which caused the department's labor costs to increase 95%. "I run two full shifts where [the old department's management] used to run one, which accounts for the increase in labor," Vair says.

University of Missouri: This 33,800-student university in Columbia, Mo., also saw an increase in labor from last year's census. Julaine Kiehn, director of Campus Dining Services, says the 12% labor increase was because the department opened a new student center. About 100 student and 10 full-time staff members were added to the department's workforce to run the new center.

The department's revenue also increased nearly 10%, which Kiehn also says is because of the new center, which added six restaurants and a convenience store to the campus's foodservice options.



North Carolina State increased meal plans by offering high-value options.

COLLEGE & UNIVERSITY CENSUS-2011 ACADEMIC YEAR

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					2010	2011	
Brigham Young University (Provo, Utah)	\$19,010,245	\$14,293,650	\$42,732,463	\$43,565,946	32,947	32,935	4,800
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University of Georgia (Oxford, Ga.)	\$12,000,000	\$13,000,000	\$29,000,000	\$41,000,000	34,000	35,000	8,300
North Carolina State (Raleigh, N.C.)	\$10,810,000	\$9,735,000	\$25,940,000	\$31,327,000	34,376	34,400	8,600
University of Minnesota (Minneapolis) ARA	\$10,400,000	\$13,000,000	\$23,600,000	\$33,700,000	55,000	55,000	8,250
West Virginia University (Morgantown, W.Va.)	\$9,200,000	\$10,000,000	\$24,500,000	\$31,500,000	29,500	30,000	7,800
University of Missouri (Columbia, Mo.)	\$7,727,668	\$8,935,280	\$21,094,203	\$27,113,125	32,415	33,803	8,000
University of Wisconsin (Milwaukee)	\$7,000,000	\$6,000,000	\$14,200,000	\$17,480,000	31,000	31,000	3,100
University of Iowa (Iowa City, Iowa)	\$6,800,000	\$6,050,000	\$13,075,000	\$19,700,000	30,400	30,700	6,140
Appalachian State University (Boone, N.C.)	\$6,800,000	\$6,300,000	\$18,250,000	\$16,810,000	17,000	17,500	5,800
Emory University (Atlanta) SOD	\$6,000,000	\$8,500,000	\$18,000,000	\$26,225,000	13,300	13,300	4,500
University of North Texas (Denton, Texas)	\$5,200,000	\$6,200,000	\$13,200,000	\$15,800,000	35,000	36,000	8,000
University of Northern Iowa (Cedar Falls, Iowa)	\$4,650,000	\$6,901,000	\$12,640,000	\$19,105,250	13,200	13,200	4,667
University of North Dakota (Grand Forks, N.D.)	\$3,900,000	\$5,000,000	\$10,545,000	\$13,880,000	14,000	14,800	3,800
Plymouth State University (Plymouth, N.H.)	\$3,800,000	\$3,800,000	\$7,600,000	\$7,200,000	4,200	4,200	2,700
Middlebury College (Middlebury, Vt.)	\$3,300,000	\$6,018,000	\$10,023,000	\$11,666,000	2,480	2,450	2,450
Gettysburg College (Gettysburg, Pa.)	\$2,969,612	\$3,269,970	\$6,464,768	\$10,743,080	2,650	2,660	2,068
Gustavus Adolphus College (Saint Peter, Minn.)	\$2,900,000	\$2,500,000	\$6,500,000	\$7,960,000	2,500	2,550	2,400
Elmira College (Elmira, N.Y.)	\$2,500,000	\$1,250,000	\$4,250,000	\$5,120,000	1,200	1,200	90
University of Redlands (Redlands, Calif.) BON	\$2,500,000	\$3,000,000	\$6,250,000	\$5,350,000	2,400	2,500	1,750
Saint Anslem College (Manchester, N.H.)	\$1,900,000	\$2,600,000	\$5,132,000	\$8,500,000	1,800	1,800	1,650
University of Wisconsin-Stout (Menomonie, Wis.)	\$1,900,000	\$4,000,000	\$6,375,000	\$7,900,000	9,300	9,300	3,800
Western Oregon University (Monmouth, Ore.)	\$1,500,000	\$1,500,000	\$4,000,000	\$4,555,000	6,300	6,300	1,008
University of Indianapolis (Indianapolis)	\$1,740,000	\$1,200,000	\$3,000,000	\$3,650,000	5,000	5,500	3,600
North Greenville College (Tigerville, S.C.) ARA	\$1,400,000	\$1,100,000	\$3,000,000	\$3,100,000	2,200	2,200	1,800
Carl Albert State College (Poteau, Okla.)	\$663,000	\$90,000	\$773,000	\$650,000	4,000	4,500	300
Herkimer County Community College (Herkimer, N.Y.) AFV	\$655,000	\$845,000	\$1,500,000	\$1,700,000	3,200	3,600	700
Fox Valley Technical College (Appleton, Wis.)	\$650,000	\$750,000	\$1,400,000	\$1,400,000	10,500	15,000	0
St. John's College (Santa Fe, N.M.) ARA	\$600,000	\$600,000	\$1,200,000	\$1,600,000	573	530	286
Union College (Lincoln, Neb.)	\$600,000	\$475,000	\$1,100,000	\$1,100,000	900	900	450
Salt Lake City Community College (Salt Lake City, Utah)	\$520,000	\$450,000	\$1,090,000	\$1,100,000	NA	NA	0
Southwestern Adventist University (Keene, Texas)	\$500,000	\$450,000	\$995,000	\$1,250,000	850	790	370
Potomac State College (Keyser, W.Va.)	\$500,000	\$750,000	\$1,350,000	\$2,370,000	1,800	1,800	690
Penn State University - Dubois (Dubois, Pa.) CRH	\$500,000	\$100,000	\$600,000	\$600,000	1,000	1,000	0
SUNY Dutchess Community College (Poughkeepsie, N.Y.) SOD	\$391,000	\$335,000	\$726,000	\$1,100,000	8,100	7,975	0
Henry Ford Community College (Dearborn, Mich.)	\$350,000	\$0	\$550,000	\$1,300,000	320	320	0
Olivet College (Olivet, Mich.) CHT	\$350,000	\$825,000	\$1,175,000	\$1,525,000	1,500	1,500	570
Chattanooga State Community College (Chattanooga, Tenn.)	\$350,000	\$0	\$350,000	\$625,000	11,000	12,000	0
Catholic Theological University (Chicago) SIRUS	\$300,000	\$200,000	\$500,000	\$80,000	60	60	60
Chattanooga State Tech. College (Chattanooga, Tenn.)	\$300,000	\$300,000	\$600,000	\$500,000	10,000	10,000	0
Iowa Lakes Community College (Emmetsburg, Iowa)	\$300,000	\$490,000	\$808,000	\$1,500,000	3,800	4,000	600
Texas State Technical College (Harlingen, Texas)	\$250,000	\$55,000	\$368,000	\$379,000	6,000	6,000	2,700
Christ the King Seminary (East Aurora, N.Y.) PTF	\$250,000	\$300,000	\$550,000	\$600,000	18	15	15
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Colorado Northwestern Comm. College (Rangely, Colo.) SOD	\$150,000	\$160,000	\$430,000	\$680,000	400	400	200
Wisconsin Lutheran Seminary (Mequon, Wis.)	\$150,000	\$0	\$150,000	\$0	150	128	45
College of Saint Joseph (Rutland, VT) FV	\$100,000	\$100,000	\$206,000	\$300,000	425	425	70
Silver Lake College (Manitowoc, Wis.)	\$100,000	\$0	\$110,000	\$27,000	1,000	1,000	100
MEAN	\$3,160,831	\$3,590,858	\$7,999,449	\$9,729,088	10,760	11,047	2,394

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