

East End Food Cooperative Shopper Experience Research

This report has been prepared by
Collective Research Group for
The East End Food Cooperative
December 2013

“ The East End Food Co-op offers great potential for members to participate in democratizing the way our food system is owned and managed. ” - Survey Respondent

Contents

Introduction	4
Methodology	5 - 6
Key Findings	7
Communication With Shoppers	8 - 9
The Shopping Experience	10 - 14
EEFC Member Benefits	15 - 16
Expansion & Future	17 - 20
Other Comments	21

Collective Research Group

Collective Research Group is a small research firm in Vancouver.
We specialize in researching community issues.

Web: www.collectiveresearch.ca

Email: cdiplock@collectiveresearch.ca

Introduction

The East End Food Cooperative (EEFC) is at an important time in its life. In the coming months the EEFC will be making critical decisions that will shape the future of the cooperative. As a democratic organization, these decisions are being made in consultation with its members. Working with Collective Research Group (CRG), the EEFC has made a major achievement in consulting with over 250 members through this research.

This report complements other recent research that helped inform the EEFC of its potential business growth. Together these reports will serve to help the EEFC make informed decisions about the future of the cooperative.

This is a condensed version of the Full Report. This version omits survey results that the Board felt would be inappropriate to release publicly, such as details that might compromise survey participants' confidentiality.

Don't miss your chance to

HELP
YOUR
CO-OP
GROW

From October 25th - November 22nd fill out the shopper experience survey and be entered in for a chance to win weekly giveaways of an \$100 gift certificate from the East End Food Co-operative. Visit www.east-end-food.coop



The research objectives set out from the beginning of this project were to:

1. Identify the factors that influence active members' decision to shop at the EEFC. This included exploring factors such as product price and quality, customer service and member care, store location, and more.
2. Identify the factors that cause member and non-member shoppers to shop elsewhere.
3. Explore how members would like to interact with the cooperative structure. Explore their understanding of the cooperative model and how they see themselves shaping the future of the EEFC.

Methodology

Main objective of research: to gain insights into the preferences and opinions of East End Food Cooperative shoppers.

Introductions and Focus Group Development June 2013

- Conducted three 1-hour interviews with members of the Board of Directors and Management to get an understanding of some of the issues facing the EEFC.
- Developed a guide and key questions for the upcoming focus groups.

Exploratory Data and Survey Design July 2013

- Conducted three 1.5-hour focus groups with Members, Non-Members and Staff.
- Synthesized findings from the focus groups and presented them to members of the Board of Directors.

Survey Development and Pre-Testing July - September 2013

- Findings from the focus groups were used to develop a survey instrument.
- Reviewed the survey instrument with the entire Board of Directors.
- Sent around a nearly complete version of the survey to the staff for feedback.
- Conducted multiple pre-tests with members and non-members.
- Incorporated various edits from the feedback received.

Survey Launch October - November 2013

- Launched the online survey October 25th. The survey ran for 4 weeks, ending November 22nd.
- Assisted the Engagement Committee with the promotion of the survey through Social Media copy, and poster and social media design.
- Coordinated the selection of prize winners with Management.

Survey Methodology

After our initial qualitative research, we then engaged with members through a survey. We worked closely with the Board to develop the Shopper Experience Survey. The survey delivery method was chosen to be online, with the option of an in-store survey if necessary. As we collected a good sample of demographics, CRG did not feel that including the in-store surveys was necessary.

The survey was pre-tested with members from the focus groups to gain feedback, as well as sent to the staff for review. Below is a summary of key information regarding the survey:

Survey Release: The survey was open from the week of October 25th-November 22nd.

Questions: There were 33 questions in total.

Average Time: 66% of response times fell between 7 – 20 minutes.

Responses: 330 (321 completes and 9 partial completes).

Delivery Method: Surveys were only accessed online.

We arrived at the 330 responses by cleaning the data of incompletes and other non-usable entries. Beside each question we have indicated the total number of responses for that question, for example “(n=323)” would indicate that the question received 323 responses.

It was difficult to determine what a representative sample of the EEFC shopper population should look like because the EEFC does not collect information on the age and gender of its shoppers. We therefore aimed to achieve a sample that looked roughly like the surrounding general population of the neighbourhood.

With this in mind it is important to acknowledge that we heard from a large sample with a good spread of age, gender and income but we cannot with any level of accuracy say that information provided in this report reflects the opinions of the general EEFC shopper population.

It is also important to acknowledge that the distribution of the survey was not random. The respondents were solicited from the EEFC newsletters, Facebook page and Twitter. This means that the respondents represent a fairly active and interested group.

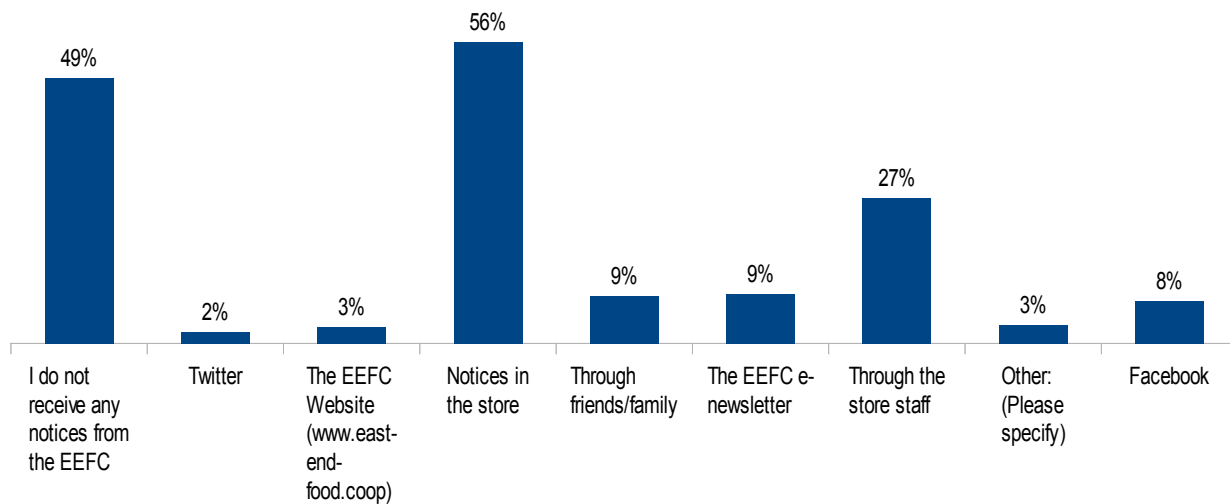
Key Findings

- This research indicates that the EEFC could improve communication with its members. We also see that newer forms of communication, such as social media, do not have a significant presence in how shoppers are being contacted; with only 2-9% indicating that they receive news from either Facebook, Twitter, the newsletter or on the website. There is a clear appetite to receive more information from both member (47%) and non-member (40%) shoppers.
- Overall respondents indicated that their shopping experience is very positive. Of all of the performance indicators measured in this report, “selection” received the least favourable responses. This finding, combined with the “further comments” section, suggests that there is room for improvement in the selection offered for various product categories at the EEFC.
- The results indicate very clear reasons as to why both members and non-members choose to shop at the cooperative. Those reasons include: being a cooperative, the sense of community and topics around accessing good food.
- There is a large amount of support from respondents for the expansion of the EEFC store. For some of the respondents this support is conditional on receiving more information about the planning behind the expansion. This includes financial plans, plans around keeping the store location local and plans around keeping the EEFC a community run store.
- Of those that do support the expansion, there are some really positive findings in terms of how they are willing to support it. Seeing nearly 1 out of every 5 of the respondents willing to make an investment, volunteer their time or help raise awareness is a tremendous response.

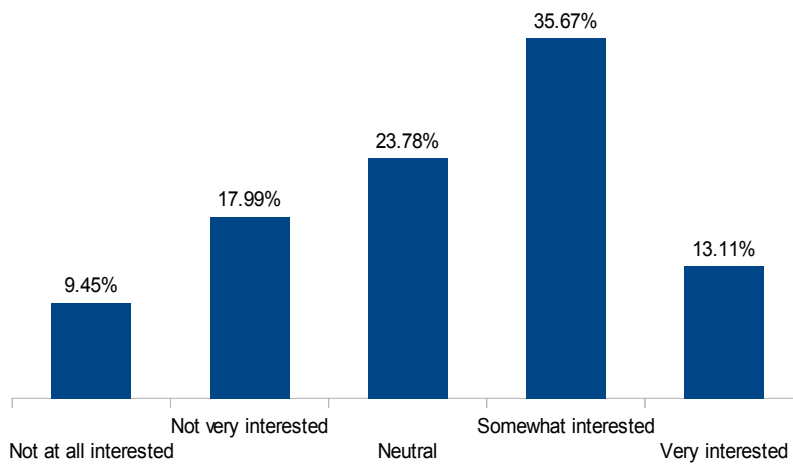
Communication With Shoppers

This next section explores EEFC's communication with its shoppers and their preferences for being contacted further.

Question (n=328) - How do you currently receive news (i.e. product sales, special offers, community events) about what's going on at the EEFC? (Please select all that apply)



Question (n=328) - How interested are you in receiving more news (i.e. product sales, special offers, community events) from the EEFC?



This research indicates that the EEFC could improve communication with its members. We also see that newer forms of communication, such as social media, do not have a significant presence in how shoppers are being contacted; with only 2-9% indicating that they receive news from either Facebook, Twitter, the newsletter or on the website. There is a clear appetite to receive more information from both member (47%) and non-member (40%) shoppers.

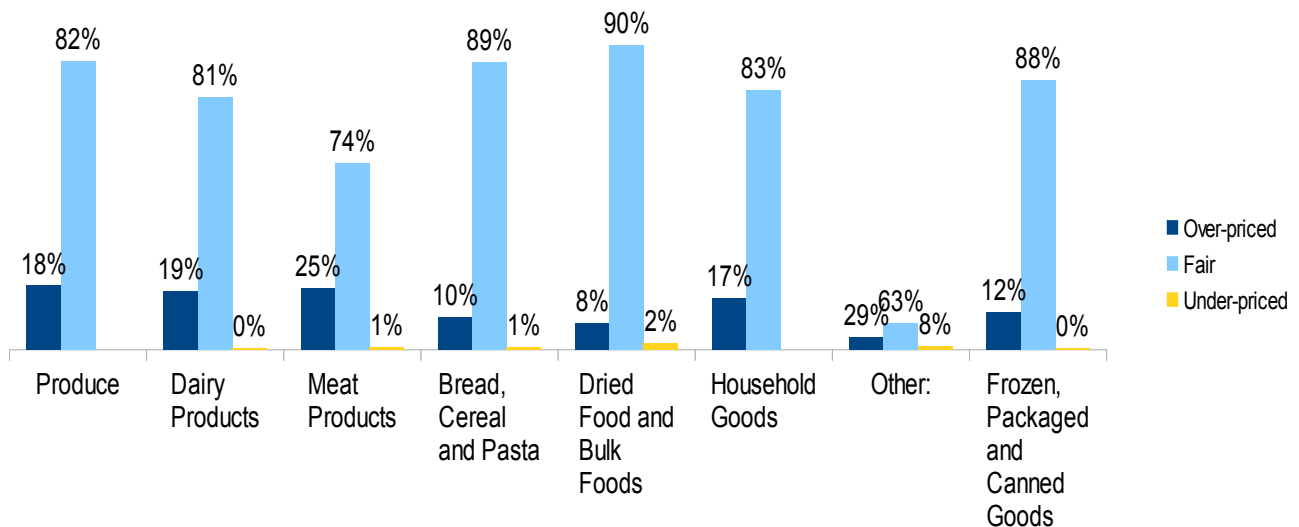
The Shopping Experience

The survey explored performance indicators including customers opinions of the price, quality and selection of products, as well as opinions on the customer service and atmosphere within the EEFC store.

The work that CRG has done provides the EEFC with insights into how the EEFC is currently performing in these areas, as well as provide baselines for future surveys to compare to. In order to be comparable, future surveys should use similar, if not the same questions.

Different products had different levels of responses and therefore the percentages displayed in the graphs may look different from product to product. The total responses ranged from 220-326.

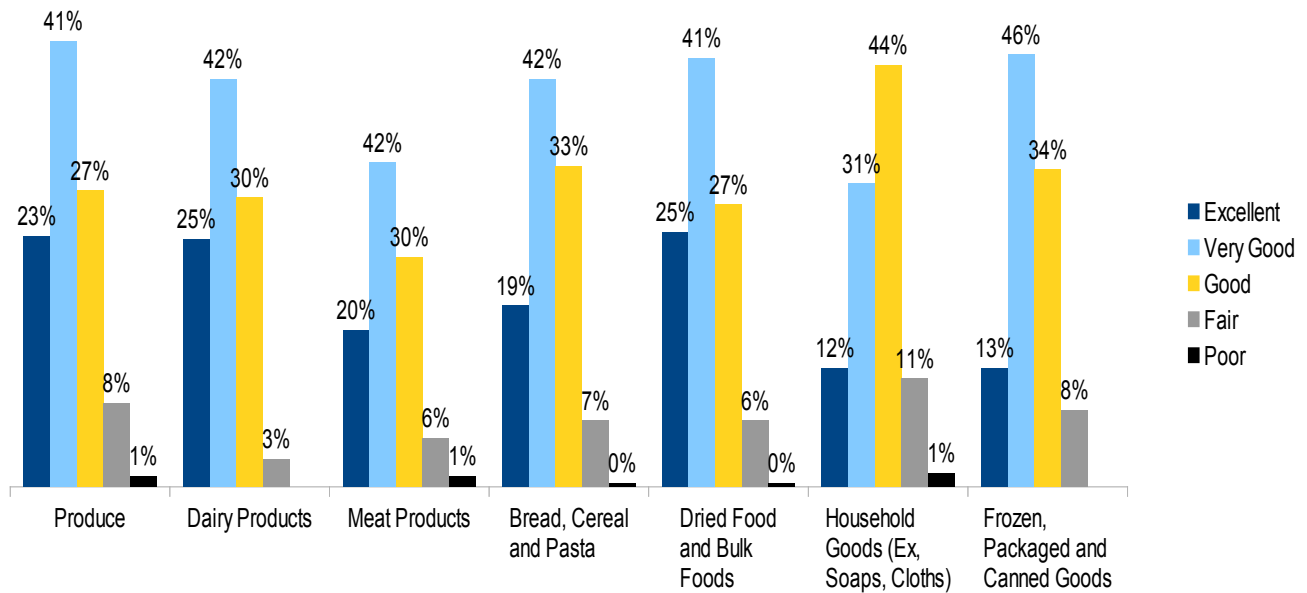
Question - (Price) Please rate EEFC's products in terms of their price, quality and selection:



The data indicates that for most product categories explored, respondents felt that the EEFC prices are “fair”, with “fair” receiving more than 80% in six out of seven categories. As we can see, the product categories that received the most responses for being overpriced were meat, produce and dairy.

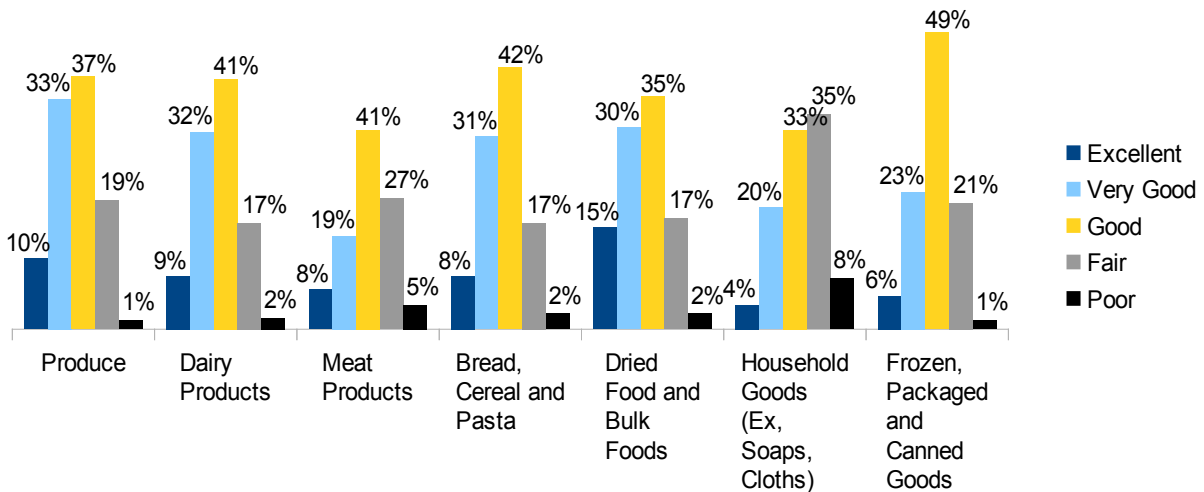
Respondents also mentioned having difficulty with indicating a product category was overpriced, as it could be unaffordable but “fairly priced”.

Question - (Quality) Please rate EEFC's products in terms of their price, quality and selection:



We see that in six out of seven product categories, at least 59% of respondents indicated that the EEFC has “Very Good” or “Excellent” quality products. One product category stands out in terms of quality and that is Household Goods, where more respondents indicated quality between “Good” to “Poor” than from “Very Good” to “Excellent”.

Question - (Selection) Please rate EEFC's products in terms of their price, quality and selection:



Of all of the three performance indicators measured for these product categories, “selection” received the least favourable responses. Rating the selection as “Fair” had a strong showing in all product categories, especially Meat Products and Household Goods. We explored further comments around selection in the next question.

Question - Do you have any further comments regarding the products offered by the EEFC?



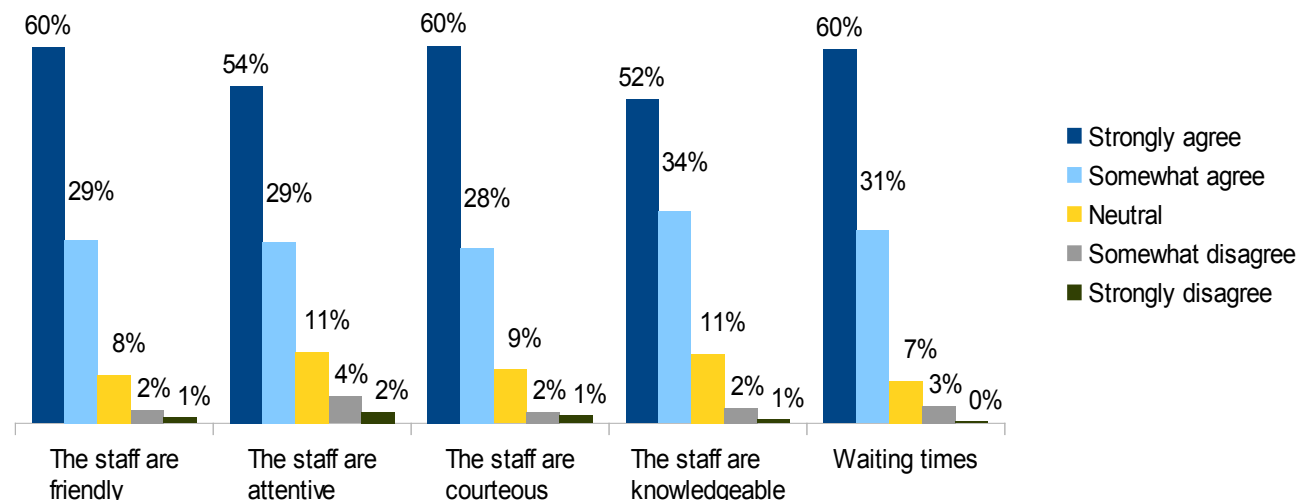
We provided respondents with an opportunity to provide further comments on the products offered by the EEFC. We received 166 responses in total, with 35% indicating that they did not want to comment or referred to the previous question to indicate why they responded the way they did.

Selection (48%) - Of those that did give feedback we see that most of the feedback was around the selection offered at the EEFC. 28% of the total comments, were comments around dissatisfaction or ways to improve selection. 20% of the total comments were positive comments about product selection. Respondents (~5%) had particular feelings towards improving the selection of vegan, gluten-free, local and ethical products.

Price (8%) - Comments regarding price were critical of prices compared to the surrounding stores but also understanding that the prices were high because of the high quality of the products.

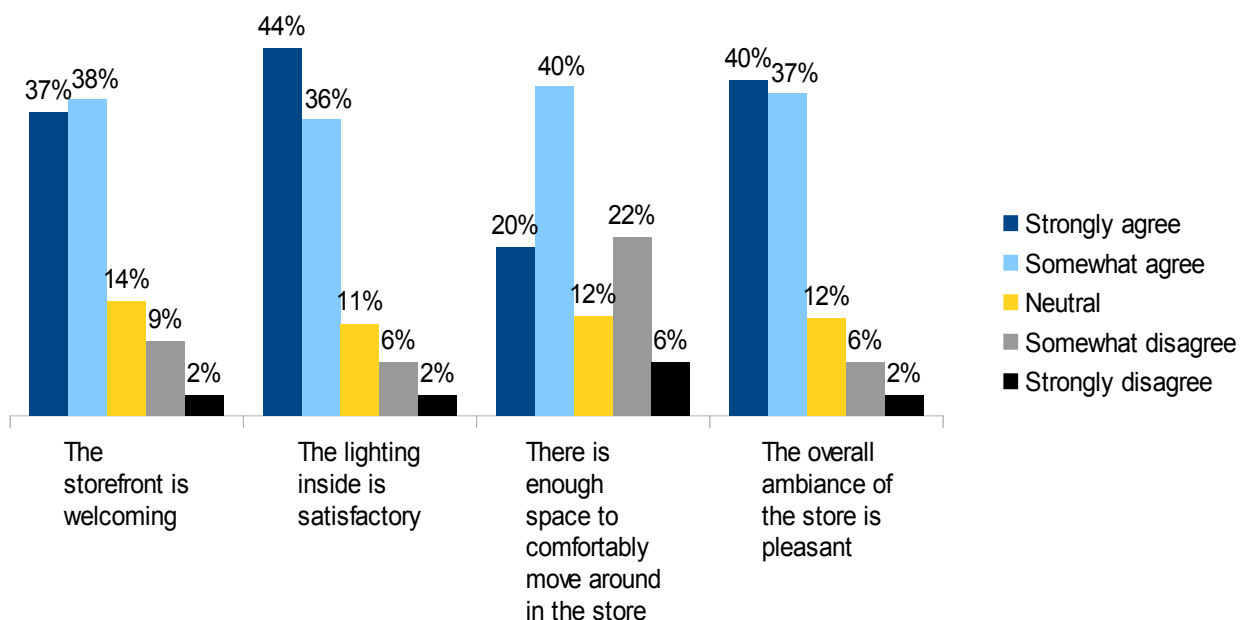
Quality (5%) - Comments regarding quality were almost entirely about improving the quality of meat and dairy.

Question - Please rate the EEFC's customer service in the following categories:



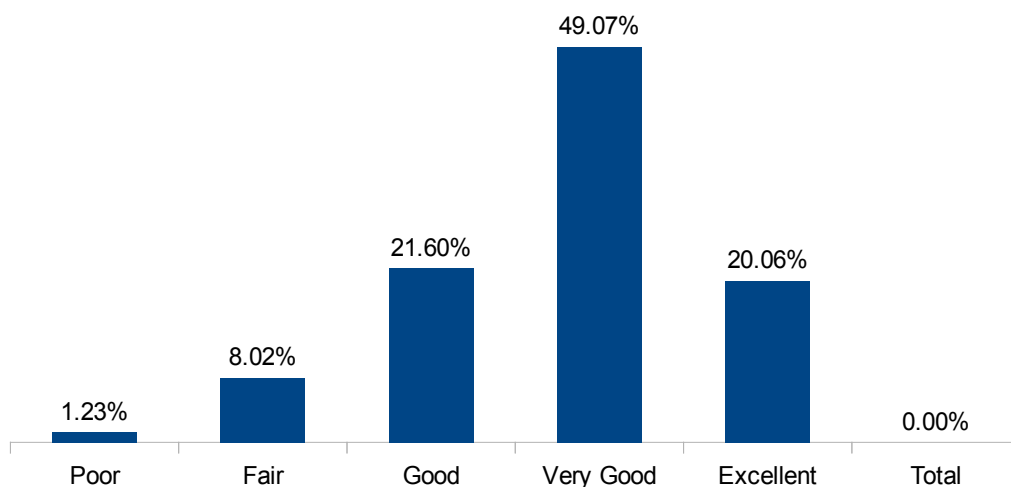
The results indicate that respondents are in strong agreement that the staff are performing well in all service categories. This is supported by further findings that the customer service experience is one of the reasons that 38% of respondents choose to shop at the cooperative.

Question - Please rate the EEFC's store atmosphere in the following categories:



Respondents indicated a “somewhat” or “strong” level of agreement (75% or more) that the atmosphere is satisfactory in three of the four atmosphere categories. The one category that received the most disagreement was regarding enough space in the store. At least 8% of respondents disagreed across all categories related to atmosphere.

Question (n=324) - Taking into account all of your experiences with the EEFC in the past year, how would you rate the EEFC overall?

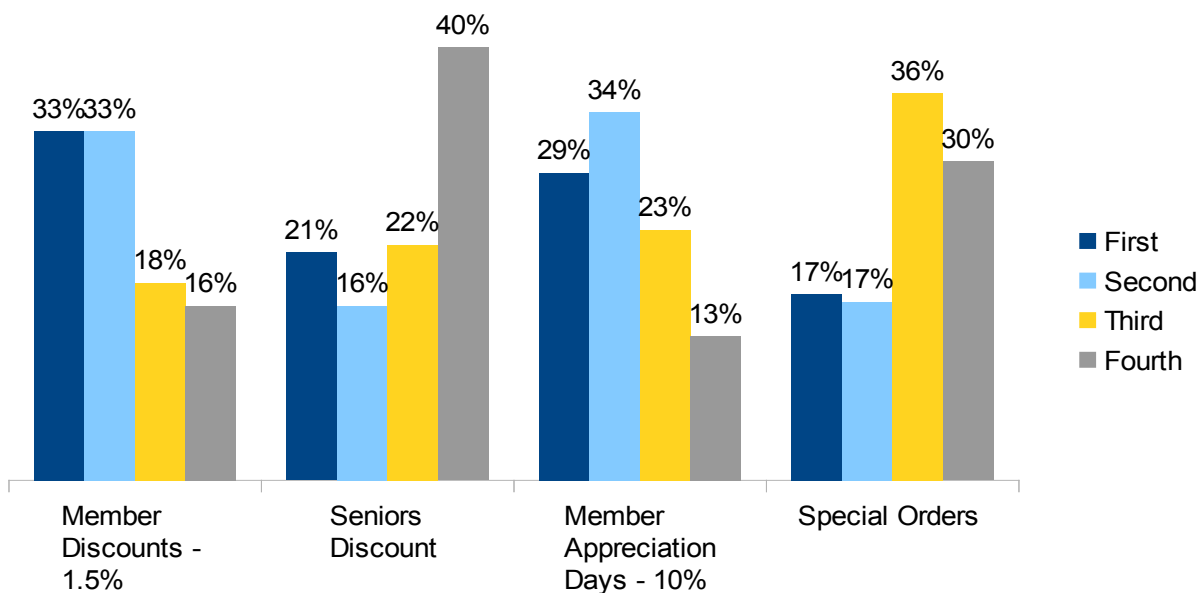


Overall, respondents indicated that their shopping experience is very positive. Of all of the performance indicators measured in this report, “selection” received the least favourable responses. This finding, combined with the “further comments” section, suggests that there is room for improvement in the selection offered for various product categories at the EEFC.

EEFC Member Benefits

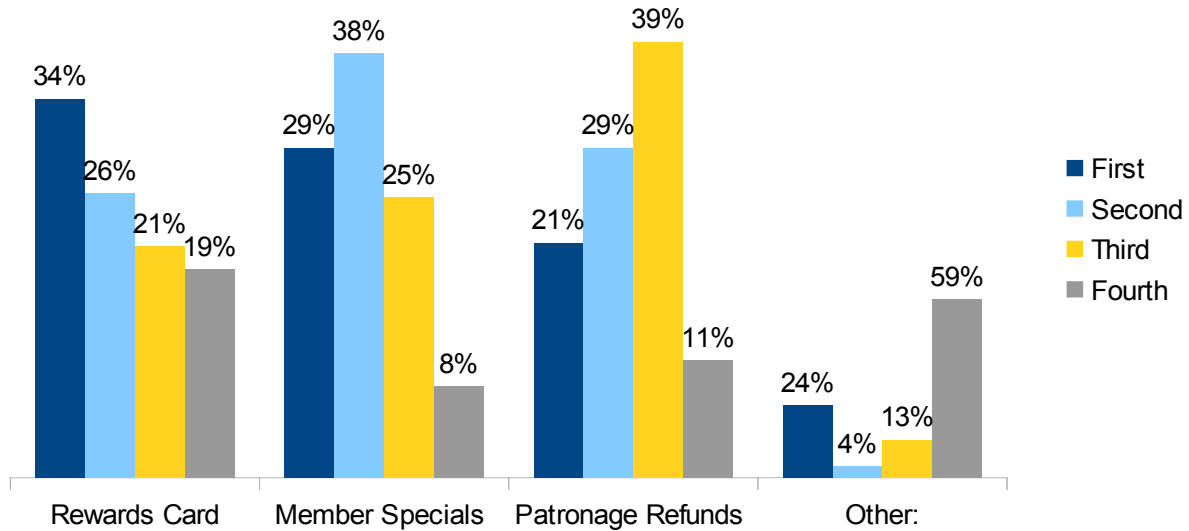
The next two questions explored respondents' opinions on current member benefits and ideas for future member benefits. These questions do not indicate whether a respondent likes or dislikes a benefit but rather which benefit is the most beneficial. For example, a respondent could value all of the benefits highly but selected one option as their fourth choice.

Question (n=282) - Please rank which of the following current member benefits you perceive to be the most beneficial: (Rank in order from 1 - 4, with 1 being the most beneficial)



The 1.5% as well as the 10% discount dominated respondents first and second choice for member benefits, with the 1.5% discount receiving slightly more preference under a weighted analysis. The seniors discount serves a select demographic of these respondents, so it is not surprising to see it being selected “fourth” over other choices. Under a weighted analysis Special Orders out performs the Seniors Discount.

Question (n=290) - The EEFC is considering offering new member benefits. Please rank which of the following member benefits you would be most interested in seeing offered: (Rank in order from 1 - 4, with 1 being the most interest)

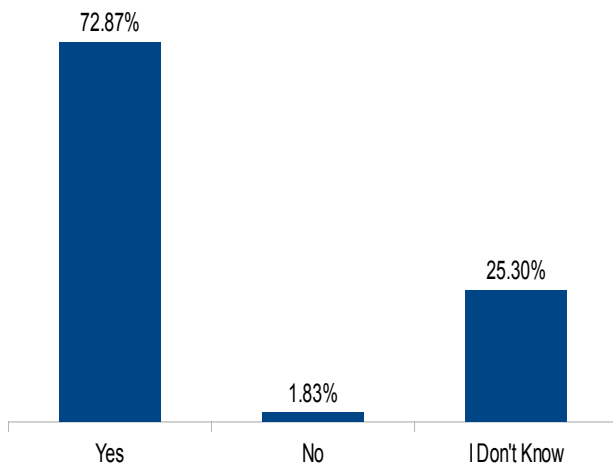


Although the Rewards Card received more firsts than Member Specials, Member Specials out performs all other categories under a weighted analysis. Weighted, the preferences for member benefits has Member Specials first, Rewards Card second and Patronage Refunds third. Honourable mentions from the other section include: a larger discount, no discounts for 'poor' food choices and donating the discount to charity.

Expansion and Future

The EEFC Board of Directors, along with its membership, has been exploring the potential expansion of the cooperative's store since the Fall of 2012. This research provides insights into the support for and concerns with this potential expansion.

Question (n=328) - The East End Food Cooperative's Board of Directors is exploring the expansion of the store's physical space. Do you support the expansion of the EEFC store?



The strong showing of support for the expansion in this question should be taken with caution until we explore further comments around expansion.

Further comments bring to light the complexity of feelings respondents hold around the expansion.

Question - Looking into the 25% that answered "I Don't Know", we analyzed further comments left in the comment box. Here's what we found:



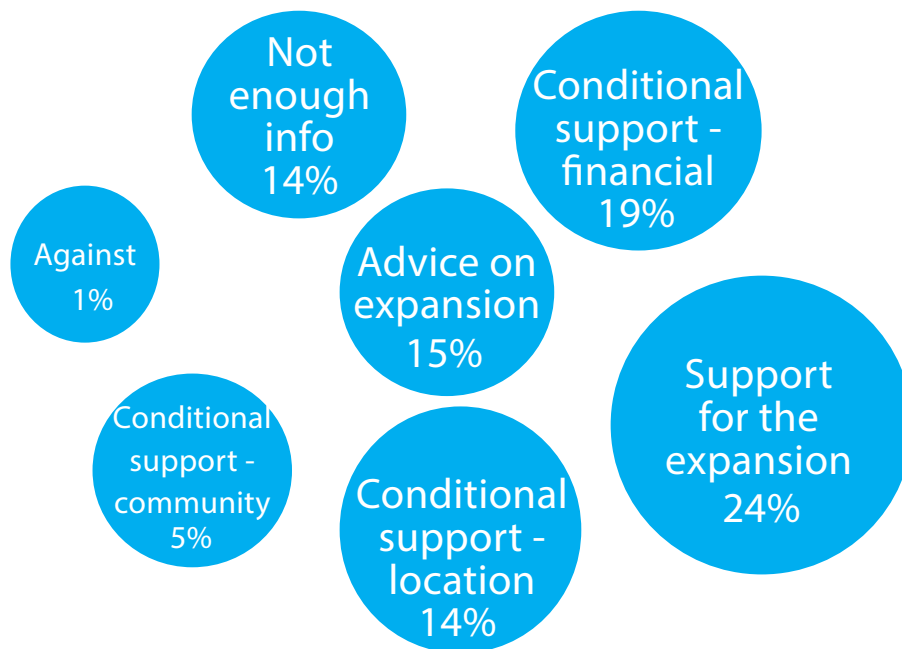
We received 36 “I Don’t Know” responses in total representing only 11% of the total responses. These responses have been coded and summarized in the following categories:

General concerns about the expansion (33%) - These respondents often cited not having a clear understanding of what the expansion entails or not enough information.

Financial concerns about the expansion (30%) - These respondents questioned whether it would raise prices and what the financial plan behind the expansion was.

Location concerns about the expansion (22%) - There was a sense of concern among these respondents that the store would move to a different location.

Question - Do you have any comments and/or concerns regarding the potential expansion of the EEFC store?



We received 192 comments regarding the expansion. These responses have been coded and summarized in the following categories:

Support for the expansion (24%) - These comments cited support for the expansion of the store.

Conditional support, financial (19%) - These respondents cited supporting the expansion but were concerned about the potential effects on prices in the store as well as wondering what financial planning the EEFC had to support expansion.

Advice on expansion (15%) - These comments mostly contained general advice about what to include in the expansion. Most comments were about creating more room and improving accessibility while shopping.

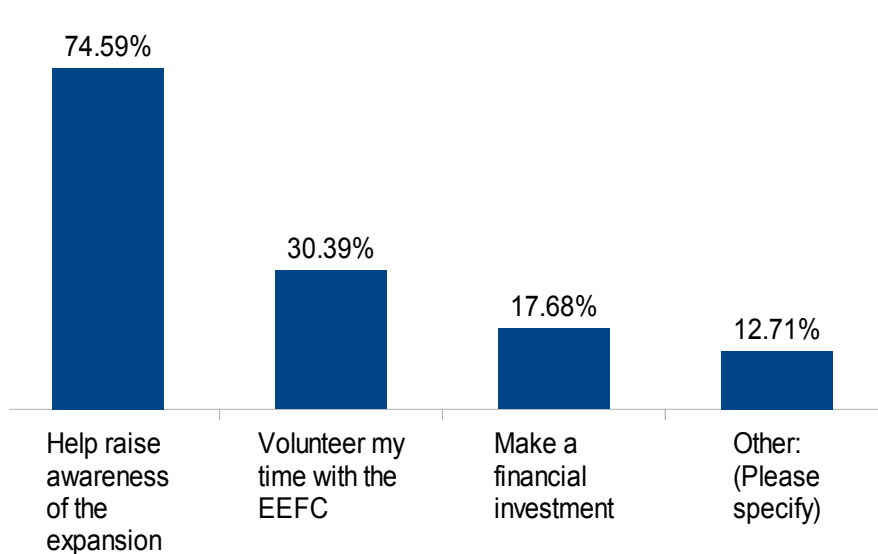
Not enough info (14%) - These respondents indicated that they did not have enough information about what was involved in the expansion of the store.

Conditional support, location (14%) - These respondents cited supporting the expansion, but had concerns with the EEFC moving locations if it were to expand.

Conditional support, community (5%)- These respondents cited supporting the expansion but had concerns that EEFC would lose the local, community grocery store feel.

Against-Only 1% of these comments were explicitly against the expansion

Question (n=181) - In which of the following ways would you consider supporting the store's expansion?
(Please select all that apply)

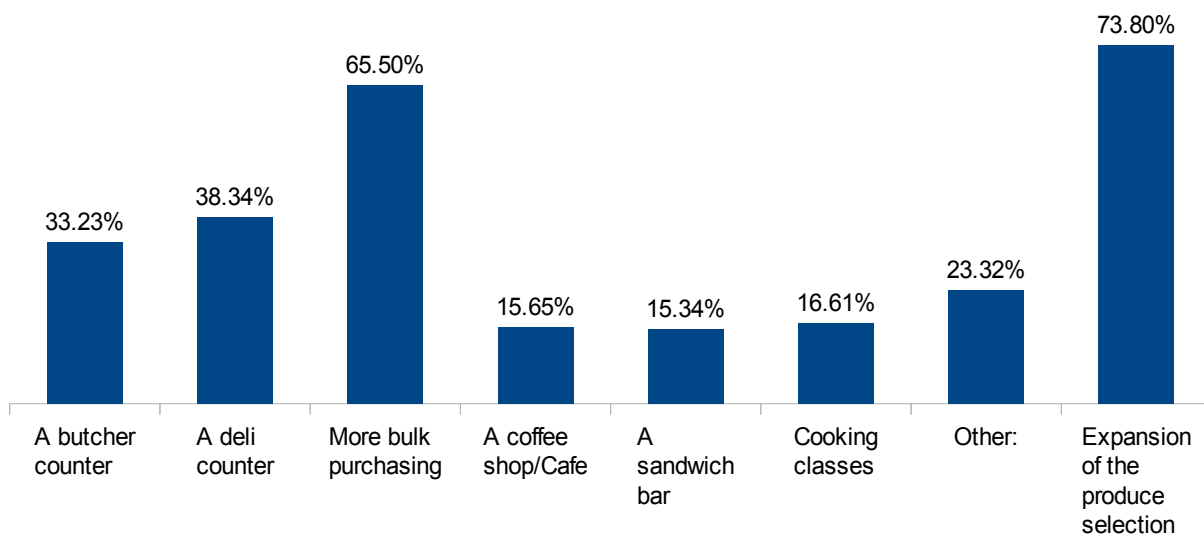


We can see that the 73% of those that support the expansion are willing to do so in a variety of ways.

The 30% willing to volunteer their time presents a good opportunity for the EEFC to involve members in the cooperative.

Almost all comments in the "Other" section involved shopping more at the EEFC as a way to support the expansion.

Question (n=313) - Which of the following products and/or services you would like to see the EEFC offer if it were to expand? (Please select all that apply)



The options for this question came out of the interviews and focus group that were conducted. A lot of support from respondents for improving selection of both produce and bulk.

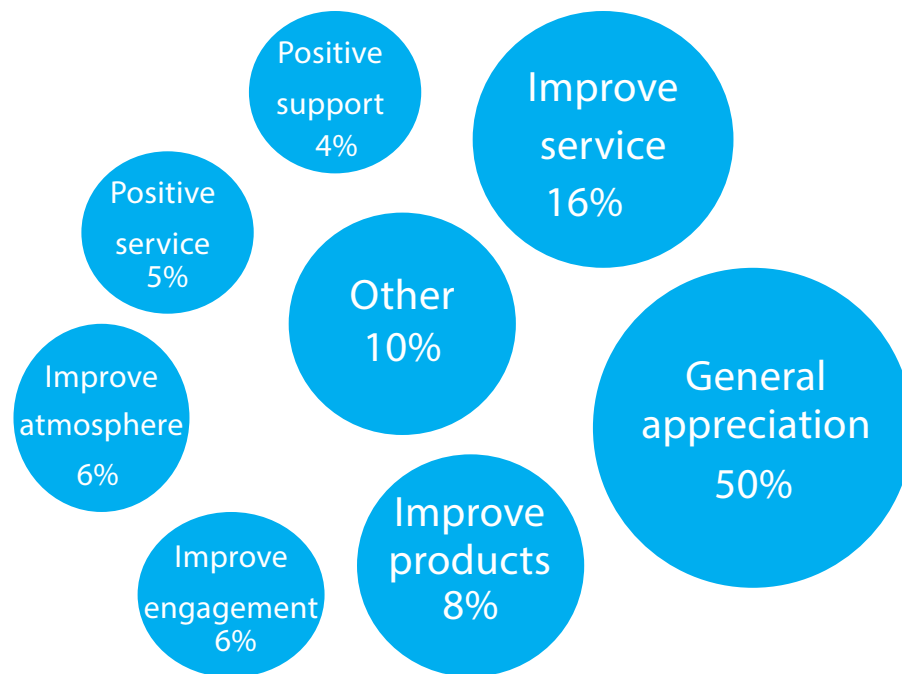
We received 65 "Other" comments, 38% of them were around improving product selection with expansion and 30% were specific product requests.

There is a large amount of support from respondents for the expansion of the EEFC store. For some of the respondents this support is conditional on receiving more information about the planning behind the expansion. This includes financial plans, plans around keeping the store location local and plans around keeping the EEFC a community run store.

Of those that do support the expansion, there is some really positive findings in terms of how they are willing to support it. Seeing nearly 1 out of every 5 of the respondents willing to make an investment, volunteer their time or help raise awareness is a tremendous response.

Other Comments

Question - Is there anything else that you would like to tell us about your experience as a shopper at, and/or member of, the East End Food Cooperative?



At the end of the survey we asked respondents for any further thoughts. We received 139 responses in total. These responses have been coded and summarized in the following categories:

General appreciation (50%) - All of these comments contained appreciation for the cooperative.

Improve service (16%) - A range of comments around customer service. From not bagging the groceries to inputting the wrong price.

Other (10%) - Most of these comments were “no comment” or positive comments about the atmosphere (1.5%).

Improve products (8%) - A range of comments around improving the products. From better local product to past expired items.

Improve atmosphere (6%) - A range of comments around the atmosphere. From better lighting and less clutter to needing more space.

Improve engagement (6%) - These comments specifically mentioned improving the ways in which members can engage with the cooperative.

Positive service (5%) - All of these comments were an appreciation for the attitudes and experiences with staff.

Positive support (4%) - Very few comments in this category. All of them were ideas and support for the potential expansion the cooperative.