UBC Food Services Project Report

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Executive Summary

UBC Food Services is a department under the umbrella of UBC Student Housing and Hospitality Services (SHHS), which operates student housing and conference accommodations as well as a daycare in addition to campus food services. There are three main functions of UBC Food Services: 1. Residential Dining; 2. Retail Dining; and 3. Catering, Concessions, Mobile Dining and Full-service Restaurants. W. Colin Moore is the Director of UBC Food Services, reporting to Louise Cowin, the Vice-President, Students currently completing a 5-year term in this capacity.

UBC Food Services operates 36 brands across 40 locations on campus, has annual revenues on the order of $40 M, and employs approximately 700 employees, of which roughly 500 are full-time unionized staff and roughly 200 are part-time, non-unionized student workers. UBC Food Services is concerned only with operations at the Point Grey campus, as food services at the UBC Okanagan campus are subcontracted to Classic Fare Catering.

UBC Food Services mission is to "be the preferred food provider and the employer of choice for our community", while their vision is to "double our business by the year 2020 and be the most admired college and university food service business in North America". Furthermore, UBC Food Services' mission statement is:

> We nourish and support the students, faculty, staff, and visitors of UBC by providing a diverse selection of fresh, delicious and memorable food experiences in a socially conscious manner. We do this by creating marketplaces and environments where wholesome food is a priority because our guests, our food and sustainability matter.

Finally, UBC Food Services aims to abide by their guiding principles of S.P.I.C.E.:

Sustainability – Applying social, economical and ecological business practices.
People First – Our guests and co-workers make us successful.
Innovation – Providing dynamic facilities and services.
Caring – Nurturing a culture of pride, integrity, respect and fun!
Excellence – In everything that we do.

The competitive environment for UBC Food Services includes the Alma Mater Society (AMS), the undergraduate student union which operates businesses in the Nest (Student Union Building), business in University Village (primarily located on University Boulevard east of Wesbrook Mall) and business in Wesbrook Village (primarily located on Wesbrook Mall south of 16th Avenue). There are also two independently run food-based businesses on campus: Koerner's Pub in the Graduate Student Centre and Loafe Café, in the Robert H. Lee alumni centre.

In 2013, Susan Wilkie, a food-service design consultant with WEBB Design was engaged to produce a Feasibility Study of Dining Services for UBC Food Services. The result was, 145-page document with financial assessments, survey results, demographic data and recommendations.

The main drawbacks of this document was that the information was dense, not particularly forward-looking and that the recommendations weren't strategic enough.

In order to formulate a strategic decision making process for UBC Food Services current retail offerings and expansion plans, this project attempts to align category and penetration gaps in the current campus landscape with emerging food trends and customer demand as well as UBC Food Services mission, vision and values.

To determine category and penetration gaps on campus, diverse members of the campus population we interviewed in order to determine their food preferences, lunchtime decision drivers and any categories or offerings they felt were missing or under-represented.

To identify emerging food trends both locally and globally, a survey of Vancouver residents was performed to determine their food preferences, lunchtime decision drivers and views of local food trends off campus. In addition, secondary research was undertaken to determine current and emerging food trends globally.

To quantify customer demand, a series of campus maps with population densities (from UBC Campus and Community Planning GIS and Data Systems) was overlaid with current UBC Food Services retail locations as well as competitive offerings on campus, broken down by category. This mapping exercise also took into account the current growth plan for student residences as well as the construction and retail development along University Boulevard.

Lastly, to ensure that strategic suggestions align with UBC Food Services mission, vision and values, a Triple Bottom Line (People, Planet, Profit) calculator was created by analysing UBC Food Services culinary guiding principles, mission statement and 2016 year-to-date financial statements.

Built on these four pillars, a strategic decision making process has been developed that incorporates a user friendly scorecard tool that can be used to evaluate current offerings

In order to validate the scorecard and determine a baseline value, we have used Mercante (offering traditional Italian pizzas in the Ponderosa Commons building) as an example of a success story for UBC Food Services.

Based on the research results, three potential retail offerings are proposed that fit the four pillars of 1. under-representation on campus, 2. demand, 3. trendiness and 4. alignment with UBC Food Services values.

Finally, during the course of the research, issues were identified concerning customer decision-making trends and access to information that are worthy of future investigation but are outside the scope of this project

Current Pains

Can I get a Tim Horton's in my building?

- Do we have other cafés close by?

- Is a café the best option to be in demand and trendy?

- Do Tim Horton's sustainability values align with ours?

With campus buildings continually growing and being renovated, requests for new food retail come often and are difficult to prepare for.

Busyness and time constraints prevent well-planned decisions from being made, as they are reactive.

There is currently awareness that more planning is needed to be proactive and wants to make better decisions, but not currently a quick, easy to use way to evaluate what offerings would be the best holistic fit for the UBC Food Services (UBC FS) landscape.

Decision Making Strategy
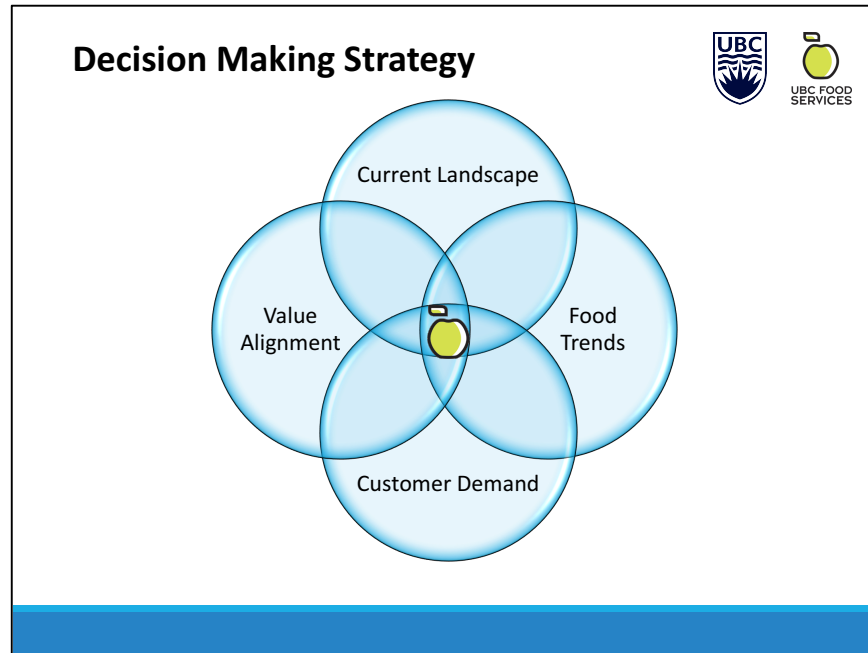
In order to make the best decision for new/adjusted food retail offerings, 4 main areas of focus will be analyzed:

1. Current Food Offering Landscape
   a. Population density map of students/staff by buildings
   b. All UBC FS retail offerings as well as the on and surrounding campus competitors in this space
   c. Cuisine centric maps to identify gaps in offerings in areas of campus
2. Food Trends
   a. North American and Vancouver food trend research, to get a forward looking perspective on where food retail is headed
3. Customer Demand
   a. Consumer surveys to further identify gaps in offerings and new cuisine offerings that are in demand
4. Value Alignment
   a. Simple Triple Bottom Line (TBL) calculator to quantitatively measure potential offerings based on their alignment with UBC FS values for health and sustainability, as well as profit potential (secondary consideration to values)

When a request comes in to add a new retail location, the map can quickly be used to identify if the desired restaurant/cuisine is a good fit in that area. If not, the food trend and customer demand database (periodic updating required for both) can be used to choose a potential restaurant/cuisine. This restaurant type, and potential franchises vs. UBC FS new brands, can be compared with the triple bottom line calculator to choose one that is the best fit for value alignment.

UBC Campus Overview

People and Infrastructure
- 80,000+ population on UBC campus

- 12,000 international students from 155 countries

- 7,000 student enrolment increase by 2017 and total population level until 2030

- 15 Infrastructure projects are due to be completed by 2020, totaling over $500M

Sustainability, Social and Economical
- UBC Campus Strategic Plan

- Some projects that exemplify UBC's vision for "living laboratory" efforts:
  - SEEDS Program
  - Centre for Sustainable Food Systems
  - U-Town @ UBC Community

The population on UBC campus students totals at 52,721 plus 14,114 faculty and staff. This includes 13,189 international students from 155 countries. The UBC community continues to be an attractive market for franchisers and businesses to seek out business opportunities in the area.

The student enrolment is expected to increase by approximately 7,000 students at the Point Grey campus by 2017, and expected to remain at this level until 2030. The demand for food services will remain high and continue into 2030.

There are 15 Infrastructure projects currently underway and due to be completed by 2020, totaling over $500 M. Projects include National Soccer Development Centre ($23 M), the Gage South Student Residence ($77 M) and a new transit terminal ($22 M).

Sustainability, Social and Economical

The President's message: "I believe my job is to work on behalf of the entire UBC community. I also want to ensure that UBC provides a student experience second to none, integrating research and community engagement with teaching and learning."

How campus will evolve overtime to meet the vision of the Campus Plan?

UBC cares about sustainability and is taking measured steps to create a livable space for the UBC community. The Campus Strategic Plan outlines some projects that exemplify UBC's vision for "living laboratory" efforts and a vibrant and interactive community:
- SEEDS Program
- Centre for Sustainable Food Systems
- U-Town@UBC Community (sustainable and affordable community plan)
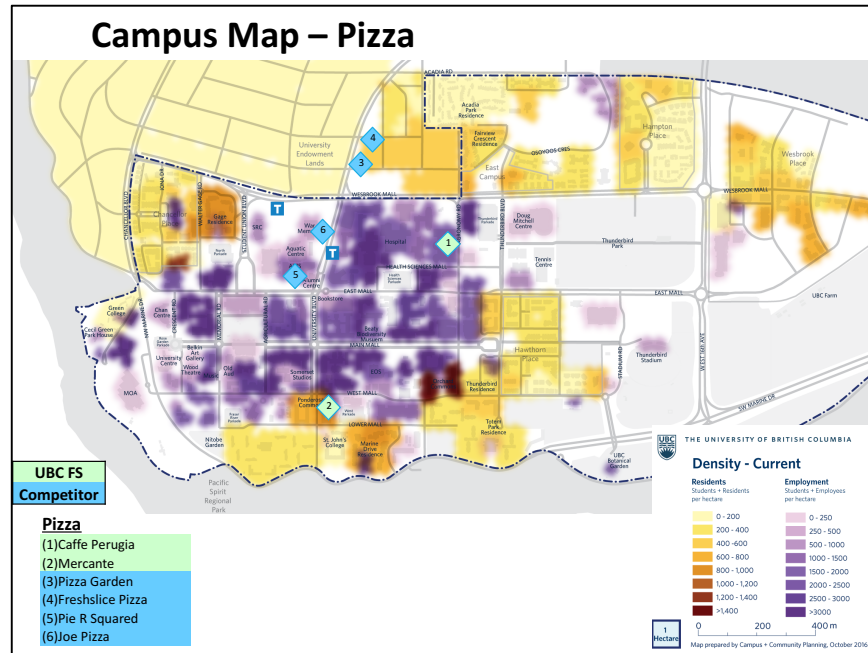
Both UBC FS and competitor offerings by cuisine are plotted on the campus map with the population density overlaid. This tool is useful to see the holistic campus food landscape and where potential gaps may be for restaurant/cuisine offerings.
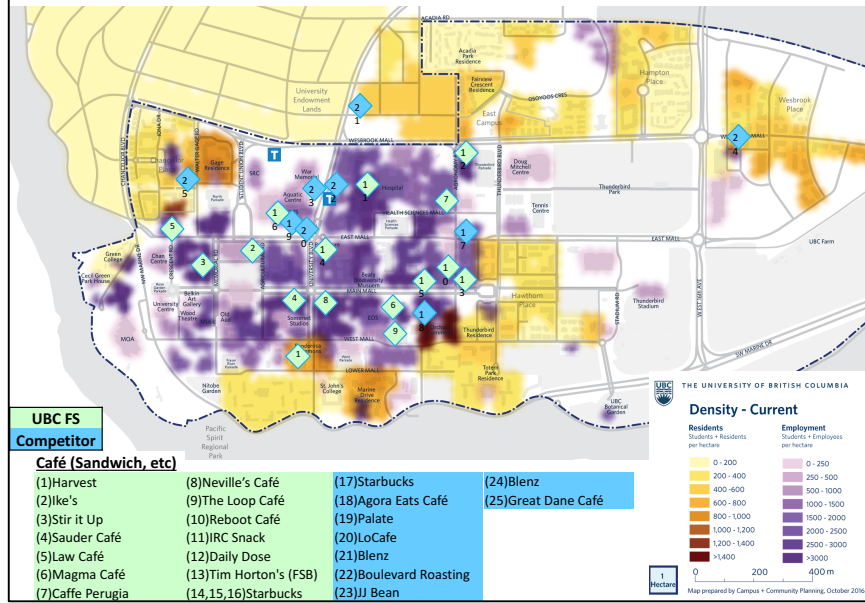
Campus Interview Results

- **Cross-section of campus population**
- **Key decision drivers**
  - Price
  - Variety/Convenience
  - Health
- **Category gaps**
  - Authentic regional cuisine
  - Variety under one roof

In order to determine food category gaps and campus demand, interviews with members of the campus population were conducted. Respondents were randomly selected in order to realize a representative distribution of campus demographics including age, gender, campus function (either staff, graduate student or undergraduate student) and area of study (if applicable). The interviews were purposefully designed to be unstructured with no set list of questions in order to try and achieve an unbiased, holistic representation of the respondent's views surrounding food services on campus.

From the interviews, key lunchtime decision drivers were identified with the major factors being price, variety and health. Category gaps that were highlighted include healthier options, vegan and vegetarian food and some regional cuisines (Chinese, Mexican and European). The issue of variety and being able to find something for everyone under one roof was mentioned frequently.

While the campus interviews achieved a broad cross-section of the campus community, the sample size was perhaps too small to realize clear trends in category gaps and student demand.

The compiled interview results can be seen in exhibit 4 of the appendix.

Vancouver Survey Results

- **No clear-cut decision drivers**

- **No clear category winner**

- **Popular lunchtime trends**
  - Tacos
  - Build your own salad
  - Poke

Following the campus interviews, an online survey was initiated to determine the lunchtime eating habits, food preferences and favourite lunch restaurants of Vancouver residents. Survey respondents were also asked about current food trends in Vancouver and which they would be most likely to choose for lunch. In addition, the general demographics of the survey respondents was collected, including age, gender and profession (either working professional, homemaker or student).

The most popular type of restaurant for lunch was a deli-type restaurant serving soups and sandwiches while the most popular choices for current food trends was tacos and build-your-own salads. In terms of a growing food trend, poke was also identified. There was no clear trend for a given type of regional cuisine when survey respondents were asked which type of cuisine they prefer (Chinese, Indian etc.).

In contrast to the campus interviews, there was no clear decision driver for lunch choices between location, price, cuisine choice, health, convenience and speed.

Similar to the campus interview, the sample population was small so the results may not be entirely representative of Vancouver's population and the survey may need to be expanded for accuracy.

The full survey questionnaire and compiled results are contained in exhibits 5, 6 and 7 respectively.

Vancouver Restaurant Trends

- **Wood-fired Neapolitan pizza**
    - 16 openings since 2011
- **Tacos**
    - 12 openings since 2009
- **Made-to-order salads**
    - 11 openings since 2010
- **Poke**
    - 4 openings in 2016

Based on the survey results, current food trends were investigated by examining restaurant openings in Vancouver over the past seven years. While not exhaustive, the list of restaurant openings gives a good indication of the direction of food trends in the city of Vancouver.

Wood-fired/Neapolitan Pizza
Neapolitan pizza has a Protected Designation of Origin (PDO) under the laws of the European Union, which governs the use of the name and restricts ingredient use. In the past five years, pizza restaurant openings in Vancouver have been trending towards more authentic, Neapolitan-style pizza with 17 openings since 2011 (exhibit 8).

Authentic Mexican Tacos
Mexican food is not a new phenomenon in Vancouver, but existing offerings (Las Margaritas, Pepita's, Topanga Café) have trended towards "Tex-Mex", a blend of Mexican with either Texan or Southern Californian influence. With 12 openings in Vancouver since 2009 (exhibit 8), "authentic" Mexican tacos are trending upward.

Made-to-order Salads
The modern salad bar and make your own salads is making a come-back as people focus on their health. Growing chains in Vancouver include Tractor (which also serves sandwiches and soup) and Freshii. There have been 11 openings since 2010 (exhibit 8).

Poke
Pronounced poe-cay, poke is a traditional Hawaiian appetizer. Usually served as a salad, it usually consists of ahi tuna, soy sauce, green onions and sesame oil. It has been identified as a global food trend (source) and is growing in Vancouver. There have been 4 Poke-specific restaurant openings in Vancouver in 2016 (exhibit 8).

North American Food Industry Overview

Consumer Behaviour
- **66 %** of consumers eat a wider variety of ethnic cuisines now than five years ago
- **85 %** of consumers say they prefer to eat ethnic cuisine in a restaurant focused on that cuisine
- **75 %** of consumers say they like it when restaurants with mainstream menus also serve ethnic cuisine

Food Trends
- Bowls (i.e. Hawaiian Rice Dish with seaweed, Poke)
- Ethnic Food: Mexican, Korean, Filipino, Italian and Chinese
- Food Halls
- Vegetarian Comfort Food
- Artisan Butcher Shops-plus-restaurants

Foods trends are ever changing, some of the trends UBCFS should look out for in making the next decisions are:

• Cuisines most commonly eaten on-premises in restaurants are Sushi, Thai, Vietnamese, Brazilian/Argentinian, Greek and Southeast Asian.

• Chinese is by far the most common cuisine for restaurant takeout and delivery, followed by Mexican and Italian. Ethiopian is tops as convenience- and grocery-store takeout.

• 66 percent of consumers eat a wider variety of ethnic cuisines now than five years ago.

• 85 percent of consumers say they prefer to eat ethnic cuisine in a restaurant focused on that cuisine.

• 75 percent of consumers say they like it when restaurants with mainstream menus also serve ethnic cuisine.

Market Dynamics
- Ethnic Food: Mexican, Korean, Filipino, Italian and Chinese
- Bowls, Bowls, Bowls i.e. Hawaiian Rice Dish with seaweed
- Vegetarian Comfort Food: Health-orientated chains become more common place and affordable.
- Artisan Butcher Shops-plus-restaurants
- Food Halls: They accommodate multiple customer preference by offering enough variety and flexibility for concept experimentation.

Scorecard – Value Alignment

🍏 **Triple Bottom Line**

- Planet (UBC FS – Sustainability Values)

- People (UBC FS – Health Values)

- Profit

The Triple Bottom Line framework incorporates three dimensions of performance: *Planet, Profit and People* was developed as part of the decision-making toolkit to help UBC Food Services to screen new restaurants before opening them on campus (exhibit 9). The score card was built in accordance with UBC Food Services mission, vision, values and guiding principles.
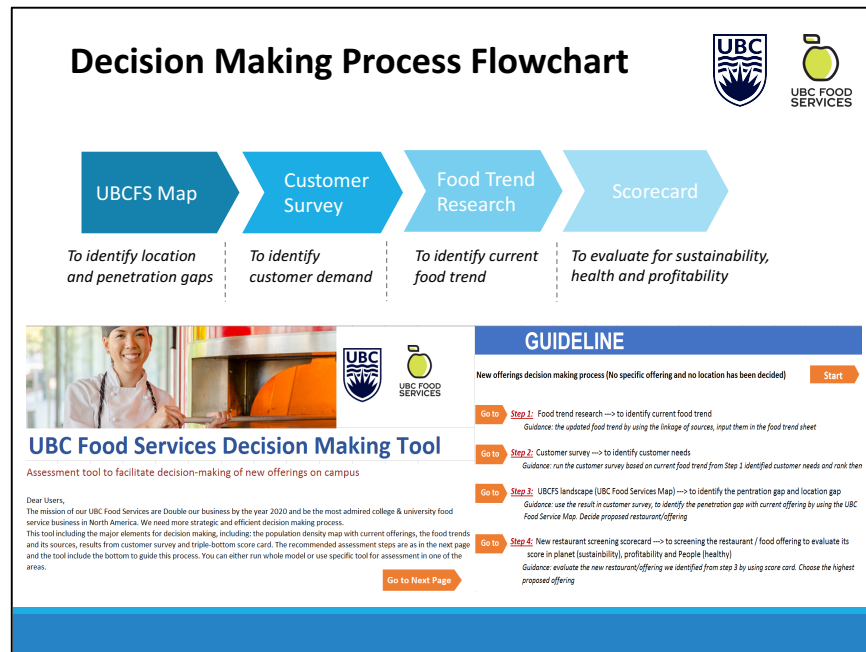
In this decision-making process, UBC Food Services needs to consider location and penetration gaps, local and international food trends, customer demands and alignment with its mission, vision and values. This is a complicated and time-consuming process and this was a major issue that was identified from discussions with UBC Food Services. In order to address this issue, a clear, easy-to-use decision process was developed with particular consideration paid to all the elements to make this decision making process more rational and efficient. The process we recommend is as following:

Step 1: Food Trend Research ---> to identify current food trends

Step 2: Customer Survey (Demand) ---> to identify customer needs

Step 3: UBC Food Services Current Landscape (Campus map with population density and current offerings) ---> to identify penetration and location gap

Step 4: New Offering Scorecard ---> to identify how well restaurant/cuisine aligns with UBC FS's values through in a triple bottom line calculation: people (healthy), planet (sustainability), and profitability.

To make this resource more user-friendly, we developed a decision making tool incorporating all the elements needed to evaluate new retail offerings. This tool includes four main elements for decision making: population density maps of campus showing current offerings, sourced data with North American and Vancouver food trends, customer surveys showing demand, and a triple-bottom line score card to evaluate potential offerings. The simple assessment steps and guideline to use and adjust the tool according to client's needs, with the direct links as well as labeled tabs to allow for easy movement between pages. The model can be run in whole or in part if only specific tools are needed for assessment in one area.

Using Mercante as an example, first we open the map to identify location gaps and then use food trend information from the industry reports from the resources listed in the tool. We identified Neapolitan pizza as a current trend. The third step is to conduct customer surveys and using the survey data to determine whether pizza can satisfy a customer's needs. According to the response, we found 15.79% people would most likely to choose Neapolitan pizza for lunch from Vancouver food trends. The last step is using the Triple Bottom Line scorecard to evaluate the sustainability, health profitability of this offering. The decision-making tool can generates a score automatically.

Successful Case - MERCANTE

SCORE CARD 1

Back to Summary · Back to Result 1

Restaurant / Food trend Pleas fill in --->	Pizza (Mercante)				
UBC Food Services – New Restaurant Screening Scorecard					
Variables	**Definition (Indicators)**		**Max Points**	**Score (%)**	**Comments**
Planet					
Sustainability	-Local		10	9	
	-Organic		10	8	
	-Antibiotic free		10	8	
	-Compostable containers		10	10	Compostable pizza boxes
	- Sustainable sourcing of ingredients (ie. Fair Trade, Oceanwise, Rainforest Alliance)		10	8	
Total score			50	43	
Profit					
Profitability	-COGS		10	8	
	- Labour costs		10	7	
	- CapEx		10	7	
	- Franchise Royalties (0=high royalties,5=no royalties)		10	10	
Total score			40	32	
People					
Healthiness	-Cooking techniques		10	9	
	-Storage of Food (freshness)		10	9	
	- Trans-fats		10	9	
	- Artificial Sweeteners, flavours, colours		10	9	
	- Wholegrain		10	9	
	- Healthy sides		10	9	
	- High protein vegetarian		10	6	
	- Low fat dairy		10	8	
	- Omega 3		10	5	No fish options
	- Nutrient rich		10	8	
	- Gluten free options		10	5	Salads, but not gluten free crusts
Total Score			110	86	
Total Score			200	161	**81%**

RESULT 1

Back to Summary

Input

What food trend/ restaurant you want to evluate? (Please fill in) — Pizza/Merchante

Go to — *Food Trend Package*

Where would you like to put this restaurant? (Please fill in, optional) — 6488 University Boulevard

Go to — *UBCFS Map*

Is there alignment with customer demand survey? (Please fill in Yes/No, optional) — Yes

Go to — *Customer Survey*

Score of Triple Bottom Line

Planet	50	
Profit	28	Go to — *Triple Bottom Line Scorecard*
People	82	
Total	160	

SUMMARY

Back to Guideline

	Option 1	Option 2	Option 3
What food trend/ restaurant you want to evluate?	Pizza/Merchante		
Where would you like to put this restaurant? (optional)	6488 University Boulevard		
Is there alignment with customer demand survey? (Yes/No)	Yes		
Total Score of Triple Bottom Line	160		
Planet	50		
Profit	28		
People	82		
Result	Go to Result 1	Go to Result 2	Go to Result 3

Recommendations - Cuisine & Service

- **Which cuisines to pursue?**
  - Bowls (e.g. Poke, Korean)
  - Tacos
  - Salad/vegetarian

- **New service concepts?**
  - Self-service with an emphasis on fresh, convenience and variety

Summary of 5-year recommendation to UBC Food Services

How do UBC Food Services double their business by 2020? Based on the success factors identified for Mercante and our research, we recommend that UBC Food Services explore the following areas before putting a new food offering on UBC's blueprint:

What cuisine to pursue?

-Bowls i.e. Hawaiian fish bowl, Korean Kimchi bowl, Filipino, 1-2-3 steps starting with bread, grain and finish with vegetables
-Tacos: fast-casual taco places
-Healthier Chinese i.e. steamed dumplings
-Vegetarian food: vegetables will continue its rise on consumer's plate. Items such as mashed cauliflower will overtake macaroni or lasagna. A vegetable crust for healthier pizza.
-Artisan meat: On the other end of the spectrum, artisanal butcher shops-cum-restaurants,

What quick-service concept?

-Self-service with an emphasis on fresh, convenience and variety.

Which segment to target

- First target the foodies and the health-conscious minded that enjoy seeking our new food offerings and leading the trend, and then sell to everyone on campus

What Could be improved?

- Operations – implement a queue management system to meet and improve customer satisfaction. It also addresses the issue of lost sales resulted from customers walking away from a long queue.

Risks & Contingency

Risks	Contingencies
- Food trends are short-lived	- Mitigate with modularity and adaptability (low capital equipment investment)
- Changing campus population and food preferences	- Capture the changes from year to year through surveys
- President Santa Ono's new vision for UBC may impact the current strategic plan	- Research the changes and incorporate them accordingly into the current mission, vision, values
- Chasing sustainability requirements may compromise other business priorities	- Scorecard can be modified to balance all priorities

Risks are inherent in almost all daily business activities of a company however, they differ by magnitude, likelihood, and impact if they occur. It is important for businesses to identify different risks and prioritize them accordingly for better allocation of limited resources. Possible closure of some of the restaurants due to non-profitability was identified as one of the risks which needs serious consideration for long term business growth [exhibit 10]. There is a possibility of changes in UBC mission, vision, and strategic priorities due to the recent appointment of new President Santa Ono, hence UBC food Service should remain flexible to adjust in their strategic priorities wherever necessary.

Changes in customer preferences and increase in prices of the ingredients are additional risks and can respectively be mitigated by regular customer surveys and forecasting.

Alternate Food Ideas

- **Food Delivery**
  - Be the first university in Canada to launch a tech-driven delivery services on campus

- **Food Hall**
  - A design concept that allows for a variety in food offerings – in high demand

- **Pop-ups**
  - A low risk opportunity for entrepreneurs to test ideas and experiment for UBC Food Services to screen independent operators

-Food delivery: It does not matter if you are working on a big group assignment or studying for your finals, you have the choice of having food delivered to your meeting room with a reasonable charge. Envisioning being the first university in Canada to launch a tech-driven delivery services on campus. The first movers include UberEats, Google and Amazon who are all in the high-speed delivery market.

-Food Hall: It is a design concept that allows for experiment of variety in food offerings. It also helps to establish social interaction among students and nurture a vibrant campus community.

-Pop-ups: This concept allows for a more creative use of space and offer. UBC Food Services can collect independent operators who have an interest in opening stores on campus and allow them to showcase their offering for a period of time before taking them on as a commercial operator.
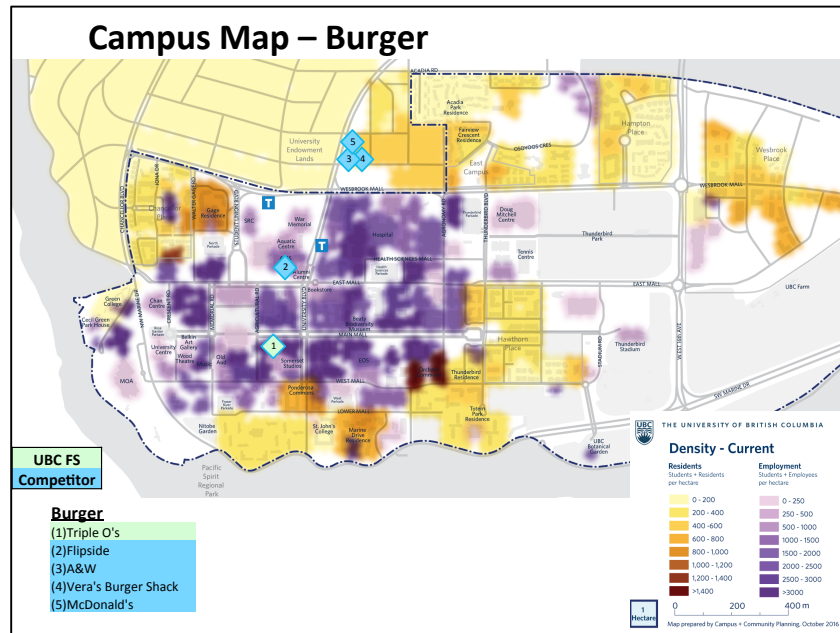
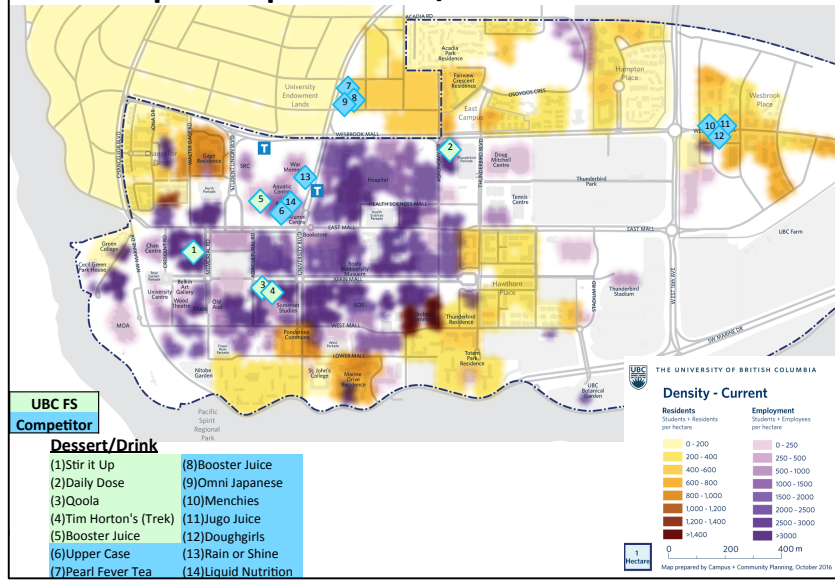## Appendices

Appendix 1 – Business Model Canvas

Key Partners	Key activities	Value Proposition	Customers Relations	Customer Segments

- Suppliers
  - UBC Farm
  - Ethical Bean Coffee.
  -Milano
  - Zhena Gypsy Tea.
  -Wendel's True Foods.
 	
- Vancouver Coastal Health, and Food Allergy Canada
	- Expansion to new places on campus.
	- Meetings customer demand
		- Healthy and locally sourced food
		- Easily accessible & convenient food locations on the campus.
			- Regular customers' satisfaction surveys
			- Meet customer needs in line with UBC sustainability strategy
				- Students
				- Faculty staff
				- UBC Campus Visitors

	Key Resources - Human resource e.g. chefs, drivers, management staff - Equipment e.g. cooking machines.		**Distribution Channels** - Coffee shops - Restaurants - Food trucks - Website with list and locations of restaurants	

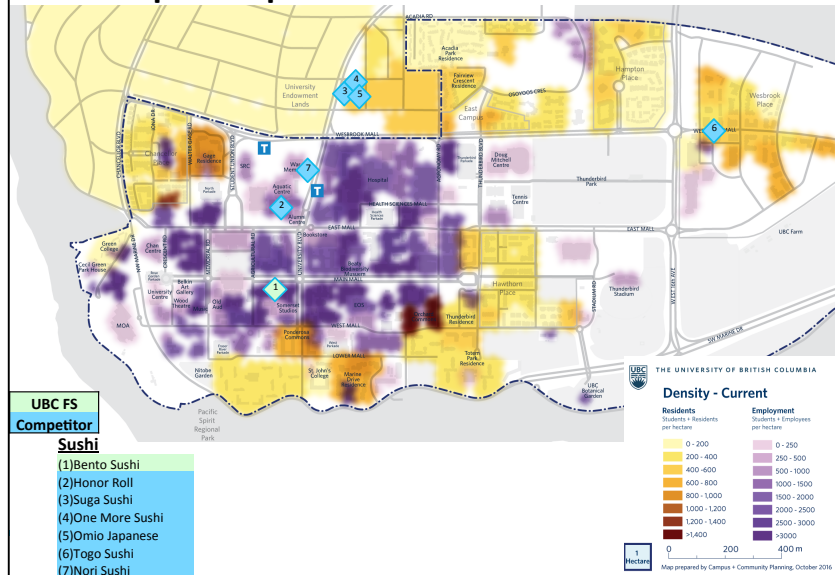| Cost Structure	Revenue Streams
- Material cost e.g. ingredients, - Labour costs - Overhead costs	- Sales is the primary source of revenue - Residence dining and catering are the most profitable sections.

Appendix 2 - Campus Maps of Food Offerings

Both UBC FS and competitor offerings by cuisine are plotted on the campus map with the overlay population. This tool is useful to see the holistic campus food landscape and where potential gaps may be for restaurant/cuisine offerings.
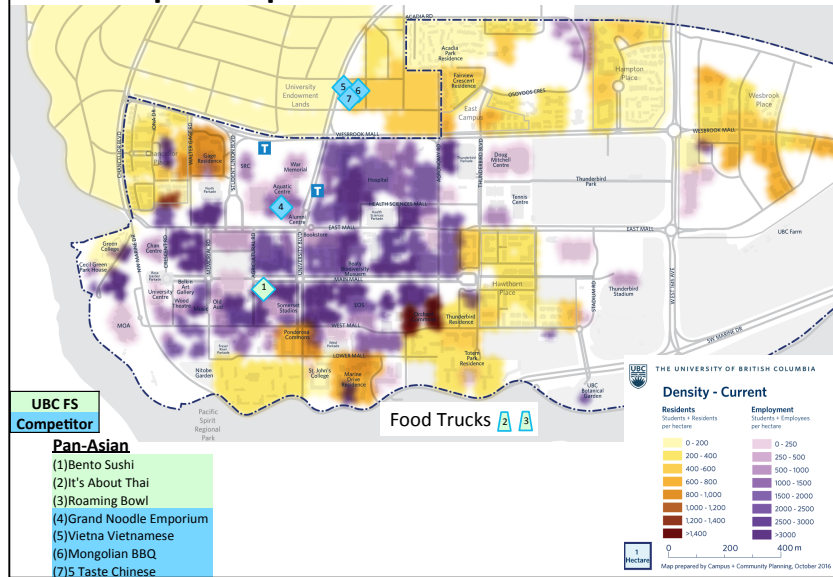
Campus Map – Burger

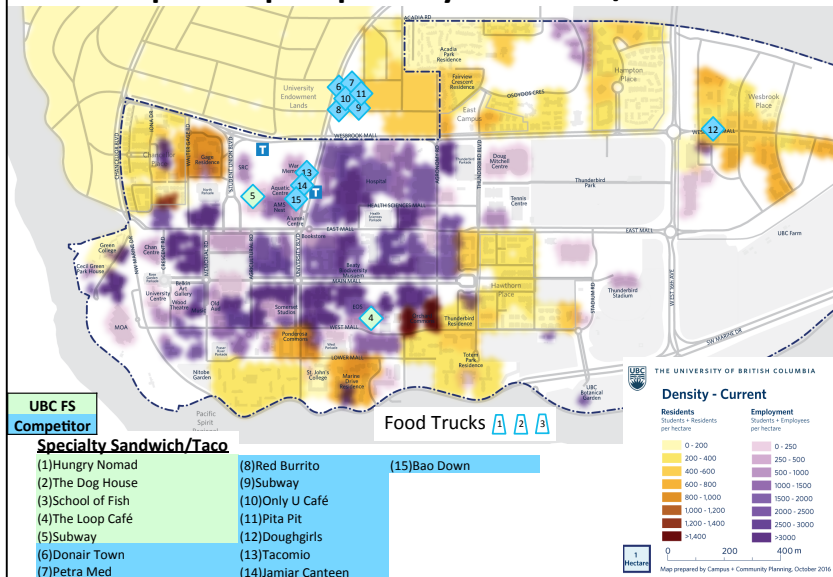UBC FS
Competitor

Burger
(1)Triple O's
(2)Flipside
(3)A&W
(4)Vera's Burger Shack
(5)McDonald's

Campus Map – Pasta

UBC FS
Competitor

Food Truck

Pasta
(1)Ike's Café
(2)Caffe Perugia
(3)Hungry Nomad

Campus Map – Dessert/Drink

UBC FS
Competitor

Dessert/Drink
(1)Stir it Up
(2)Daily Dose
(3)Qoola
(4)Tim Horton's (Trek)
(5)Booster Juice
(6)Upper Case
(7)Pearl Fever Tea
(8)Booster Juice
(9)Omni Japanese
(10)Menchies
(11)Jugo Juice
(12)Doughgirls
(13)Rain or Shine
(14)Liquid Nutrition

Campus Map – Sushi

UBC FS
Competitor

Sushi
(1)Bento Sushi
(2)Honor Roll
(3)Suga Sushi
(4)One More Sushi
(5)Omio Japanese
(6)Togo Sushi
(7)Nori Sushi

Campus Map – Pan-Asian

UBC FS
Competitor

Pan-Asian
(1) Bento Sushi
(2) It's About Thai
(3) Roaming Bowl
(4) Grand Noodle Emporium
(5) Vietna Vietnamese
(6) Mongolian BBQ
(7) 5 Taste Chinese

Food Trucks

Campus Map – Specialty Sandwich/Taco

UBC FS
Competitor

Specialty Sandwich/Taco

|		
(1) Hungry Nomad	(8) Red Burrito	(15) Bao Down
(2) The Dog House	(9) Subway	
(3) School of Fish	(10) Only U Café	
(4) The Loop Café	(11) Pita Pit	
(5) Subway	(12) Doughgirls	
(6) Donair Town	(13) Tacomio	
(7) Petra Med	(14) Jamjar Canteen	

Food Trucks

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Appendix 3 - Café Profitability Map

The cafés around campus are mapped out with their location, and either a green or red icon to show whether they were or were not profitable through March 2016. Although financial information is not known for competitors, their locations are shown as well for reference. Trends can be identified to see if café overpopulation in areas is a possible cause for poor profitability.
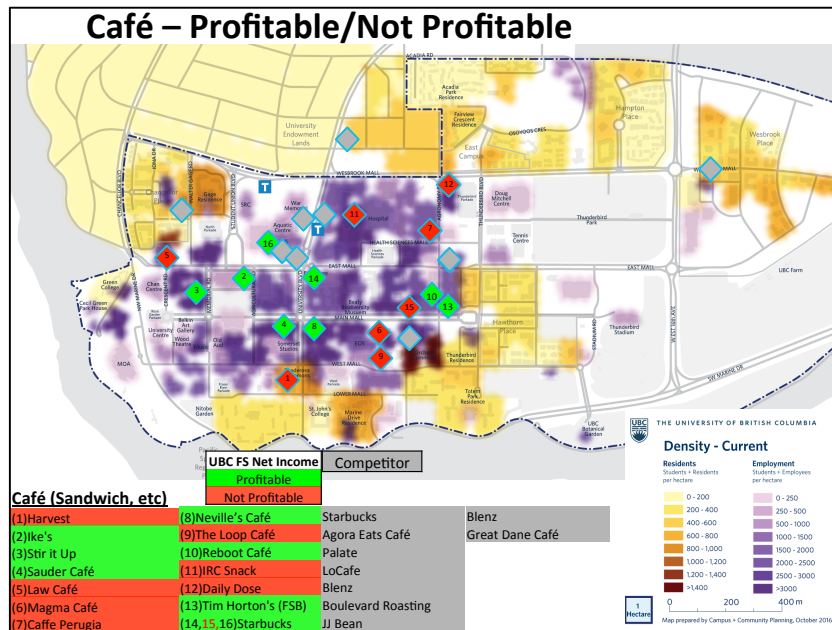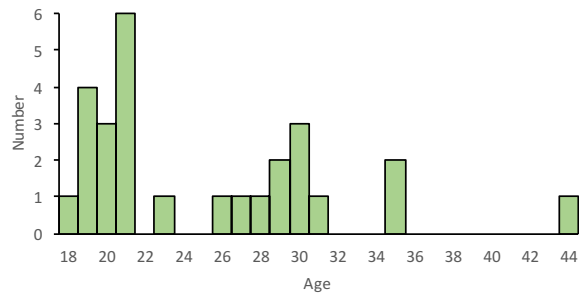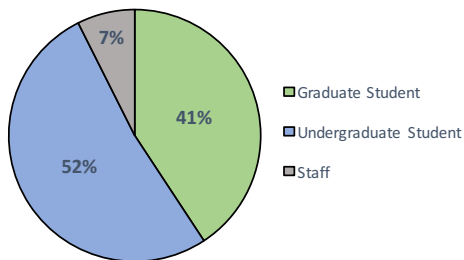
Appendix 4 – Campus Interview Results
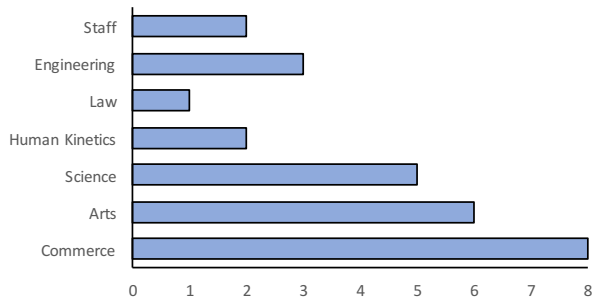
Gender of Interview Respondents

- Female
- Male

44% 56%
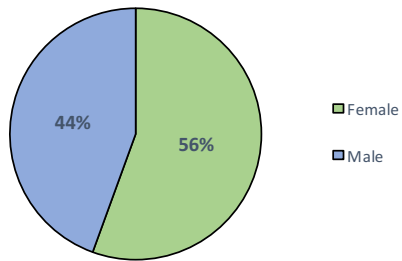
Age of Interview Respondents

Campus Function of Interview Respondents

- Graduate Student
- Undergraduate Student
- Staff

41% 52% 7%

Faculty of Student Interview Respondents
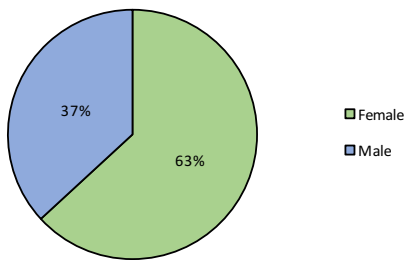

Key Decision Drivers of Interview Respondents
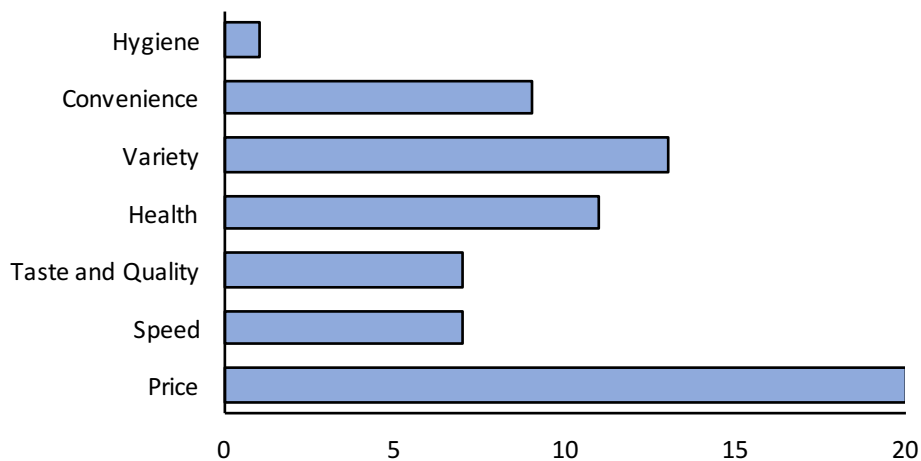
Appendix 5 – Survey Questions

1. How many times per week do you purchase your lunch?
- Every Day
- Almost Every Day
- A Few Times per Week
- Once a Week
- Rarely

2. Please rank the following factors in order of importance when eating out for lunch.
- Speed
- Convenience
- Price
- Location
- Cuisine Choice
- Health

3. What is your favourite lunchtime cuisine?
- Italian
- Japanese
- Vietnamese
- Mexican
- Fast Food
- Indian
- Chinese
- Deli (Soup and Sandwich)
- Other

4. What is your favourite lunchtime eatery? (open form)

5. Is there a specific cuisine you'd like to see more of in Vancouver? (open form)

6. Of the following Vancouver food trends, which would you most likely choose for lunch?
- Poke
- Tacos
- Wood-fired pizza
- Vegan/Vegetarian
- Pho
- Build-your-own salad

7. What is your primary occupation?
- Student
- Working Professional
- Homemaker

8. What is your age?
- 18-24
- 25-29
- 30-34
- 35-39
- 40+

9. What is your gender?
- Male
- Female
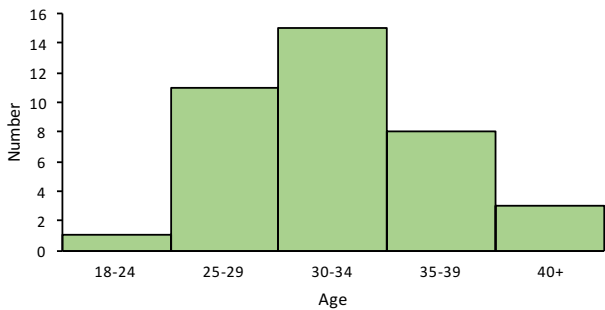- Prefer not to say

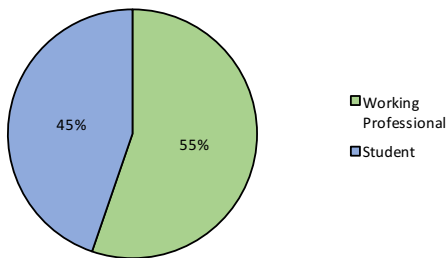# Appendix 6 – Vancouver Survey Demographics
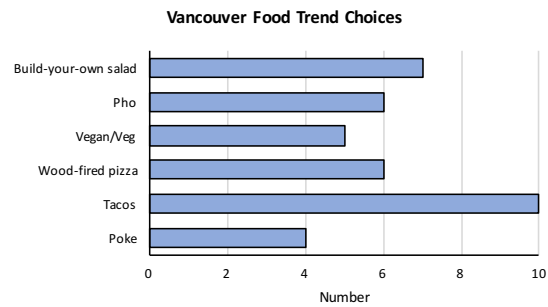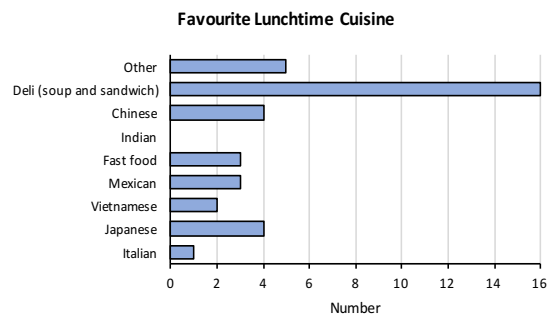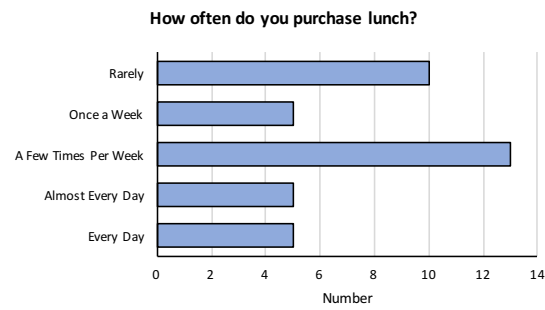
Gender of Survey Respondents

- Female
- Male

37%
63%

Age of Survey Respondents

Profession of Survey Respondents

- Working Professional
- Student

45%
55%

Appendix 7 – Vancouver Survey Results

How often do you purchase lunch?

Favourite Lunchtime Cuisine

Vancouver Food Trend Choices

Priority	Speed	Convenience	Price	Location	Cuisine choice	Health
1	4 (10.53%)	10 (26.32%)	5 (13.16%)	7 (18.42%)	9 (23.68%)	3 (7.89%)
2	4 (10.53%)	3 (7.89%)	9 (23.68%)	10 (26.32%)	4 (10.53%)	8 (21.05%)
3	4 (10.53%)	5 (13.16%)	8 (21.05%)	8 (21.05%)	5 (13.16%)	8 (21.05%)
4	13 (34.21%)	4 (10.53%)	8 (21.05%)	4 (10.53%)	5 (13.16%)	5 (13.16%)
5	6 (15.79%)	6 (15.79%)	3 (7.89%)	5 (13.16%)	9 (23.68%)	9 (23.68%)
6	7 (18.42%)	10 (26.32%)	5 (13.16%)	5 (13.16%)	6 (15.79%)	5 (13.16%)
Average	**3.11**	**3.39**	**3.74**	**3.89**	**3.50**	**3.37**

Appendix 8 –Compiled Vancouver Restaurant Openings 2009-2016

Wood-fired/Neopolitan Pizza

Restaurant Name	Year Opened	Neighbourhood
Campagnolo Roma	2011	Hastings Sunrise
Nicli Antica Pizzeria	2011	Gastown
Nook	2011	West End
Novo	2011	Kitsilano
Pizzeria Barbarella	2011	Broadway east of Main
Pizzeria Farina	2011	Main Street/Chinatown
Bibo	2012/2016	Kitsilano/Olympic Village
Famoso	2012	Commercial Drive
Parlour	2012	Yaletown
Via Tevere	2012	Commercial Drive (Victoria St.)
Nook	2013	Kitsilano
Bufala	2014	Kerrisdale
Corduroy Pie Company	2015	Shaughnessy/Fairview
Bella Gelateria	2015	False Creek North
Bibo	2016	Olympic Village
Joe Pizza	2016	Gastown

Tacos

Restaurant Name	Year Opened	Neighbourhood
Banditas	2009	Commercial Drive
La Taqueria	2009	Gastown
La Taqueria	2011	Cambie
El Caminos	2012	Main Street
Taco Fino	2012	Gastown
Gringo	2013	Gastown
Los Cuervos	2013	Mount Pleasant
Taco Fino	2015	Grandview Woodlands
Tacomio	2015	Gastown
Lucky Taco	2016	Kitsilano
Mezcaleria	2016	Commercial Drive
Taco Fino	2016	Yaletown

Poke

Restaurant Name	Year Opened	Neighbourhood
Pacific Poke	2016	Chinatown
Poke Guy	2016	Gastown
Poke Time	2016	Robson Street
Pokerrito	2016	Downtown/CBD

Build-your-own Salad

Restaurant Name	Year Opened	Neighbourhood
Chopped Leaf	2010	Downtown/CBD
Green Leaf	2010	Downtown/CBD
Freshii	2011	Downtown/Coal Harbour
Freshii	2012	Fairview Slopes
Freshii	2012	Downtown/CBD
Tractor	2013	Kitsilano
Leafy Box	2014	Yaletown
Nosh	2015	Downtown/CBD
Tractor	2015	Downtown/Coal Harbour
Freshii	2016	Kitsilano
Tractor	2016	Olympic Village

CBD: Central Business District

Appendix 9 -Triple Bottom Line Score Card

UBC Food Services – New Restaurants Screening Scorecard				
Variables	**Definition (Indicators)**	**Max Points**	**Score (%)**	**Comments**
Planet		**50**		
Sustainability	-Local	10		
	-Organic	10		
	-Antibiotic free	10		
	-Compostable containers	10		
	Sustainable sourcing of ingredients (ie. Fare trade, ocean wise, rainforest alliance)	10		
Profit		**30**		
Profitability	-COGS	**10**		
	- Labour costs	**10**		
	- Capex	**5**		
	- Franchise Royalties	**5**		
People		**110**		
Healthiness	-Cooking techniques	10		
	-Storage of Food (freshness)	10		
	- Trans-fats,	10		
	- Artificial Sweeteners, flavours, colours,	10		
	- Wholegrain,	10		
	- healthy sides	10		
	- High protein vegetarian	10		
	- Low fat dairy	10		
	- Omega 3	10		
	- Nutrient rich	10		
	- Gluten free options	10		
Total Score				

Appendix 10 – SWOT Analysis

Strengths	Weaknesses
- Leader in campus food services	- Non-profitability of some restaurants
- Sustainability and Healthy food	- Poor marketing
- Mobile food trucks	- Profitability is not a huge concern
- Restaurants in many locations on campus	
- Local Sourcing of ingredients	

Opportunities	Threats
- Increasing demand for variety of cuisine	- Rapid change is world and Vancouver food trends
- New Technology/Innovation	- High labour costs
- Introduce new types of food	- Cost of production Inputs
- Restaurant operating hours	
- Partnerships/Alliances	
- Expansion into new places	

Appendix 11 – References

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