2018 iCOOP Korea Members' Consumption & Attitude Survey

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The iCOOP Korea Members Survey has been conducted every three years since 2006 with a the hope of using the results as guidelines to ensure the actions of ICOOP korea align with theh wishes of its members .The fifth survey in 2018 also read changes in the members' consumption and daily life amid huge social changes to create an ICOOP korea that is "of the members, by the members, for the members."

Survey Overview
- Objective : to understand the reality and thoghts of the members of ICOOP korea, and to design an ICOOP korea created by the members
- Respondents: Paid members of 96 local iCOOP korea cooperatives across the nation
- Period : July 10 though August 1, 2018,(Stores nationwide & online mail)
- Tool : Structured questionnaire
- Method :(in store) One-on-one face-to-face interview with the help of local co-ops' activists(surveyors) (onlie) Online survey on the online mall (shopping website)
- Sample size: 1,518 person(sampling proportioned to the number of members in local co-ops, with a confidence level of 95% ± 2.56%

December 2018
iCOOP Co-operative Institute

2018 iCOOP Korea Member Survey At A Glance

Respondents in Averages

44.2 years old

Household size
3.62 persons

Monthly household income
3~5 million won

Length of iCOOP membership
5.1 years

Of an average monthly food spending of **650,000**won
358,000 spent on ICOOP store/mall
Average of **56.9%**

Hoping for colse bond with neighbors yet relaxed solidarity

Asking neighbors fo help in critical situations *out of 100%

Members / General public

	Members	General public
Asking for help with some house chores due to severe cold	27.7%	9.0%
Feeling depressed or stressed and wanting to talk	12.1%	6.5%

Thoughts on social action *out of 7

High awareness of the need for ethical consumption(6.1).

relatively low awareness of the need to participate n group

Members / General public

	Members	General public
I purchase ethical and eco-friendly products despite their slightly higher price	6.1	5.2
I participate in social or political organization	4.2	4.6

cf. Not at all tmportant(1)– Very important(7)

Product reliability and shared values are importnt for the members. They connect ICOOP with "eco-friendly and safe food"

ICOOP online/offline stores are where they usually do their grocery shopping. * out of 100%

45.7% ~ **88.3%** of the respondents picked ICOOP as the maippn place for grocery shopping by item

Grain	Bread	Noodlies	Meat	Tofu & Egg	Milk
49.8%	58.2%	59.5%	66.4%	88.3%	64.8%

Vegetable	Fruit	HMR	Sauces	Cooking oil	Snacks
71.0%	45.7%	56.5%	69.9%	74.5%	55.2%

45.7% ~ 88.3%
of the respondents picked ICOOP as the main place for grocery shopping by item

Dreaming of work– life balanced

Members' economic paticipation–

(Housewives recording the lowest ever proportion)

Housewives	Wage earners	College/ grad students, unemployed	Self–employed, family–owned business	OTHERS
57.4%	29.8%	7.8%	1.1%	4.0%

Eating non home–cooked food(frequecy) *out of 100%

62.2% dint at laest once a week   52.0% consume ready–made food

At leest on a week / At least once a month / Less than once a month

	At leest on a week	At least once a month	Less than once a month
dine out	62.2%	28.0%	9.9%
Take–out, delivery	36.2%	36.5%	27.3%
Ready–made food	52.0%	20.7%	27.3%

Items desired for the first development * 1st and 2nd choices integrated, out of 198.1%

67.2% want developement of safe items for convenient meals (prepared food + meal kits)

Biodegradable packing materials	HMR	Meal kit	Small packaging	Alternative food (e.g. vegan food)	Green items for health&beauty
43.3%	32.4%	34.8%	23.0%	14.8%	21.8%

67.2% (HMR + Meal kit)

cf. not weighted by rank (simple intergration)

Why do you use ICOOP korea stores? * Multiple responses, out of 190.1%, simple average by item

Product reliability& shared vakues pointed average by item

Product reliability	Shared values	Fresh food	Good taste
85.8%	32.5%	19.3%	11.1%

Members think of ICOOP korea *open–ended question

Members think of ICOOP korea as
" trustworthy food that is safe to eat"

cf. The more often the word is mentioned, the larger is is

Who Are ICOOP Korea Members?

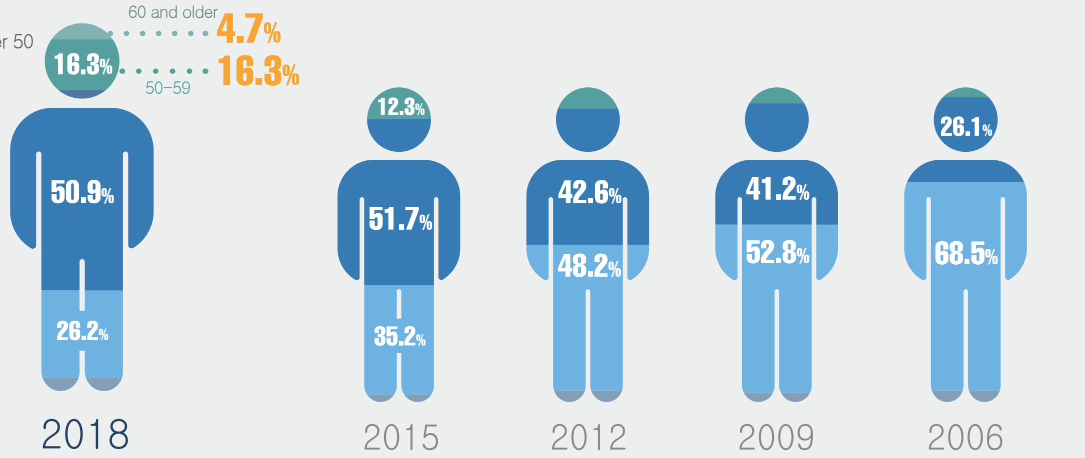
Diversified age groups and economic participation

Respondents' age distribution *out of 100%

44.18 years old on average

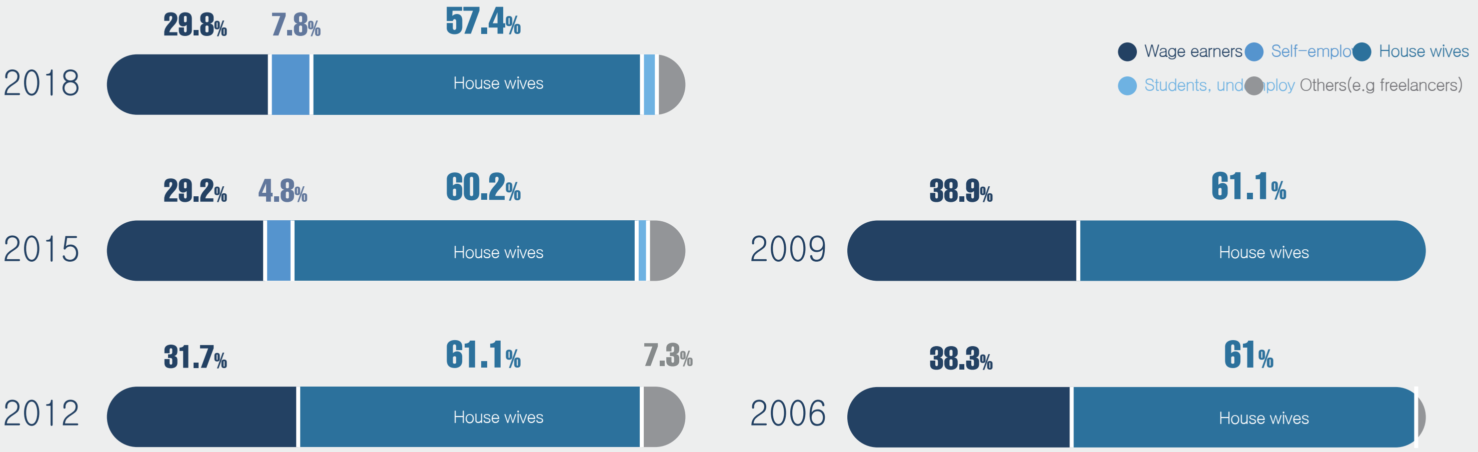
40–49 still the largest group, a sharp increase over 50

60 and older
50–59
40–49
30–39
29 and younger



Respondents' occupation

Fewer housewives, more self-employed

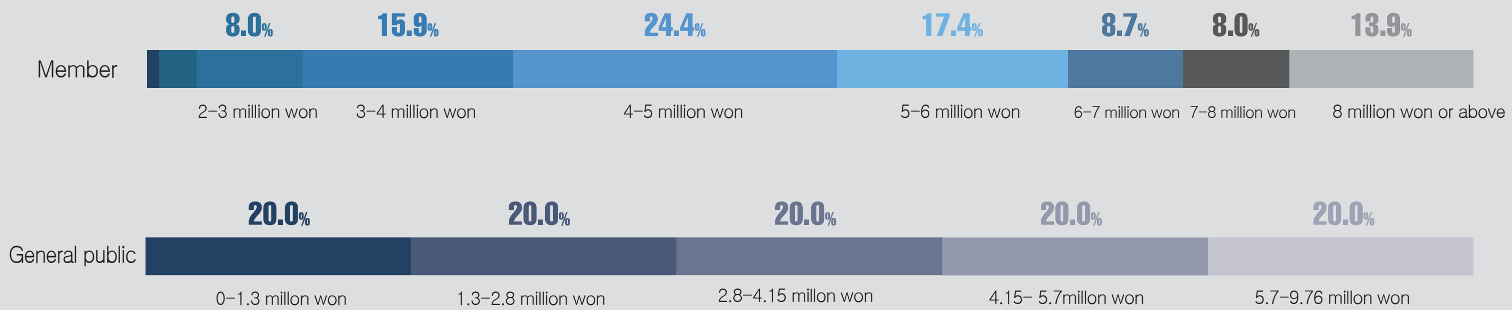


cf. For 2006–2012 surveys, wageearners included the self-employed, and others included college grade students and the unemployed.

Small income gap, strong middle-income class

Members' monthly household income distribution * out of 100%

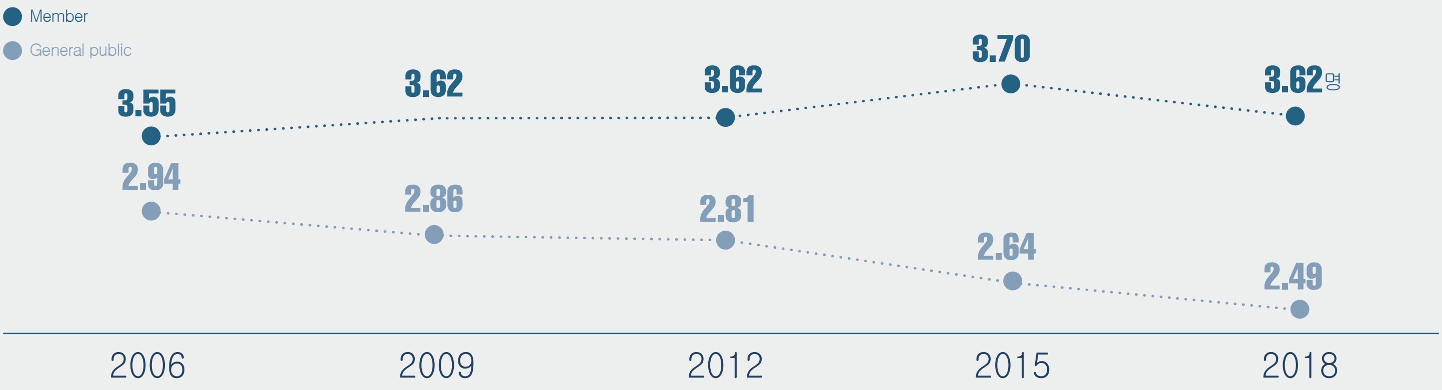
Middle- income groups earning 3–5 million won a month are dominant.



cf. general public data source: Household Income and Expenditure Survey by Statistics Korea

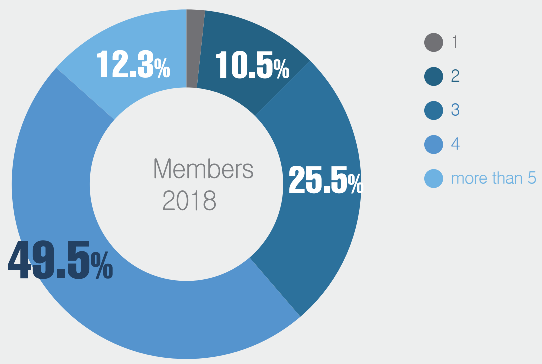
Members’ households’center around a family of four

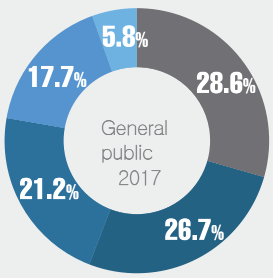
Trend in average household sizes



주 cf. general public data sauce: National Population Census by Statistic

Household size *out of 100%



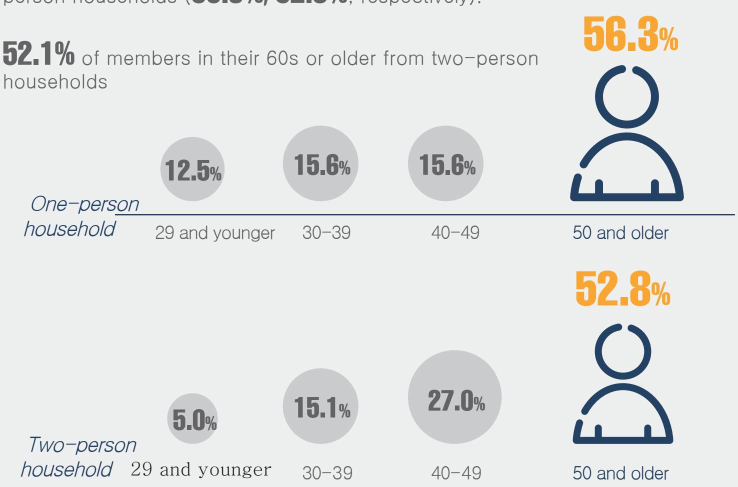


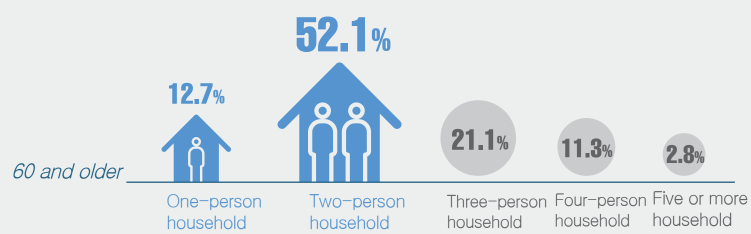
주 cf. general public data sauce: National Population Census by Statistic

Relationship between respondent’s age and household size * out of 100%

Older generations(members in their 50s or older) account for the majority of single and two-person households (**56.3%, 52.8%**, respectively).

52.1% of members in their 60s or older from two-person households

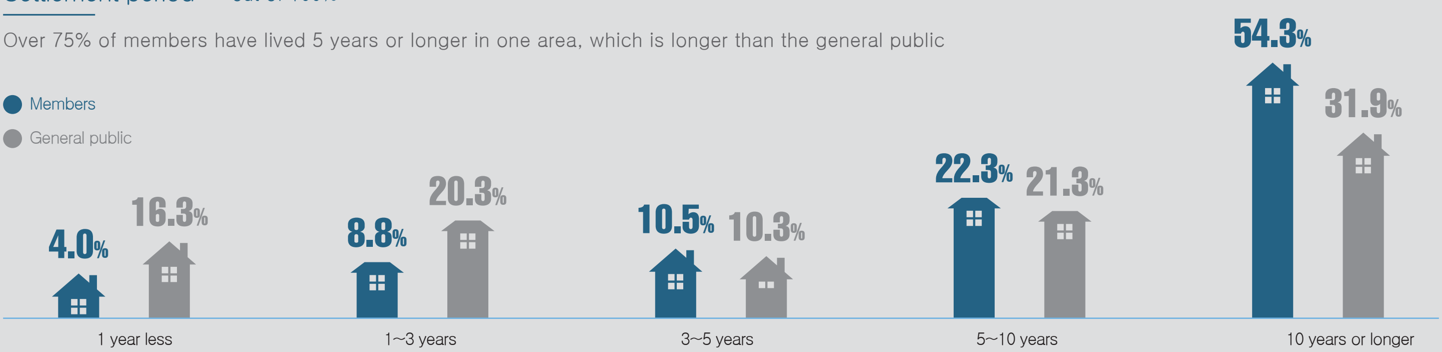




Long settlement period – possibility of close local communities?

Settlement period * out of 100%

Over 75% of members have lived 5 years or longer in one area, which is longer than the general public



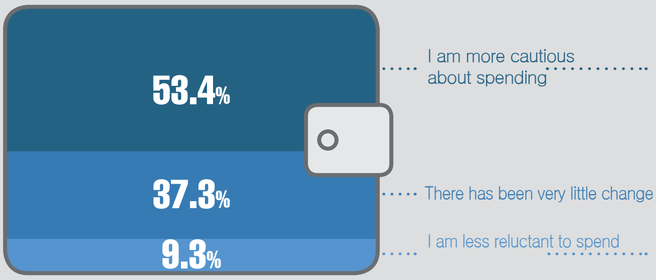
주 cf. general public data source: National Population Census by Statistic Korea

Thoughts on changing lifestyles, society and economy

Shrinking consumer confidence due to economic factors, such as inflation and economic downturn

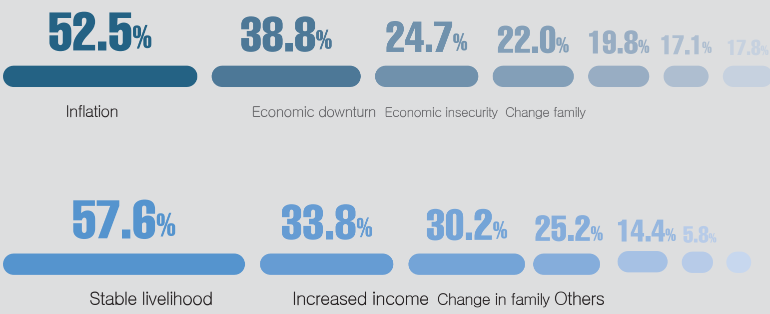
Changes in consumption attitude (motivation to purchase)

*out of 100%



Reasons for changed attitudes towards consumption

* out of 100%

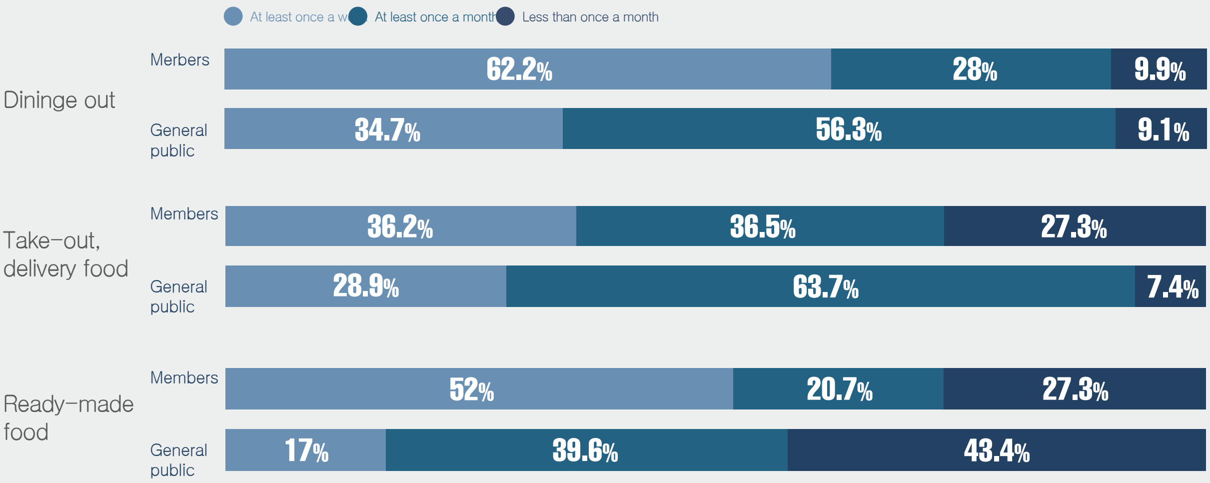


More frequent eating of non– home– cooked food & Concern for food safety

Frequency of home meal replacement

* out of 100%

More frequent eating non–home–cooked food, including dining–out, than the general public

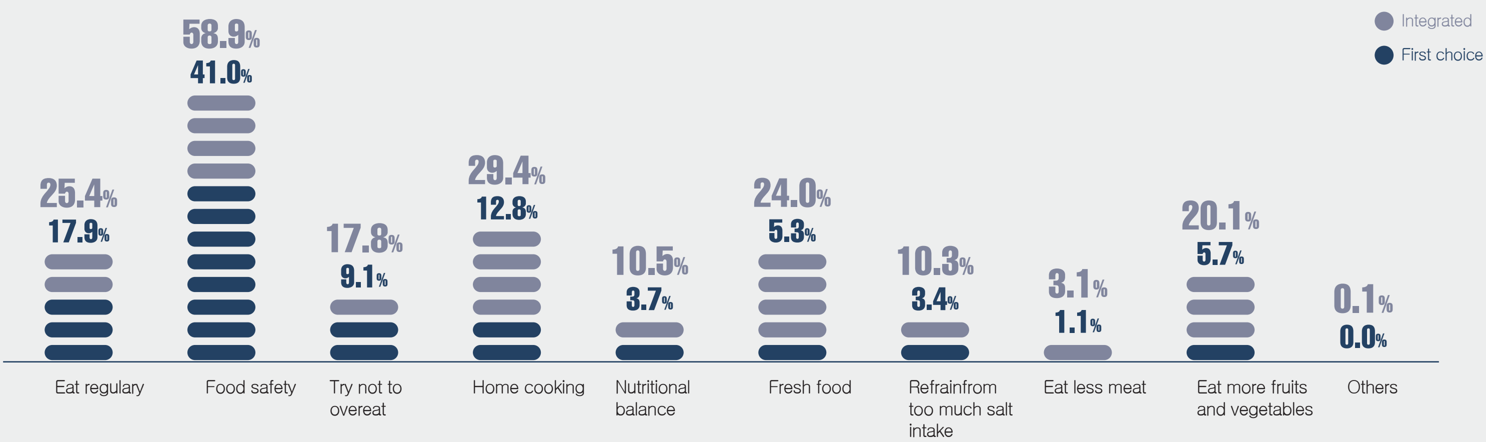


cf. general public data source; 2017 Statistic Report on Food Consumption by korea Rurak Economic institute (2017)

Matters members pay attentionto in their diet

* Mutiple responses, out of 199.6%

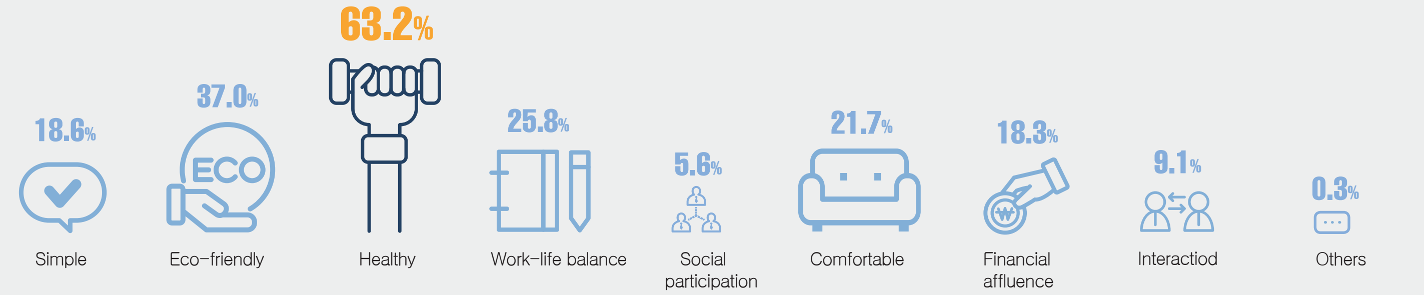
Cooking their own food is important out of concern for food safety



Aming for healthy and green lifestyles & Inclination towards spending on health and leisure

Lifestyle that members dream of

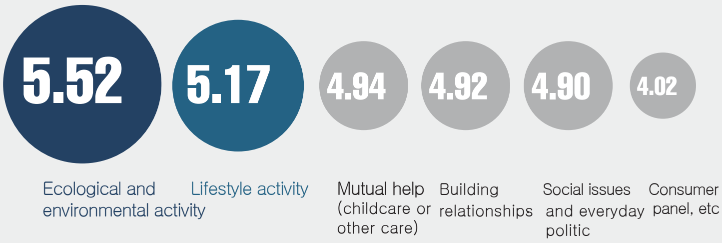
* Multiple responses, out of 199.7%



Level of interest by activity

* out of 7

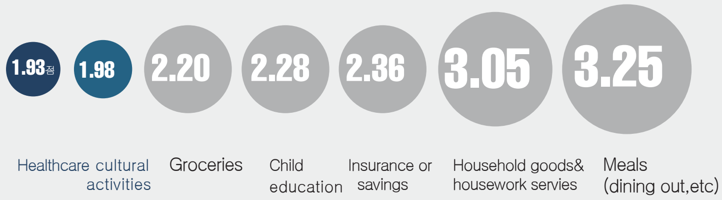
cf. Not at all interested (1) ~ Very interested (7)



Intention to save money, by sector

*out of 4

cf. Spending increase is okay (1) – Want to cut spending (4)

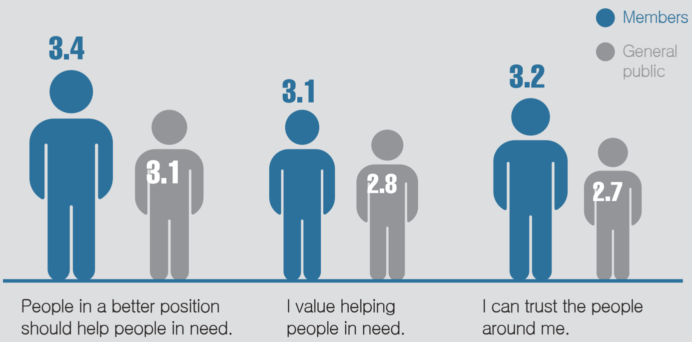


Relatively low awareness of the important of participation in group despite social appropriateness and high awareness of social responsibility

Thougths on social appropriateness and trust

*out of 4

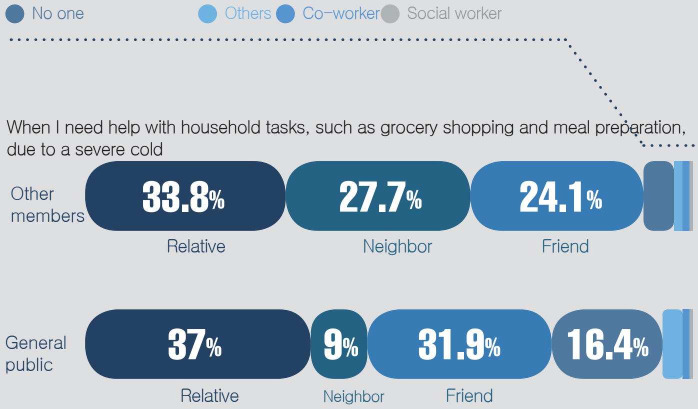
cf. Completely disagree(1) ~ Completely agree(4)



cf. general public data source : 2017 Social Integration Survey by Korea Institute of Public Administrtion (2017)

Who to ask for help in times of need

*out of 100%



cf. general public data source : A Study on the Assessment of Social Intergration and Follow-up Action by Korea Institute for Health and Social Affairs (2017)

Thoughts on social action

* out of 7

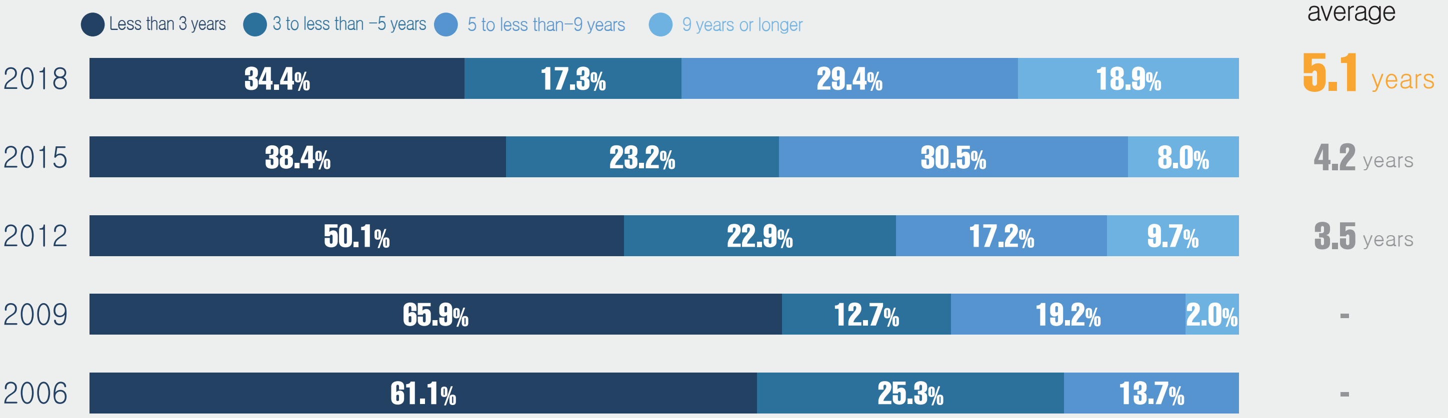
Members General public

cf. Not at all important (1) ~ Very important (7)

Use of and Expectations for ICOOP Korea

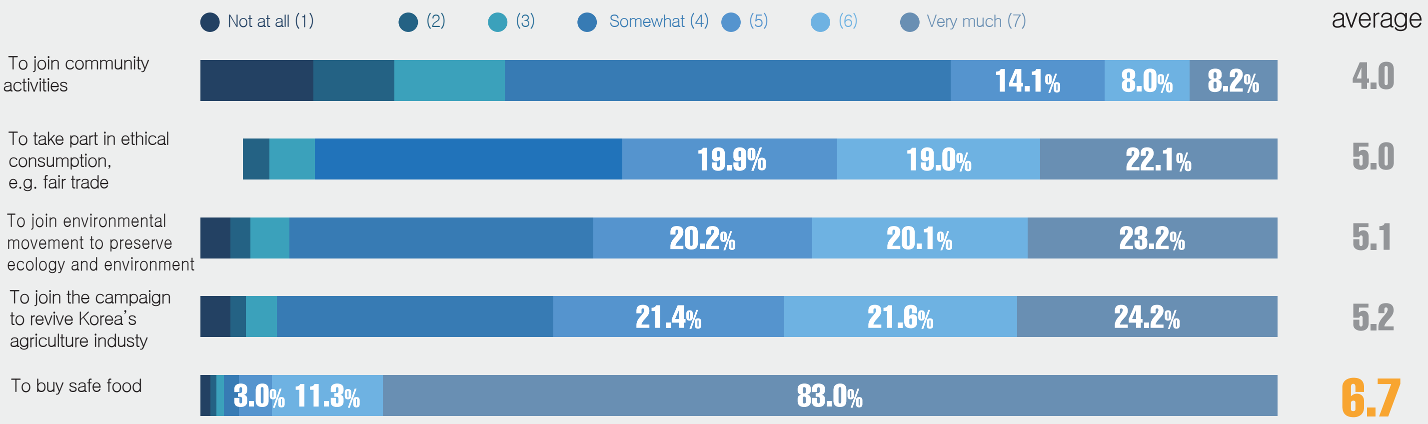
Members tend to have longer membership periods and use others co-ops as well.

Length of membership
* out of 100%



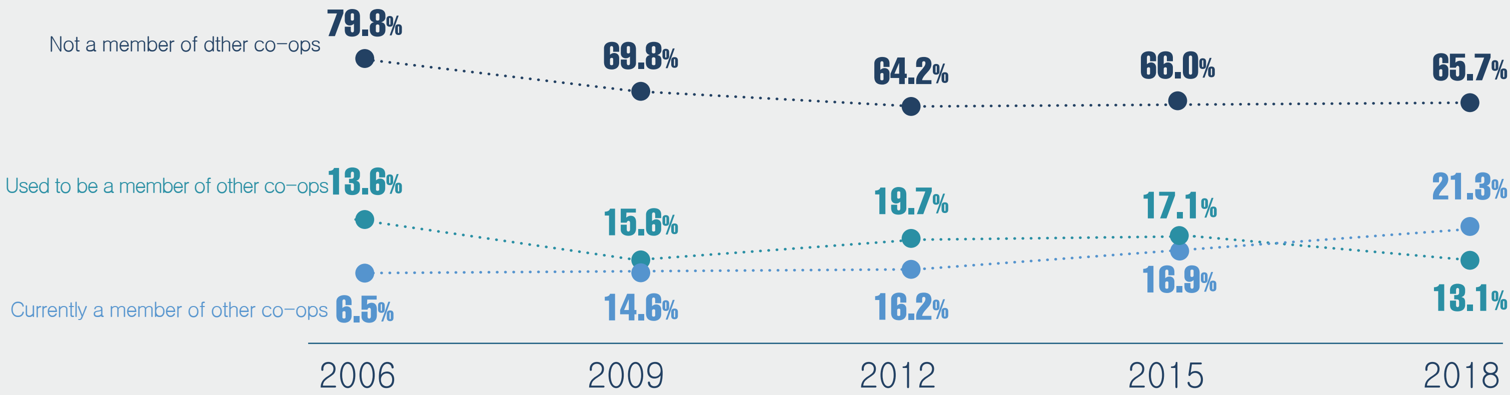
Reasons for joining
*out of 100%, out of 7

Most members join to "purchase safe food"



Membership to and use use of other cooperatives
* out of 100%

There has been an increse in the number of members who have joined and used other co-ops(21.3), particularly among members who have been with ICOOP Korea for 3-5 years



Shopping with ICOOP Korea: increased visits but decreased spending

Principal method of shopping ICOOP Korea product

*out of 100%

Mainly at offline stores: **75%**

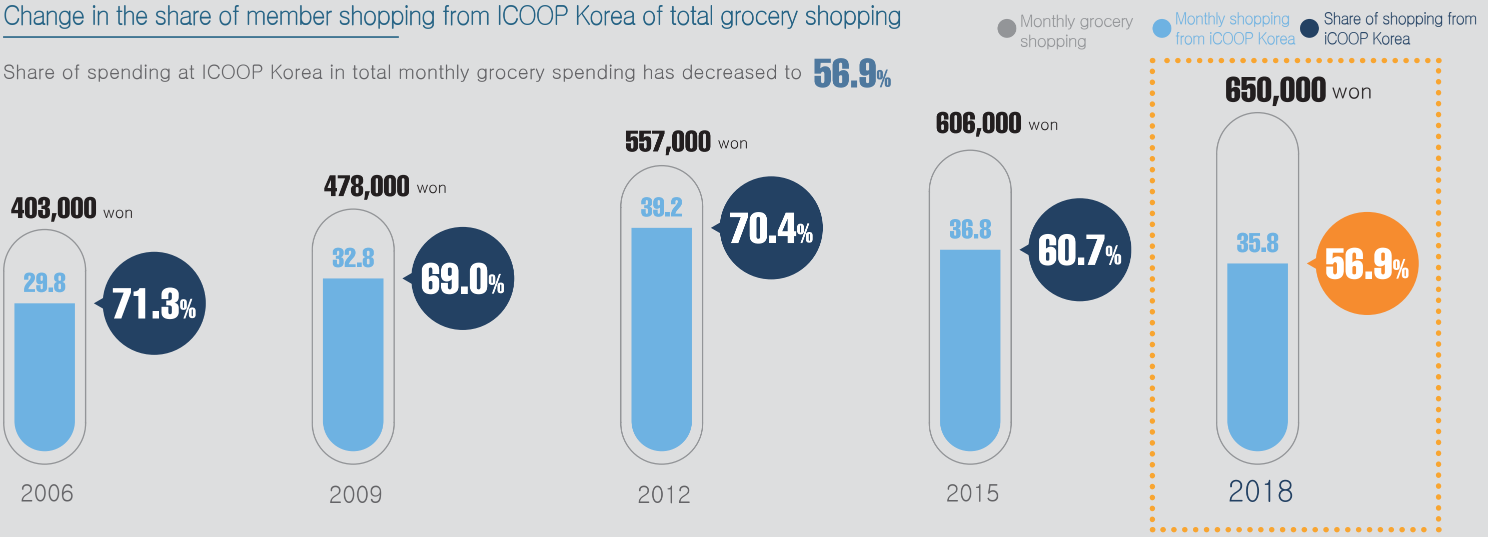
Monthly visits to stores/online mall, spending per visit

Per- visit spending has decreased despite the higher number of visits by members who use both stores and online mall.

Classification		Store 2018	Store 2015	Store 2012	Store 2009	Online 2018	Online 2015	Online 2012	Online 2009	Online 2006
No. of visits	Total	8.43	–	–	–	1.66	–	–	–	4.8
	Mainly store	9.7	9.4	8.4	–	0.3	0.4	2.1	–	.
	Mainly online	3.5	4.0	7.7	–	6.7	4.6	4.21	4	4.8
Spending per visit (in won)	Total	32,779	–	–	–	22,383	–	–	–	–
	Mainly store	33,360	35,000	54,000	–	15,778	5,000	56,000	–	.
	Mainly online	29,710	42,000	45,000	–	41,444	68,000	32,400	–	–

Change in the share of member shopping from ICOOP Korea of total grocery shopping

Share of spending at ICOOP Korea in total monthly grocery spending has decreased to **56.9%**

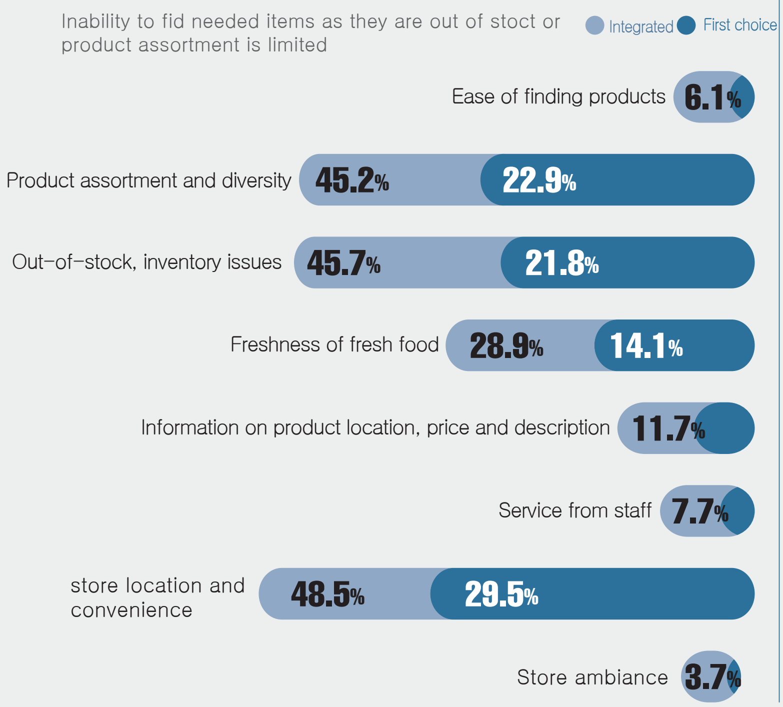


It is inconvenient that products are sometimes not available, but trust product safety and satisfaction remains.

Areas for improvement at stores

* Multiple responses, out of 192.4%

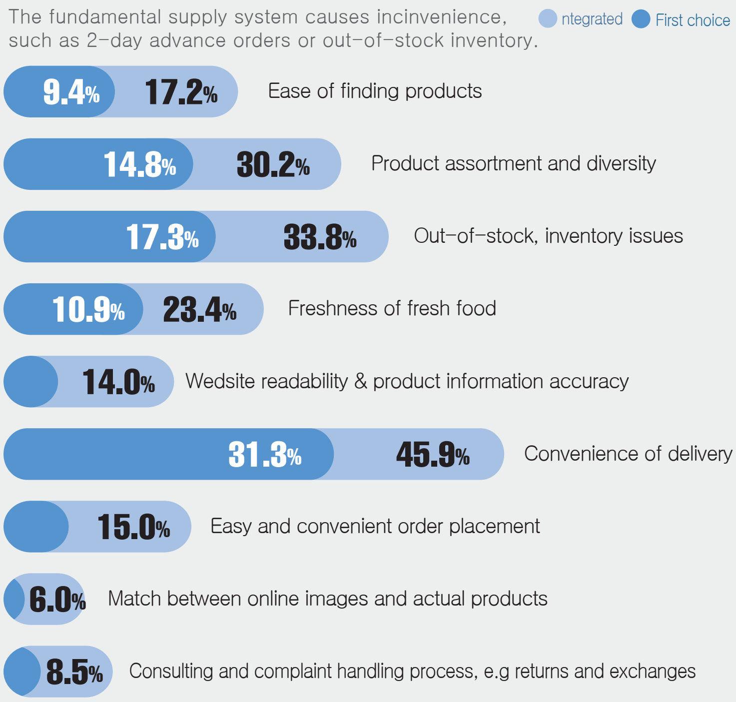
Inability to fid needed items as they are out of stoct or product assortment is limited



Areas for improvement at the online mall

* Multiple responses, out of 194%

The fundamental supply system causes incinvenience, such as 2-day advance orders or out-of-stock inventory.



Overall opinions on ICOOP Korea products

* out of 4

At least **80%** of respondents expressed positive opinions(Much, Very Much) of the products from ICOOP Korea.

sThe higher levels of agreements are   seen in the following areas: confidence in product safety (98.6%) and satisfaction with products used (94.3%)

cf. Not at all (1) ~ Very much(4)

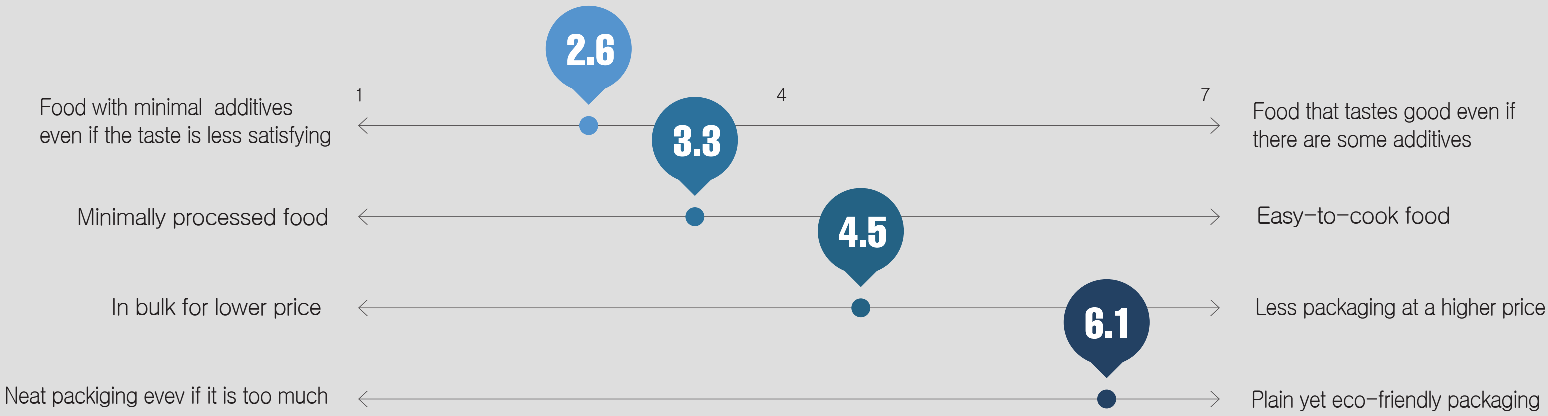
Member choice 2018?

Purchasing considerations

* out of 7

Member prefer eco-friendly packinging and minimal additives.

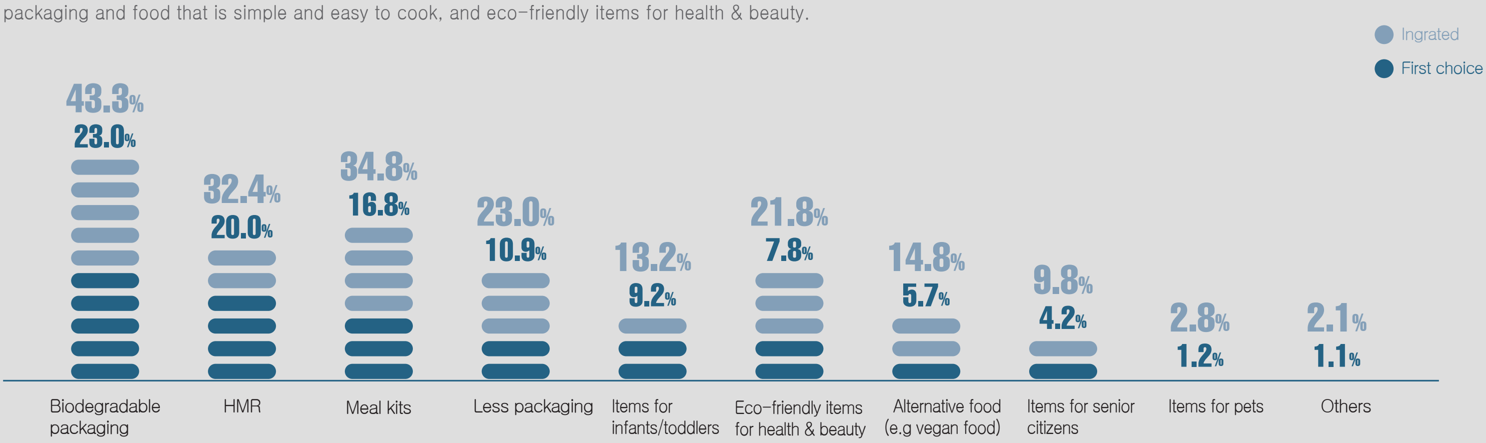
The are concerned about whethert to choose cost-effectiveness or less packinging , and ease of cooking or minimized processing



Products that members want ICOOP Korea to develop first

* Multiple responses out of 198.1%

Member inclination towards protecting the environment, convenience and health has been reflected in eco-friendly packaging and food that is simple and easy to cook, and eco-friendly items for health & beauty.



iCOOP Korea , the Future We Create Together

A good understanding and a strong sense of ownership of familier programs and activities· · · ·

Change of thinking after joining iCOOP Korea

* Multiple responses, out of 198.7%

Members feel significant changes in the issues close to them, such as food safety and the enviroment.

2018

79.5% I am more aware of food safety

- I have become more interested in social issues 43.8%
- I have better understanding of ethical consumption 28.7%
- I have become more interested in our agriculture in Korea 16.9%
- I have become more interested in social issues, such as consumer's right to know and job-relatea problems 12.9 %
- I am more aware of food safety 9.7%
- I am not changed much 7.2%

2015

79.2% I am more aware of food safety

- I have a better understanding of ethical consumption 48.8%
- I have become more interested in environmental and ecological issues 31.8%
- I am more aware of the value of cooperation 15.8%
- I have become more interested in our agriculture in Korea 15.5%
- I have become more interested in social issues, such as consumer's right to know and job-relatea problems 4.9 %
- I am not changed much 3.9%

The degree of a sense of ownership from participation in iCOOP in Korea activities

* out of 4, out of 100%

Members feel a part of cooperation through participation in activities open to many

cf. I do not have a sense of ownership(1) ~ I have a strong sense of ownership (4)

	Average(out of 4)	Have never participated(in %)
Diverse campaign	2.37	12.0%
Community or small group activities at local cooperation	2.13	15.7%
General Assembly of local cooperatives	1.74	16.4%
Visit to Gurye and Goesan Natural Dream Park	1.82	21.9%
Varoius Events of Co-operatives	2.16	26.2%

Understanding of iCOOP Korea

* out of 4

Members have a good understanding of programs related to daily use (e.g member reward points, membership fees) but a poor understnading of the foundation of members activities and the organizations to which the cooperative donates.

cf. I do not knw at all(1) ~ I know very well(4)

1. It works to promote awareness of the threats posed by harmful substances and the consumer's right to know by engage in a GMO Full Disclosure campaign and a Body Burden Reduce campaign. **3.43**
2. It is a cooperative that is contributed to, used, and run by its members. **3.34**
3. The advance payment system shares the burden of production costs with producers and allows the co-op to lower cost. **3.34**
4. Menbers get "member reward points" based on length of membership and amount invested. **3.29**
5. It has established Natural Dream Park In Gurye and Goesan with the participation of members, producers and emplyees to create a food safety system from production to distribution to consumption. **3.22**
6. Membership fees are used to train members, develop activists and promote campaigns. **3.20**
7. It sets product standards to meet member expectation and examines the sustainability of production and consumption through its own certification system called iCOOP Certification AAA **3.03**
8. Activities at local cooperatives are organized by volunteers. **2.94**
9. Local co-op activists become leaders at locel communities through various activities and take on responsibilities. **2.82**
10. The Seed foundation for the Social Economy of Korea supports marginalized groups and contributes to the creation of a cooperative ecosystem. **2.56**

Information should always be accessible and available

iCOOP Korea's information and news media that the members view as important

* out of 4, out of 100%

Members value the media that is always accessible and available, such as mobile messengers and social media channels of local cooperatives.

Not important(1) ~ Very important(4)

	Average(out of 4)	Do not know about this medium(%)
Kakao Talk Plus Friend	2.96	2.4%
Online mall pop-up window announcements	2.66	6.0%
Local co-op on social midea	2.60	5.7%
Participation in local co-op activities	2.49	4.3%
Local co-op websites, newsletters	2.41	6.2%
iCOOP Korea on social media and iCOOP Korea app	2.36	10.6%
iCOOP Korea website,blog	1.95	19.4%

Importance of information and news media by survey year

* out of 4

cf. Not important (1) ~ Very important (4)

More members feel the media needs to provide more information or news.
This may be an indication of a desire not to miss out on information or news.

2018

Kakao Talk Plus Friend	2.96
iCOOP Korean on social media and iCOOP Korea app	2.36
iCOOP Korea websites , blog	1.95
Online mall pop-up window announcement	2.66
Local co-op on social media	2.60
Participation in loical co-op activities	2.49
Local co-op websites, newletters	2.41

Average necessity, bt media 2.49

2015

iCOOP Korea Facebook page	1.87
iCOOP Korea blog	1.87
Ofiicial iCOOP Korea website	2.40
Local co-op newsletters	2.93
Local co-op websites	2.27

Average reads by media 2.27

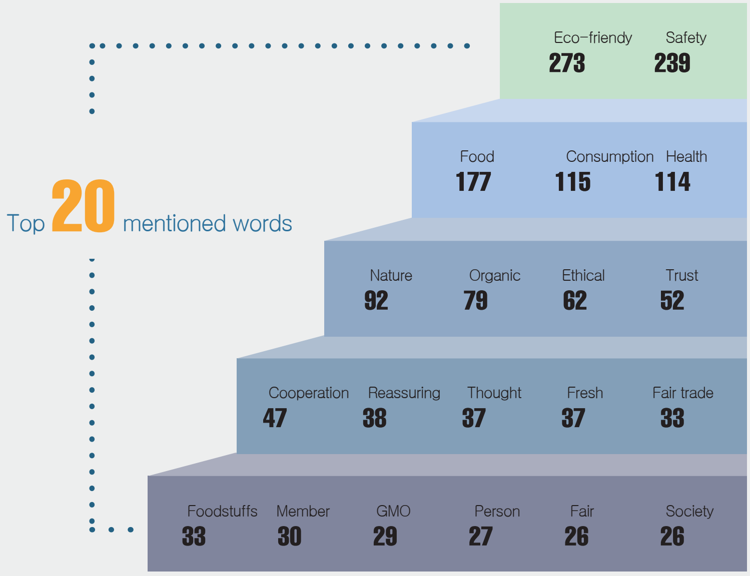
"Eco-friendly", "Safe" and "Food": From current images to expectations

Images when you think of ICOOP Korea

* open-ended question

Members think of iCOOP Korea as ",trustworthy food that ts safe to eat"

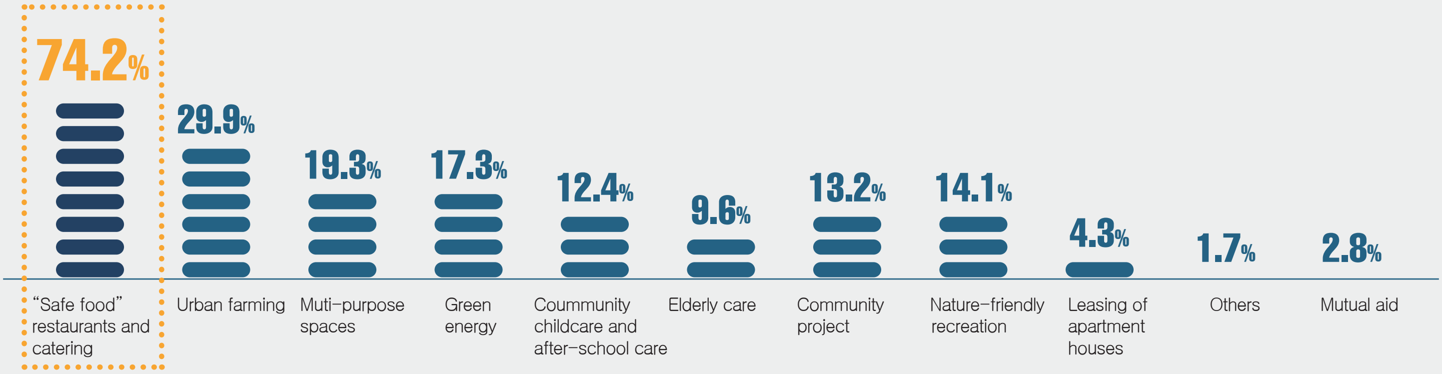
주 cf. The more the word is mentioned, the larger it is.



Future issues which iCOOP Korea should prepare for

* Mutiple responses, out of 198.1%

The topic that needs to be addressed the most by iCOOP Korea's business is "safe food"



Future expectations for iCOOP Korea

* Mutiple responses, out of 199.7%

"Promoting ethical consumption ans production to make life": expectations as expressed by 70% of repondents

This indicates their expectation that iCOOP Korea will maintain its purpose and grow in maturity and quality