NACAS · JUNE 2026

APEX Pilot *Briefing*

What 4,500+ students across participating campuses told us about the auxiliary services that shape their campus experience - and what it means for institutional strategy.

34+ INSTITUTIONS SIGNED UP

4,500+ STUDENTS SURVEYED

9 SERVICE AREAS EVALUATED

PROGRAM STRUCTURE

9 Service Areas. *One framework.*

APEX is built around a modular architecture that lets institutions benchmark what matters most. Nine core modules cover the full auxiliary portfolio; most offer extended versions for deeper dives where desired.

THIS BRIEFING COVERS

The **five modules with sufficient institutional participation** to report aggregate results - Dining, Bookstore, Meal Plan, ID Cards, and Vending. Remaining modules will appear in full-launch reporting.

9 CORE MODULES

01
Dining
reported here

02
Bookstore
reported here

03
Meal Plan
reported here

04
ID Cards
reported here

05
Vending
reported here

06
Parking
Fewer institutions, expanding next cycle.

07
Housing
Fewer institutions, expanding next cycle.

08
Print & Mail
Fewer institutions, expanding next cycle.

09
Retail
Fewer institutions, expanding next cycle.

ADMIN SURVEY

What auxiliary leaders *told us*

Inputs from participating institution leadership: challenges and priorities by service area, from modules with 6+ reporting institutions.

DINING

CHALLENGES

63% cite student satisfaction as the top challenge. Cost control is a pressure with thin margins.

PRIORITIES

Expanding food concepts, dietary accommodations, culturally diverse menus. Capital projects: **26%** cite construction or renovation.

BOOKSTORE

CHALLENGES

88% cite faculty adoption as the dominant pain point. Student affordability flagged by **54%**.

PRIORITIES

First-day / Inclusive Access near-universal (**67%** participate). Improving faculty engagement active at **50%** of institutions.

MEAL PLAN

CHALLENGES

32% report the plan is underutilized (another 32% only moderately), despite **84%** having mandatory plans. Structures often unchanged for a decade.

PRIORITIES

Active restructuring at **55%** of institutions toward flex/tiered models. Expanding access to commuters.

ID CARDS

CHALLENGES

70% cite budget as the primary barrier. Outdated platforms flagged by **60%**; **80%** are interested in upgrading or integrating new capabilities.

PRIORITIES

Mobile credential transition the leading emerging priority. Open API integration to reduce data silos across services.

VENDING

CHALLENGES

Vendor performance and payment or technology limitations are each flagged by **nearly four in ten**.

PRIORITIES

Expanding healthy/fresh options (**57%** flag as top gap). Modernizing payment: **around four in ten** cite contactless and campus-card integration as goals.

AUXILIARY DRIVES LOYALTY

one-third

of whether students recommend their institution is predicted by auxiliary services alone.

In a single-institution case study that weighed every part of the student experience - teaching and learning, campus culture, sense of belonging and campus spaces - auxiliary delivery services accounted for approximately one-third of overall likelihood to recommend.

Dining and the bookstore alone carry roughly a fifth. Auxiliary services are not a cost center adjacent to the experience - they are institutional strategy.

— EXECUTIVE TAKEAWAYS

Student loyalty isn't built *only in the classroom.*

When students decide whether to recommend their institution, the campus-life experience of services, culture, belonging, and spaces carries most of the explainable signal. Academics matter enormously but are generally already strong and uniform; the differentiating room is on the experience side. That's where auxiliary lives.

1

Auxiliary services carry real, measurable weight.

In a deep-dive case study with a client institution, where auxiliary was measured alongside everything else (teaching, culture, support, communications), dining and bookstore alone accounted for roughly a fifth of what drives recommendation. Just two of eleven service areas. A fully measured auxiliary portfolio could plausibly approach a third - a projection to be confirmed with full-launch data.

2

Dining plays in the top tier.

The single most compelling fact from that case study: dining is statistically tied with campus culture, belonging, and campus spaces as a top driver of recommendation. A dining program isn't a cost center adjacent to the student experience. It competes with the institution's biggest experience levers.

3

Dining drives loyalty through two doors.

Deeper measurement splits dining's weight into two distinct, reliably measured pathways: the experience itself (food quality, variety, value for money) and dining's role in campus life (it keeps students on campus, connects them to it, supports their day). Each carries weight on its own. Dining isn't just food service. It's campus-life infrastructure, and that's the budget conversation it belongs in.

4

Auxiliary is where improvement is actually buyable.

Auxiliary and experience scores sit in the 50s to 70s with proven benchmark gaps. In the case-study data, teaching already scored in the high 70s with little variance, leaving less headroom there, and the levers on the auxiliary side (menus, pricing, hours, service standards) are operational, not curricular. The detailed APEX item batteries tell you exactly which lever: they're diagnostic-grade, so "fix value-for-money before variety" is a data-backed call, not a hunch.

5

Auxiliary is disproportionately how students decide what to say about their institution.

Auxiliary's weight shows up in recommendation far more than in satisfaction. These services aren't just about keeping students happy day-to-day. They are disproportionately the experiences that shape what students tell the world about where they went to school.

THE BOTTOM LINE

Dining is the *#1 auxiliary loyalty driver.*

Dining satisfaction is the single strongest predictor of whether students recommend their institution, and the bookstore is its closest peer. Gains in these two top-tier services move the recommendation needle further than equivalent gains anywhere else in the portfolio.

Tiered is not trivial. Meal plan, ID cards and vending are each significant predictors of recommendation in their own right. Every service adds incremental weight, and across the full portfolio those gains compound — discounting the lower tier leaves real loyalty on the table.

Impact is tiered, not evenly spread — a few services carry most of the signal.

LOYALTY IMPACT INDEX - LIKELIHOOD TO RECOMMEND THE INSTITUTION

100 = the strongest service (dining). A score of 50 means a service carries half the loyalty influence of dining.

TOP TIER - STRONGEST LOYALTY SIGNAL

Dining - both formats 100

Bookstore 64

STRONG SIGNAL - SMALL SAMPLE, DIRECTIONAL

Housing 90

MIDDLE TIER

Meal Plan 38

ID Cards 34

Vending 31

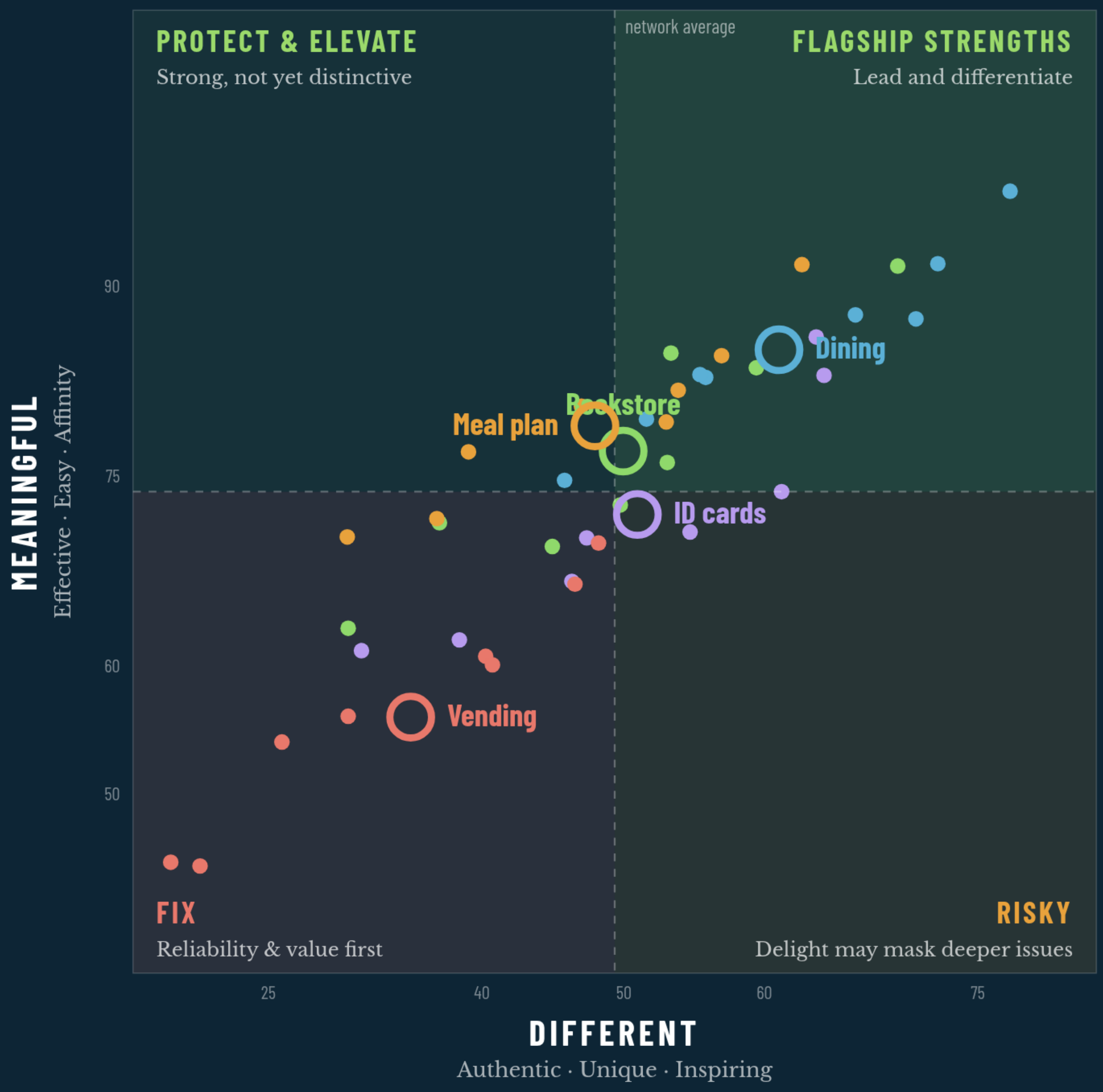
Parking, print & copy, and mail services: too few responses to place reliably. Read as tiers, not exact ranks - estimates within a tier are statistically indistinguishable.

Introducing the Meaningful & Different framework

Satisfaction tells you whether a service works. It cannot tell you whether the service builds loyalty. The Meaningful & Different Index measures the two things that do.

Meaningful: it meets real student needs, easily, and students feel a connection to it. **Different**: it feels distinctly ours, not interchangeable with any other campus or the plaza across the street.

Across industries, experiences that score well on both are what turn satisfied customers into loyal ones. Satisfaction alone does not. The pattern below is the opportunity: every service scores higher on Meaningful than Different. Our services work. Few are memorable yet.



Each institution appears as a dot. Most cluster mid-field, but the tails are long: the best and weakest institutions are worlds apart on the very services that drive loyalty.

SERVICE 01 · THE FLAGSHIP

Dining

71%

AVG. SATISFACTION

ACROSS INSTITUTIONS

Lowest 41% Highest 96%

~25%

OF WHY STUDENTS RECOMMEND THEIR SCHOOL, FROM DINING (HALLS & CAFÉS)

WHAT THE DATA SAYS

Dining is the single most consequential service in this dataset - not just by satisfaction, but by its structural role in institutional loyalty. Taken across both formats, dining carries roughly a quarter of the loyalty signal in the auxiliary portfolio - the largest share of any service, with only the bookstore in the same tier.

WHAT'S WORKING

Staff friendliness (72% sat.) and convenient location (72% sat.) are the clear operational strengths. Comfort and atmosphere follow at 69%. These scores are above network average.

THE CRITICAL GAP

Food quality and menu variety at 22% dissatisfaction, healthy options at 16%. Value for money at 28% unsat. All sit in the high-importance zone. These are not marginal complaints.

37% go off-campus often

46% cite price as pull factor

36% cite variety as pull factor

75% say dining keeps them on campus

"Lower the cost. The portions are too small to pay $12 for a sandwich."

STUDENT VOICE - DINING HALLS

IN STUDENTS' OWN WORDS

WHAT THEY LIKE

CONVENIENCE & LOCATION	*"Convenient location, especially when classes are back to back."*
VARIETY OF OPTIONS	*"A decent variety of options."*
PRICE & VALUE	*"Price/affordability while still tasting great."*

WHAT THEY'D CHANGE

MORE VARIETY	*"Affordable prices and more diverse meals."*
EXTENDED HOURS	*"Have caf's open after 5 pm — half the students come to study after work."*
LOWER PRICES	*"Lower the cost. The portions are too small to pay $12 for a sandwich."*

THE STRATEGIC IMPERATIVE

Protect this asset relentlessly. Dining is the #1 auxiliary loyalty predictor. Address variety and healthy options - both sit in the high-importance, high-dissatisfaction zone, and both are directly actionable.

SERVICE 02 · THE AFFORDABILITY LEVER

Book store

72%

AVG. SATISFACTION

ACROSS INSTITUTIONS

Lowest 56% Highest 81%

WHAT THE DATA SAYS

Satisfaction looks healthy at 72%, and that number hides the real story. Course-material cost is pushing a majority of students to go without required materials - and the programs built to fix it are unknown to most of the students who would benefit. This is the largest module in the study, and its biggest lever is not merchandise. It is keeping required materials in students' hands.

53% of students skipped a required course material this term because it cost too much. 80% say price decides what they buy - or whether they buy at all. That is an academic-success risk, not a retail complaint.

53% skipped a required material (cost) | 80% price drives the purchase | 30% buy from Amazon instead

AFFORDABILITY PROGRAMS — WANTED, BUT UNKNOWN

WHAT STUDENTS DON'T KNOW

55% are unsure their school offers Inclusive Access. 57% are unsure about Equitable Access. 47% do not know whether free or low-cost (OER) materials exist.

WHAT STUDENTS WANT

63% want Inclusive Access. 54% want Equitable Access. The demand is already there; only the awareness is missing.

"I didn't know the bookstore had a rental programme. I've been buying everything full price."

STUDENT VOICE - BOOKSTORE

IN STUDENTS' OWN WORDS

WHAT THEY LIKE

FAST SERVICE	*"Everything is good — the customer service is fast and the layout is easy to navigate."*
HELPFUL STAFF	*"The people were really helpful and the service was great."*
OVERALL EXPERIENCE	*"Overall good experience."*

WHAT THEY'D CHANGE

HIGH PRICES	*"The prices are extremely high — it's more convenient to buy most things online."*
STOCK & AVAILABILITY	*"Many items remain unstocked, including ones needed for the program."*
SIGNAGE	*"More signage of where things are located — the bookstore can be hard to navigate."*

THE OPPORTUNITY

Make affordability programs visible. Promote Inclusive Access, Equitable Access and free/OER options at enrolment and the start of every term. The demand already exists; the awareness does not. Near-zero capital, and it directly protects academic performance.

WHAT TO WATCH

The transaction is moving off campus: 30% already buy from Amazon and 29% from other online sellers. The bookstore keeps the relationship only if it wins on affordability and transparency, not shelf space.

SERVICE 02 · BOOKSTORE, CONTINUED

The Faculty Lever

COURSE MATERIALS RUN THROUGH INSTRUCTORS

73%

OF FACULTY PURCHASE RECOMMENDATIONS POINT TO THE BOOKSTORE

WHY FACULTY ARE THE LEVER

Students do not learn what to buy from the bookstore. They learn it from faculty. 88% find out about required materials from the instructor's syllabus and 38% from an instructor email, while only 29% hear it from the bookstore itself. Faculty are the channel students trust, which makes faculty adoption the bookstore's single biggest lever - for both the transaction and the cost.

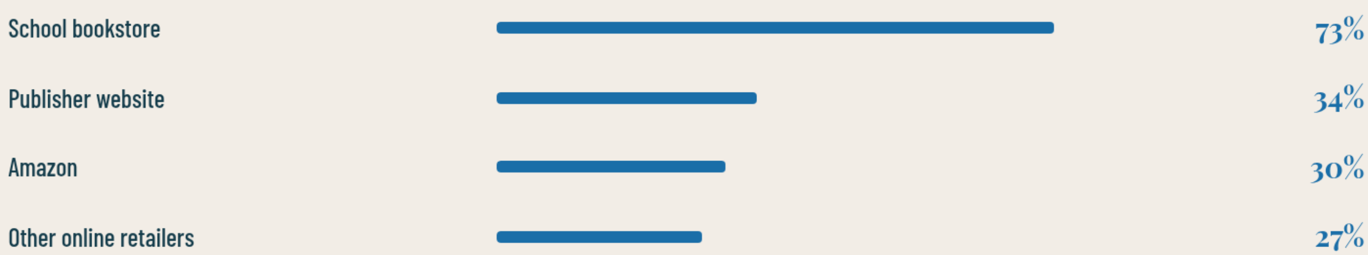
When professors do recommend where to buy, **73%** point students to the school bookstore - more than double Amazon (30%) or the publisher (34%). But the guidance is inconsistent: only **30%** of students get a recommendation in every course, and **18%** get none. When faculty stay silent, students default to price-shopping off campus.

88% learn materials from the syllabus

73% of faculty recs point to the bookstore

18% get no purchasing guidance

WHERE FACULTY SEND STUDENTS TO BUY



THE OPPORTUNITY

Win faculty, not just students. Equip instructors to do two things: name the bookstore in the syllabus, and adopt affordability programs (OER, Inclusive Access, Equitable Access). Faculty are the only channel that moves both the transaction and the cost of materials.

WHAT TO WATCH

Silent faculty are the leak. In the 18% of cases with no guidance, and the 52% with only partial guidance, students drift to Amazon and skip required materials. The bookstore cannot reach these students directly - only faculty can.

SERVICE 03 · THE ENGAGEMENT GAP

Meal Plan

60%

AVG. SATISFACTION

ACROSS INSTITUTIONS

Lowest 39% Highest 74%

WHAT THE DATA SAYS

The meal plan works for the students who use it; the engagement gap is retention. About one in four returning students will not re-register, and another one in six are unsure. Half of peer institutions already offer flexible or tiered plans, and students who can't use their balance flexibly disengage - which reads as dissatisfaction.

WHAT'S WORKING

Convenience and variety within structured plans score well. Where meal plan apps are known and used, satisfaction is high. The product works - the problem is access, flexibility, and awareness.

THE STRUCTURAL FRICTION

Only 36% agree the meal plan supports their health and wellbeing. Commuter exclusion signals that plans are compliance tools, not valued services. Rigidity drives off-campus spend.

27% won't re-register

16% unsure about re-registering

36% feel it supports health & wellbeing

50% of peers offer flex model already

SATISFACTION BY ELEMENT

WHAT WORKS · % SATISFIED		WHY THEY HESITATE · % DISSATISFIED	
Convenient locations	78%	Cost of the plan	46%
Staff friendliness	76%	Value for money	36%
Portion size	68%	Food quality	34%

"I lose money every semester because I can't use my remaining balance on anything useful."

STUDENT VOICE - MEAL PLAN

IN STUDENTS' OWN WORDS

WHAT THEY LIKE

FLEXIBLE SWIPES	*"Being able to pop in for a quick soda or cookie without fearing I'm wasting a meal."*
DIETARY VARIETY	*"I'm able to choose the vegetarian option — a relief not to have to eat around the meat."*
FOOD & STAFF	*"The butter chicken thighs with rice when it's on the menu — and the nice lunch staff."*

WHAT THEY'D CHANGE

MORE VARIETY	*"More off-campus locations and options."*
RISING COST	*"I was sad when prices increased recently."*
HOURS	*"Hours of operation, especially for athletes."*

THE LEVER

Move toward a tiered or flex-dollar model. Expand access to commuters. Add meal plan app onboarding at orientation. None of this requires new capital - it requires institutional will.

SERVICE 04 · THE HIDDEN ASSET

ID Cards

64%

AVG. SATISFACTION

ACROSS INSTITUTIONS

Lowest 46% | Highest 80%

WHAT THE DATA SAYS

ID card satisfaction is solid and the service has the lowest friction in the portfolio - but it is significantly underutilised. A third of students are unaware of integrations that already exist. The mobile credential transition represents the next horizon, but the immediate gain is simply awareness of what students already have.

64% avg. satisfaction

33% unaware of existing integrations

STRENGTHS · % SATISFIED

System integration **65%** Entry reliability **65%** Customer service **64%**

UNTAPPED DEMAND · % WHO WOULD USE THE ID FOR THIS IF IT WERE OFFERED

Library access	47%
Transit access	45%
Parking access	45%
Event entry	42%

Plus 54% would use the card for printing and 46% for building access if those were enabled.

> *"I had no idea my ID could pay for anything. I've just been using it to get into the dorm."*
>
> *STUDENT VOICE - ID CARDS*

IN STUDENTS' OWN WORDS

WHAT THEY LIKE

HELPFUL STAFF — *"The staff are very helpful and professional."*

DIGITAL APPEAL — *"A digital ID card seems convenient — something my school should be offering."*

PRINTING — *"I use it for printing on campus."*

WHAT THEY'D CHANGE

LIMITED ACCEPTANCE — *"Can't be used at nearly all places on campus — it could be used for more things."*

NO TAP / DIGITAL — *"We don't have digital IDs and still have to swipe most locations instead of tap."*

WEBSITE CONFUSION — *"I had a hard time figuring out the website."*

THE ACTION COSTS NOTHING

Launch a "What Your ID Can Do" campaign. Zero capital required. Mobile credential transition is the strategic horizon - but begin with awareness. 33% of students are missing value they already have access to.

SERVICE 05 · THE LAGGARD

Vending

58%

AVG. SATISFACTION

ACROSS INSTITUTIONS

Lowest 44% | Highest 74%

Lowest Meaningful.
Lowest Different.
No delight signal.

THE DEFINING NUMBER

Pricing and value for money carries 68% importance - the highest importance score of any attribute across all five service areas. Satisfaction sits at just 37%. This is the single largest importance-satisfaction gap in the entire dataset.

- **56/100** Meaningful (lowest of all)
- **43%** agree it reduces cost or stress
- **24%** unsat. on healthy options
- **−43** Net Promoter Score (60% detractors)

SATISFACTION BY ELEMENT

WHAT WORKS · % SATISFIED		WHERE IT HURTS · % DISSATISFIED	
Cleanliness	64%	Pricing / value	31%
Ease of selecting	62%	Healthy options	24%
Location & access	61%	Variety of items	15%

Larger schools rate vending higher (61% satisfied) than small and mid-size schools (53%).

WHAT STUDENTS WANT IN MACHINES · % OF STUDENTS

	% of students
Healthier snacks	72%
Real drinks (water, juice, pop)	70%
Everyday snacks	69%
Health & wellness items	62%
Fresh / healthy meals	58%

Top turn-offs: prices too high (46%), limited healthy options (25%), repetitive selection (24%).

> *"Literally just allow us to use dining dollars."*
>
> AN UNPROMPTED, RECURRING ASK IN THE OPEN-ENDS

"They are just very expensive. A drink for $5 is a lot when stores charge $2.50."

STUDENT VOICE - VENDING

IN STUDENTS' OWN WORDS

WHAT THEY LIKE

CONVENIENT LOCATIONS	*"Conveniently located, with reasonably convenient cash purchasing."*
BUDGET OPTIONS	*"Low-cost staple / budget options."*
QUICK SNACKS	*"Handy for grabbing a snack between classes."*

WHAT THEY'D CHANGE

HIGH PRICES	*"They are just very expensive. A drink for $5 is a lot when stores charge $2.50."*
MORE VARIETY	*"More options with more locations."*
HEALTHY CHOICES	*"No healthy options."*

WHAT'S BROKEN

Pricing (68% importance, 37% sat.), variety (49% imp., 50% sat.), healthy options (24% unsat.), and payment friction - outdated systems when students expect tap-to-pay.

WHAT WOULD CHANGE IT

Vending's problem is value perception, not presence. The fixes are concrete: fairer pricing, more healthy and fresh options, contactless and campus-card payment, and better variety - the attributes students rate lowest and want most. None requires new capital.

LEADERSHIP ACTION

Three priorities for *senior leadership*

Derived from APEX pilot findings - ordered by estimated impact on student experience and institutional outcomes.

I Protect Dining - Close the Healthy Food Gap

Dining anchors the top tier of auxiliary loyalty drivers. Satisfaction on healthy options sits at just 45%, with one in five students actively dissatisfied - a fixable problem with clear student demand. Protect this asset first, then elevate it by acting on the healthy-options gap.

- Prioritize healthy and varied menu options in dining
- Audit the capital plan - deferred maintenance erodes the portfolio's most valuable service
- Share best practices from top-quartile institutions in the network

A 10-point dining satisfaction gain moves the institutional recommendation needle as much as any equivalent investment in the portfolio.

II Close Awareness Gaps Before New Investment

Students don't know what they already have. ID integrations, Inclusive Access, and meal plan apps are underused not because students reject them - but because they don't know they exist.

- Launch "What Your ID Can Do" campaign immediately - zero capital required
- Make Inclusive Access opt-out visible at enrolment for all students
- Add meal plan app onboarding to orientation week

The lowest-cost, highest-return intervention available. Communication converts existing value into measurable student outcomes.

III Fix Value and Flexibility in Vending and Meal Plans

Both services face structural misalignment. Vending's issue is value, not capital. Meal plans need a flexibility model. Neither requires new spend - both require institutional will.

- Prioritize contactless payment and healthier products in vending
- Move meal plan toward tiered or flex-dollar model - 50% of peers already have
- Expand meal plan to commuters to signal genuine value beyond compliance

Vending's 37% pricing satisfaction is the largest importance-satisfaction gap across all five services. Meal plan non-engagement is a structural risk, not a student preference.

GET INVOLVED

For more information — or to register for the inaugural fall launch — contact us.

Dean Langan

Executive Director, Higher Education Assessment & Analytics
Sheridan College

dean.langan@sheridancollege.ca

William Hurley

Chief Strategy Officer
NACAS

william.hurley@nacas.org

https://nacas.org/apex