

Customer Satisfaction Benchmarking Survey

National Peer Performance Tracking Study

NACUFS / University Residences & Dining Services

Student Life Research and Assessment

June 2011

INTRODUCTION

University Residences & Dining Services participated in The National Association of College & University Food Services (NACUFS) Customer Satisfaction Benchmarking Survey in November 2010. Respondents included 1,400 students (87% of total respondents) and 210 faculty/staff/other guests.

The survey's purpose was to measure satisfaction and importance ratings for operating characteristics such as food, menu, service, cleanliness, the dining environment, and environmental stewardship. In addition to providing an overall perspective of performance, survey results will be used as a benchmark to compare the dining experience at Ohio State to similar institutions.

METHODOLOGY

In November 2010, postcards at each dining location distributed instructions for survey participation to every 3rd guest. The survey was administered online; each respondent could use the URL or QR code (Quick Response matrix barcode readable by some camera phones) to access the link to the survey. Approximately 38,000 postcards were distributed; over 1,600 guests responded.

DEMOGRAPHICS

Gender	Year in School	Approximate Respondents by Location <small>(not required to answer all questions)</small>					
Male	49%	First year	36%	Baker Commons	50	Ksa Café	60
Female	51%	Sophomore	22%	Berry Café	150	Lane Ave	20
		Junior	14%	Boss Doggs	25	Mirror Lake	120
		Senior	17%	Caffeine Element	50	North Commons	150
On Campus	59%	Graduate	10%	Campus Grind Drinko	30	Oxley's	75
Off Campus	41%	Other	1%	Campus Grind McPherson	50	PAD	40
				Campus Grind VetMed	50	Sloopy's	65
				Courtside Café	100	Terra Byte	60
				Espress-OH	50	Marketplace	210
				Fresh Express	175	Union Market	105
						Woody's	35

The proportion of male to female respondents, and the class distribution were fairly balanced, reflecting the distribution of meal plans both by gender and rank. The number of respondents also tends to follow the volume of traffic at each location.

HIGHLIGHTS

- Ohio State's top three areas where *Importance* significantly outscores *Satisfaction* directly parallel that of the industry (*Value, Nutritional Content, and Variety of Healthy Menu Choices*).
- The mean satisfaction of *Off Campus* respondents (also includes Faculty/Staff respondents) is higher than *On Campus* students most notably in *Service* (4.32 vs 4.1), and some *Food* attributes. This constituency ranks most menu attributes lower in importance than their on campus counterparts.
- Mid-collegiate (sophomore, junior) students are less satisfied than their first year and fourth year counterparts in nearly all areas of review, except for *Location*, underscoring the significance of convenience to this population. This group also has the greatest discrepancy in importance of *Value* versus their level of satisfaction (*Gap of 1.26*).
- Women were more satisfied than men in areas of *Overall Service* (4.25 vs. 4.12) and *Staff Friendliness* (4.27 vs. 4.22).

FINDINGS

This section summarizes consolidated findings without regard to type of operation (all-you-care-to-eat, coffee, retail), or respondent demographics, as compared to other NACUFS institutions.

NACUFS BENCHMARK INSTITUTION COMPARISON

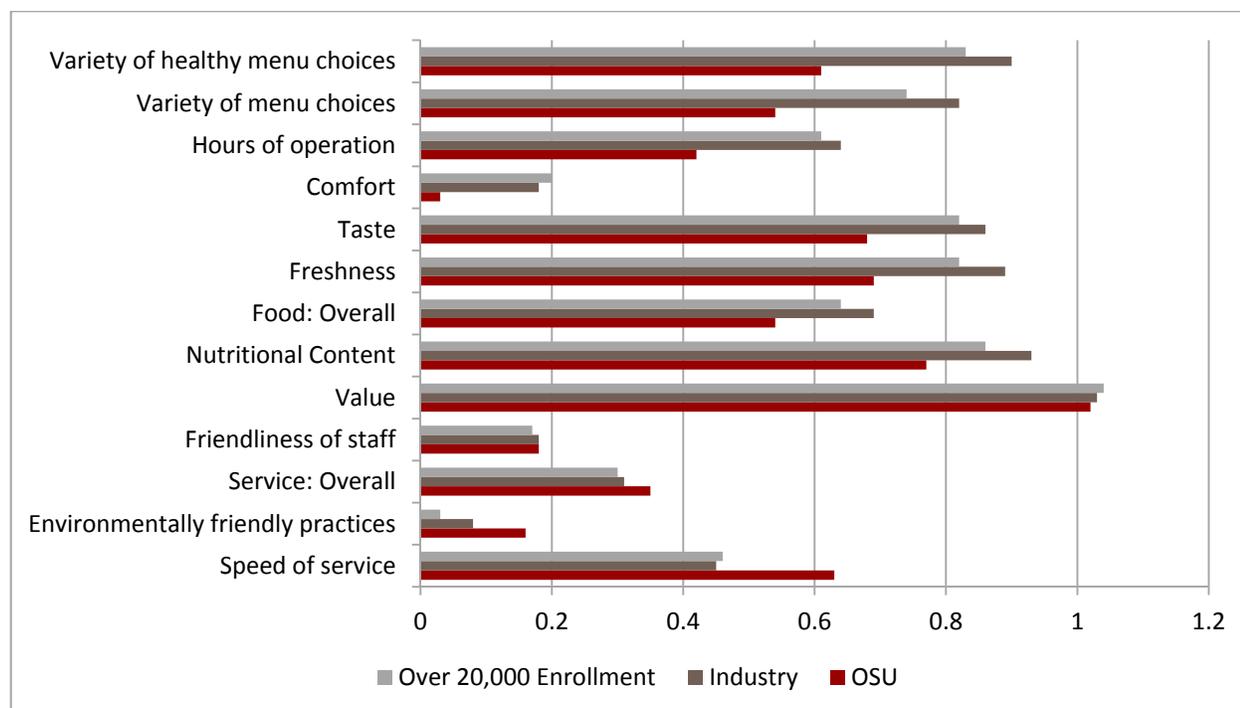
MEAN SCORES

The table to the right indicates that guests who dine at The Ohio State University have higher overall satisfaction than do peer benchmark institutions (*All responses based on a 1-5 scale, where 5 is the highest*). Of the participating schools in this survey, 49% have enrollment over 20,000 students and 77% are public institutions – Ohio State's mean satisfaction score outranks these schools by 0.17.

Institution/Operation Type	Mean Satisfaction
Ohio State University	4.01
All Valid Respondents	3.82
Midwest Region	3.84
Public Institution	3.84
Primarily 4-year Institution	3.82
Mainly Self-Operated	3.87
Over 20,000 Enrollment	3.84

GAP ANALYSIS

Areas where *Importance* significantly outscored *Satisfaction* could be looked at as opportunities for improvement. The graph below demonstrates where our gap was largest versus peer institutions. These include *Speed of Service*, *Overall Service*, and *Environmental Practices*. In contrast, guests' ranking of importance in *Hours of Operation* and *Variety of Menu Choices* more closely aligns with their satisfaction than those of similar collegiate institutions, indicating that Ohio State may be doing a better job in these areas.



BENCHMARK DATA

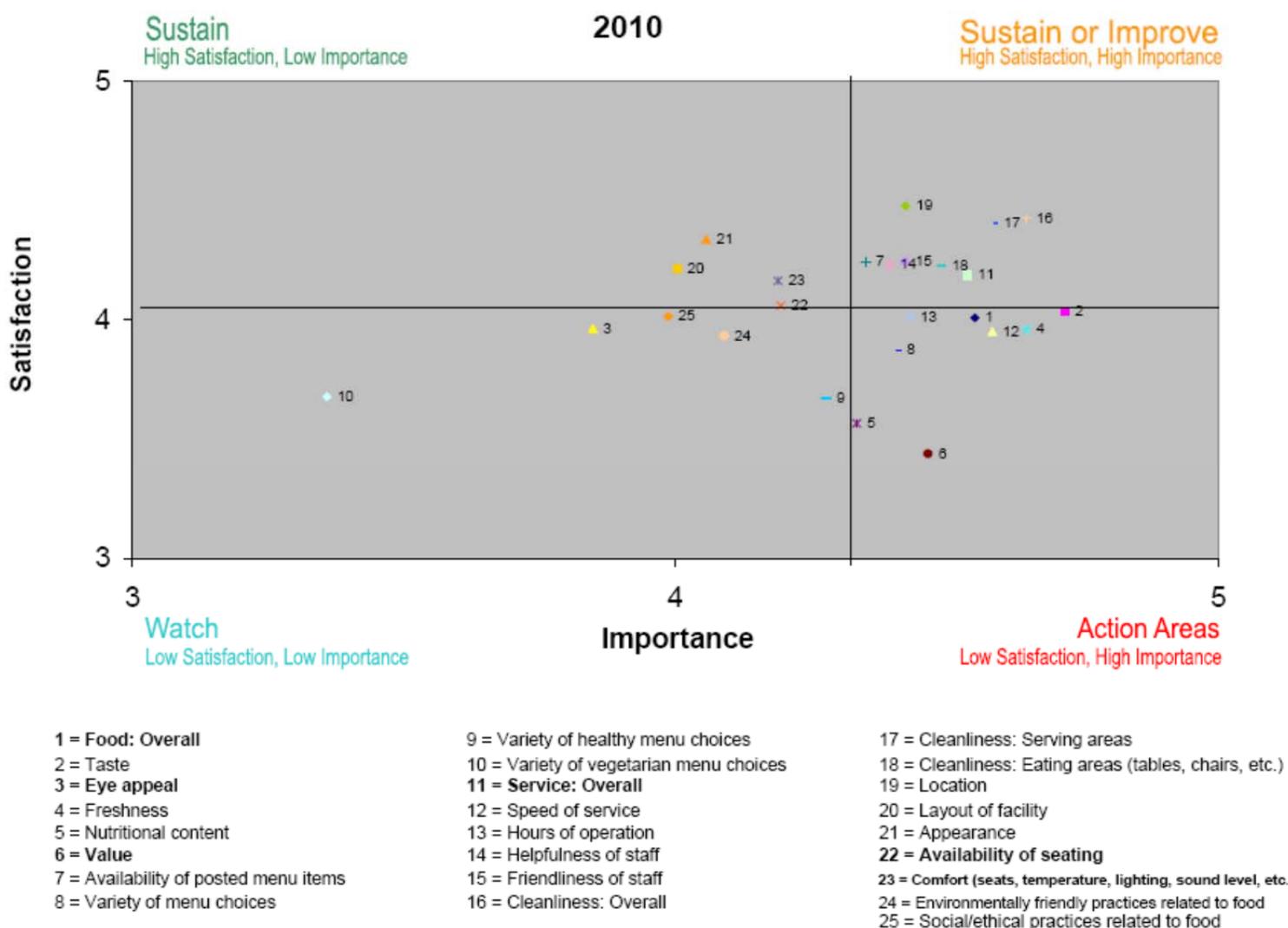
PREDICTORS OF SATISFACTION

The top five predictors of overall satisfaction for Ohio State respondents are charted to the right, according to their degree to which they do so. Of all measured variables, 37% of the variance in overall satisfaction can be attributed to five performance attributes: *Overall Food, Service, Eye Appeal, Value, and Comfort*.

Food: Overall	0.33
Service: Overall	0.16
Eye Appeal	0.12
Value	0.12
Comfort	0.11

GAP ANALYSIS

This graph helps identify areas where the greatest effect on overall customer satisfaction can be achieved. Satisfaction ratings are plotted on the vertical axis, with importance ratings on the horizontal axis.



Those items falling in the most extreme part of the *low satisfaction, high importance* quadrant indicate areas where action could be taken. These include *Nutrition, Value, and Variety*. NACUFS does not define attributes; therefore, respondents could interpret *Nutrition* to mean the prominence/availability of nutritious choices, awareness of nutrition information or another meaning. Similarly, *Value* might encompass multiple attributes – from price to portion to presentation.

OPEN-ENDED SUMMARY

Aside from location-specific tactical needs, responses from the open-ended summary yielded a majority of comments with these themes:

- Amount of food for a swipe / Lower prices
- More healthy choices
- More variety
- More vegetarian options

The first response needs more clarification on the *Value* attribute, as it is unknown whether it is a stronger factor for Ohio State students who use a meal plan, or for all those paying cash/credit, or if it is an equally shared sentiment. The other three major categories may warrant more research. For example, there are over 20 dining locations on-campus, each with a different menu. It may be that diners are unaware of the variety of menus; better communication about the different menus may answer some concerns about variety and vegetarian options. Likewise, determining “healthiness” concerns (calories, fresh fruit, trans-fat free, etc.) may help further identify communication opportunities.

IMPLICATIONS

(NACUFS) survey results for Ohio State offer the Office of Student Life a snapshot of how satisfied diners are with their experiences at on-campus facilities.

The results illustrate that overall satisfaction is strong. The results also indicate that, when compared to similar institutions, Ohio State does a good job of meeting meal service basics. The quantitative nature of the questions leaves room for interpretation, yet provides some solid directional guidance for future strategic planning initiatives. In particular, as Dining Services looks to fine-tune menu offerings and pricing equations, it is important to keep in mind that perceptions of value are not necessarily commensurate with price. The revamping of the meal plan program in 2012 may be a logical opportunity to better define Dining Services’ offerings.

In addition to current production/procurement standards, the menu development process should include established objectives/goals for nutrition (content and/or perception). Dining Services should consider reviewing individual units’ elements of display, packaging, and presentation as drivers of perception of freshness/eye appeal.