



DEPARTMENT OF THE AIR FORCE

HEADQUARTERS AIR FORCE SPACE COMMAND

Food Preference and Customer Satisfaction Survey Results Pacific Coast Club, Vandenberg AFB, CA Jun 10

A food preference and customer satisfaction survey was administered 25 Jun to 6 Jul 10 by the 30th Force Support Squadron Marketing Department for the Pacific Coast Club (PCC). A total of 478 valid survey responses were received. Sixty percent of the respondents were male. Additionally, 52% percent were active duty, 22% were civilians and 9% were retirees. Sixty percent of the respondents were under the age of 45.

Overall, the data shows the majority of the respondents have “average” perceptions and satisfaction levels with the food quality, service and dining experience at the Pacific Coast Club (See Table 1). However, the PCC may be able to retain and attract new customers by improving and capitalizing on product, price, operational and marketing initiatives. The “fair” and “poor” ratings essentially represent potential market growth.

Table One
Overall Satisfaction Lunch Experience at PCC
(Respondents could only choose a **single** response)

| Response | Chart | Frequency | Count |
|----------------|-------|--------------|------------|
| Poor | | 10.9% | 48 |
| Fair | | 22.6% | 100 |
| Average | | 31.4% | 139 |
| Good | | 27.8% | 123 |
| Excellent | | 7.2% | 32 |
| N/A | | | 32 |
| Not Answered | | | 30 |

Data provides insight into the food style preferences of respondents, which should be considered when developing lunch selections for menu and buffet ordering. These data also provide valuable perspectives on potential food offerings for special event menus. See Tables 2 and 3 below.

Table Two
The Top Five Food Preferences
 (Respondents were allowed to choose **multiple** responses)
 (N=588)

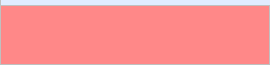










| Response | Chart | Frequency |
|----------------|---|--------------|
| Italian |  | 71.8% |
| Asian |  | 49.3% |
| Pizzeria |  | 42.9% |
| Mexican |  | 63.6% |
| Bar-B-Que |  | 63.3% |
| Grill Items |  | 47.4% |

Table Three
Top 5 Lunch Food Items
 (Respondents were allowed to choose **multiple** responses)
 (N=588)

| Response | Chart | Frequency |
|--------------------------------|---|--------------|
| Burgers |  | 36.2% |
| Chicken (Grilled, Fried, etc.) |  | 49.1% |
| Salad |  | 52.7% |
| Deli Sandwiches/ Subs/ Hoagies |  | 45.2% |
| BBQ Selections |  | 43.2% |

Additionally, respondents were asked to rank order preferences of current PCC lunch buffet options. The top six rankings are listed below:

- Santa Maria Barbeque
- Salad Bar
- Mexican
- Ribs & Chicken
- Barbeque Brisket
- Fish & Chips

Table 4 provides detailed information on satisfaction levels of several operational aspects of the PCC. With the exception of the cleanliness indicator, data show that the

majority of respondents have neutral to negative impressions. However, all of these elements can be enhanced through operational improvements to the customer service and product mixes. Operational corrections can address and positively impact the neutral and fair impressions, in particular.

Table Four
Overall Satisfaction PCC Lunch Service

| | | Excellent | Good | Neutral | Fair | Poor |
|----------------------|----------|--------------|--------------|--------------|--------------|-------------|
| Buffet Food Items | Count | 35 | 173 | 135 | 77 | 28 |
| | % by Row | 7.8% | 38.6% | 30.1% | 17.2% | 6.3% |
| Menu Items | Count | 31 | 186 | 126 | 80 | 22 |
| | % by Row | 7.0% | 41.8% | 28.3% | 18.0% | 4.9% |
| Customer Services | Count | 65 | 189 | 103 | 65 | 27 |
| | % by Row | 14.5% | 42.1% | 22.9% | 14.5% | 6.0% |
| Cleanliness | Count | 103 | 233 | 70 | 29 | 15 |
| | % by Row | 22.9% | 51.8% | 15.6% | 6.4% | 3.3% |
| Affordability | Count | 29 | 141 | 105 | 100 | 74 |
| | % by Row | 6.5% | 31.4% | 23.4% | 22.3% | 16.5% |
| Hours of Operation | Count | 30 | 159 | 130 | 75 | 55 |
| | % by Row | 6.7% | 35.4% | 29.0% | 16.7% | 12.2% |
| Overall Food Quality | Count | 29 | 190 | 111 | 85 | 35 |
| | % by Row | 6.4% | 42.2% | 24.7% | 18.9% | 7.8% |
| Total | Count | 322 | 1271 | 780 | 511 | 256 |
| | % by Row | 10.3% | 40.5% | 24.8% | 16.3% | 8.2% |

Opportunities also exist to improve food quality perceptions at the PCC and other on-base restaurants, as shown in Table 5.

Table Five
On-Base Restaurant Food Quality Comparison

| | | Poor | Fair | Average | Good | Excellent |
|---------------------------------------|----------|-------------|--------------|--------------|--------------|-------------|
| Pacific Coast Club | Count | 52 | 100 | 149 | 136 | 38 |
| | % by Row | 10.9% | 21.1% | 31.4% | 28.6% | 8.0% |
| The Marshallia Ranch Golf Grill | Count | 14 | 47 | 115 | 104 | 23 |
| | % by Row | 4.6% | 15.5% | 38.0% | 34.3% | 7.6% |
| The Lucky Strike Bowling Center Grill | Count | 29 | 64 | 151 | 139 | 28 |
| | % by Row | 7.1% | 15.6% | 36.7% | 33.8% | 6.8% |
| Breakers Dining Facility | Count | 5 | 11 | 47 | 88 | 62 |
| | % by Row | 2.3% | 5.2% | 22.1% | 41.3% | 29.1% |
| AAFES Establishments | Count | 21 | 62 | 195 | 156 | 12 |
| | % by Row | 4.7% | 13.9% | 43.7% | 35.0% | 2.7% |
| Total | Count | 121 | 284 | 657 | 623 | 163 |
| | % by Row | 6.5% | 15.4% | 35.6% | 33.7% | 8.8% |

These data show that 32% of respondents felt that the PCC food quality was either “poor” to “fair”; 31% stated “average” and 37% stated “good” to “excellent”. Similarly, 51% of respondents rated PCC customer service as either “average”, “fair” or “poor” as shown in Table 6. The data are consistently showing modest to mediocre performance to respondent satisfaction levels, indicating the need for operational enhancements.

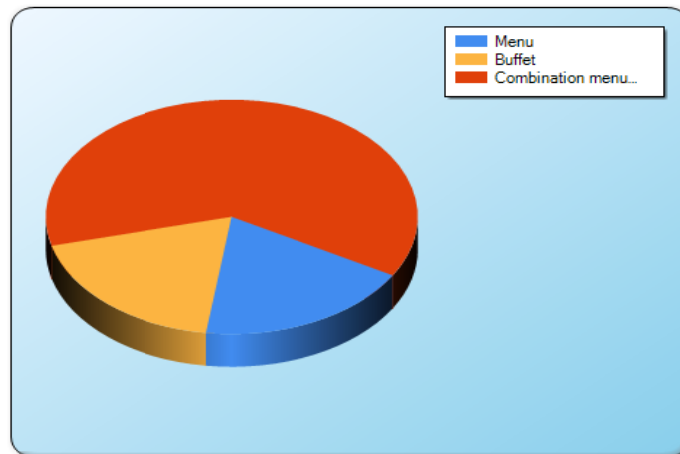
Respondents also stated a preference for changing the buffet menu every three months. It is equally important to consider the comments submitted by respondents about the cost, quality, value perceptions and consistency of the buffet menu.

More than 260 comments were provided for food quality and preference questions. Most frequently, respondents requested healthy, fresh and low-fat buffet and menu selections. They requested food and dining experiences that were similar to Baja Fresh, Chipotle, Panera Bread and Quiznos. Respondents tended to request more

variety in menu offerings, including authentic Mexican, Asian rice and noodle bowls, wrap sandwiches, Thai, an extended salad bar and high quality meats. Additionally, comments frequently suggested taking advantage of the abundant fruits and vegetable produced locally. Respondents also felt that PCC food costs were too expensive, particularly for special events, given inconsistent quality and limited portion sizes. Based on the comments provided by respondents, the PCC is infrequently viewed as a dining option for lunch. Most personnel visit the PCC when required to attend (mandatory) special events. Data also show that the PCC is not currently viewed as a family dining experience.

The majority of respondents (62%) prefer that the PCC offer a combination of menu and self-serve buffet lunch options (See Chart 1). Additionally, seventy-one percent (71%) of the respondents reported “brown bagging” lunch for convenience and affordability daily. The preponderance of brown bagging has market share and market penetration considerations for the PCC, requiring a cost effective and superior product to change the behaviors of customers accustomed to brown bagging lunch.

Chart One
Menu or Buffet Service Preference
(Respondents could only choose a single response)



Pricing

Respondents estimated that on average, they are currently paying between \$8.00-\$10.00 to eat lunch at off-base restaurants. Largely due to value perceptions, respondents (46%) are willing to pay between \$6.00-\$8.00 to eat lunch at the PCC. Only 20 percent of the respondents were willing to pay between \$8.00-\$10.00 to eat at the PCC. These data further reflect customer concerns over the quality and perceived value of eating at the PCC.

Table Six
Payment Willingness Lunch Pacific Coast Club
 (Respondents could only choose a single response)
 (N=546)

| Response | Chart | Frequency | Count |
|----------------------|-------|--------------|------------|
| Under \$4.00 | | 6.3% | 33 |
| \$4.01-\$6.00 | | 24.4% | 128 |
| \$6.01-\$8.00 | | 45.6% | 239 |
| \$8.01-\$10.00 | | 21.2% | 111 |
| Greater than \$10.00 | | 2.5% | 13 |
| Not Answered | | | 22 |

Table Seven
Customer Service at the On-base Restaurants

| | | Poor | Fair | Average | Good | Excellent | N/A | Total |
|-----------------------|----------|-------------|--------------|--------------|--------------|--------------|------------|---------------|
| Pacific Coast Club | Count | 33 | 79 | 129 | 151 | 81 | 46 | 473 |
| | % by Row | 7.0% | 16.7% | 27.3% | 31.9% | 17.1% | | 100.0% |
| The Bowling Center | Count | 14 | 66 | 146 | 149 | 56 | 81 | 431 |
| | % by Row | 3.2% | 15.3% | 33.9% | 34.6% | 13.0% | | 100.0% |
| The Golf Course Grill | Count | 21 | 41 | 101 | 100 | 34 | 206 | 297 |
| | % by Row | 7.1% | 13.8% | 34.0% | 33.7% | 11.4% | | 100.0% |
| The Dining Facility | Count | 7 | 14 | 55 | 74 | 71 | 282 | 221 |
| | % by Row | 3.2% | 6.3% | 24.9% | 33.5% | 32.1% | | 100.0% |
| AAFES Establishments | Count | 16 | 66 | 187 | 145 | 30 | 69 | 444 |
| | % by Row | 3.6% | 14.9% | 42.1% | 32.7% | 6.8% | | 100.0% |
| Total | Count | 91 | 266 | 618 | 619 | 272 | 684 | 1866 |
| | % by Row | 4.9% | 14.3% | 33.1% | 33.2% | 14.6% | | 100.0% |

**Table Eight
Special Event/Banquet Services Satisfaction**

| | | Excellent | Good | Neutral | Fair | Poor | Not Applicable |
|--------------------|----------|-------------|--------------|--------------|--------------|--------------|----------------|
| Food Quality | Count | 24 | 145 | 70 | 68 | 60 | 95 |
| | % by Row | 6.5% | 39.5% | 19.1% | 18.5% | 16.3% | |
| Customer Services | Count | 43 | 152 | 80 | 52 | 38 | 96 |
| | % by Row | 11.8% | 41.6% | 21.9% | 14.2% | 10.4% | |
| Affordability/Cost | Count | 12 | 65 | 59 | 95 | 133 | 98 |
| | % by Row | 3.3% | 17.9% | 16.2% | 26.1% | 36.5% | |
| Total | Count | 79 | 362 | 209 | 215 | 231 | 289 |
| | % by Row | 7.2% | 33.0% | 19.1% | 19.6% | 21.1% | |

Entertainment & Activities

Table 8 below shows the majority of respondents are “unlikely” to “neutral” to attend entertainment opportunities at the PCC, including sporting events and jazz concerts. However, Single Airmen in the dorms, families living on base and Guard/Reserve personnel expressed a preference for live band concerts, wine-dinner pairings and sports and poker tournaments on the weekends. Additionally, these segments requested extended hours for the PCC Enlisted and Officers’ Clubs on the weekends.

**Table Nine
Entertainment Opportunities**

| | | Likely to Attend | Neutral | Unlikely to Attend |
|--------------------------|-----------------|------------------|--------------|--------------------|
| Comedy Night | Count | 194 | 110 | 156 |
| | % by Row | 42.2% | 23.9% | 33.9% |
| Jazz Concerts | Count | 117 | 107 | 235 |
| | % by Row | 25.5% | 23.3% | 51.2% |
| Dinner Theater | Count | 165 | 112 | 183 |
| | % by Row | 35.9% | 24.3% | 39.8% |
| Guest Chef | Count | 150 | 136 | 175 |
| | % by Row | 32.5% | 29.5% | 38.0% |
| Wine Tasting | Count | 185 | 103 | 173 |
| | % by Row | 40.1% | 22.3% | 37.5% |
| Live Bands | Count | 189 | 116 | 157 |
| | % by Row | 40.9% | 25.1% | 34.0% |
| Sports Theme Tournaments | Count | 113 | 113 | 233 |
| | % by Row | 24.6% | 24.6% | 50.8% |
| TOTAL | % by Row | 34.5% | 24.7% | 40.7% |

Approximately 98 suggestions were offered regarding entertainment opportunities, the most frequently mentioned included:

- Unlikely to attend/live off base and won't come back
- Live local bands (rock, R&B, Rap and Country)
- Gambling and poker tournaments
- UFC and DirectTV football
- Beer Pong
- Local wine and food pairing events with special guest chefs

The PCC currently offers Kids' Night to attract families. Unfortunately, the majority of respondents (82%) stated that the Kids' Night offering was not applicable,

demonstrating that there is only a small demand for Kids' Night at the PCC. It is important to note that only 20 percent of the respondents answered the Kids' Night questions. Respondents most frequently rated the Kids' Night food quality, entertainment and affordability as "fair" to "poor".

Respondent comments provide some insight into the demand and operational concerns affecting Kids' Night:

- Poor food quality, improve child-friendly buffet and food selections (healthy and variety)
- Too expensive, given the poor food quality and lack of entertainment
- Unlikely to attend/live off base and won't come back
- Include entertainment (movies, interactive activities, something unique beyond the bouncy castle, age-appropriate activities)
- Improve marketing
- Do not hold Kids' Night when the lounge is open and adults are drinking, weekend night occasionally

Fifty-three percent of the survey respondents reported that they would never attend Sunday brunch at the PCC. Furthermore, respondents are only willing to pay between \$10.00-\$15.00 for a Sunday brunch buffet. Several negative comments were offered on the food quality, customer service and cost of the special Mother's Day Brunch held last May.

The PCC maintains separate Enlisted and Officers' lounges. The majority of the enlisted and officer respondents most frequently selected the "not applicable" satisfaction rating categories. This may mean that few active duty personnel have visited the lounges, demonstrating a potential to develop a market niche. Table 10 shows the levels of satisfaction for the Officers' Lounge. Officers tended to positively rate customer service, but the data show opportunities to improve operation hours, menu selections and the activities offered. Officer comments included:

- Space renovations, light, cleanliness
- Prices are too high, improve the bar menu (similar fare to Chili's burgers, wings, etc)
- Improving the bartending service and dedicate staff
- Long waits to receive food orders at lunch time and during social hour

**Table Ten
Officers' Lounge Satisfaction**

| | | Excellent | Good | Fair | Poor | Not Applicable |
|-------------------------------|-----------------|-------------|--------------|--------------|--------------|----------------|
| Hours of Operation | Count | 8 | 59 | 62 | 33 | 305 |
| | % by Row | 4.9% | 36.4% | 38.3% | 20.4% | |
| Menu Selection | Count | 5 | 55 | 60 | 29 | 317 |
| | % by Row | 3.4% | 36.9% | 40.3% | 19.5% | |
| Customer Services | Count | 18 | 74 | 51 | 18 | 304 |
| | % by Row | 11.2% | 46.0% | 31.7% | 11.2% | |
| Activities (pool, music, etc) | Count | 5 | 41 | 67 | 30 | 318 |
| | % by Row | 3.5% | 28.7% | 46.9% | 21.0% | |
| TOTAL | % by Row | 5.9% | 37.2% | 39.0% | 17.9% | |

Similarly, enlisted personnel rated the Enlisted lounge operation hours, customer service and menu selection as “good” to “fair”, see Table 11. The level of satisfaction with the activities, demonstrate ample opportunities to develop new initiatives to more positively influence perceptions to appeal to enlisted personnel. Enlisted personnel comments included:

- Improving bartender responsiveness
- Prices are too high, improve the bar menu (similar to Chili’s burgers, wings, etc.)
- Improving the entertainment with DJ, diverse music, upgraded large televisions, multimedia interactive games
- Longer evening hours and open on weekends, especially Guard/Reserve weekends
- Long waits to receive food orders
- Separate space entirely from the Officers’ Lounge

**Table Eleven
Enlisted Lounge Satisfaction**

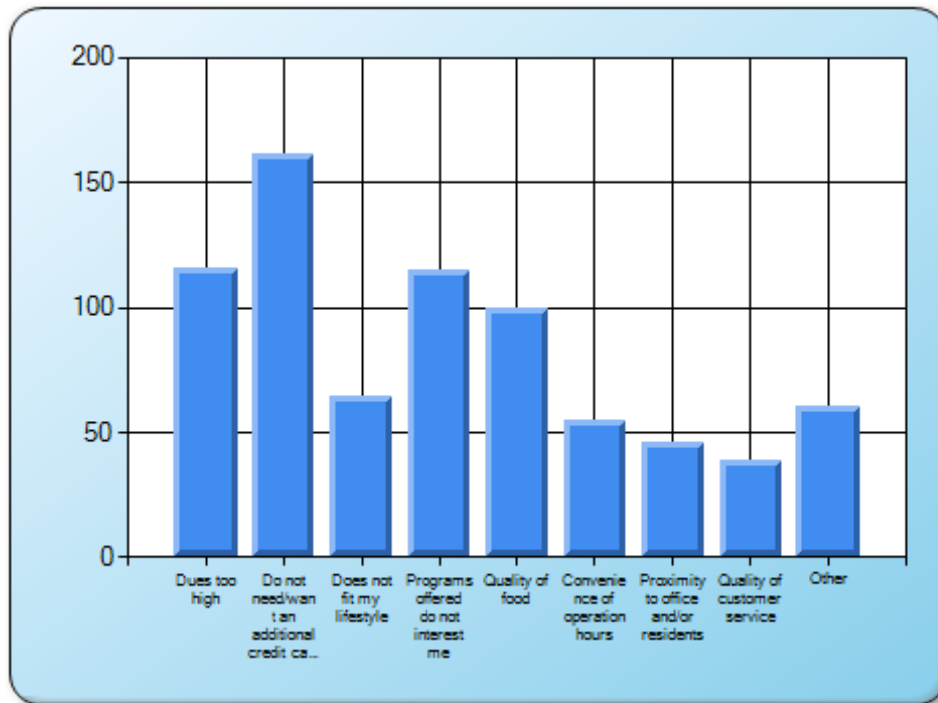
| | | Excellent | Good | Fair | Poor | Not Applicable |
|---------------------------------------|-----------------|-------------|--------------|--------------|--------------|----------------|
| Hours of Operation | Count | 10 | 81 | 80 | 64 | 232 |
| | % by Row | 4.3% | 34.5% | 34.0% | 27.2% | |
| Customer Service | Count | 26 | 106 | 80 | 25 | 226 |
| | % by Row | 11.0% | 44.7% | 33.8% | 10.5% | |
| Menu Selection | Count | 4 | 71 | 88 | 53 | 247 |
| | % by Row | 1.9% | 32.9% | 40.7% | 24.5% | |
| Activities (pool tables, music, etc.) | Count | 7 | 77 | 93 | 53 | 234 |
| | % by Row | 3.0% | 33.5% | 40.4% | 23.0% | |
| Total | % by Row | 5.1% | 36.5% | 37.1% | 21.2% | |

Membership

A slight majority of respondents (53%) were not members of the PCC for the following reasons, as shown in Chart 2:

- don't want or need an additional credit card
- dues were too high
- programs/services offered were not of interest to them
- poor food quality

Chart Two
Reasons why not a member of the Pacific Coast Club?
 (Respondents were allowed to choose **multiple** responses)



Recommendations

- Request an operational Staff Assistance Visit to develop strategies to address the operational and food service/quality concerns
 - Healthy and fresh menu options, local food vendors, broader menu variety, meat quality
 - Examine costs for lunch, buffet and special events catering
- Develop an integrated marketing plan, including:
 - Comprehensive re-branding and advertising campaign
 - Membership value and benefits statements
 - Incentives and promotional initiatives (loyalty cards/programs, specialty dinners, periodic membership rewards and incentives)
- Consider offering special weekend hours and activities, especially on Guard/Reserve weekends
 - Develop weekend/evening programs to attract dorm residents
- Pursue funding to enhance the dining and entertainment experiences of the Enlisted and Officers' Lounges
- Initiate significant enhancements to Kids' Night, including menu and entertainment options, along with a new branding initiative
- Do not pursue a Sunday Brunch option, except for traditional holidays