

Weavers Way Co-op

Customer Survey
May 2011

Prepared for:



Prepared by:

reed|group

Shopping Patterns

Spending and Frequency

- ▶ Proportion of dollars spent at Weavers Way is largely unchanged from 2009 survey
- ▶ Frequency of shopping has increased since 2009 survey, especially among those shopping more than once a week which has gone from 29% to 44%

Q1. How much does your household spend in an average week on groceries?

Q5. How much of your grocery dollars does your household spend at Weavers Way Co-op in an average week?

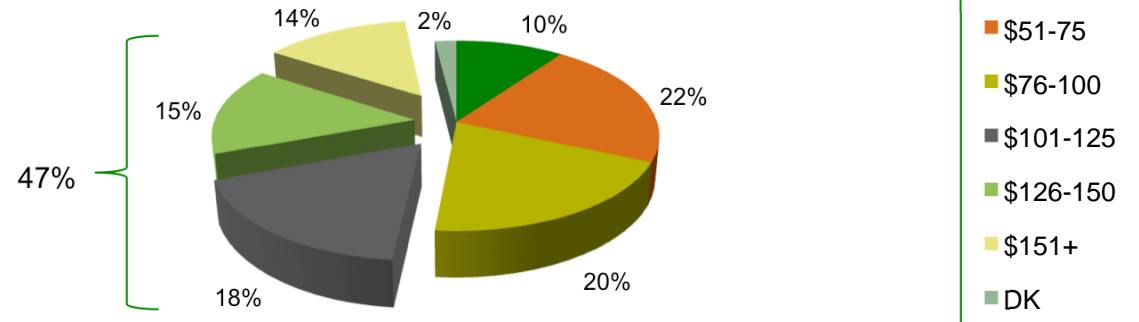
Q6. On average, how often do you shop at Weavers Way Co-op?



Spending and Frequency

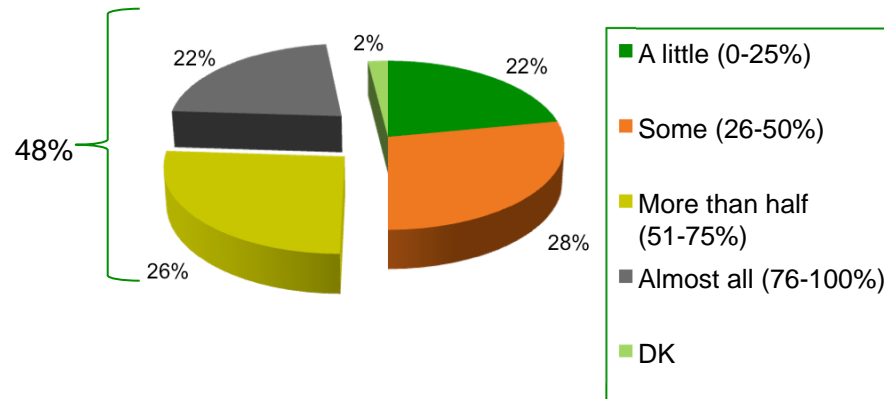
Avg Spent on Weekly Groceries

n=584



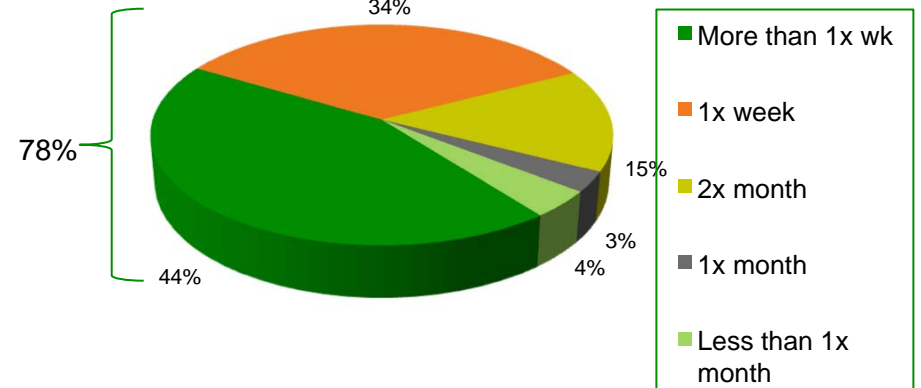
Weekly \$ Spent at Weavers Way Co-Op

n=584



Frequency of Shopping at Weavers Way

n=584



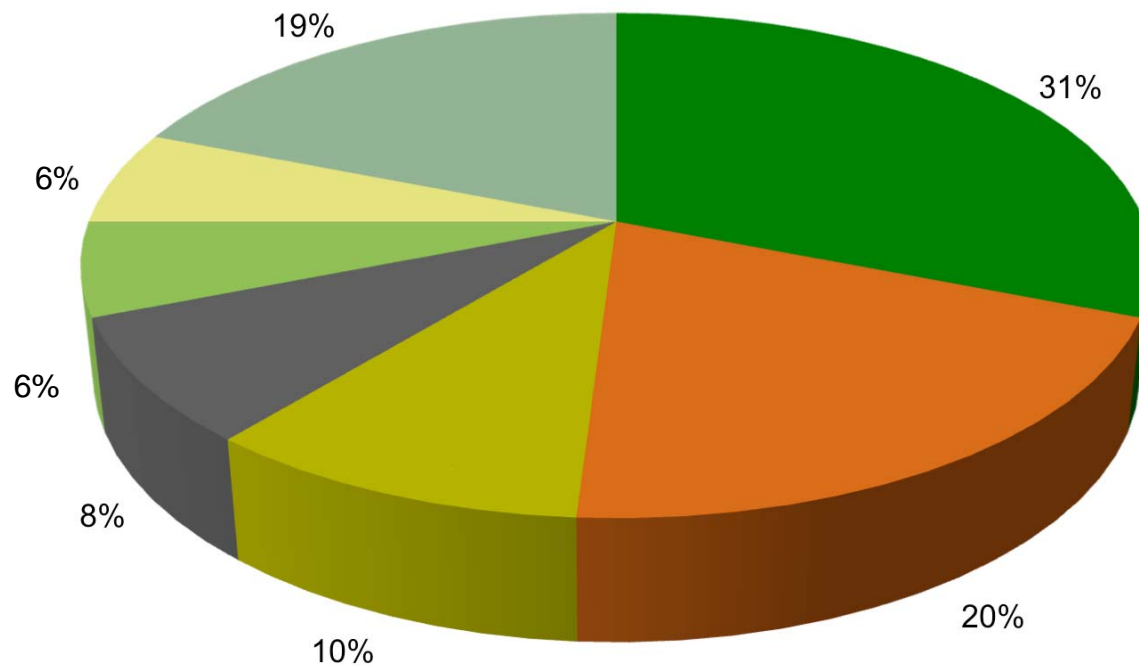
Places for Shopping

- ▶ The distribution of co-op vs. non-co-op shopping is similar to that reported in 2009
- ▶ The distribution of shopping at various Weavers Way locations, of course has changed, with 20% indicating that they spent most of their grocery dollars at WW-Chestnut Hill
- ▶ The lack of respondents spending most of their grocery dollars at WW-West Oak Lane is a reflection of small sample as well as patterns of grocery expenditure

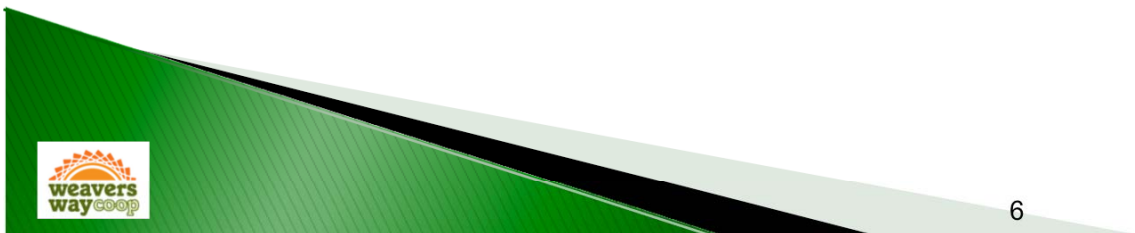
Q2. During the past 6 months where have you spent most of your grocery dollars?



Places for Shopping



n=580



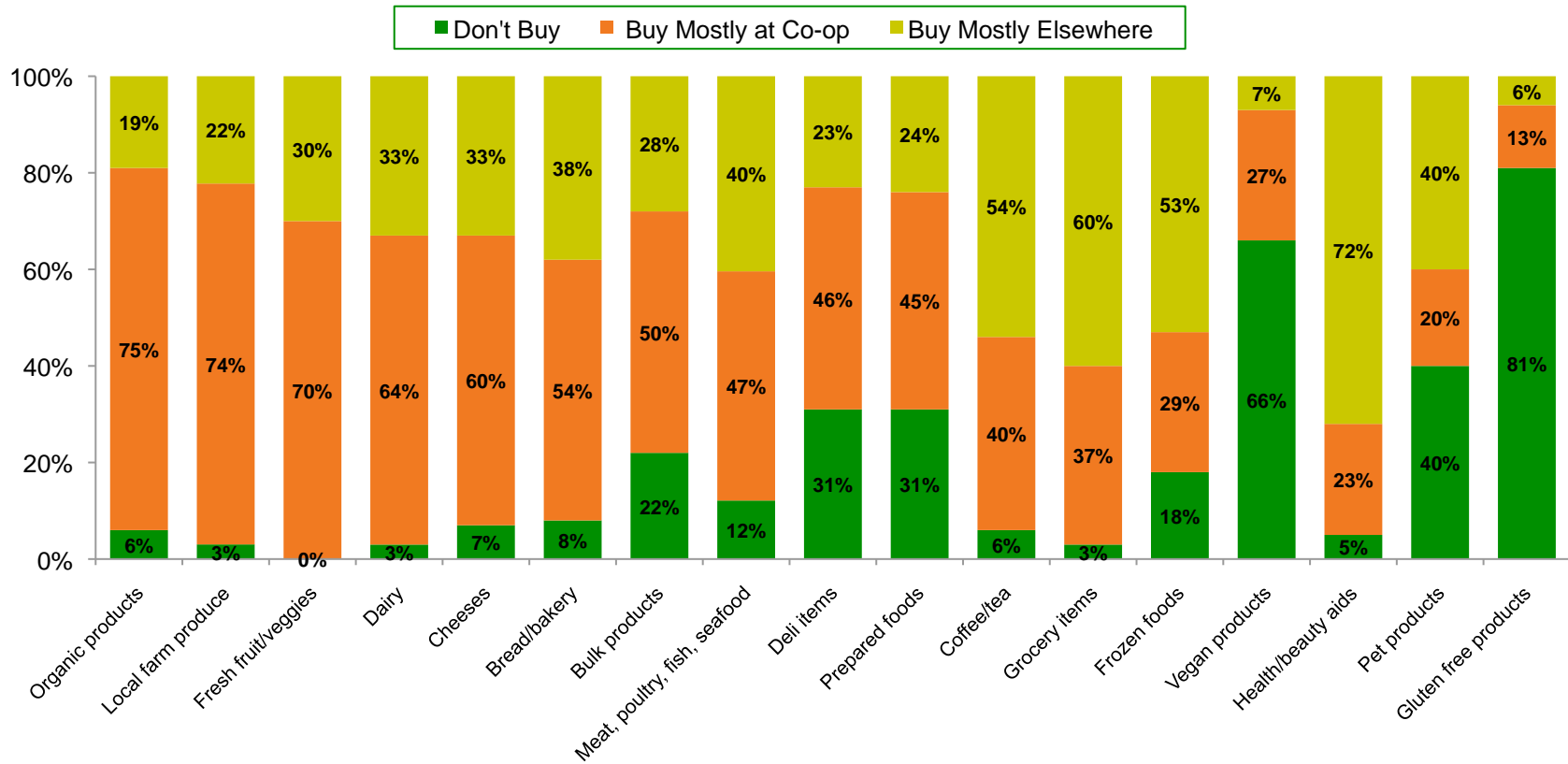
Purchasing Patterns

- ▶ Buying patterns reflect both household consumption patterns and co-op product offerings
- ▶ Product purchasing rates are highest for organic, local, fresh fruit/vegetables, dairy/cheese, bread and bulk products
- ▶ Lowest purchasing rates tend to be for specialized types of products
- ▶ The slightly lower percentages reporting “buy mostly at WW” for organic and local produce compared with 2009 may reflect increased availability

Q3. Where do you regularly purchase the following types of products?



Purchasing Patterns



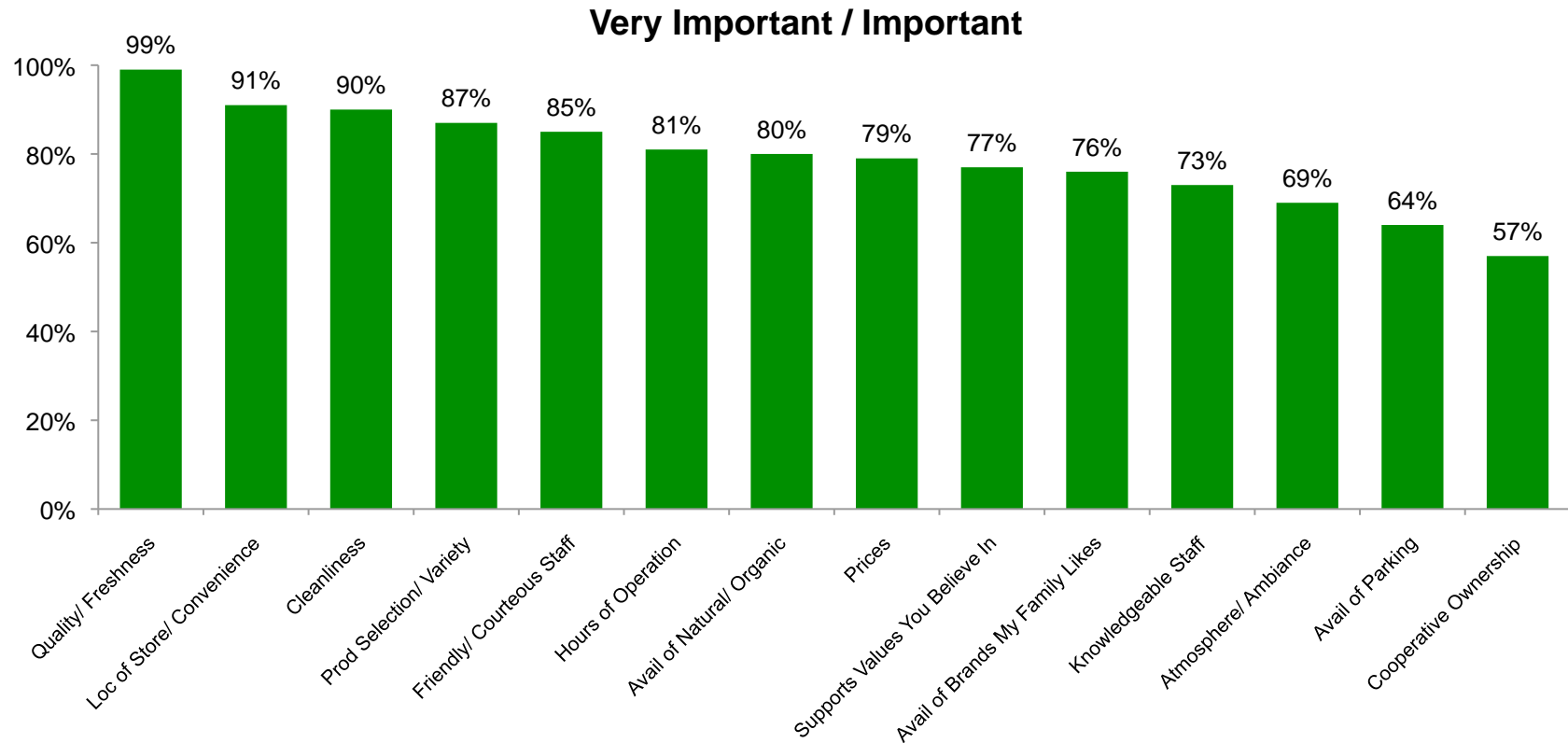
n=varies

Importance of Factors When Choosing Where to Shop

- ▶ Importance levels for all items increased from the 2009 survey (question is also slightly different) with the largest increases for a variety of store management issues
 - Cleanliness
 - Friendly/courteous staff
 - Hours of operation
- ▶ Most important are:
 - Quality/ freshness
 - Location of stores/convenience
 - Cleanliness
 - Product selection/variety
 - Friendly/ courteous staff

Q4. How important is each of the following to you when choosing where to shop for groceries?
Rating Scale: Very Important, Important, Somewhat Important, Not Important, No Opinion

Importance of Factors When Choosing Where to Shop



n=varies

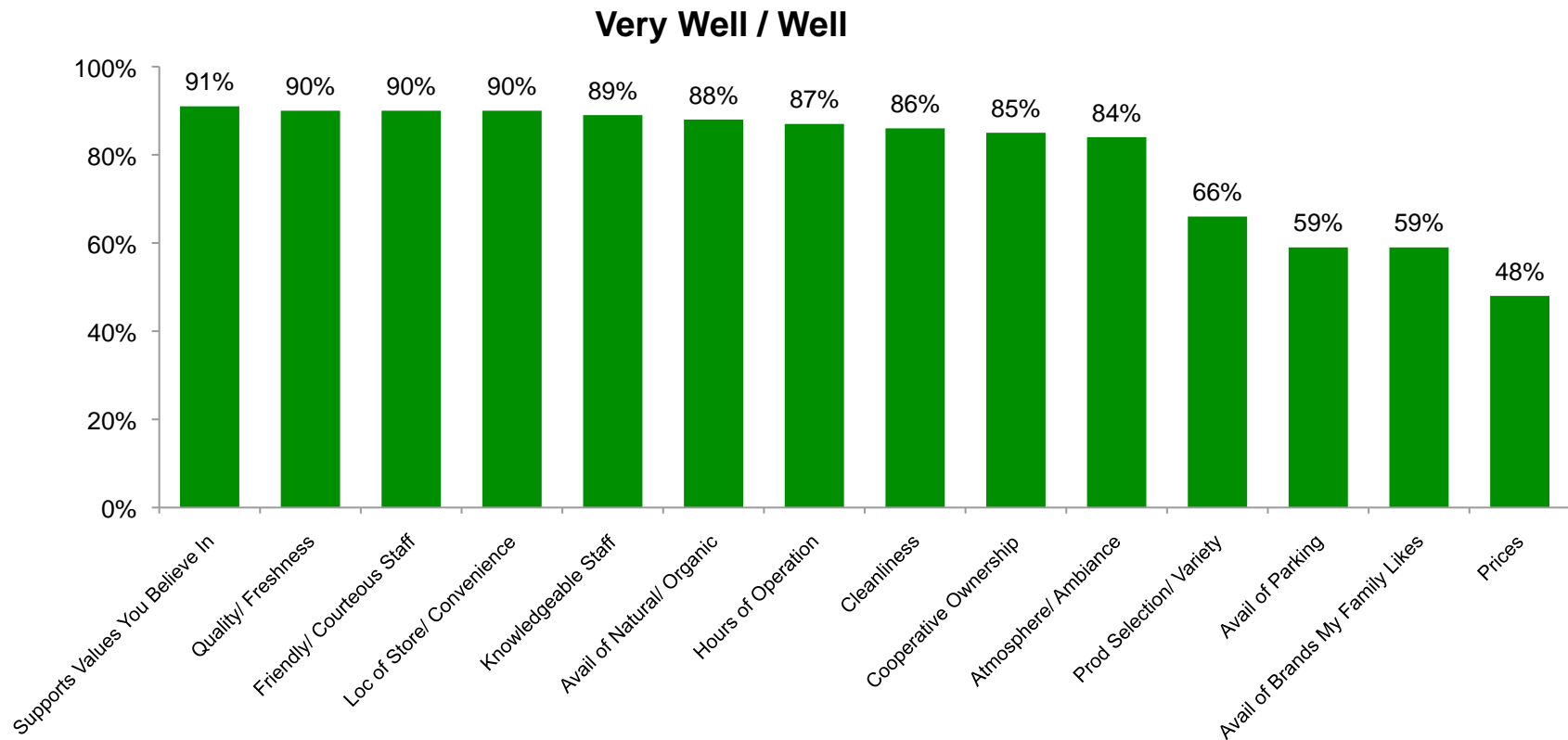
How Well Weavers Way Co-Op is Meeting Needs Regarding Store

- ▶ Weavers Way performance in meeting needs is rated very highly by survey participants
- ▶ Levels of performance (meeting needs) have increased from 2009

Q9. Please rate Weavers Way Co-op in terms of how well it is meeting your needs with respect to the following store characteristics.
Rating Scale: Very Well, Well, Somewhat Well, Somewhat Poorly, Poorly, Very Poorly, No Opinion



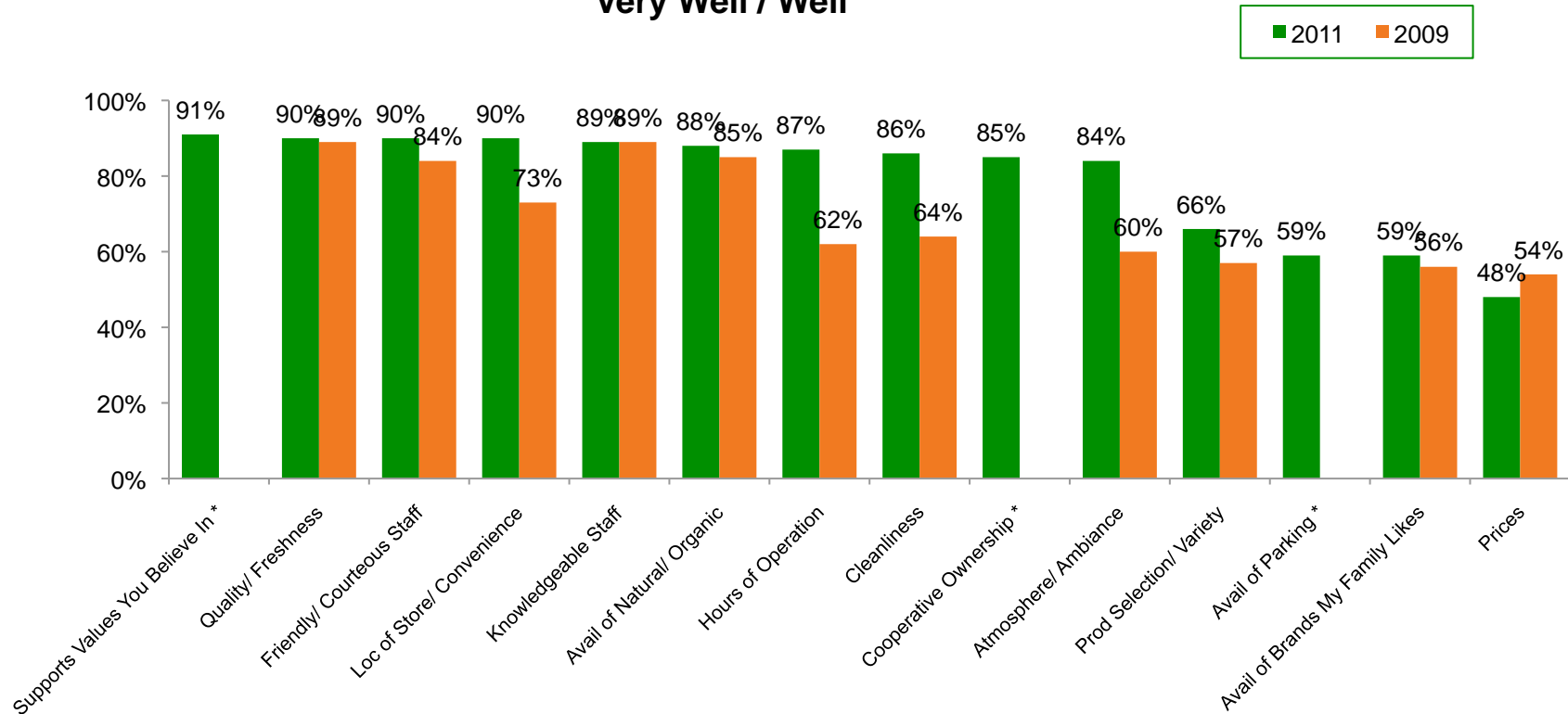
How Well Weavers Way Co-Op is Meeting Needs Regarding Store



n=varies

How Well Weavers Way Co-Op is Meeting Needs Regarding Store

Very Well / Well



* Not asked in 2009

n=varies



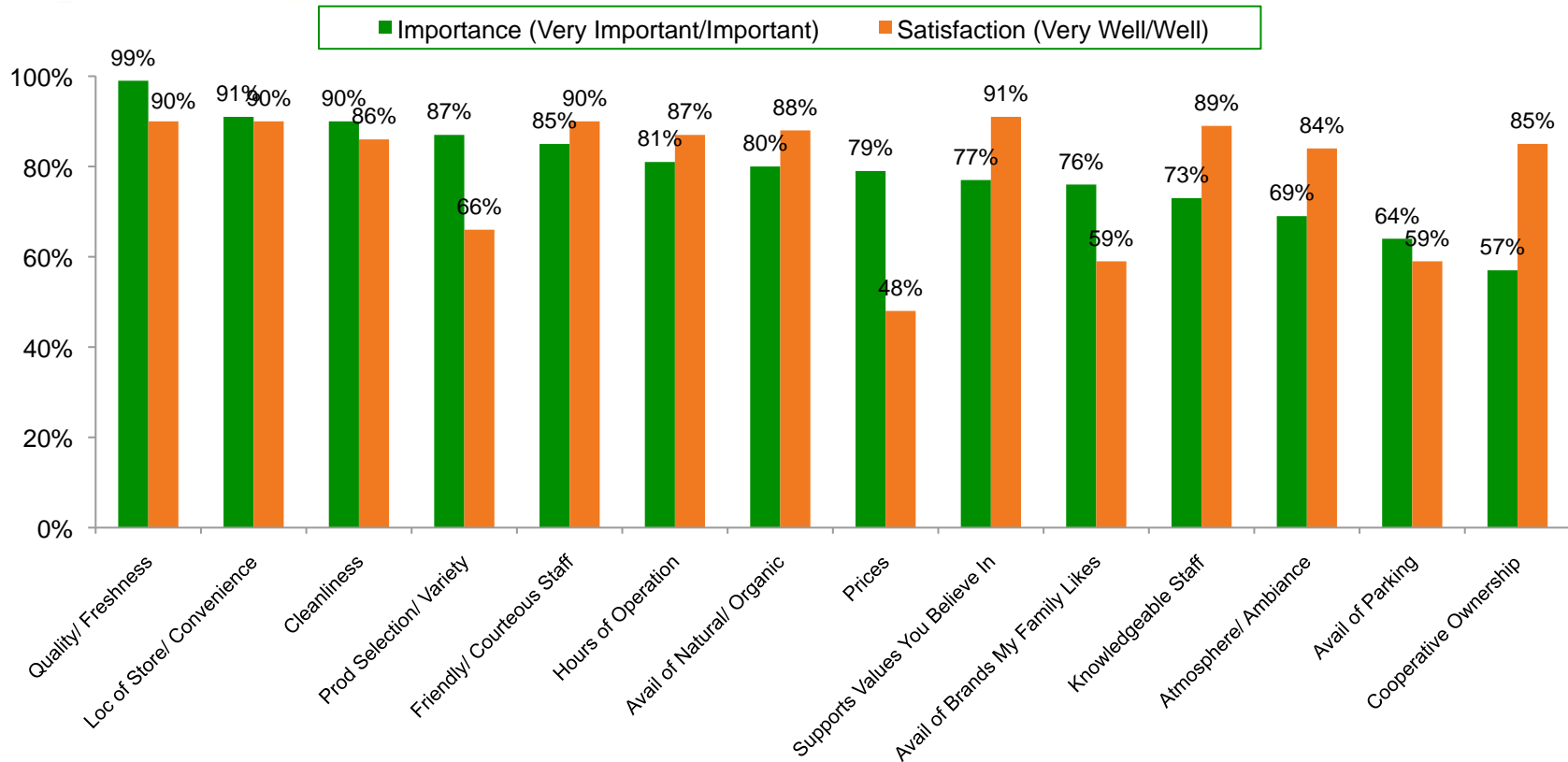
Comparison of Factors Considered When Choosing to Shop vs Satisfaction with Weavers Way Co-Op

- ▶ One consequence of increasing importance levels is that performance (meets needs) lags behind importance for several of the criteria used in deciding where to shop for groceries, with gaps most notable for
 - Quality/ freshness (9%)
 - Product selection/variety (21%)
 - Prices (31%)
 - Availability of brands my family likes (17%)

Q4. How important is each of the following to you when choosing where to shop for groceries?

Q9. Please rate Weavers Way Co-op in terms of how well it is meeting your needs with respect to the following store characteristics.

Comparison of Factors Considered When Choosing to Shop vs Satisfaction with Weavers Way Co-Op



n=varies

How Well Weavers Way is Meeting Respondents' Needs on Selected Items

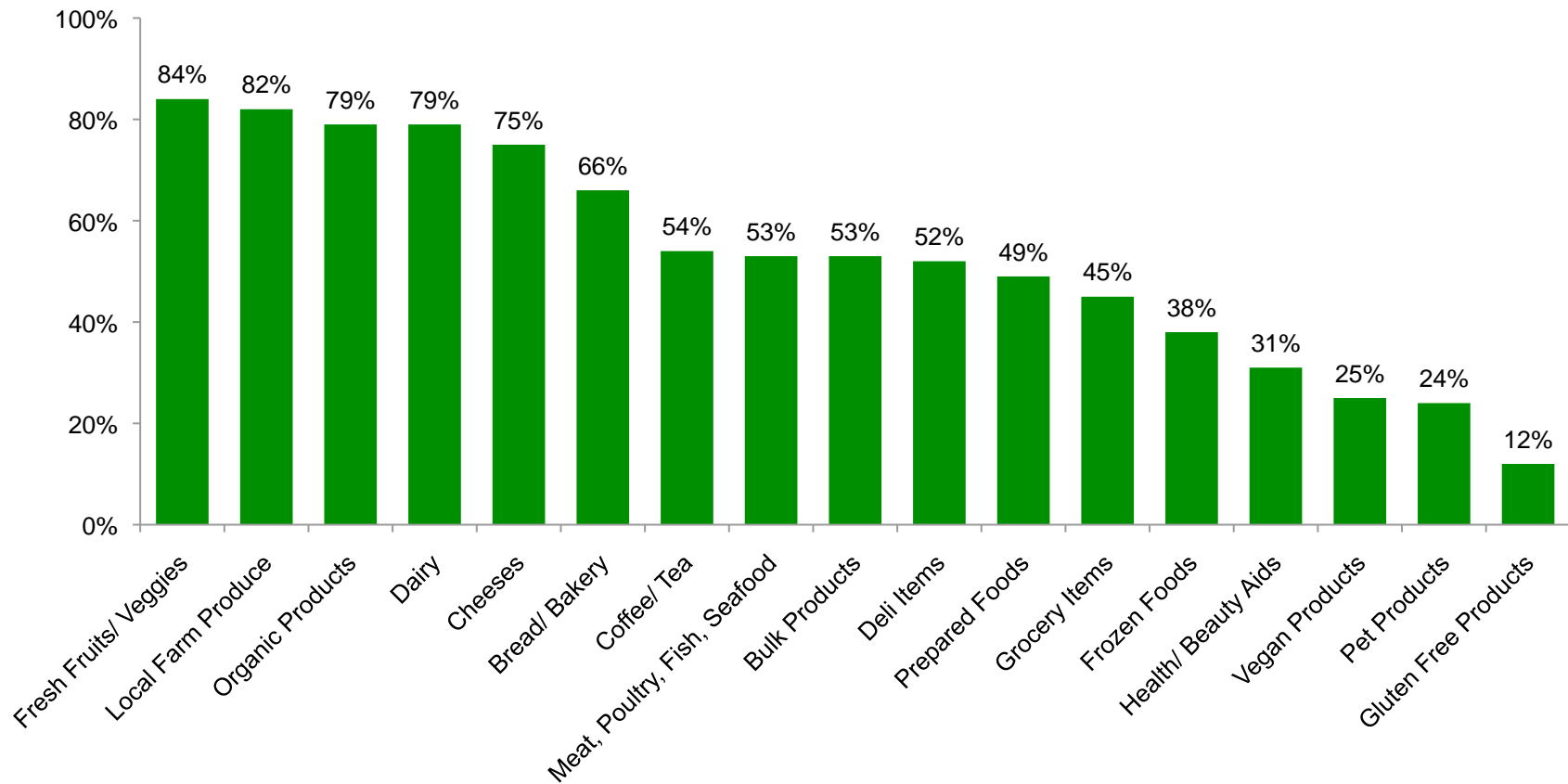
- ▶ Generally WW is meeting respondent's needs on selected items very well, and at levels higher than those reported in 2009
- ▶ Non-produce items are again rated in mid-range compared with produce items
- ▶ Health and beauty items receive relatively low ratings (reasons unknown)

Q11. Please rate Weavers Way Co-op in terms of how well it is meeting your needs in the following product categories.
Rating Scale: Very Well, Well, Somewhat Well, Somewhat Poorly, Poorly, Very Poorly, No Opinion



How Well Weavers Way is Meeting Respondents' Needs on Selected Items

Very Well / Well



n=varies

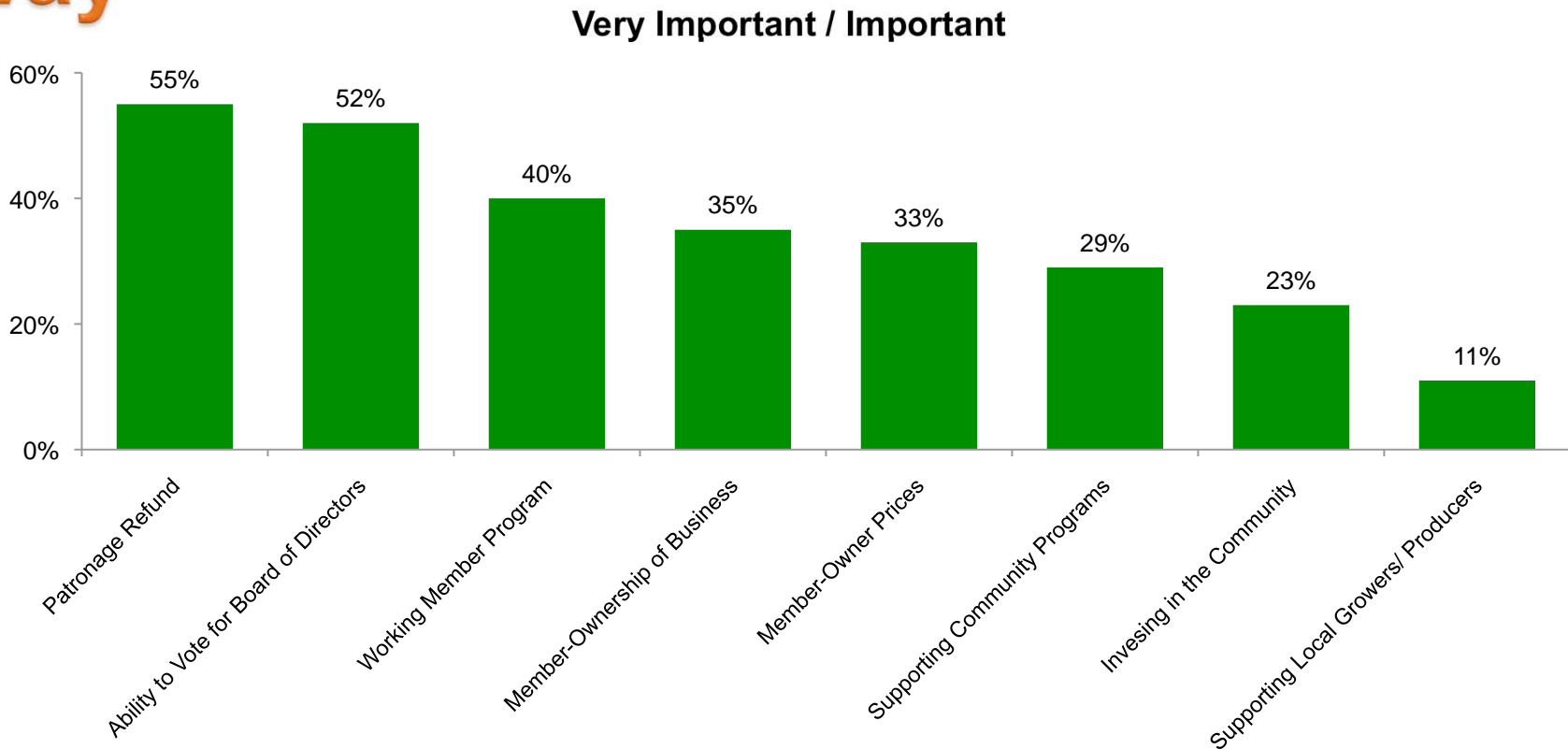
Importance of Selected Features as Reasons for Shopping at Weavers Way

- ▶ The patronage refund takes top place as an economic reason for shopping at WW
- ▶ The importance of voting for Board members has increased significantly since 2009
- ▶ Member ownership, and member pricing dropped slightly in importance from 2009

Q13. How important are the following features as reasons for you to shop at Weavers Way Co-op?
Rating scale: Very Important, Important, Somewhat Important, Not Important, No Opinion



Importance of Selected Features as Reasons for Shopping at Weavers Way



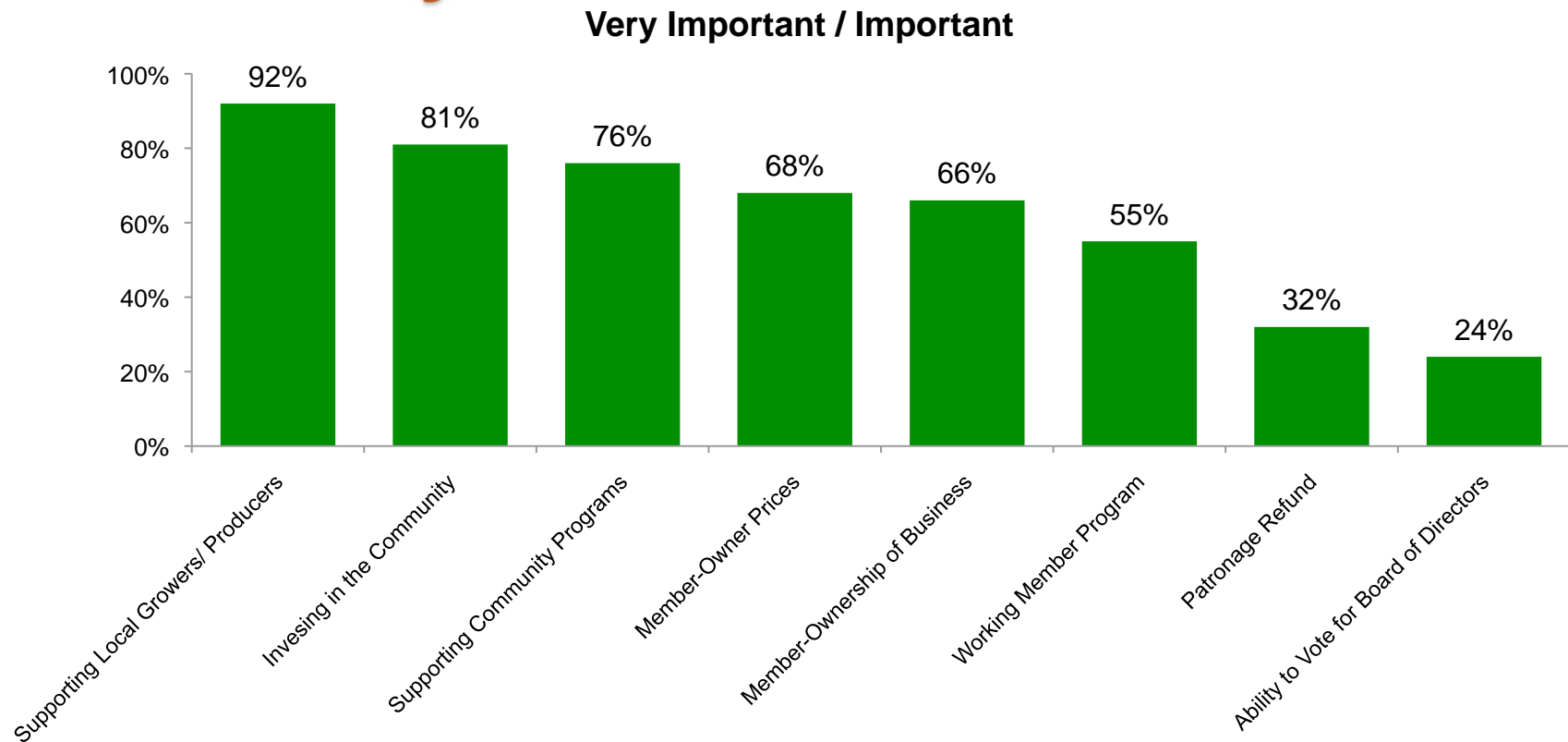
n=varies

Importance of Selected Features as Reasons for Joining/Maintaining Membership at Weavers Way

- ▶ Interestingly support for local suppliers and community programming are among the most important reasons identified for joining the co-op
- ▶ Ratings on this question (joining) are flipped from ratings on the previous question (shopping), reflecting the framing differences provided by the two questions

Q14. How important are the following features as reasons for joining/maintaining your membership at Weavers Way Co-op? (Members only)
Rating scale: Very Important, Important, Somewhat Important, Not Important, No Opinion

Importance of Selected Features as Reasons for Joining/Maintaining Membership at Weavers Way



n=varies

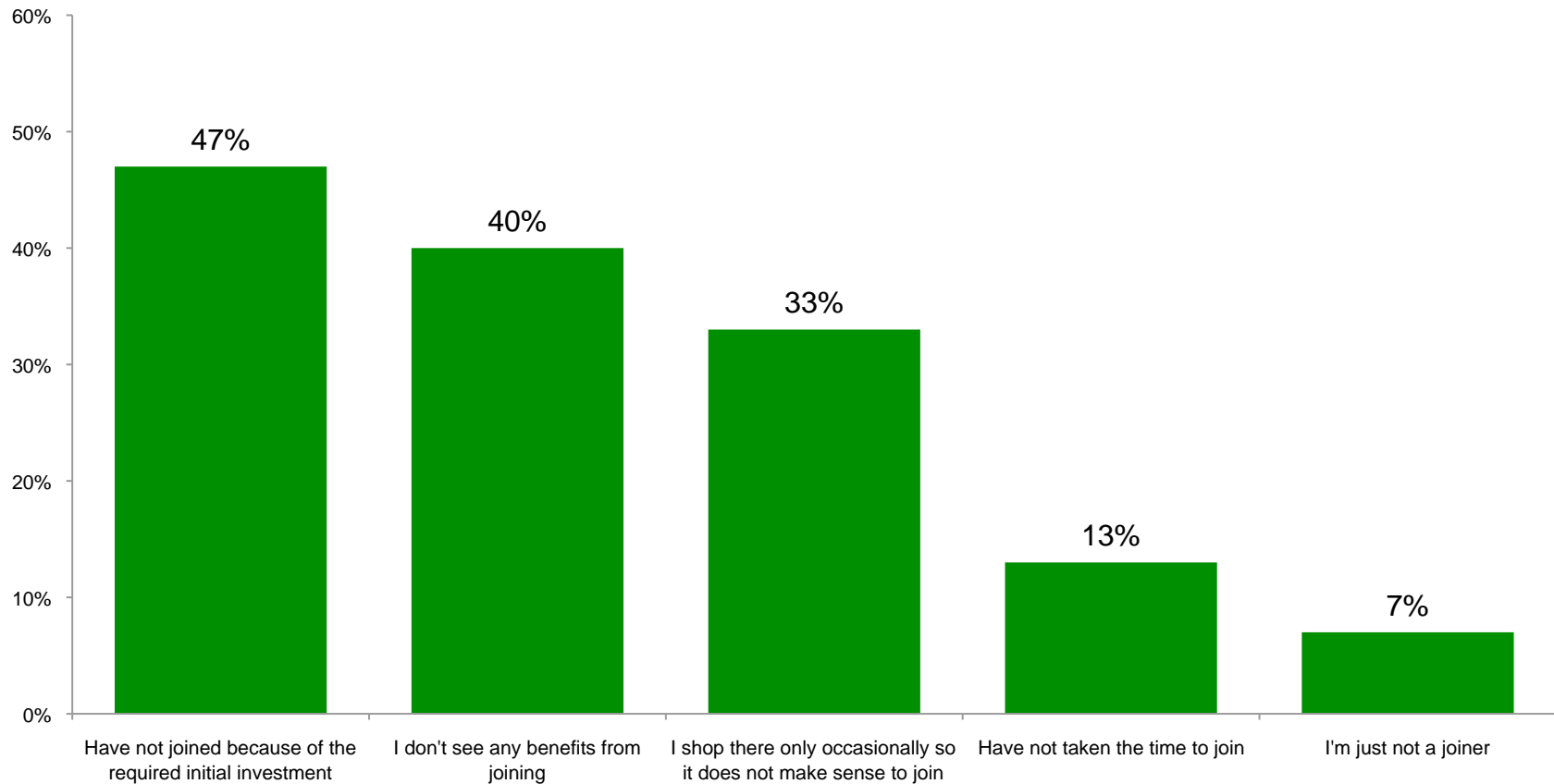
Importance of Selected Features as Reasons for NOT Joining Weavers Way

- ▶ Generally, the various reasons for not joining WW are not considered particularly important
- ▶ Among the various reasons, the initial investment is most frequently mentioned as a barrier, followed by a lack of understanding of the benefits of joining

Q15. How important are the following features as reasons for joining/maintaining your membership at Weavers Way Co-op? (Non-Members only)
Rating scale: Very Important, Important, Somewhat Important, Not Important, No Opinion

Importance of Selected Features as Reasons for NOT Joining Weavers Way

Very Important / Important



n=15
Caution: small base



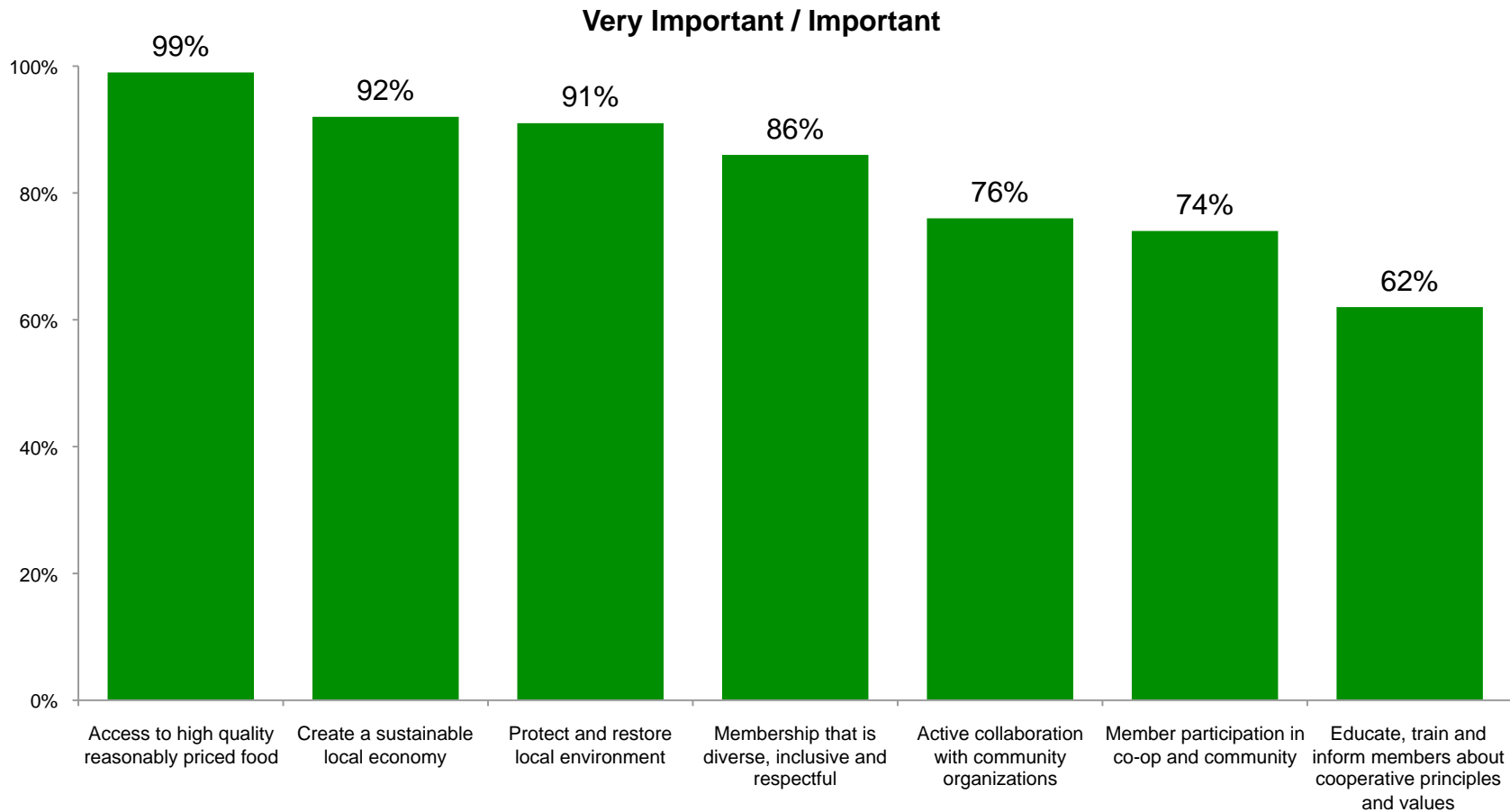
Importance of Ends / Goals of Weavers Way

- ▶ Overall, survey respondents showed very high levels of support for WW Ends/Goals
 - Highest levels of support are for
 - Access to high quality/ reasonably priced food
 - Sustainable local economy
 - Protection/ restoration of local environment
 - Lowest support is for education about co-op principals and values (inconsistent with importance attributed to electing Board?, or they just don't know what they are?)

Q16. How important is each of the following ends or goals of Weavers Way to you?
Rating scale: Very Important, Important, Somewhat Important, Not Important, No Opinion



Importance of Ends / Goals of Weavers Way



n=varies

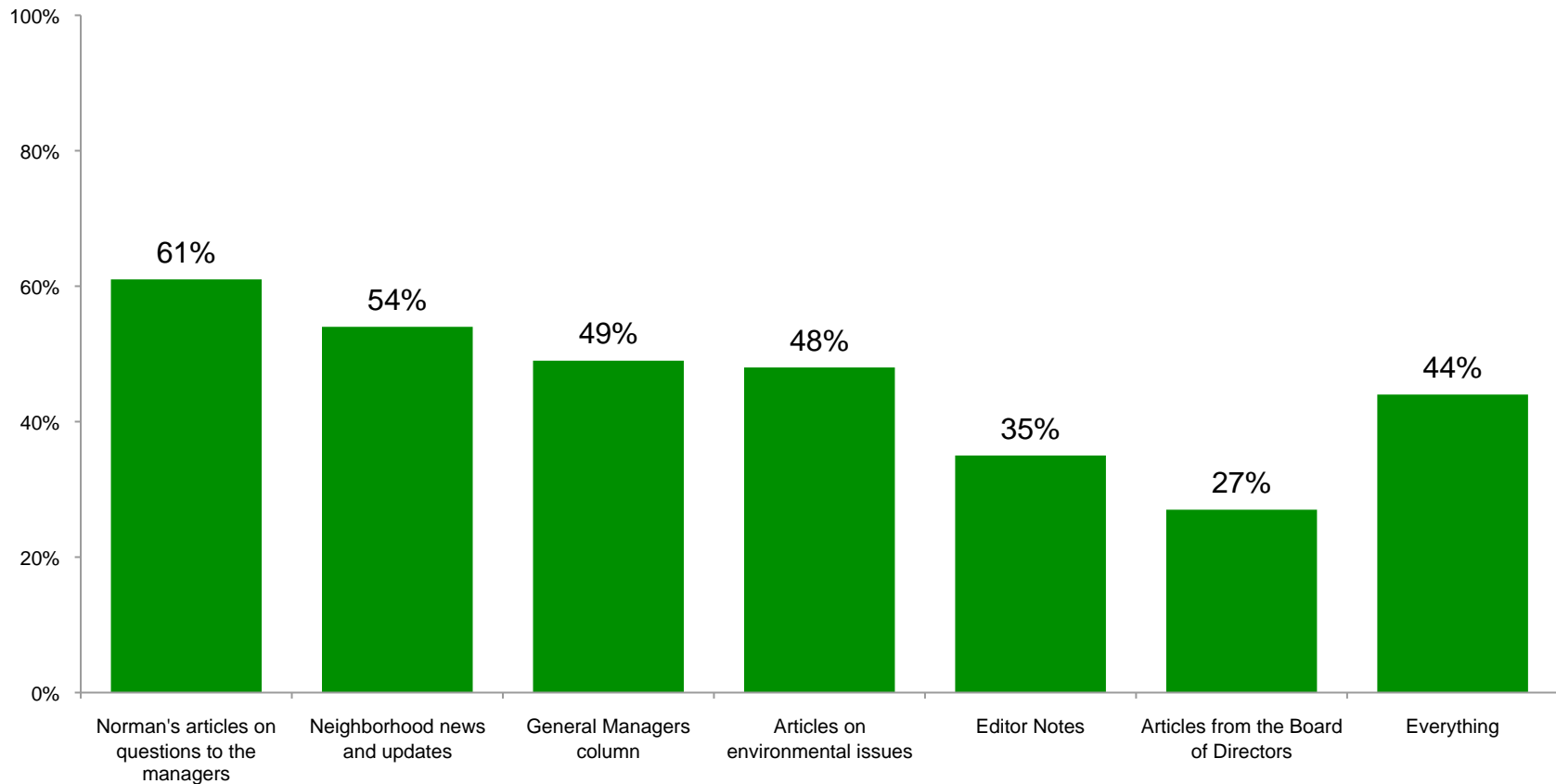
Frequency of Reading Parts of The Shuttle

- ▶ Stormin' Norman's tidbits top the popularity poll for Shuttle readership
- ▶ Readership for other parts of the Shuttle are mid-range
- ▶ But also mid-range are those reporting that they read everything in the Shuttle frequently or quite often...
- ▶ Maybe Board articles need to be framed in a Q/A format to increase their readership

Q17. How often do you read the following parts of the Shuttle?
Rating Scale: Frequently, Quite Often, Occasionally, Seldom, Never

Frequency of Reading Parts of The Shuttle

Frequently / Quite Often



n=varies

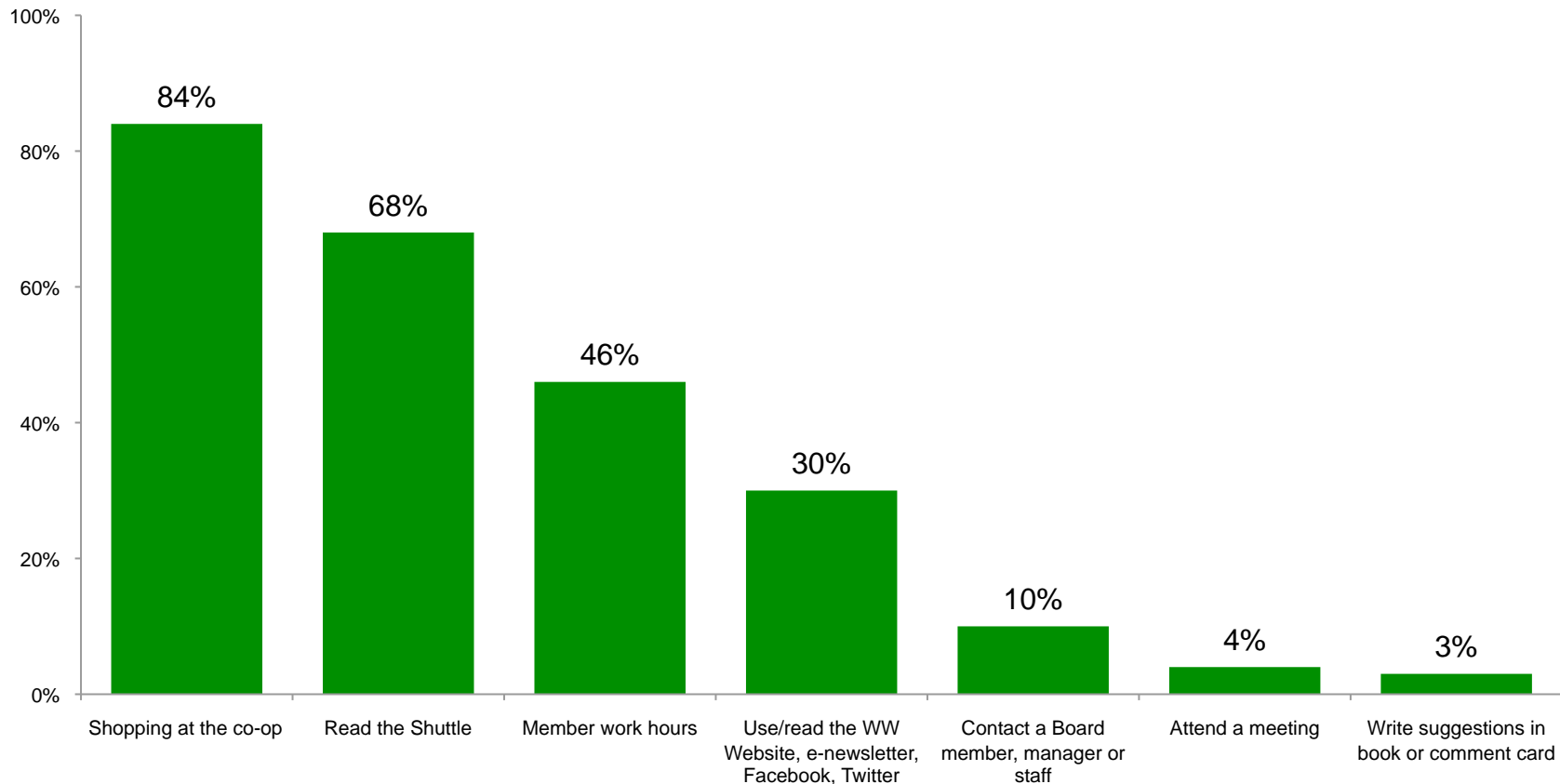
Frequency of Ways to be Engaged with Co-Op

- ▶ Face to face contact -- from shopping and then from work hours -- provides the most important opportunity to engage with the co-op
- ▶ The Shuttle also plays an important role
- ▶ For this group, the internet has yet to provide a major engagement point
- ▶ Shopper/member initiated contact is rarely identified as a way that members can engage with Weavers Way

Q18. Listed below are a number of ways in which members can be engaged with the co-op. Tell us how frequently you participate in each type of engagement.
Rating Scale: Frequently, Quite Often, Occasionally, Seldom, Never

Frequency of Ways to be Engaged with Co-Op

Frequently / Quite Often



n=varies

Agreement with Selected Features

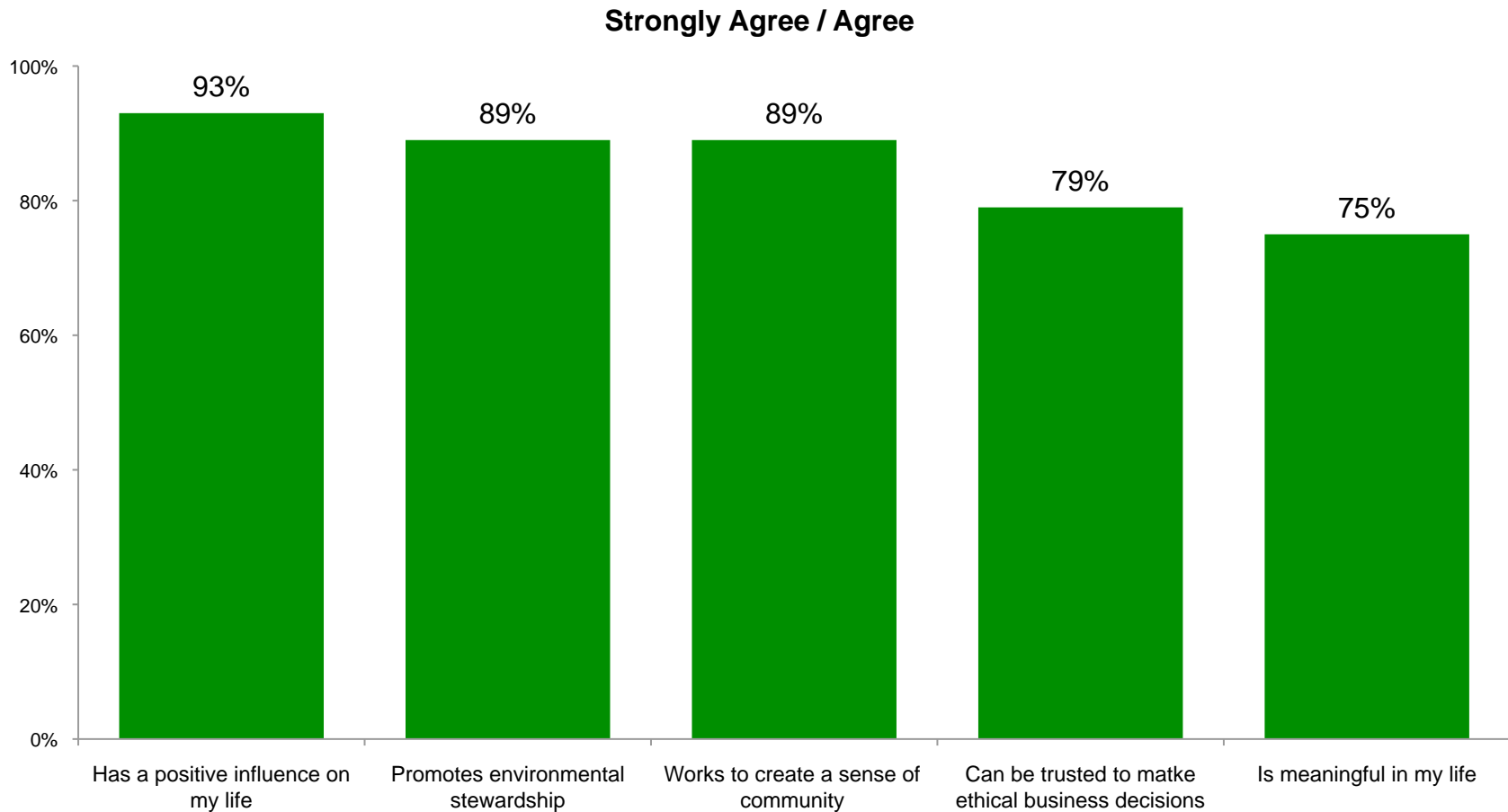
- ▶ Survey participants give Weavers Way very high ratings on its impact on their lives and their communities

Q19. Please indicate the extent to which you agree that Weavers Way Co-op:

Rating Scale: Strongly Agree, Agree, Somewhat Agree, Somewhat Disagree, Disagree, Strongly Disagree, No Opinion



Agreement with Selected Features



n=varies

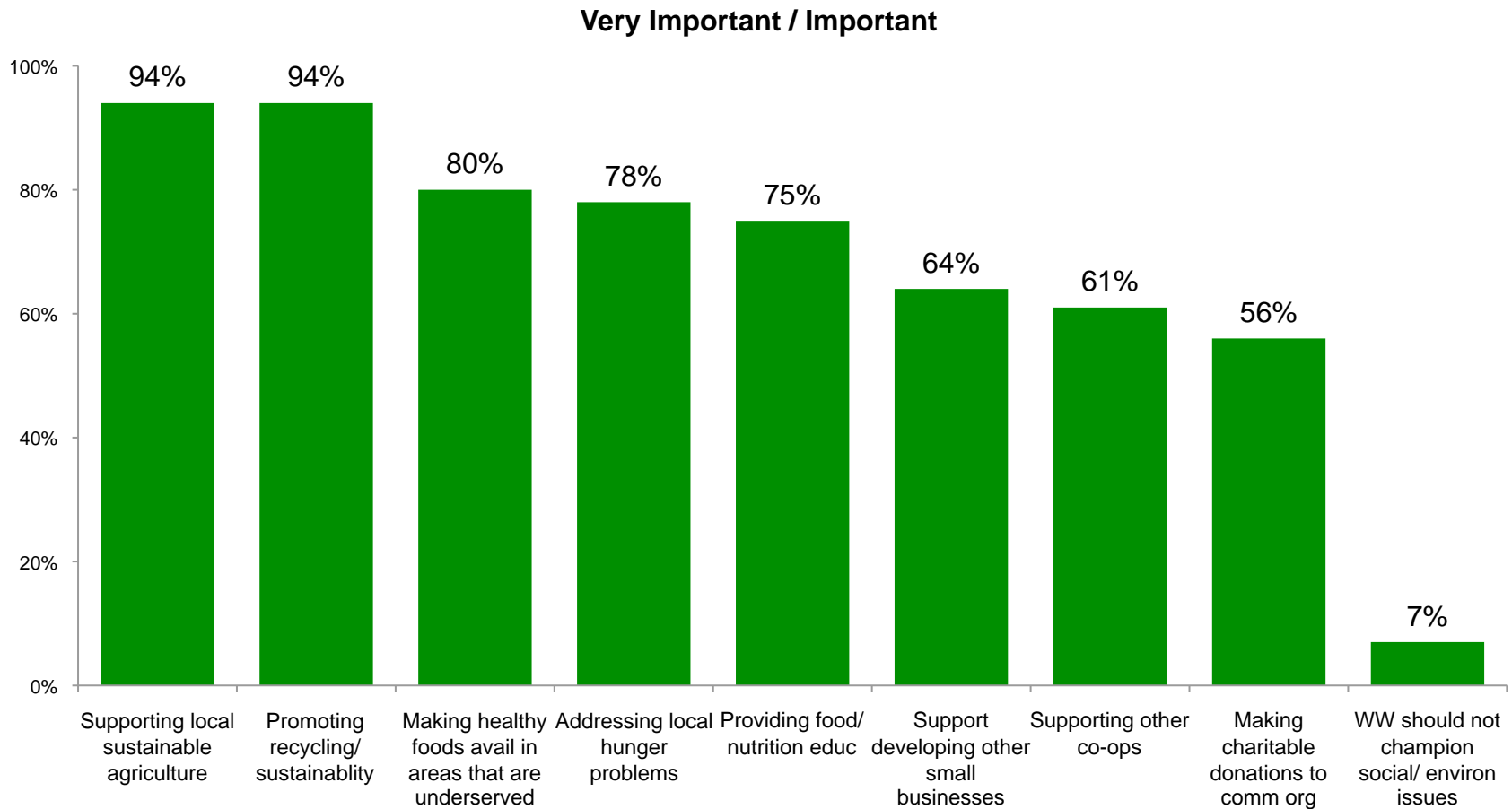
Importance of Issues that Weavers Way Should Champion

- ▶ Sustainability and social justice issues (local agriculture, environment, making healthy food available, nutrition education) are at the top of the list for the co-op to champion
- ▶ A very small percentage of respondents don't think the co-op should champion any social or environmental issues

Q20. How important to you is it that Weavers Way Co-op champion each of the following issues?
Rating Scale: Very Important, Important, Somewhat Important, Not Important, No Opinion



Importance of Issues that Weavers Way Should Champion



n=varies

Investments That Should be Considered by Weavers Way Co-Op

- ▶ Responses fall into three groups
 - Highest percentages favor WW farm and carbon-reducing investments
 - Moderate support is reported for aiding the co-op movement/economy and for renovating the Mt. Airy store
 - There is also moderate support for paying down co-op debt
 - Relatively few survey participants support making no new investments, on the one hand, or opening new Weavers Way stores, on the other.

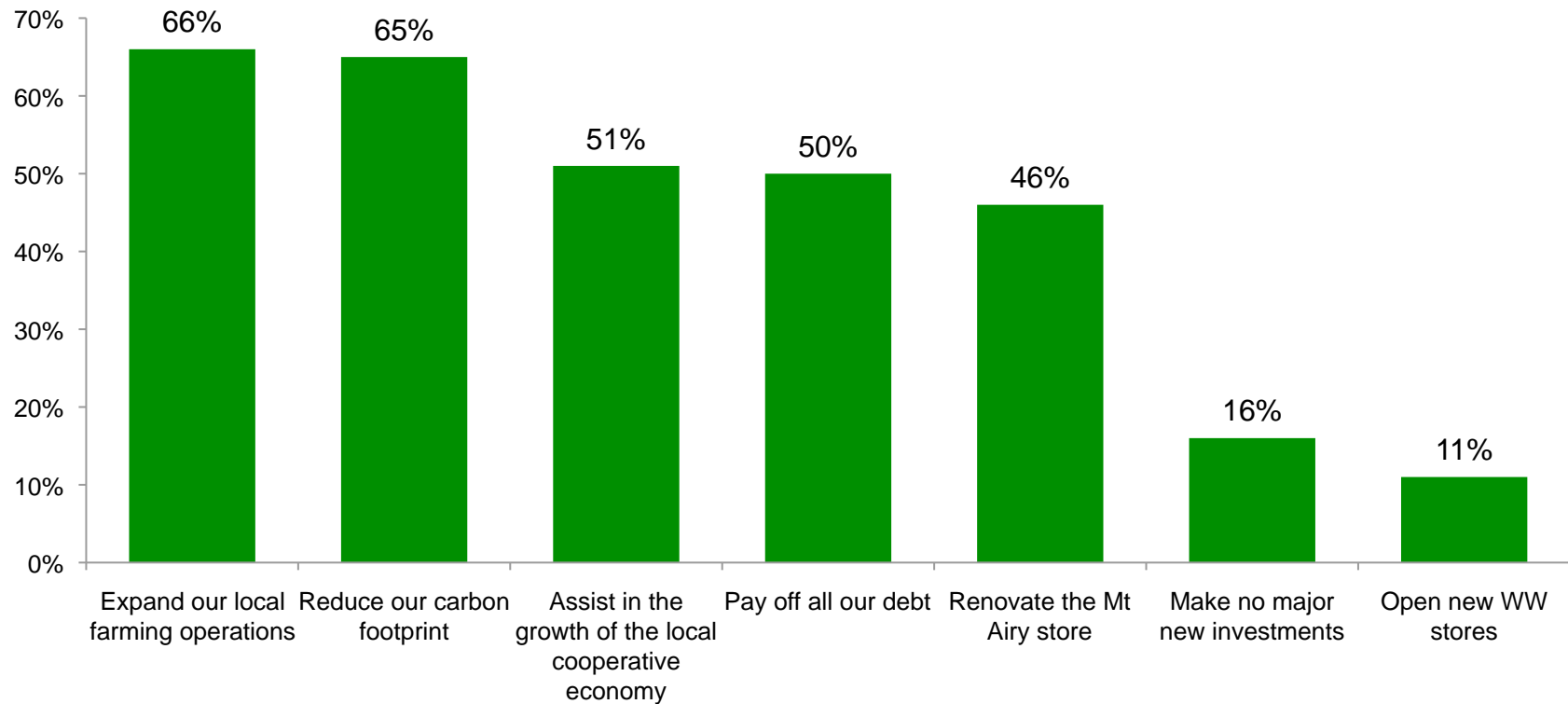
Q21. It has been a year since Weavers Way opened the Chestnut Hill Store. As we think about the future of Weavers Way, what investments should Weaver Way Consider? Please provide a rating for each option below.

Rating Scale: Definitely Consider, Strongly Consider, Somewhat Consider, Somewhat Not Consider, Strongly Not Consider, Definitely Not Consider, No Opinion



Investments That Should be Considered by Weavers Way Co-Op

Deinitely Consider / Strongly Consider



n=varies

Likelihood to Recommend/ Satisfaction with Weavers Way Co-Op

- ▶ High proportions, higher than in 2009, are likely to recommend Weavers Way as
 - A place to shop
 - A positive influence on the community
 - An organization to join
- ▶ Smaller proportions, although still a majority would recommend Weavers Way as a place to work
- ▶ Almost everyone reports that they are either extremely satisfied or satisfied overall with Weavers Way Co-op, comparable to 2009 results

Q22. How likely is it that you would recommend Weavers Way Co-op to a friend or colleague ...

Rating Scale: Very Likely, Likely, Somewhat Likely, Somewhat Unlikely, Unlikely, Very Unlikely, No Opinion

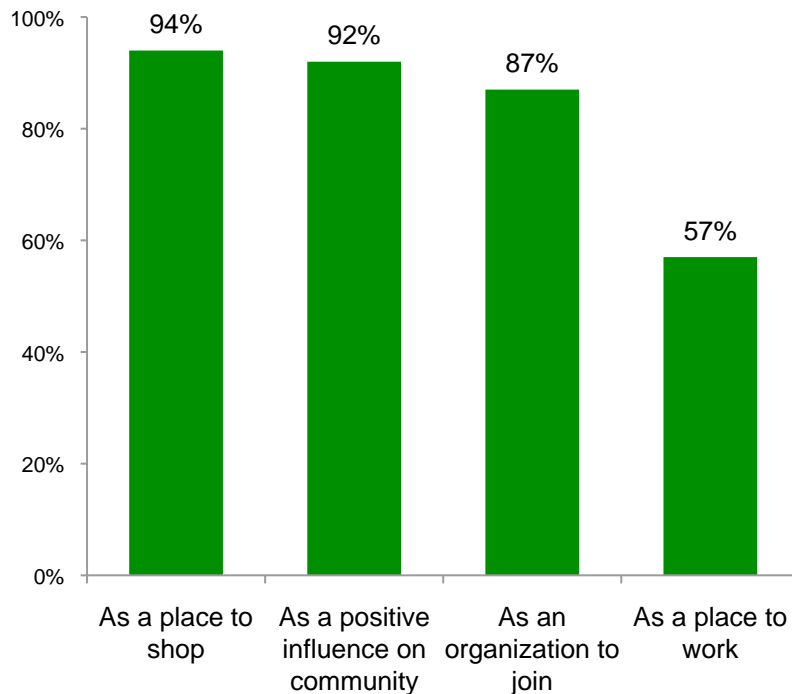
Q23. How would you rate your overall satisfaction with Weavers Way Co-op?

Rating Scale: Extremely Satisfied, Satisfied, Slightly Satisfied, Slightly Dissatisfied, Dissatisfied, Extremely Dissatisfied

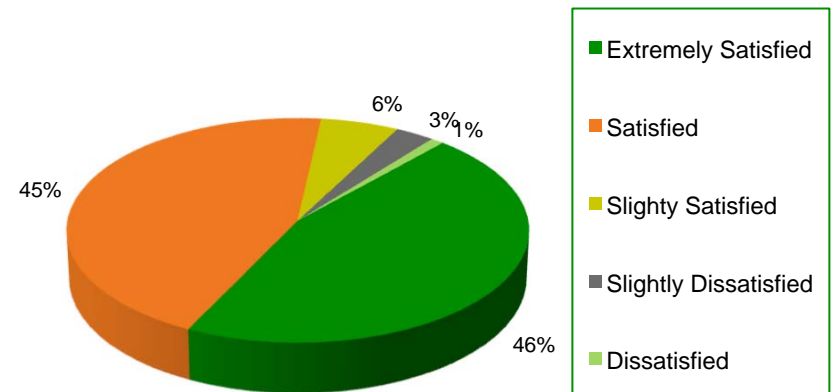


Likelihood to Recommend/ Satisfaction with Weavers Way Co-Op

Likelihood to Recommend Weavers Way Co-op ...
(Very Likely / Likely)



Overall Satisfaction with Weavers Way Co-Op



n=583

n=583

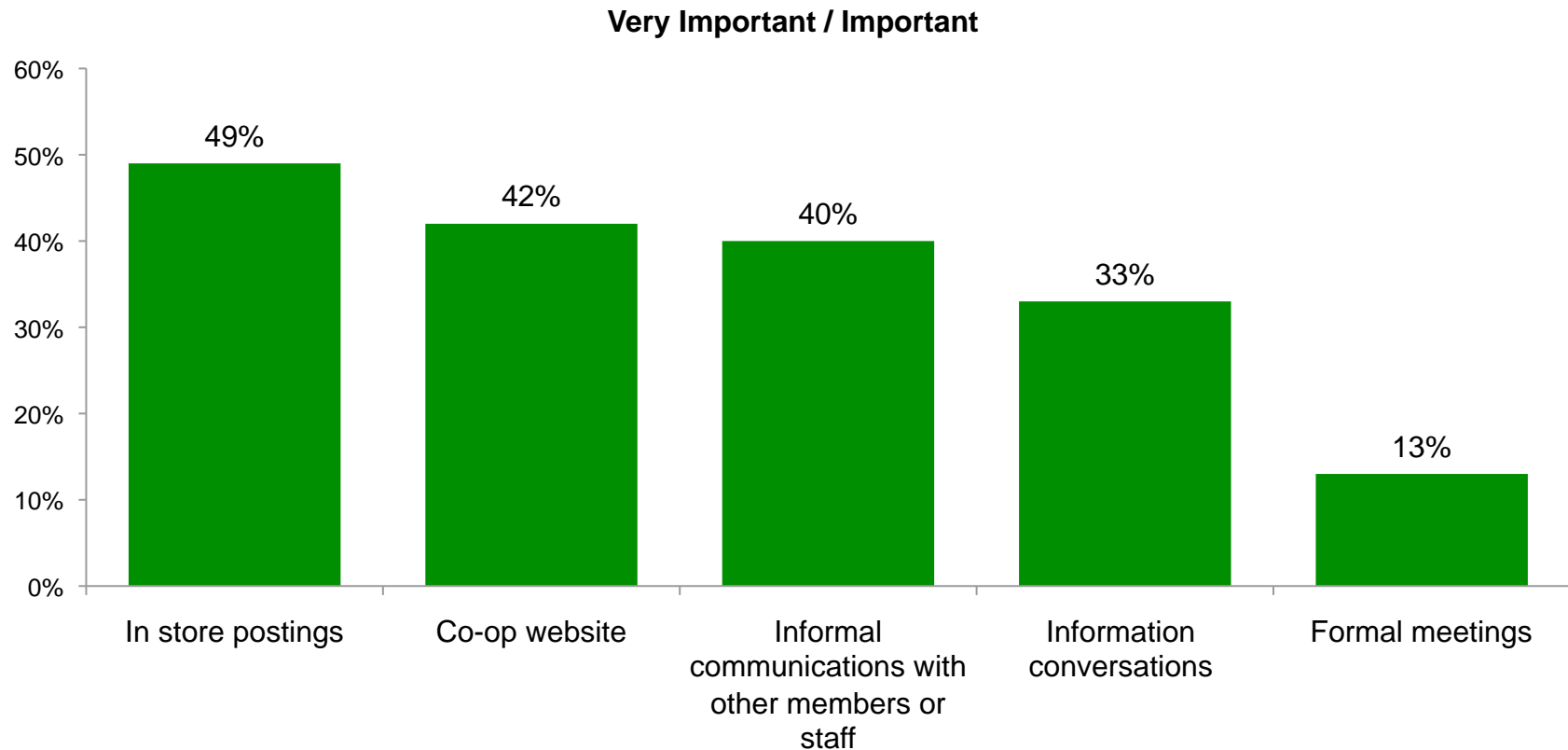
Importance of Sources of Information about Weavers Way Co-Op

- ▶ Store based postings (and presumably store based informal communications) are the most important sources of information about the co-op
- ▶ The web site is also an important source of information (note: that this not engagement, but information)

Q25. How important to you are the following sources of information about Weavers Way Co-op?
Rating Scale: Very Important, Important, Somewhat Important, Not Important, No Opinion



Importance of Sources of Information about Weaves Way Co-Op



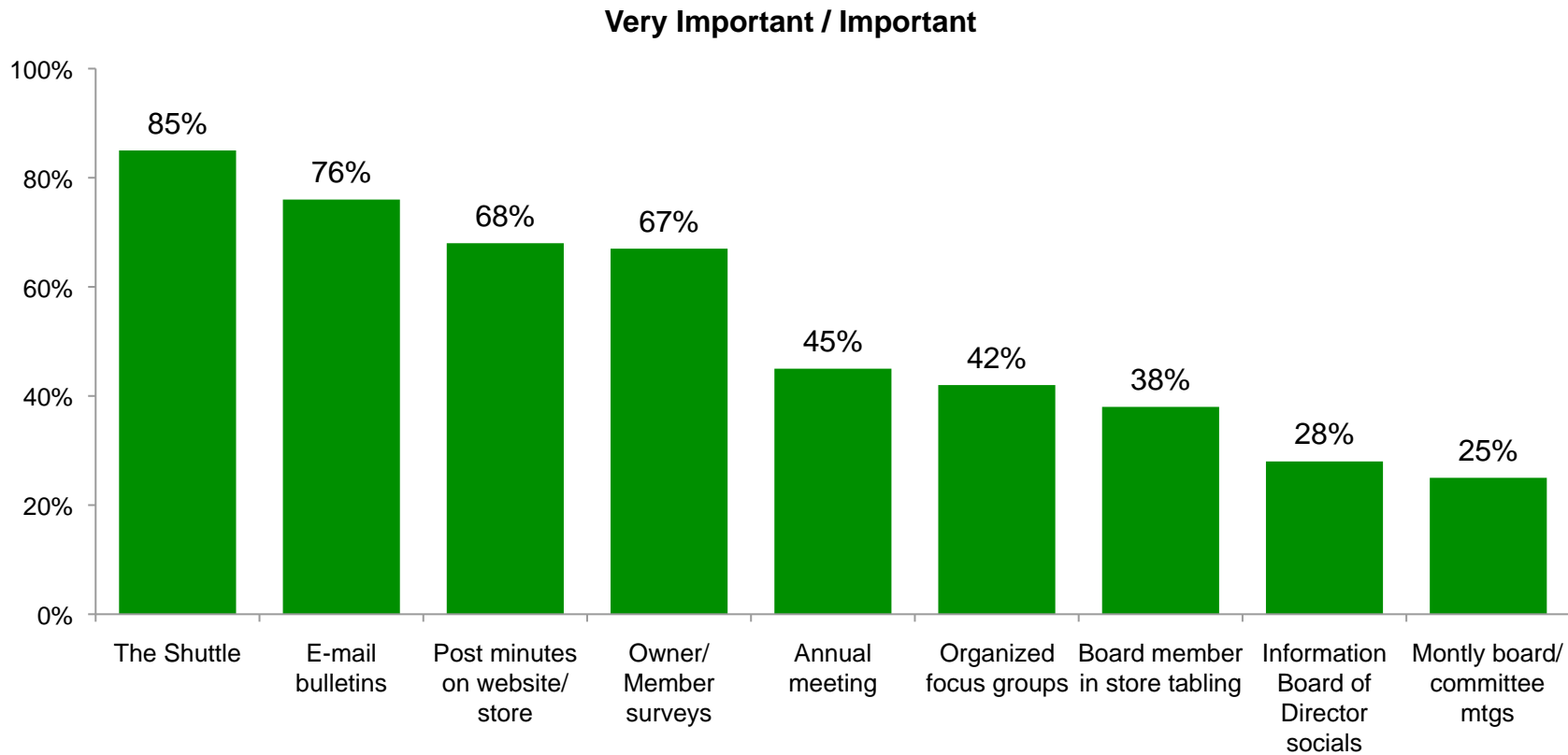
n=varies

Preference for Ways the Board Should Communicate

- ▶ Existing communication vehicles seem to be preferred as ways for the Board to communicate with owner members

Q26. Owner members of Weavers Way Co-op elect a Board of Directors to represent our interests and carry out our vision. Please indicate your preferences for ways in which the Board should communicate with you and get your feedback.
Rating Scale: Definitely Prefer, Somewhat Prefer, Somewhat Not Prefer, Definitely Not Prefer, No Opinion

Preference for Ways the Board Should Communicate



n=583

Importance of Information/ Satisfaction with Delivery of Information

- ▶ Overall, the delivery of various types of information appears to be in sync with priorities attached to those same types of information
- ▶ The exception, respondents received more information than they needed about
 - Financial information/ reports
 - News about the Board and committees

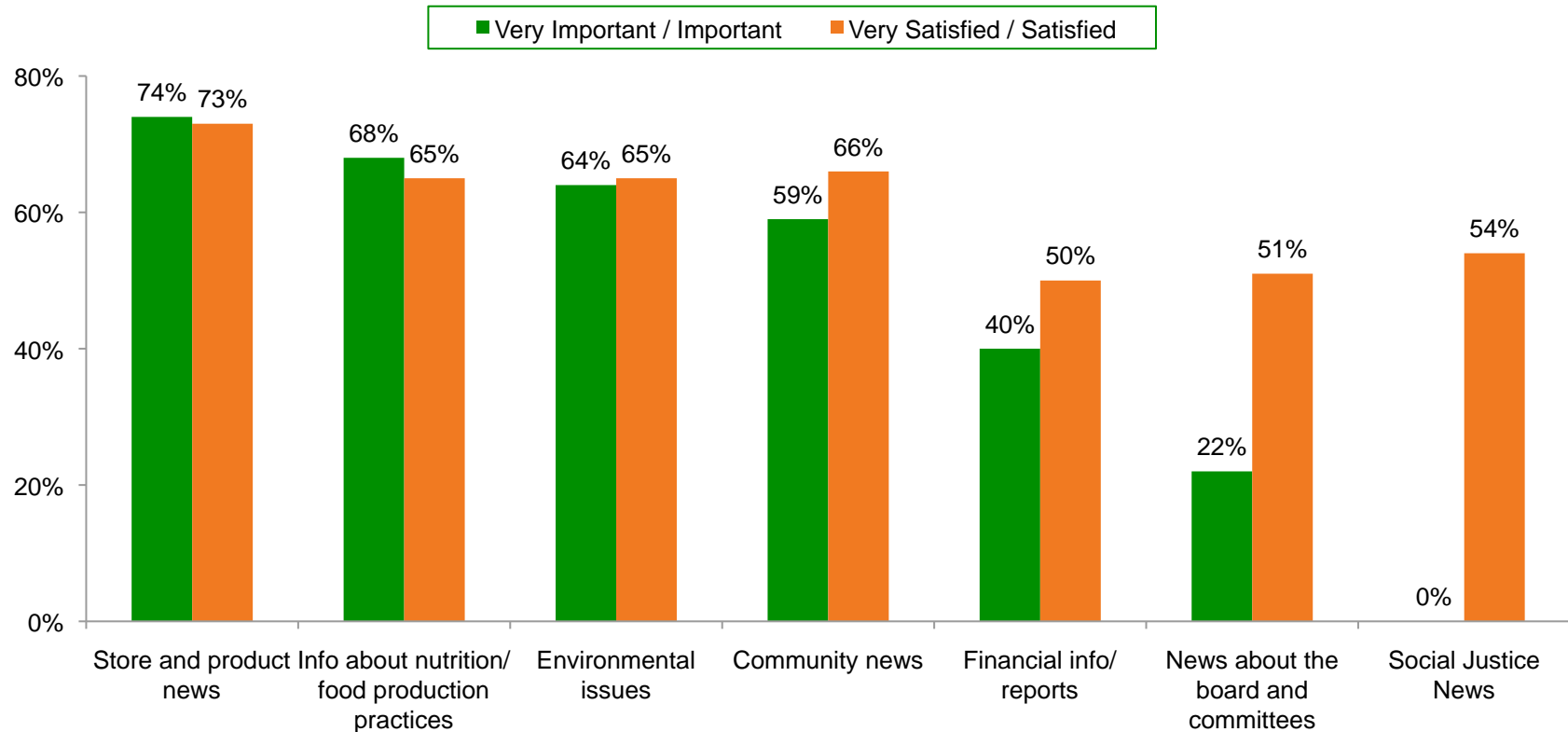
Q27. How important to you are the following types of information?

Rating Scale: Very Important, Important, Somewhat Important, Not Important, No Opinion

Q28. How satisfied are you with Weavers Way Co-op's current delivery of this information to you?

Rating Scale: Very Satisfied, Satisfied, Somewhat Satisfied, Somewhat Dissatisfied, Dissatisfied, Very Dissatisfied, No Opinion

Importance of Information/ Satisfaction with Delivery of Information



Note: Social Justice News not asked for Importance

n=varies

Agreement with Personal Characteristic Statements

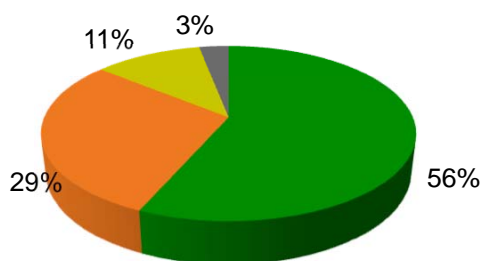
- ▶ The profile of what respondents value is consistent with their responses to other questions in the survey, specifically
 - Health and nutrition are priorities
 - Local, organic and sustainability are priorities
 - Willing to pay a premium price for local, organic and sustainable grocery products
 - Community is important
 - Social engagement around issues of importance is the norm

Q30. Please indicate your level of agreement with the following statements?

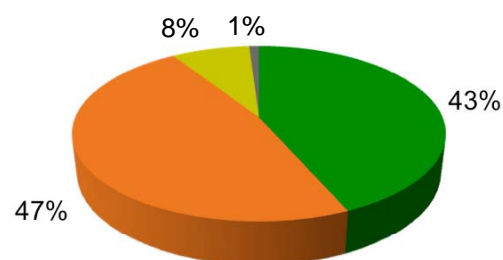
Personal Characteristics

Agreement with Personal Characteristic Statements

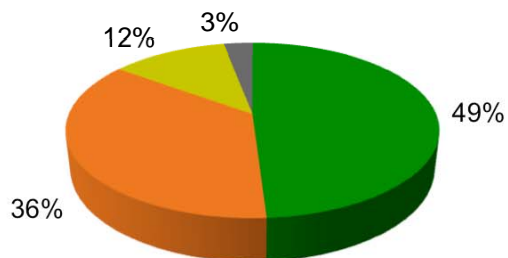
I exercise on a regular basis
n=583



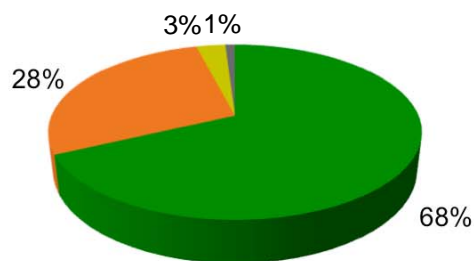
Nutritional value is more important to me than price when buying food
n=584



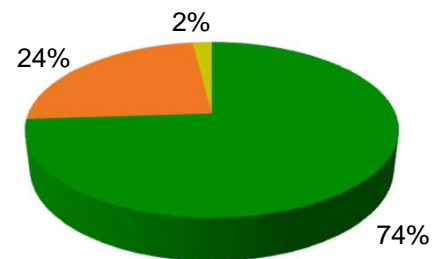
Organic foods are very important to me and my family
n=584



I am proactive about my health
n=584

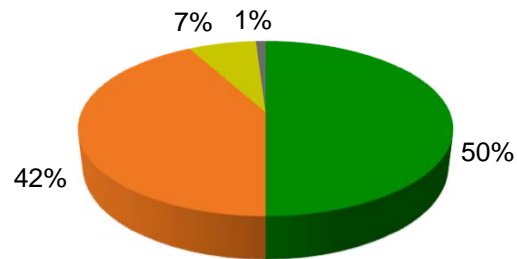


I buy local foods when available
n=584



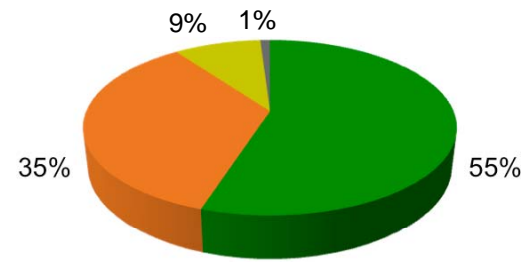
Agreement with Personal Characteristic Statements

I shop in places where I feel a sense of community
n=584

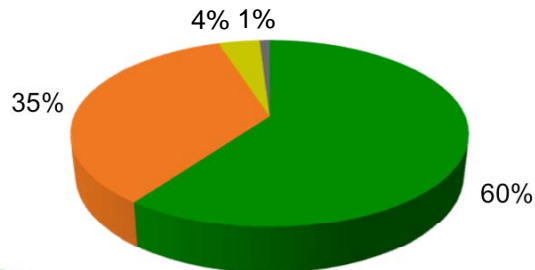


■ Agree
■ Somewhat Agree
■ Somewhat Disagree
■ Disagree

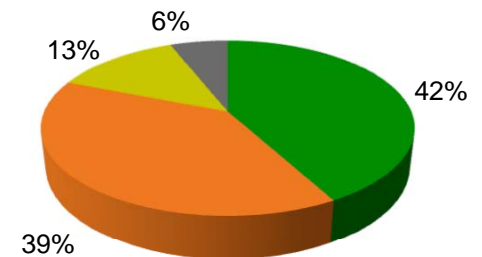
As much as possible, I shop at
Locally owned retailers
n=584



I am willing to pay a little more for products that are
produced more sustainably/ with less environmental
impact
n=584



I engage in activities that address political/
social issues
n=583

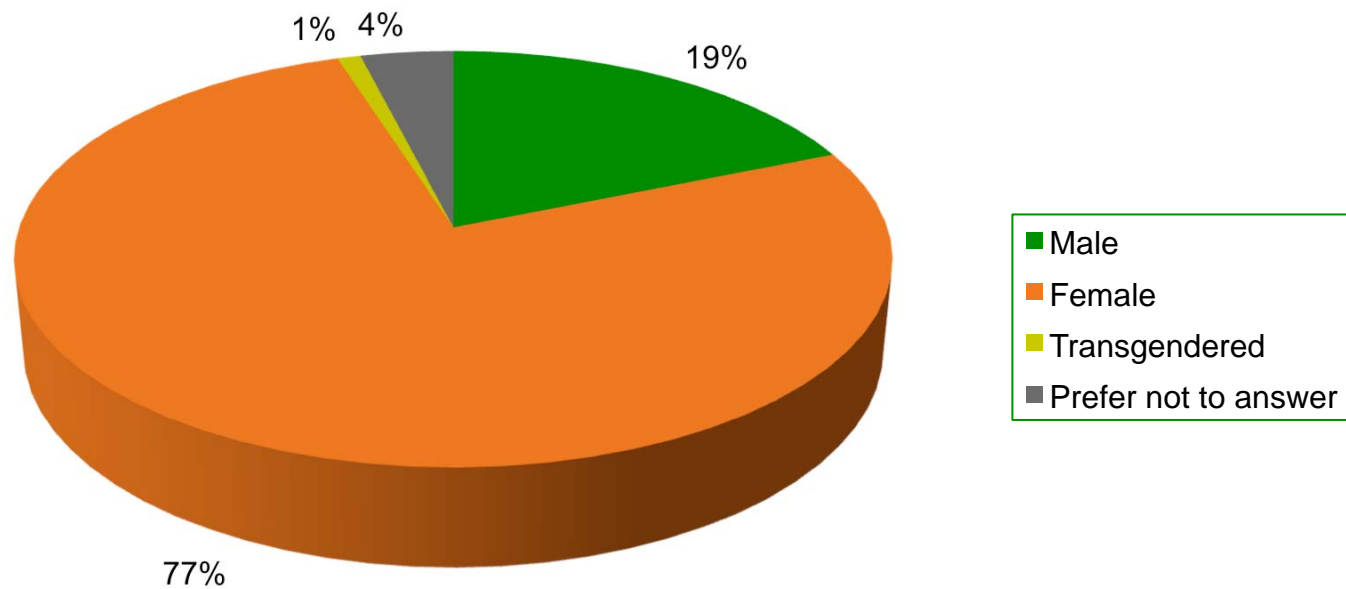


Gender Identification

- ▶ 77% of the respondents are women, so either:
 - The co-op email address list is dominated by the addresses of female heads of household, OR
 - Women are more engaged in the co-op and co-op experience than men, OR
 - Women are heavier users of the internet, OR
 - Women are more likely to respond to internet surveys, OR
 - Emails send out during the daytime are more likely to reach women than men, OR
 - All of the above

Q31. How do you identify?

Gender Identification



n=584

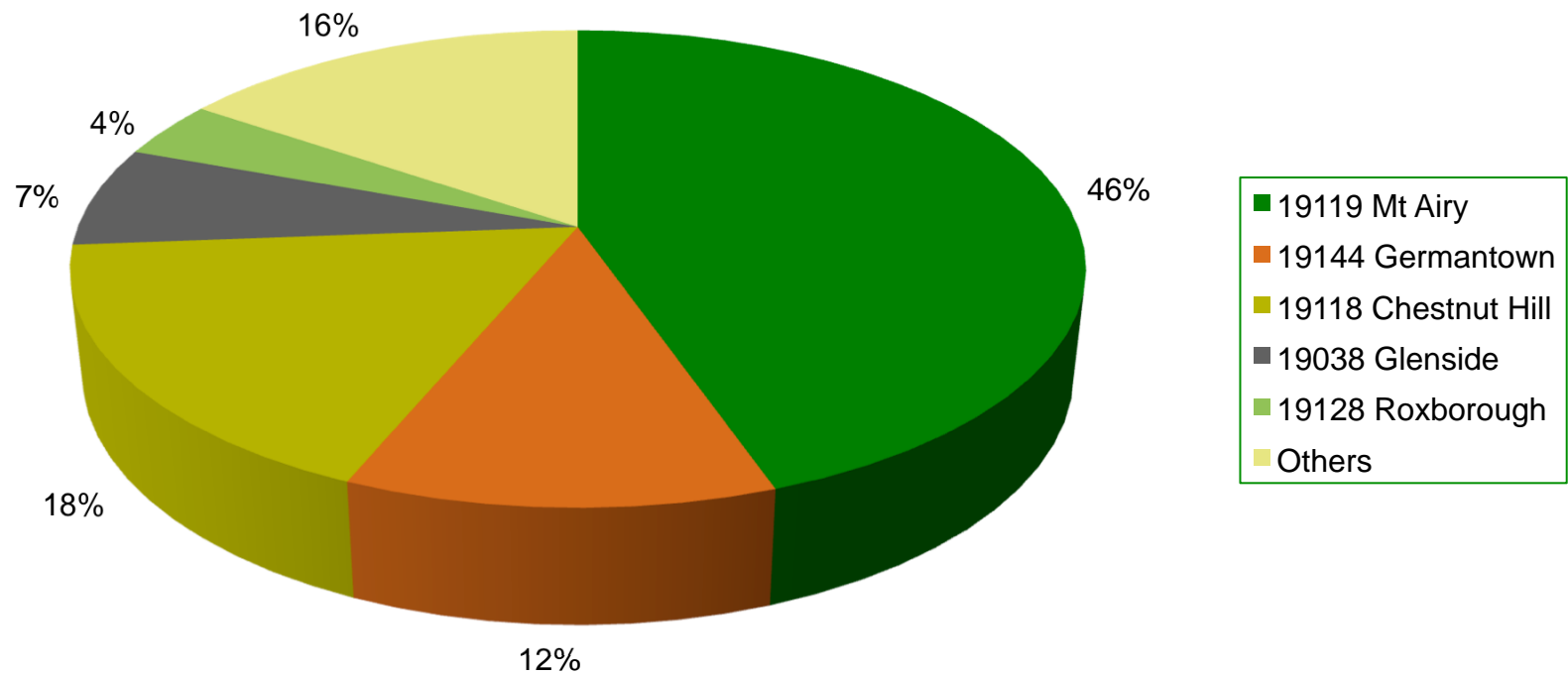
Zip Code

- ▶ Not surprisingly, the proportion of survey participants from Chestnut Hill has increased since the 2009 survey

Q32. What is your zip code?



Zip Code



n=584

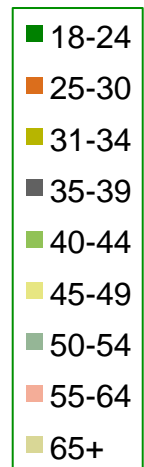
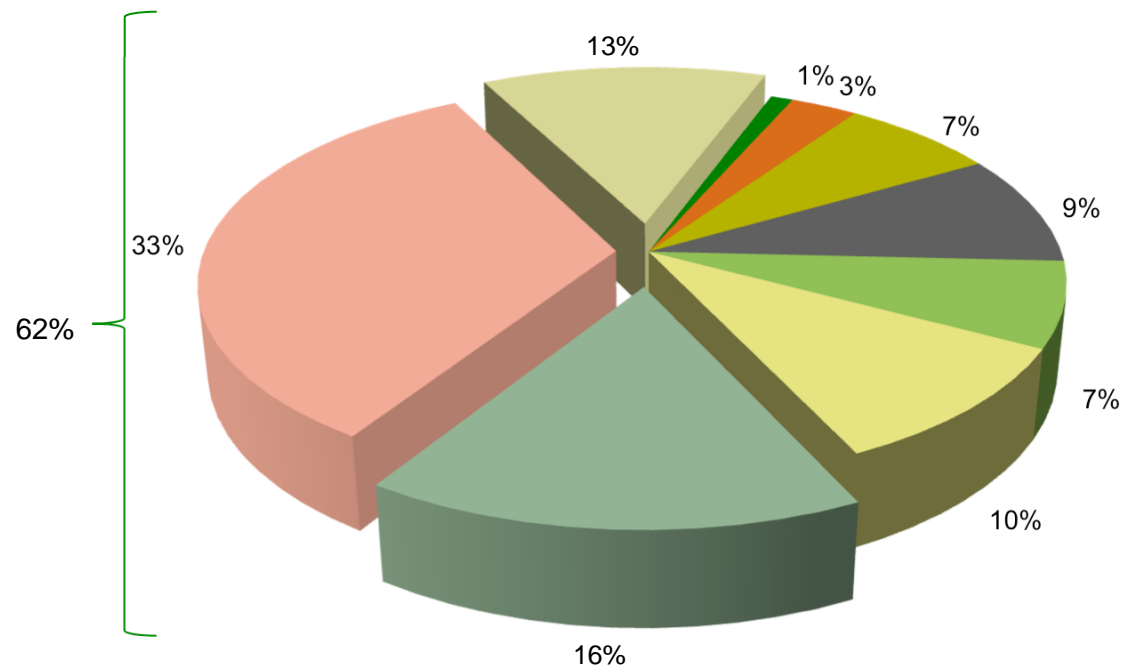
Age

- ▶ The proportion of respondents age 55+ has increased since the 2009 survey

Q33. What is your age?



Age



n=584

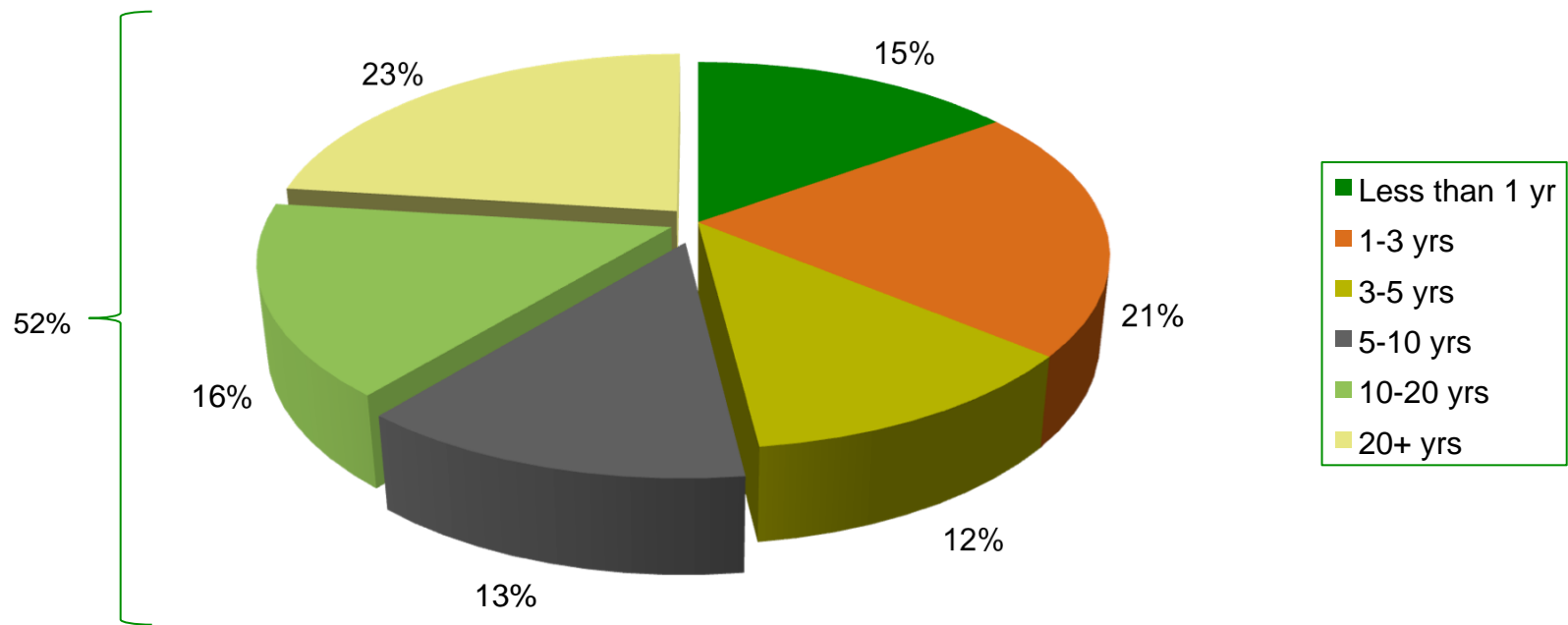
Length of Time Shopping

- ▶ The length of time shopping at Weavers Way has decreased since the 2009 survey, with the largest increases in the less than 1 year and 1 – 3 year categories (likely the impact of the Chestnut Hill store opening)

Q34. How long have you been shopping at Weavers Way Co-op?



Length of Time Shopping



n=584

Length of Time as Member/Owner, Working Member

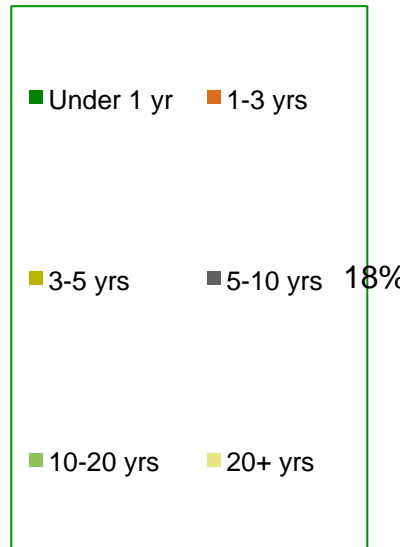
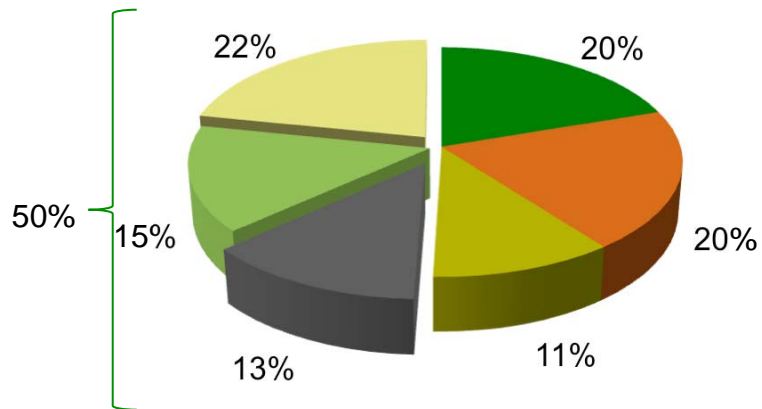
- ▶ The proportion of long term members (5 years or more) among working members is significantly higher than the proportion for all members surveyed
- ▶ A health proportion of both member/owners and working members have joined within the last year

Q36. How long have you been a member-owner of Weavers Way Co-op?
Q37. How long have you been a working member of Weavers Way Co-op?

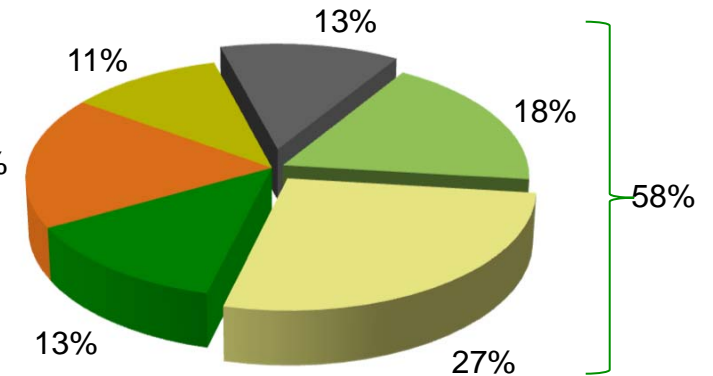


Length of Time as Member/Owner, Working Member

Member/Owner
n=567



Working Member
N=415

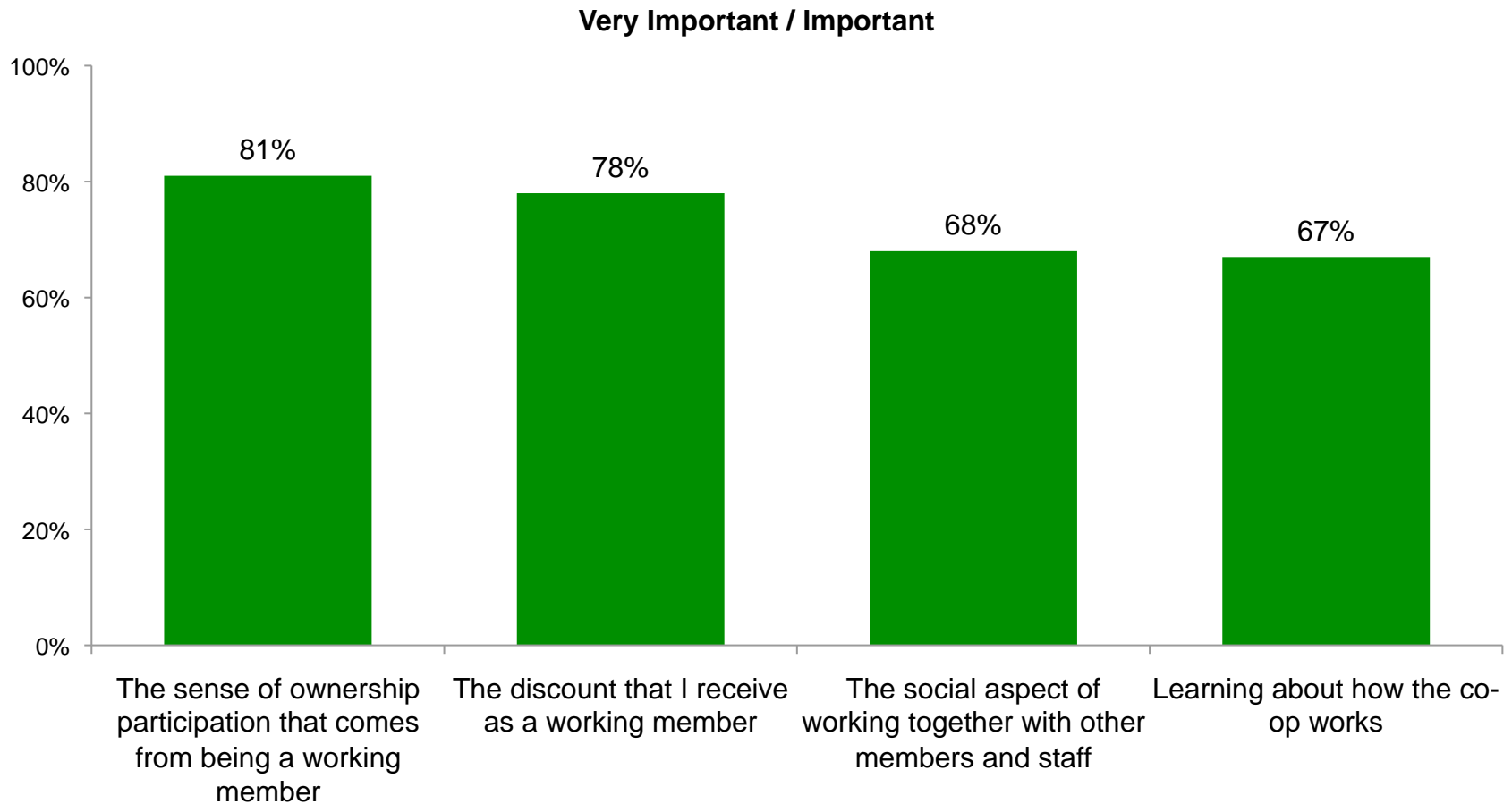


Importance of Aspects of Working Member Program

- ▶ The sense of ownership participation actually tops working member discount in importance to working members, although both are highly rated
- ▶ Although rated somewhat lower, the social aspects of working and the ability to learn how co-ops work are also both very important to working members

Q38. How important to you is each of the following aspects of the working member program? (Working Members)
Rating Scale: Very Important, Important, Somewhat Important, Not Important, No Opinion

Importance of Aspects of Working Member Program



n=337

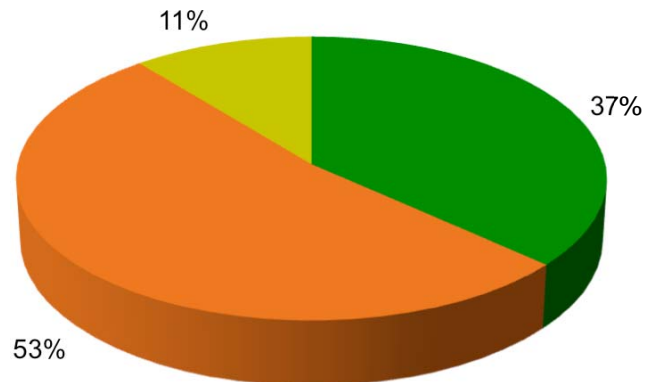
Number in Household

- ▶ The household composition of responders to the survey is notable for two reasons
 - First, there is a relatively high proportion (37%) of one member households
 - Second, there are very few households with three or more household members (only 11%)

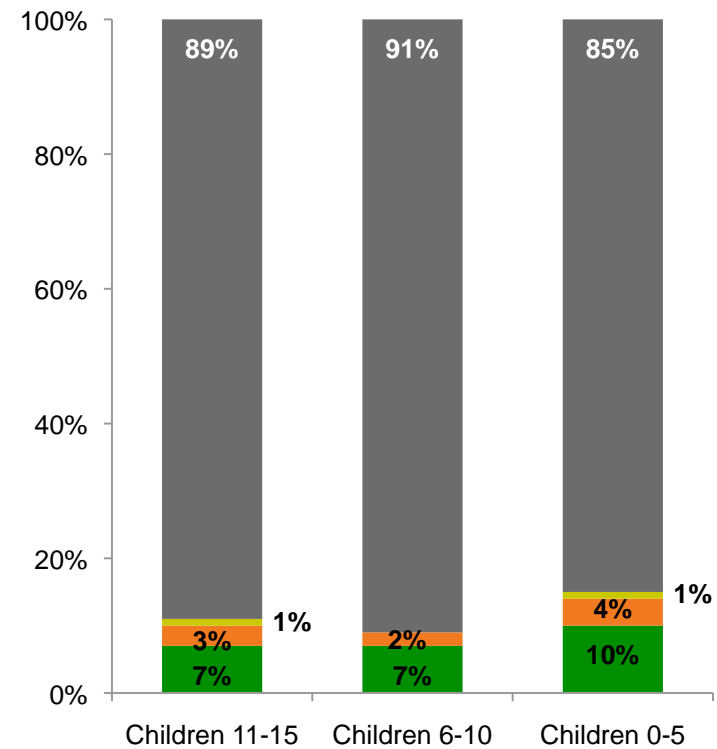
Q39. Including you, how many of the following live in your household?

Number in Household

Adults (16+ years old)
n=584



■ One ■ Two ■ Three or More



■ One ■ Two ■ Three or More ■ None

n=varies

Traveling Distance to Co-Op / Ways to Get There

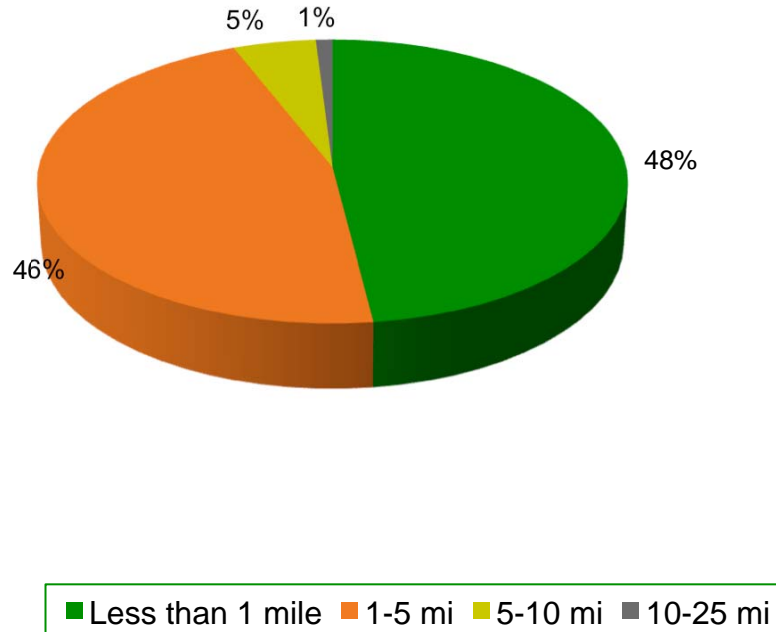
- ▶ Almost half of survey participants live within a mile of the co-op at which they shop, and almost everyone lives within 5 miles
- ▶ A very large proportion of respondents walk to the co-op (40%), with the next largest proportion being those who drive in a private car

Q40. How far do you travel (one way) to shop at the co-op?

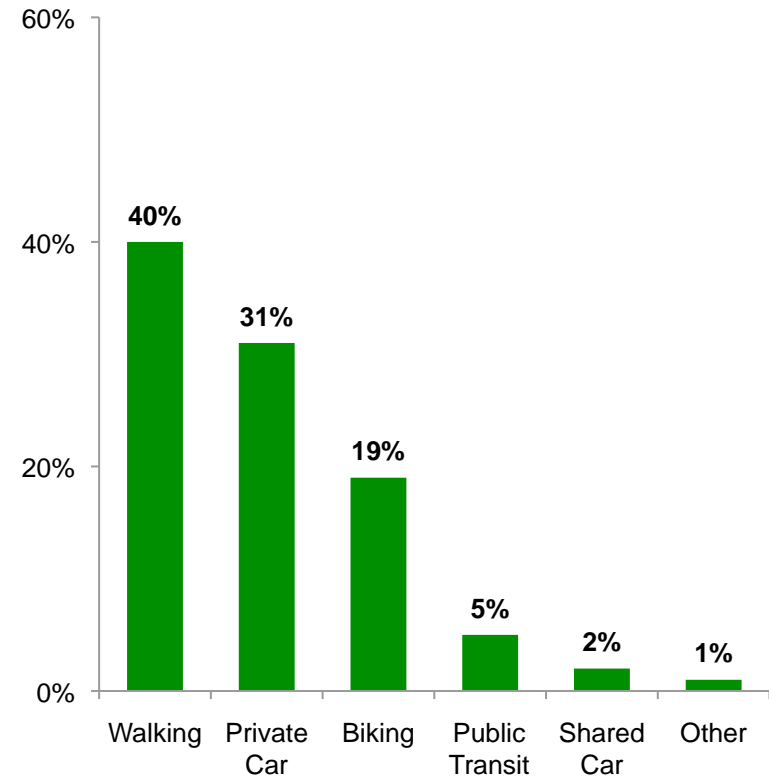
Q41. When you shop at the co-op how often do you get there by ...?

Traveling Distance to Co-Op / Ways to Get There

Traveling Distance
n=584



Ways of Getting to Co-Op
(Usually / Frequently)



n=varies

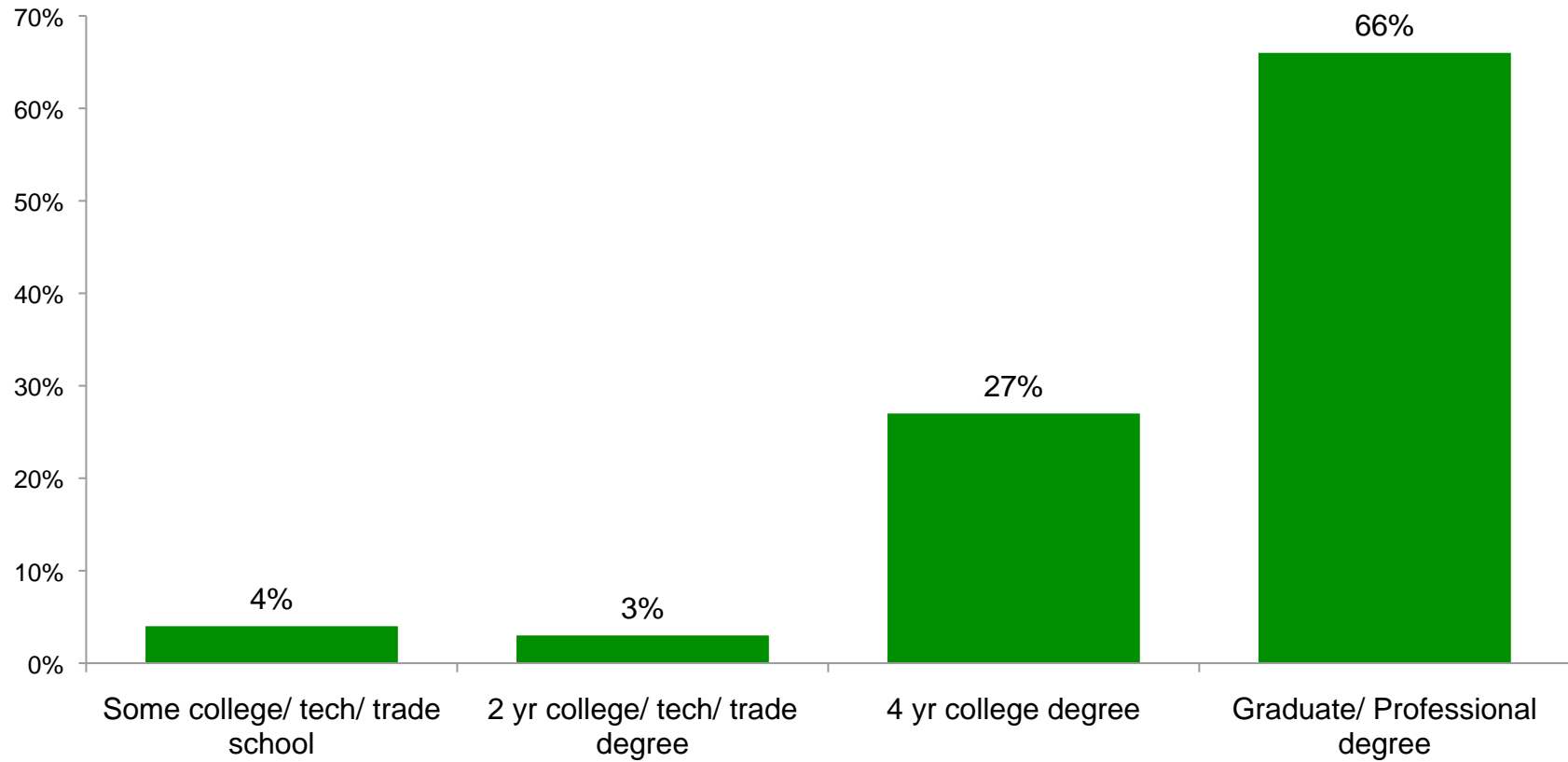
Education Level

- ▶ Weavers Way survey respondents continue to be a very highly educated group

Q42. What is your highest level of education?



Education Level



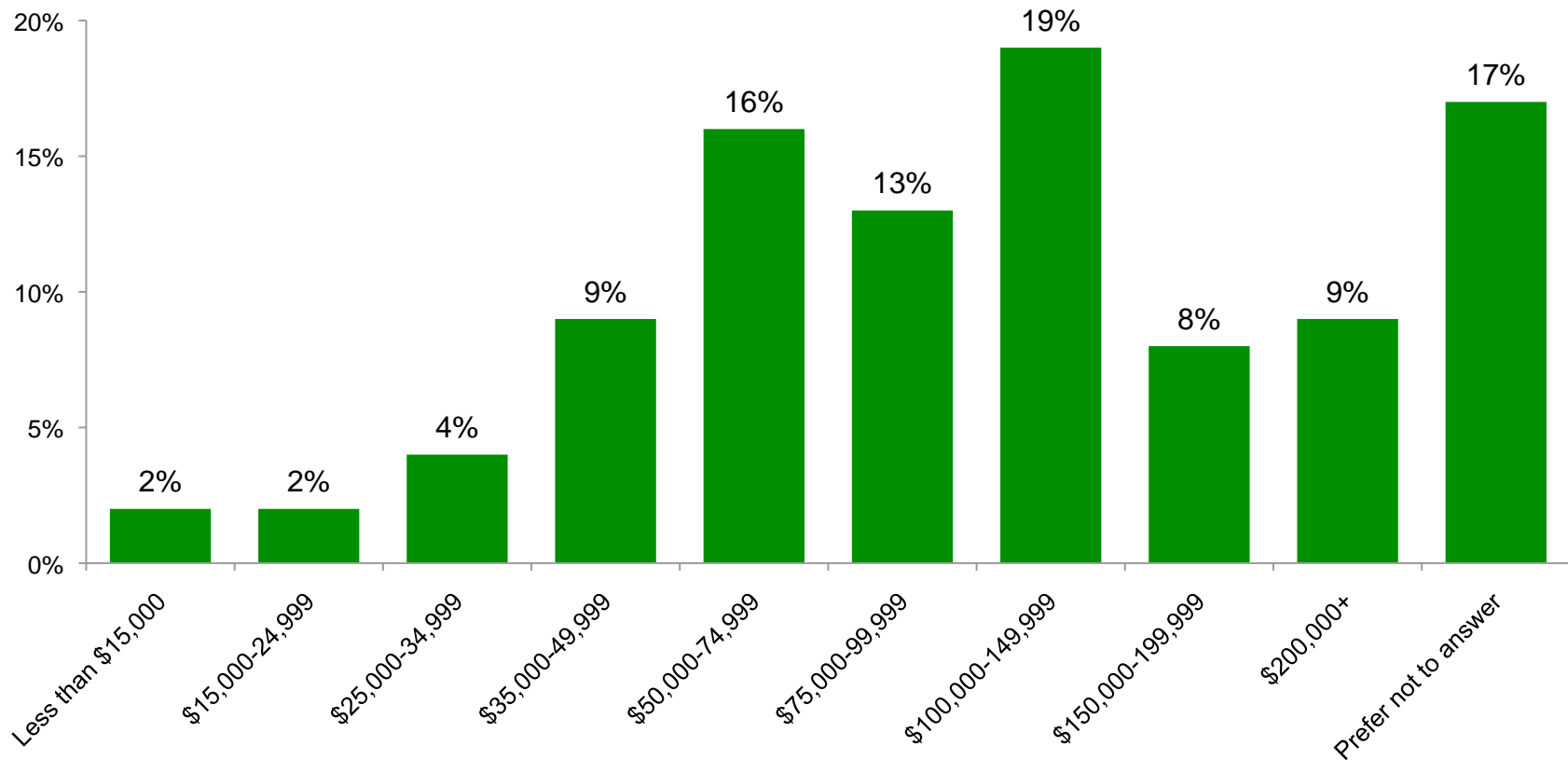
n=584

Annual Household Income

- ▶ Those responding to the survey are an affluent group, with almost half reporting a household income of \$75,000 or more
- ▶ Consistent with this general profile of survey respondents, only 8% report a household income of under \$35,000

Q43. What is your approximate annual household income?

Annual Household Income



n=584

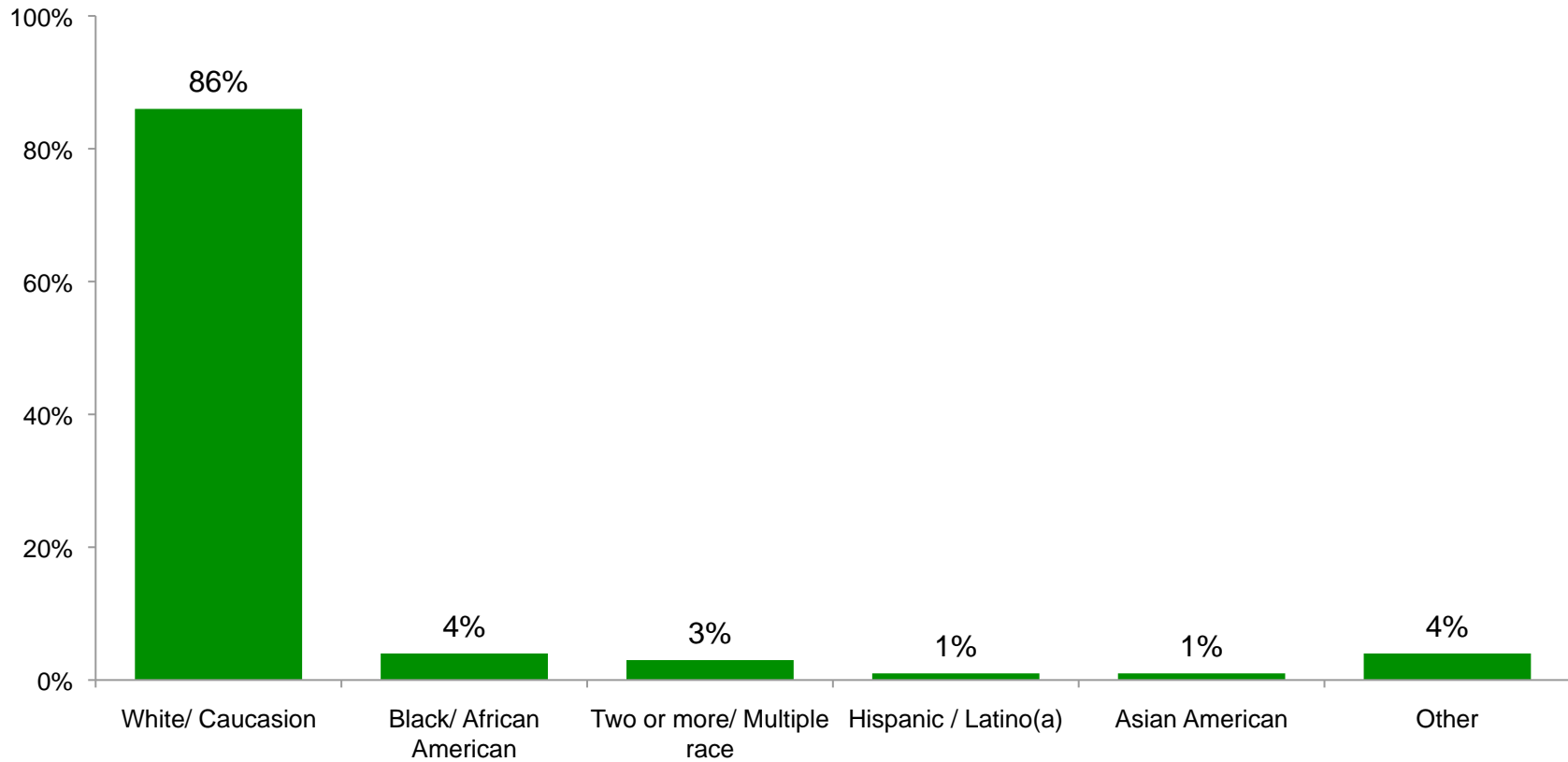
Ethnicity

- ▶ Survey responders are overwhelmingly white/Caucasian

Q44. Please tell us your ethnicity



Ethnicity



n=584

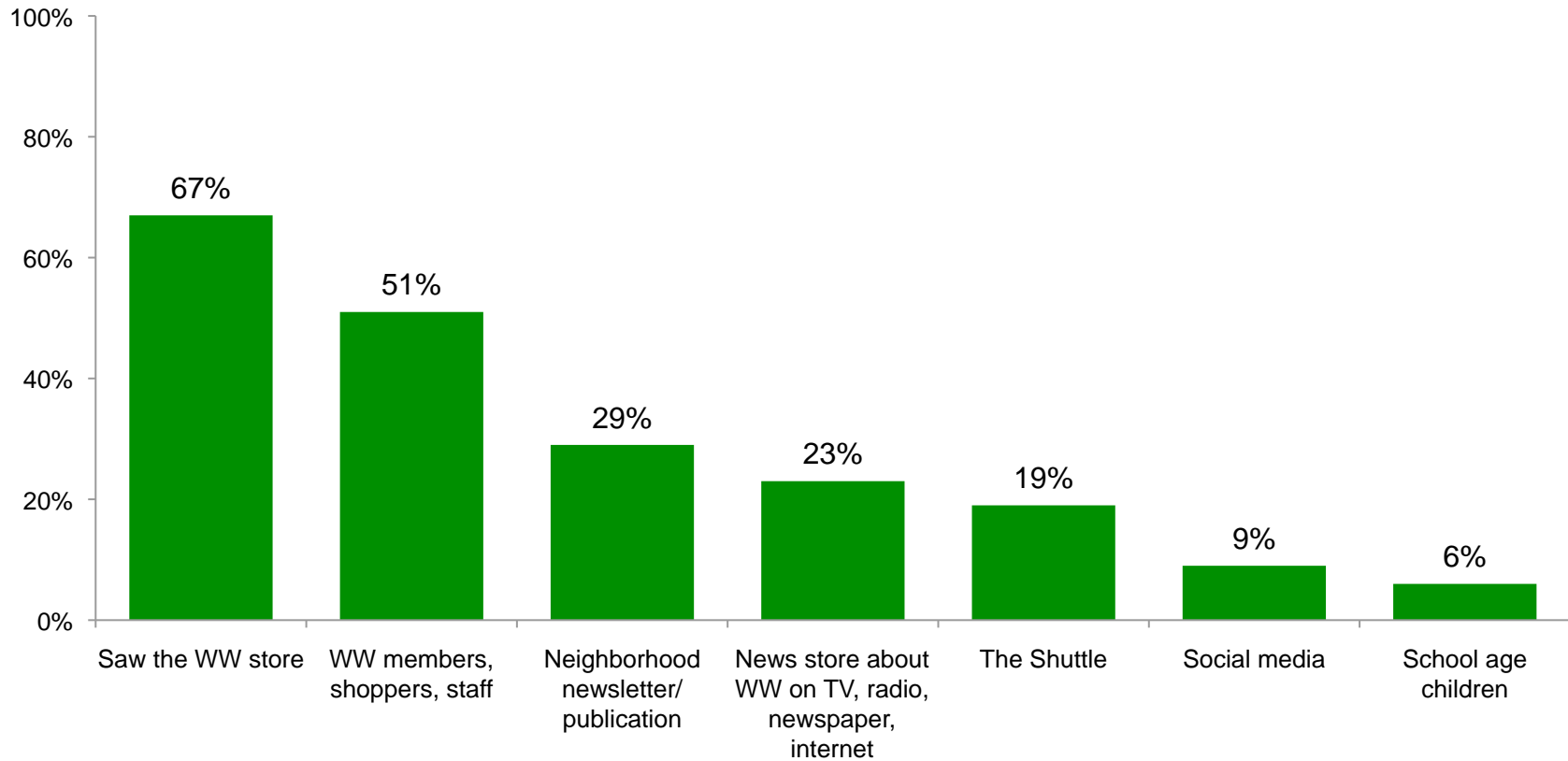
Importance of Sources of Information

- ▶ Survey responders initially learned about Weavers Way in several ways, including
 - Seeing the store (most important)
 - Hearing about Weavers Way from members, shoppers or staff
 - Via traditional media – both neighborhood newsletter/newspaper and other media (radio, TV, newspaper, internet)

Q35. How important was each of the following as a source of information about Weavers Way Co-op before you started shopping at the co-op? (Shopping less than one year at the co-op)
Rating Scale: Very Important, Important, Somewhat Important, Not Important, No Opinion)



Importance of Sources of Information



n=90



Store Demographics

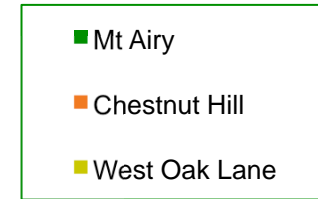
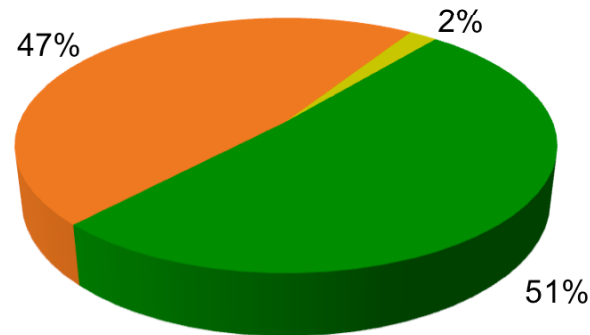
- ▶ The Mt. Airy and Chestnut Hill stores are the locations most shopped and they are shopped about equally
- ▶ The proportion of working members among shoppers is much higher for Mt. Airy than for either Chestnut Hill or West Oak Lane

Q7. Over the last 6 months, when you shopped at Weavers Way Co-op, what percent of the time do you shop at ?
Q8. Which of the following best describes your relationship to Weavers Way Co-op?

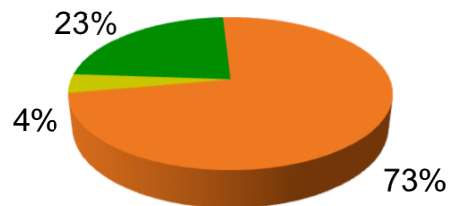


Store Demographics

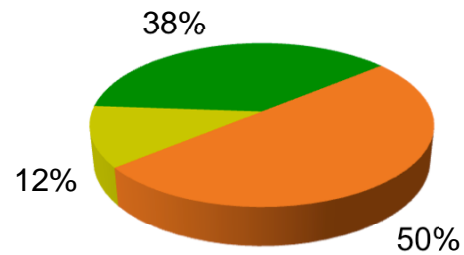
Mean % of time I shop at co-op , I shop at
n=584



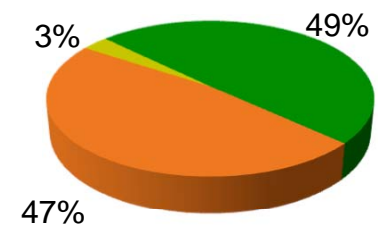
Mt Airy
n=286



West Oak Lane
n=8 (Extremely small base)



Chestnut Hill
n=232



Non-working member Working member Shopper