



UCSF Corner Market - Customer Survey and Focus Group Report

Executive Summary:

Andrea Baker Consulting (ABC) worked with UCSF to successively complete Phase One of the proposed UCSF 'Corner Market' project. Phase One of this project included outreach to the UCSF community and the surrounding Dogpatch/Potrero to determine the types of services, amenities and product mix that would best meet their needs in a community grocery store. To help facilitate this outcome a survey tool was created and administered to both communities, through online and intercept surveys at key locations within the surrounding area of the proposed 'Corner Market'. The survey results will provide specific recommendations to potential grocery store operators as they prepare their proposals in response to this UCSF retail opportunity. We established a goal of 300 surveys (completed by the surrounding community) and 200 (completed by UCSF graduate students) for this exercise and were successful in achieving 631 surveys.

Based on the responses received, it was determined that the 'Corner Market' would be well received and patronized by both the UCSF and Dogpatch/Potrero communities. ABC further conducted a focus group with self selected respondents of the survey to better understand their desired product mix and operational concerns regarding the proposed 'Corner Market'. The focus group revealed that while there may be some differences in the needs of the UCSF community and the Dogpatch/Potrero community, both expressed a strong preference for the 'Corner Market' to provide fresh, local produce and prepared food options from Bay Area artisans. The results from the focus group revealed that many would like to see a store similar to 'Good Life Grocery' Bi-Rite or 'Gus's' in the proposed location. The focus group also revealed that the UCSF community is more price-sensitive than the Dogpatch/Potrero community. To cater to the needs of both, the 'Corner Market' operator will have to be mindful of the price differences, while providing items that currently are not readily available to the surrounding residents.

Background

The ABC team was retained by UCSF to help identify the expressed needs of the UCSF and Dogpatch/Potrero communities for the proposed 'Corner Market' set to open in 2018 at the Minnesota Street Project (MSP) located at 602 Minnesota Street. The information derived from this process will allow operators responding to the retail opportunity to be better informed and therefore more responsive to the needs of the communities that will be served by the market. The 'Corner Market' will be 5180 sq foot and will occupy one of the ground floor retail spaces at the Minnesota Street Project. This project includes ground floor commercial and housing for approximately 750 UCSF graduate students. The selected grocery store operator will provide services and amenities to the future housed students, nearby UCSF administrative staff (250 employees) and the evolving Dogpatch/Potrero community.

Timeline of project:

The ABC team and UCSF started working on the project in July 2017. A survey tool was developed with input from UCSF staff and a list of intercept survey locations was developed by Andrea Baker Consulting and approved by UCSF. We established a goal of 300 surveys from the surrounding community and 200 surveys from UCSF graduate students. The surveys went live in late September 2017; and intercept and online surveys were conducted for a six week period. The survey link was closed on November 1, 2017. One focus group was then facilitated to gather additional information regarding preferred services and product mix. The focus group was held on the evening of November 13, 2017 at a UCSF Mission Bay conference room and was comprised of 15 participants.

Statistical tools:

For ease of distribution, since UCSF already used Qualtrics, the surveys directed to the UCSF community used the Qualtrics platform. The surveys were identical in every respect, with the exception of the analytical platform used to administer the survey. Surveys shared with the Dogpatch/Potrero community were administered using SurveyMonkey. The final responses were merged into an excel spreadsheet for final review and analysis.

Intercept surveys were conducted primarily using iPads for more efficient data collection, though printed copies were provided upon request or if considered more adaptable to the constituents at the individual survey site. The survey tool was also translated in Spanish and Chinese though neither language option was selected by respondents.

Prior to administering the survey; the tool was tested to ensure that questions were clear, concise, easily comprehended, and could be completed in 7-8 minutes.

Implementation of Project:

UCSF was committed to a survey outreach process that would engage respondents from all target audiences including: UCSF graduate students and trainees Dogpatch/Potrero, Bayview and Mission Bay residents and workers community. This commitment was manifested by thoughtful development and proctoring of a multilingual survey tool administered by a diverse team of proctors in multiple locations on a variety of days and times. Additionally the survey was vigorously promoted using several social media platforms; and by sharing the survey with neighborhood and community organizations. The project was conducted as follows:

Part One: Review of previous survey and revisions made to ensure appropriate and desired data collection

The ABC team reviewed a survey that had previously been implemented within the UCSF community and suggested changes and modifications in order to collect information that would be insightful to operators responding to the 'Corner Market' retail opportunity. These recommendations were shared with and approved by UCSF designated staff.

Part Two: Develop and test the survey tool

Once ABC had reviewed and revised the survey, we sent it to UCSF staff for final approval. The survey was approved and though the surveys were identical, it was decided that UCSF would input the survey using Qualtrics (thus streamlining the ability to share online with the UCSF community) and ABC would input the survey using Survey Monkey for sharing with all other surveyed communities. ABC committed to merging all results into one composite excel spreadsheet for review and analysis. The survey allowed for anonymous completion though respondents could self select to participate in a later focus group by sharing their name and contact information at the end of the survey.

ABC then conducted a small 'pilot test' to understand time and address any confusions in the survey language. After a few modifications, the final survey was finalized with a total of 21 questions and required approximately 8 minutes to complete.

ABC also created postcards that promoted the survey project and encouraged residents and workers in the neighboring/adjacent communities to participate by completing a survey online. Of the 487 community surveys completed 314 or 64% were done online and the remaining 36% (173) were achieved through intercept surveys

Part Three: Implementation of the survey collection

ABC developed an outreach strategy that included promotion of the survey project using social media platforms, and at local gathering places and businesses using postcards which directed community to the online survey. The survey tool was also shared with a variety of neighborhood and community organizations who proactively shared and encouraged their constituents to complete surveys. The outreach plan also included the proctoring of intercept surveys at key gathering places and festivals

- Outreach to neighborhood associations and groups
- Outreach to local merchant associations and groups
- Conduct intercept surveys at the local farmer's market (UCSF)
- Conduct intercept surveys at various restaurants, cafes, and neighborhood parks
- Conduct intercept surveys at a nearby grocery store
- Outreach to neighborhood residents on online communities, like NextDoor
- Distribution of printed postcards at nearby retail locations and events frequented by community
- Request to neighborhood associations and merchant associations to share the survey link in their newsletters
- Table at a local neighborhood festival to promote and conduct the survey
- Include the survey in ABC's weekly newsletter that has over 700 subscribers (Dogpatch and Bayview communities primarily)

Sampling size:

Respondents were selected based on the location and foot traffic at selected sites. Individuals were approached about the survey with no preference. Of those approached, we collected feedback from whoever agreed to take the survey.

ABC attended meetings of several local neighborhood and merchant organizations to introduce them to the survey, request that they promote completion of the survey amongst their constituents; and to answer any clarifying questions regarding the survey tool and its goals.

Locations and Dates of survey collection:

The areas and locations were selected based on their close proximity to the proposed 'Corner Market' location, level of foot traffic, and popularity with local residents.

The survey was live and available from September 20, 2017 through October 31, 2017, - a total of six weeks.

Below are the locations and dates of outreach conducted:

UCSF Farmers' Market

September 27, 2017 from 10:30-1:30PM

October 4, 2017 from 10:30-1:30PM

October 11, 2017 from 10:30-1:30PM

Neighborhood Association Meetings

Potrero Dogpatch Merchants Association: October 10, 2017

Dogpatch Neighborhood Association: October 10, 2017

Dogpatch Business Association: October 17, 2017

Potrero Boosters Association: October 24th, 2017

Neighborhood Festival

Potrero Festival: October 21, 2017

Neighborhood Intercept Locations

Safeway (in Potrero Mall, 2300 16th Street): September 15 and September 16, 2017

Piccino's Restaurant: October 13, 2017

22nd Street corridor walk: October 13, 2017

18th to 23rd Streets corridor walk: October 15, 2017

Just For You Cafe: October 15, 2017

American Industrial Center: October 19, 2017

Neighbor Bakehouse: October 19th, 2017

Hard Knox Cafe: October 19th, 2017

Esprit Park: October 19th, 2017

Postcards were also distributed to the following sites

Magnolia Brewing

Harmonic

Long Bridge Pizza Company

Potrero Hill Neighborhood House

Property management at residential housing sites

Invention Hub

Results:

We were pleased to exceed our established goal of 300 surveys. The ABC team collected a total of 487 responses, comprised of the following communities:

Mission Bay (residents and workers): 46

Dogpatch/Potrero (residents and workers): 395

Bayview (residents and workers): 36

Total responses from UCSF: 144 responses comprised of 23 students/trainees and 83 staff.

Intercept Survey Locations	Number of Surveys
Safeway (Potrero Mall Location, 2300 16th Street): (9/15-9/15/17)	Paper: 5
UCSF Farmers' Market Day 1 (9/27/17)	Online: 29 Paper: 20 Total: 49
UCSF Farmers' Market Day 2 (10/4/17)	Online: 44 Paper: 17

	Total: 61
UCSF Farmers' Market Day 3 (10/11/17)	Online: 40 Paper: 12 Total: 52
Just For You Cafe, 22nd St. (10/15/17)	Online:7 Paper: 7 Total: 14
Piccino's, 22nd St. (10/13/17)	Paper: 11
American Industrial Center, Neighbor Bakehouse, Hard Knox Cafe, Esprit Cafe (10/19/17)	Paper: 10
Total Intercept Surveys	Incompleted Paper Surveys: 29 Completed Paper Surveys: 53 Completed via iPad Surveys: 120 <u>Total Intercept Surveys Completed: 173</u>

Analysis and learnings from the survey results:

The Corner market is highly anticipated with 75% of respondents affirming that they would likely shop at the proposed market. The three areas of greatest importance to consumers when shopping at a Corner Market were convenience, price, and selection of fresh produce and meat, fish, and poultry products. The preferred product mix is for produce, groceries, dairy products, as well as meat proteins. There was strong interest in having the operating hours be from 7am to 10pm or no later than 8am to 9pm.

The survey collected information on the types of products and items people would like to have available at the 'Corner Market'. It was important to a majority of the respondents that the Corner Market provide locally produced goods and an expansive selection of fresh produce. Respondents primarily purchase produce, groceries, and dairy items when shopping and indicated that these products were staples on their grocery shopping list.

A majority of the survey respondents did not know about the UCSF Farmer's Market, and those who did, rarely shopped there. Many of the survey respondents shopped at a nearby local grocery store (such as Safeway, Gus's) for groceries rather than buying in bulk. When purchasing items, 50% of respondents are generally shopping for themselves and another adult,

25% are shopping for themselves, and 22% are shopping for a family unit of three or more. A significant number, (38% of the respondents) shopped 1-2 times per week for groceries at a Corner Market, while 29% of them shopped on a weekly basis. A large number of respondents indicated that they would shop at the Corner Market 1-2 per week and 85% indicated that they would do so at least once/week.

Respondents also stated a preference for the Corner Market to carry grab-and-go items and prepared meals. At least 60% of respondents expressed a desire for prepared/ready to eat food coffee and pastry.

An equal number of respondents indicated that they would shop either on the way home (43%) or at various times during the day. There was minimal interest expressed in having delivery service available.

Our pool of respondents were 62% female and 33% male, most inclined to shop locally for grocery products, with at least 50% living in Dogpatch/Potrero. Additionally over 50% indicated that they would be willing to pay an additional 10% (or more) for the convenience of a 'Corner Market'.

The UCSF respondents comprised of 60% staff and 20% students/trainees.
(For detailed results please refer to Appendix A)

Focus Group Findings:

To better understand the diverse needs of those who completed the survey, ABC recommended conducting a focus group. The focus group also allowed us to ask clarifying questions about what was important (product type and origin) and what was of greatest interest to the potential shopper at the Corner Market.

While 112 people who had expressed interest in being part of the focus group, once the list was filtered to include those most likely to be frequent users: UCSF students, trainees and staff and residents and workers in neighboring adjacent communities (Dogpatch/Potrero, Mission Bay Bayview) we were left with a total of 48 *qualifying* respondents. Invitations were extended to this final list, of which 20 responded in the affirmative. The final attendance at the focus group consisted of 15 people: 3 were affiliated with UCSF and 12 were Dogpatch neighborhood residents. Through the focus group, we were able to solicit more specific feedback regarding the Corner Market. The focus group revealed that the people were really excited about the 'Corner Market' since there was not one nearby. To many, the 'Corner Market' was a community amenity that was sorely lacking and greatly needed. Most of the participants of the focus group wanted the Corner Market to carry local products. They affirmed that "local" products meant anything made in California, specifically those items produced within 100 miles of the Bay Area. Some specific examples also included products like ACME Bread and Niman Ranch Meats.

Respondents also likened the Corner Market to “Good Eggs” - a Bay Area based company that sources products from local commissaries and provides them to consumers.

The focus group participants expressed that local and sustainable products are very important for their shopping experience. They have a strong preference for supporting farmers and producers who ‘do the right thing’, i.e. practice sustainable farming practices. We asked the group to provide us with an example of their grocery list and an estimated total of the grocery list. A majority of the group listed dairy, fresh veggies, bread, and meats in their grocery list (for detailed results on grocery list, please see Appendix C).

Focus group members also expressed a desire that the Corner Market provide a variety of prepared/packaged foods that they could use for dinners. The majority would prefer “organic” prepared/packaged foods, but focus group members were emphatic that taste was of prime importance when purchasing those items. They would not purchase any product that did not taste good, even if it was organic. They also stated that prepared foods should not cost more than eating out, specifically, it should not cost more than \$20 per complete meal.

We asked the focus group to elaborate more on the types of products they would anticipate to see in each of the following categories:

- 1) Grab ‘n’ Go
- 2) Prepared/Ready to Eat
- 3) Soups/Salads
- 4) Foods to Reheat

Responses are charted below:

Grab n Go	Prepared/Ready to Eat	Soups/Salads	Foods to Reheat
<ul style="list-style-type: none"> -Not soggy sandwiches - Sushi - Rotisserie Chicken - Roast Chicken Salad - Ramen Bowl - Pastries - Cakes -Baked savory/sweet items 	<ul style="list-style-type: none"> - Not restaurant take-out - Doesn't break the bank - Enchiladas - Lasagna - Prepared entrees - Roast Beef - Non-carb options 	<ul style="list-style-type: none"> - Whole foods salads - Need protein - Lots of veggie choices - Soups 	<ul style="list-style-type: none"> - Indian like Sukhi's - Meatballs - Soups

The focus group participants also expressed a desire that the Corner Market's inventory include non-food items like beer, wine, phone chargers, toiletries, over-the-counter medications (like Advil), coffee filters, cleaning supplies and stamps. Participants also expressed a desire that there be a knowledgeable staff, and proactive to customers' needs. Many felt that this would inform and lead to a robust patronage of the Corner Market. They also expressed that it was highly important that the staff be friendly and work to become 'part of the community'. There was a request for a community board that would serve as a 'hub of communication' for community members and patrons of the Corner Market.

Focus group participants expressed concerns regarding: increase in garbage, loitering, and appropriate lighting to the area. Other concerns included appropriate security and a reduction in parking. There was strong interest expressed in UCSF providing a community representative to listen and address their concerns once the Corner Market opened.

(For a detailed report on the focus group, please see Appendix B and Appendix C)

Conclusion:

ABC understands that the survey was primarily completed by Dogpatch/ Potrero residents, many of whom are less price-sensitive. In selecting a Corner Market operator, ABC would encourage UCSF to identify an established operator since the community wants a greater selection of fresh produce along with great customer service. The operator would have to provide local, sustainable, and organic products. A variety of fresh vegetables, and fruits will have to be provided. Dairy, fresh bread, and quality meats should also be included in the product mix. Further, the operator should be able provide grab-and-go items, and prepared foods that sell for less than \$20.

Since the Corner Market will be frequented by Dogpatch and Potrero community, customer service is equally important. The staff should be able to answer customers' questions and concerns, assist them in locating items, and quickly handle and process returns.

ABC also recommends that UCSF have an identified staff member to respond to community requests, and address their concerns both upon opening as well as ongoing. The neighborhood is excited about the Corner Market and this survey has generated additional, positive interest regarding its opening in the community.



Appendix B: Corner Market Focus Group Report

Opening/Clarifying Questions:

What does the term 'Corner Market' mean to you?

- 1) Convenience
- 2) One stop for basics
- 3) Snacks
- 4) NYC Bodega - both food and staples
- 5) Fresh Vegetables
- 6) Mini grocery
- 7) Small
- 8) Drinks
- 9) Variety
- 10) On demand essentials and missing ingredients
- 11) Efficient
- 12) Last minute items
- 13) Prepared foods
- 14) Community Market

What does convenience mean to you?

- 1) Product mix
- 2) One of everything
- 3) Variety
- 4) Proximity to home/job
- 5) Ease/Access
- 6) Drop in to pick up last minute items
- 7) Loading zone for people to load their cars with groceries
- 8) Quality of products
- 9) Certainly not expensive (Market Hall)
- 10) Drop-in
- 11) Efficient check-out
- 12) Limited offering by items
- 13) Parking
- 14) Hours of operation

What do you consider local products?

- 1) Bay Area artisans
- 2) Within 100 miles

- 3) Anything CA
- 4) SF Made to produce goods
- 5) ACME/ Cowgirl Creamery
- 6) Niman Ranch
- 7) Gilroy
- 8) Local favorites
- 9) Mitchells
- 10) Small batch producers
- 11) Grown Nearby
- 12) Like Good Eggs
- 13) Cottage Industry

When you express a desire for ‘organic foods’ what do you mean specifically?

- 1) Prefer local over organic
- 2) Those that follow sustainable farming practices
- 3) Has to be local and fresh
- 4) I eat organic foods that have a soft skin - grapes, strawberries
- 5) Non-GMO
- 6) I like the option of having organic foods
- 7) Support farmers who do the right thing

Prepared/cooked foods:

- 1) Taste is more important over it being organic
- 2) I'd pay 10% more organic prepared food but not 20-25%
- 3) Only buy organic if it is prepared food

What would you anticipate finding in the following categories of prepared foods?

Grab n Go	Prepared/Ready to Eat	Soups/Salads	Foods to Reheat
-Not soggy sandwiches - Sushi - Rotisserie Chicken - Roast Chicken Salad - Ramen Bowl - Pastries - Cakes -Baked savory/sweet items	- Not restaurant take-out - Doesn't break the bank - Enchiladas - Lasagna - Prepared entrees - Roast Beef - Non-carb options	- Whole foods salads - Need protein - Lots of veggie choices - Soups	- Indian like Sukhi's - Meatballs - Soups

Additional comments: It shouldn't cost more than \$20.00

If the Corner Market had a deli - what products would you like to see in the deli section?

- 1) Cheese
- 2) Charcuterie - salami, prosciutto
- 3) Prepared salads
- 4) Sandwiches - vegetarian/ non-meat
- 5) Custom, made to order sandwiches
- 6) Prepared pasta
- 7) Olives, antipasto, artichokes
- 8) Picnic foods
- 9) Wine
- 10) Macaroni salads
- 11) Smoked fish
- 12) Like NY Deli
- 13) Chocolates
- 14) Bagels and Cream cheese

Please create a sample grocery list for you.

- **What grocery products are a 'must have' for you? Place an asterisk next to those items**
- **Select items you prefer to be organic**
- **How much would you anticipate the cash register receipt to total?**

What would paying a premium mean to you?

10%

20%

More

(Please see the attached grocery list excel spreadsheet for each individual)

If you went to the Corner Market in the morning (7-9am) what would you be purchasing?

- 1) Milk
- 2) Cappuccino
- 3) Cereal
- 4) Pastries
- 5) Coffee beans
- 6) Lunch
- 7) Cream
- 8) Bacon
- 9) Local bread
- 10) Juice
- 11) Fruit
- 12) Gatorade
- 13) Advil/Pedia-light
- 14) Eggs
- 15) Croissants
- 16) Bagels
- 17) Feminine products

What additionally services would you like the Corner Market to provide to you as a patron?

Non-Food Items:

- 1) Foil
- 2) Ziploc
- 3) Toilet Paper
- 4) Trash bags
- 5) Stamps
- 6) Health and Beauty
- 7) Comet
- 8) Cleaning supplies
- 9) Chargers
- 10) Gum
- 11) Candy
- 12) Diapers
- 13) Coffee filters
- 14) Pharmacy - cough syrup
- 15) Wine/beer
- 16) Magazines
- 17) Nail Clipper
- 18) Ice

Additional services:

- 1) Wi-Fi
- 2) Stamps
- 3) Real people at checkout!
- 4) Flowers
- 5) Notary
- 6) Being able to get parking/BART/MUNI passes
- 7) UPS drop off
- 8) Photocopy
- 9) Red Box
- 10) ATM
- 11) Dry cleaning pickup/drop off

How quickly do you expect to get through the checkout line? "Lines should be no longer than ____people" or maximum time you expect to wait in line

There should be an express lane (5 items or less)

If there are 3 people or more in a line, they need to open another register

Lines should be 3 minutes or less

How important is it to you to have service staff who are knowledgeable about products?

- All are important
- Service, knowledgeable, and friendly

- Make eye contact
- Should know where things are
- I like the idea of a co-op; more of a buy-in

What defines 'great customer service' for you?

- Good Life!
- Know me on a first name basis
- Eye-contact
- Greeting, not hiding behind things
- Good cashier skills to be efficient
- Returns should be easy and hassle free
- Generosity of sampling
- Sense of community
- Professional services
- Enthusiastic about what they are doing
- Say you don't know if you don't know something; don't pretend
- If there is an issue, then there needs to be a manager/supervisor on site to handle the issue and quickly resolve it

Give an example of 'great customer service at a grocery store or corner market that you have patronized

- I was at TJ's and I was walking with my dog. I just needed one thing. One of their staff came out and said, I can watch your dog while you go shop
- Have a place that has a place to tie up the dog
- Water bowl for the dog

Follow up Questions:

What other questions/suggestions do you have regarding the proposed Corner Market?

- It needs to be well-lit but not too bright as there are people that live nearby
- Shouldn't have people hanging outside too much
- Well groomed/well-lit
- Considerate of the neighborhood
- Ensure that no additional parking is lost
- What time will be trash pick-up?
- Do we get to bag our own groceries or will there be baggers?
- Been a long time coming! Better get it RIGHT! Something like GoodLife, Bi-Rite grocery
- There needs to be a feedback mechanism
- Someone needs to be there at UCSF Community Relations to answer questions/concerns that the neighborhood may have
- Should have security during certain hours
- Increase in trash is a concern for me...so how are you going to resolve that?
- Consideration of neighbors
- Not a neighborhood joint
- Bulletin board
- Are there going to be bike racks?
- Public restroom