

The New College & University Dining Model

Proposed 2027 Research Program #12741

Introduction

College and university dining is entering another period of significant change. Enrollment and institutional financial pressures are colliding with higher student expectations, rising labor and food costs, changing meal-plan participation, and growing demand for convenience, flexibility, variety, and value. Campus dining programs must serve residential students, commuters, faculty, staff, and visitors across dining halls, retail concepts, convenience stores, mobile ordering, grab-and-go, catering, and other venues—often with limited labor and aging facilities.

Students increasingly compare campus dining not only with other institutions, but with restaurants, grocery prepared foods, delivery platforms, and the food experiences available in their home communities. At the same time, colleges and universities must protect meal-plan economics, support recruitment and retention, accommodate dietary needs, improve satisfaction, and meet institutional goals involving wellness, sustainability, and inclusion.

This study will examine how the campus dining model is changing, which operating and menu strategies are gaining traction, and where manufacturers can help institutions improve participation, efficiency, student satisfaction, and financial performance.

This proposal is a working research framework that will be refined with study sponsors before fieldwork begins.

Overall Objectives

- Assess the current condition and future direction of college and university foodservice.
- Understand how enrollment, institutional finances, student demographics, and campus living patterns are affecting dining programs.
- Measure student usage, satisfaction, value perceptions, unmet needs, and expectations across campus dining venues and occasions.
- Evaluate operator priorities involving meal plans, residential dining, retail concepts, grab-and-go, late-night food, delivery, catering, and convenience.
- Identify how labor, equipment, facilities, sourcing, technology, waste, and operating costs influence menu and purchasing decisions.
- Examine the roles of self-operation, foodservice management firms, group purchasing organizations, distributors, and national brands.
- Identify product, packaging, merchandising, menu-development, and supplier-support opportunities.
- Provide sponsors with a practical how-to-win framework for the C&U foodservice segment.

Proposed Key Issues

To be refined with sponsor input during kickoff.

The Changing Campus Dining Model

- How are enrollment trends, institutional finances, housing patterns, and student demographics changing the size and composition of campus dining demand?

- How do dining strategies differ among public and private institutions, two- and four-year schools, residential campuses, commuter campuses, and institutions of different sizes?
- Which parts of campus dining are expanding, contracting, or being redesigned?
- How important is dining to student recruitment, retention, campus life, and the overall student experience?
- What financial, operational, and organizational pressures are most likely to reshape campus dining during the next three to five years?
- Which institutions and operating models represent best-in-class performance, and what can others learn from them?

Meal Plans, Participation and Value

- How are meal-plan structures, participation requirements, pricing, dining dollars, rollover policies, and guest privileges changing?
- What drives students to use—or avoid—their meal plans?
- How do students evaluate the value of unlimited, block, declining-balance, commuter, and voluntary meal plans?
- Where do unused meals, limited operating hours, venue restrictions, long lines, menu repetition, or perceived quality undermine satisfaction?
- How are institutions trying to increase participation among upperclassmen, off-campus students, commuters, faculty, and staff?
- What role do affordability, food insecurity, financial aid, and institutional support programs play in campus dining decisions?

Student Dining Behavior and Expectations

- Where, when, and how often do students purchase or consume food and beverages on campus?
- How do behaviors differ by residential status, class year, schedule, meal-plan status, demographic group, and institution type?
- What drives venue and product selection: convenience, taste, speed, value, variety, health, brands, customization, social experience, or operating hours?
- How satisfied are students with residential dining, campus retail, grab-and-go, convenience stores, vending, delivery, and late-night options?
- Which food, beverage, service, and technology needs remain unmet?
- When and why do students leave campus, order delivery, prepare their own food, or skip meals rather than use campus dining?

Residential Dining and Retail Concepts

- How is the role of the traditional dining hall changing?
- Which station concepts, service formats, cuisines, and menu strategies are driving residential dining satisfaction and repeat usage?
- How are colleges balancing all-you-care-to-eat dining, retail concepts, national brands, local brands, and institution-developed concepts?
- Where are food halls, microrestaurants, campus convenience stores, kiosks, pop-ups, food trucks, and satellite venues gaining relevance?
- How do institutions decide whether to operate a concept internally, partner with a national brand, or use a local operator?
- What creates enough variety without adding excessive labor, inventory, equipment, or menu complexity?

Grab-and-Go, Delivery and Eating on the Move

- How important are portable meals, snacks, beverages, and meal replacements to students moving between classes, work, activities, and housing?
- Which grab-and-go products, portion sizes, packaging formats, and price points perform best?

- How are mobile ordering, pickup, delivery, smart lockers, vending, and unattended retail changing access to campus food?
- What are the greatest challenges involving freshness, holding, shelf life, temperature, waste, assortment, and restocking?
- How can institutions serve late-night, weekend, commuter, satellite-campus, and off-hour demand more effectively?
- Where can manufacturers provide scalable solutions for high-volume, low-labor, portable foodservice?

Menu, Product and Beverage Opportunities

- Which food and beverage categories are gaining or losing operator and student interest?
- What is the outlook for breakfast, bakery, pizza, sandwiches, handhelds, bowls, global foods, proteins, plant-forward options, snacks, desserts, and comfort foods?
- How are coffee, specialty beverages, hydration, energy, functional beverages, smoothies, and protein beverages fitting into campus dining?
- Where are institutions seeking more authentic global flavors, familiar branded products, premium offerings, or limited-time menus?
- How important are allergen-friendly, vegetarian, vegan, halal, kosher, gluten-free, high-protein, and other specialized offerings?
- Which products and components can be used across multiple venues or menu applications to reduce complexity and waste?
- Where do operators perceive meaningful gaps in product quality, format, portion size, case pack, or availability?

Health, Wellness, Sustainability and Inclusion

- How are student expectations and institutional commitments influencing nutrition, ingredient transparency, dietary accommodations, and wellness programming?
- Which health and wellness claims influence selection, and which receive more attention than actual demand warrants?
- How are institutions addressing allergens, religious dietary requirements, cultural authenticity, and students with specialized needs?
- What sustainability goals are affecting sourcing, packaging, disposables, food waste, reusable containers, and plant-forward menuing?
- Where are institutions willing to accept higher costs or operational tradeoffs, and where are practical constraints limiting progress?

Labor, Facilities and Operational Execution

- How are labor availability, wages, turnover, training, union requirements, and student employment affecting service levels and menu development?
- Which products and formats help institutions maintain quality and variety with fewer skilled labor hours?
- How do kitchen capacity, equipment, storage, loading access, and aging facilities constrain innovation?
- Where are commissaries, central kitchens, cook-chill, batch production, speed-scratch products, and cross-campus production being used?
- What tradeoffs will operators accept among labor savings, product cost, customization, consistency, speed, and perceived quality?
- How are forecasting, production planning, digital ordering, robotics, automation, and other technologies affecting operations?

Purchasing, Distribution and Decision-Making

- Who influences menus, specifications, purchasing, product testing, sustainability requirements, and supplier selection?

- How do decision processes differ among self-operated institutions and campuses managed by Compass, Aramark, Sodexo, or other foodservice management firms?
- What roles do GPOs, distributors, system contracts, local purchasing, and institution-level autonomy play?
- How are products sourced for residential dining, retail venues, convenience stores, catering, and grab-and-go?
- What are the most important product and supplier-selection criteria?
- Why are promising products rejected, delayed, or unsuccessful after rollout?
- Where do operators want more culinary support, menu concepts, student insights, training, merchandising, equipment assistance, or business-building ideas from manufacturers?

Proposed Scope of Coverage

Final institutional, venue, and respondent quotas will be established with sponsors. The study is expected to include the following.

Institution Types

- Public and private institutions
- Two-year and four-year colleges and universities
- Residential, commuter, and mixed campuses
- Small, midsize, and large institutions
- Self-operated and foodservice-management-company-operated programs

Dining Venues and Service Areas

- Residential dining halls and board-plan programs
- Campus retail restaurants, food courts, and student unions
- Nationally branded and institution-developed concepts
- Campus convenience stores, markets, kiosks, and vending
- Grab-and-go, mobile ordering, pickup, delivery, and unattended retail
- Catering and special-event foodservice where relevant
- Satellite locations, commuter services, late-night, and weekend programs

Proposed Methodology

Final sample design and research instruments will be shaped with sponsor input.

1. Engagement Initiation

- Private kickoff discussions with each sponsor to review objectives, categories, institutional priorities, and intended uses of the research.
- Sponsor review of the student questionnaire, operator questionnaire, and executive discussion guide before launch.
- Confidential sponsor-only questions incorporated into the research and reported privately.

2. Existing Data and Program Review

- Review of public information, institutional dining programs, menus, meal-plan structures, industry reporting, and relevant FSIP proprietary research.
- Development of a baseline assessment of segment structure, operating pressures, and emerging campus dining models.

3. Student Research

- A nationwide online survey of approximately 500 students enrolled at two- and four-year colleges and universities.
- Coverage of residential and commuter students, meal-plan participants and nonparticipants, and students at varied institution types.
- Measurement of campus dining usage, venue and product selection, satisfaction, value, meal-plan behavior, competitive alternatives, dietary needs, and unmet expectations.

4. Quantitative Operator Research

- Approximately 200 interviews with qualified college and university dining decision-makers responsible for operations, culinary, purchasing, menu development, retail, meal plans, or program strategy.
- Coverage of self-operated and managed programs across varied institution types, sizes, and dining models.
- Measurement of current practices, financial and operating priorities, menu and product needs, purchasing criteria, supplier relationships, investment plans, and future expectations.

5. Executive Interviews

- Approximately 15–20 in-depth interviews with campus dining executives and selected leaders from foodservice management firms or other influential organizations.
- Exploration of strategy, meal-plan economics, organizational decision-making, operating models, best practices, innovation, and the future direction of campus dining.
- Development of qualitative context that explains the reasons behind the quantitative findings.

6. Strategic Analysis and Reporting

- Integration of student, operator, executive, market, and FSIP findings into a comprehensive segment assessment.
- Identification of priority institution types, venues, occasions, categories, operating needs, and implications for manufacturers.
- Development of a practical how-to-win framework for sponsor sales, marketing, innovation, and channel strategy.

Study Deliverables

- Comprehensive PowerPoint report featuring detailed analysis, strategic implications, charts, and executive commentary.
- Assessment of campus dining structure, student behavior, meal-plan participation, venue performance, operator priorities, operational needs, and future direction.
- Analysis of residential dining, retail, grab-and-go, delivery, late-night, beverage, and other growth opportunities.
- Identification of critical success factors and best practices across different institution and operating models.
- Practical recommendations for product development, packaging, menu support, merchandising, sales, and channel strategy.
- Complete research instruments, cross-tabulations, and supporting data appendix.
- Confidential reporting of each sponsor's proprietary questions.
- Sponsor presentation and discussion following internal review of the report.
- Ongoing access to FSIP for follow-up questions and interpretation at no additional cost.
- Optional post-study strategy workshop to translate findings into company-specific growth priorities and action plans.

The Strategic Value to Sponsors

This study will help manufacturers understand how campus dining demand is changing and what institutions require from products and suppliers. It will connect student needs with the economic, labor, equipment,

distribution, procurement, and organizational realities that determine whether a product or program can be adopted and executed across campus.

Sponsors will gain a clearer understanding of which institution types, venues, occasions, categories, and decision-makers deserve priority; how self-operated and managed programs differ; where current offerings fall short; and which forms of manufacturer support can improve adoption and strengthen customer relationships.

Foodservice IP's C&U Experience

Foodservice IP has advised manufacturers and industry organizations on college and university foodservice, noncommercial channel strategy, operator needs, product opportunities, distribution, innovation, and go-to-market planning. This 2027 program will update and expand FSIP's prior C&U work for the segment's current financial, demographic, and operating environment.

The project will be led by Tim Powell, Principal. Senior FSIP consultants will remain involved from study design through fieldwork, analysis, reporting, and sponsor discussions so that the findings are interpreted as strategic evidence rather than delivered as a stand-alone collection of survey results.

Timing and Fees

- Anticipated project duration: approximately 14–16 weeks from initiation.
- Target kickoff: late fourth quarter 2026.
- Target delivery: first or second quarter 2027, depending on sponsor timing and final fieldwork scope.
- Pre-launch sponsors will help refine study objectives, institutional coverage, product scope, and research instruments.
- \$15,000 per sponsor for one study.
- Discounted participation: two studies for \$26,500 or three studies for \$35,000 when confirmed together.
- Private, in-person presentations are exclusive of travel expenses.

Billing Policy

- 50% upon project initiation
- Balance due upon delivery of the final report

Conclusion

The new campus dining model must deliver greater flexibility, convenience, value, and variety while operating within tighter financial and labor constraints. This study will provide sponsors with current student and operator evidence, a clear view of how different campus models are evolving, and practical guidance for creating products and support that institutions can successfully adopt.

Foodservice IP's shared-cost research model combines broad industry evidence with sponsor customization and ongoing strategic support. Sponsors help shape the work, receive confidential coverage of their priority questions, and retain access to the study team after delivery.

Participation Authorization

Our company confirms participation in the Foodservice IP multi-client study, The New College & University Dining Model #12741, in the amount of \$15,000.

Billing will follow the terms described in this proposal: 50% upon project initiation and the balance upon delivery of the final report.

Name

Title

Company

Address

Email

Signature

Date

To participate, please sign this page and return it to tpowell@foodserviceip.com. Questions may be directed to Tim Powell at 312-600-5151.