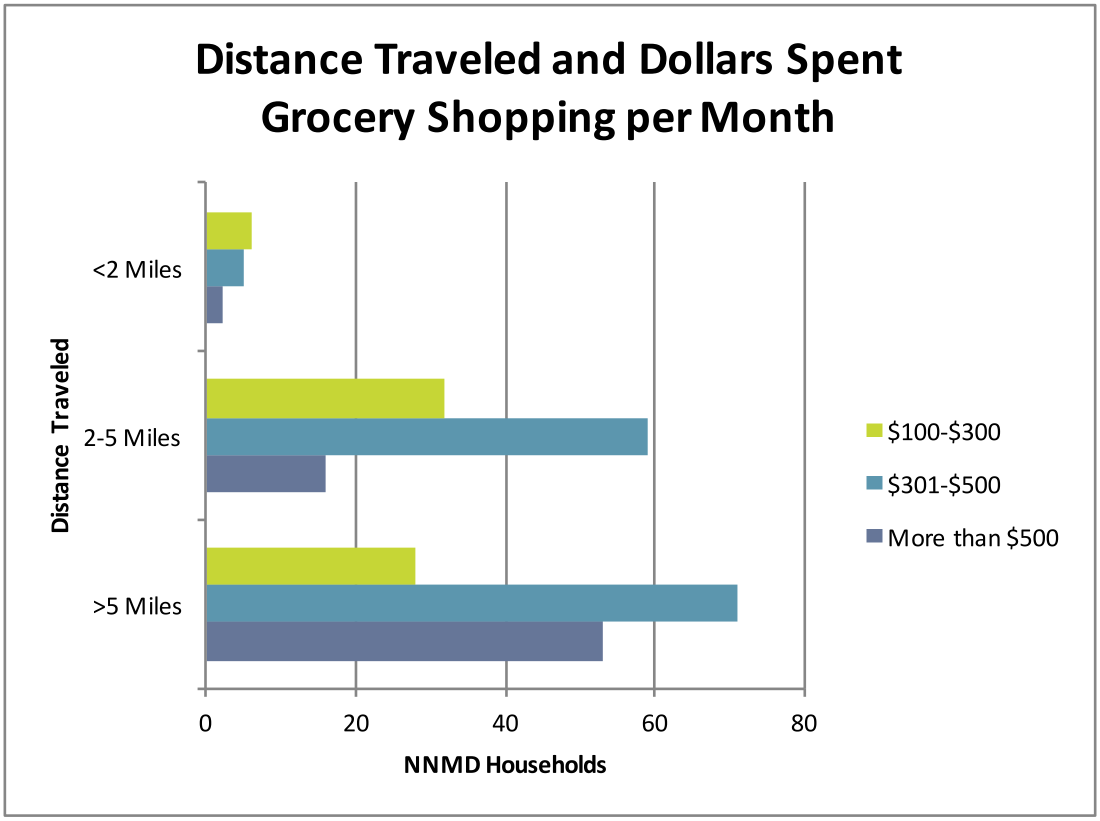
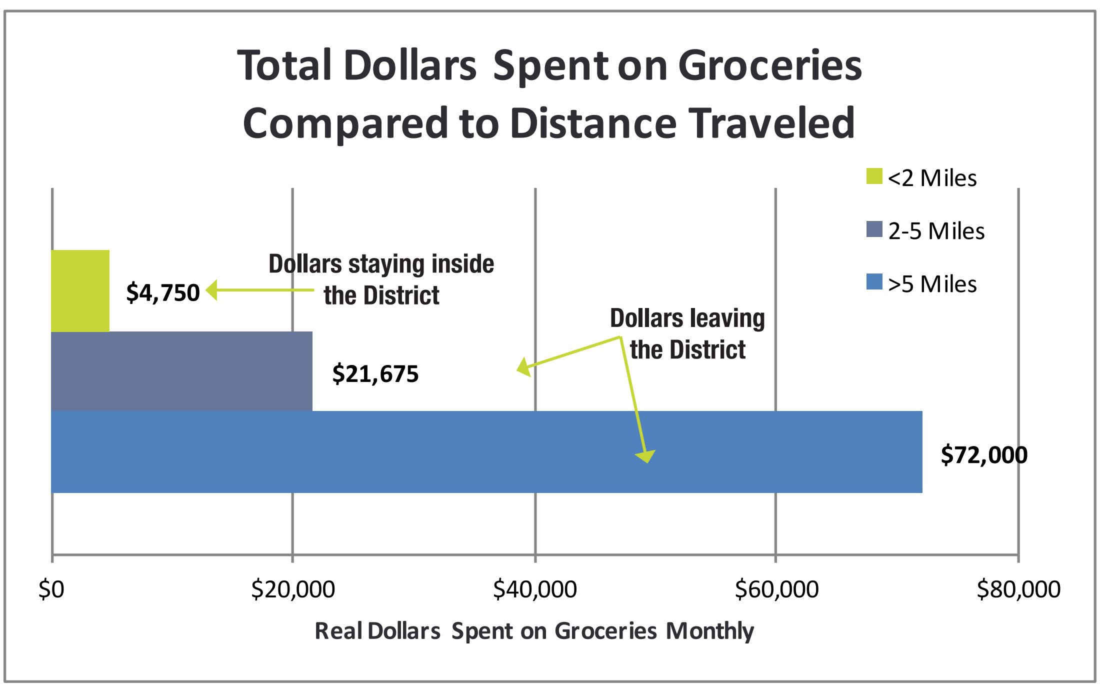
2015 GROCERY STORE STUDY
NEAR NORTHWEST MANAGEMENT DISTRICT

In Fall 2015, a survey was taken of residents in the Greater Inwood area, a group of neighborhoods in the northwest Houston area. From the data, we can report that 80% of those surveyed (282 respondents) had between 1-3 members in their household (226). Over half of them (154) purchased groceries 4-6 times per month. Over half surveyed (155) traveled more than 5 miles, followed shortly behind by 40% (113) who travel between 2-5 miles. Only 13 surveyed traveled less than two miles to the grocery store. Half of those surveyed spend between $301 - $500 per month on groceries, with roughly a quarter spending over $500, and the remaining 23% spending between $100-$300.

MORE THAN HALF OF THOSE SURVEYED -- 55% OF RESPONDENTS -- TRAVEL MORE THAN 5 MILES FROM THEIR HOME IN THE GREATER INWOOD AREA REGULARLY TO PURCHASE THEIR GROCERIES.





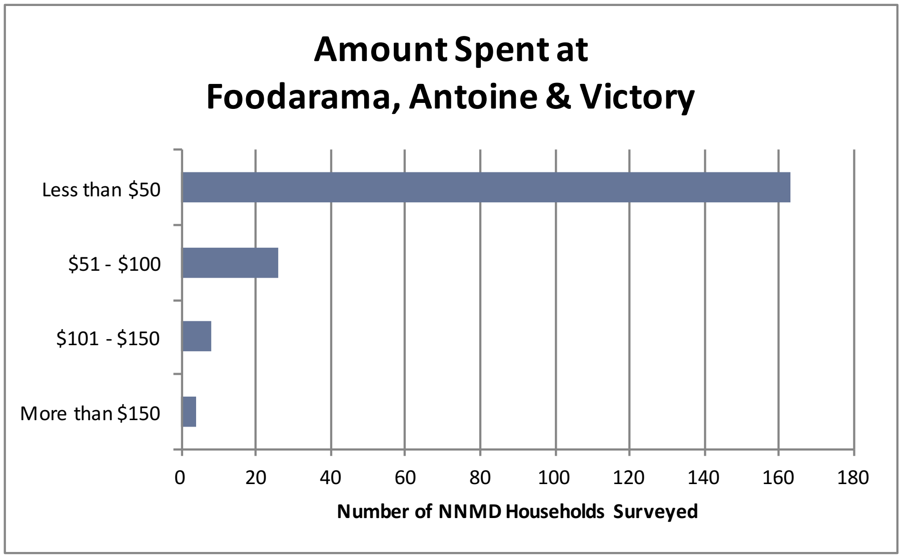
AN ESTIMATED $93,675 IS REPORTED TO LEAVE THE DISTRICT EACH MONTH FROM THESE RESIDENTS AS THEY TRAVEL TO STORES A DISTANCE OF 2 TO OVER 5 MILES AWAY TO SHOP FOR GROCERIES.

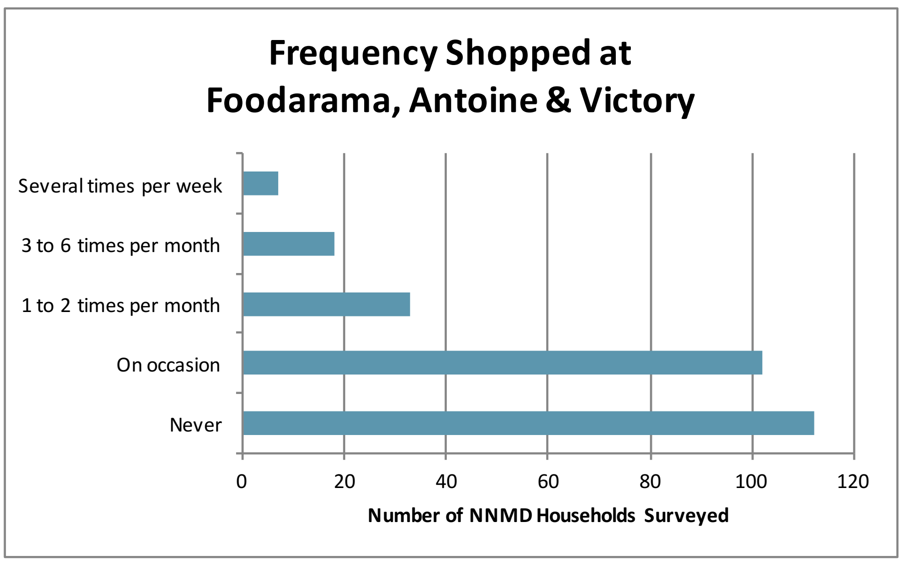
LOCAL GROCERY STORE FEEDBACK

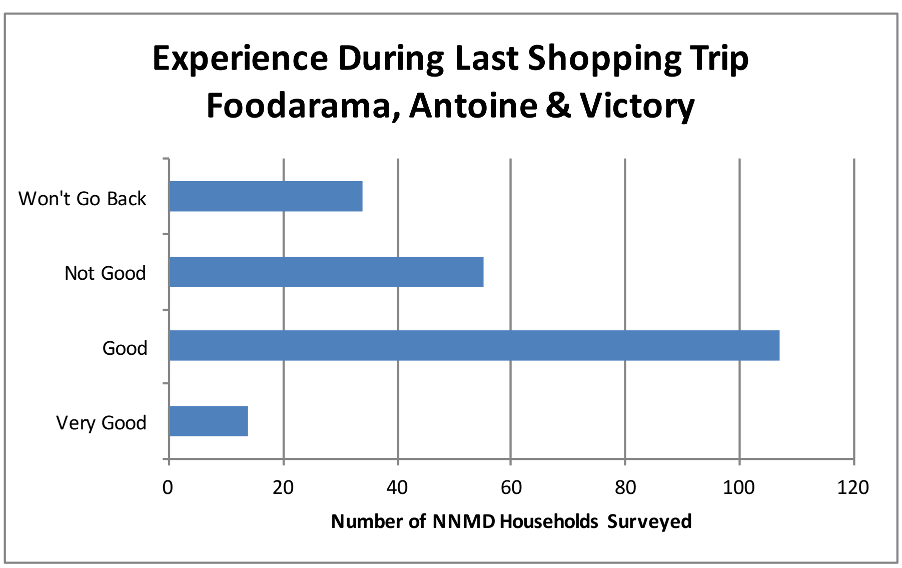
FOODARAMA AT ANTOINE & VICTORY

Of those surveyed, 41% (116) never shop at the Foodarama located at Antoine and Victory. 37% shop there occasionally. 81% of those surveyed spent less than $50 there the last time they shopped.

About half of those surveyed (108) indicate their Foodarama shopping experience was “good”, however, an almost equal amount indicate their experience was either “not good” (27%) or won’t go back (16%). 7% indicate their experience was “very good”.





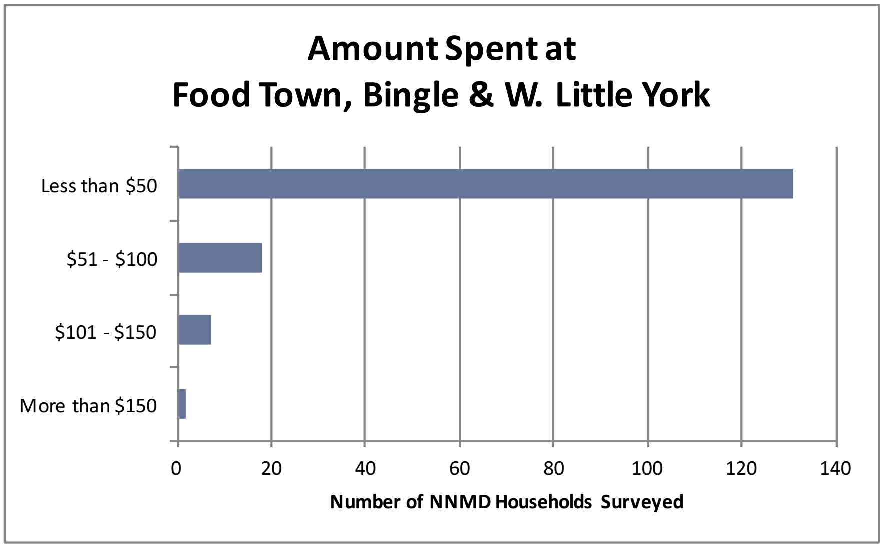


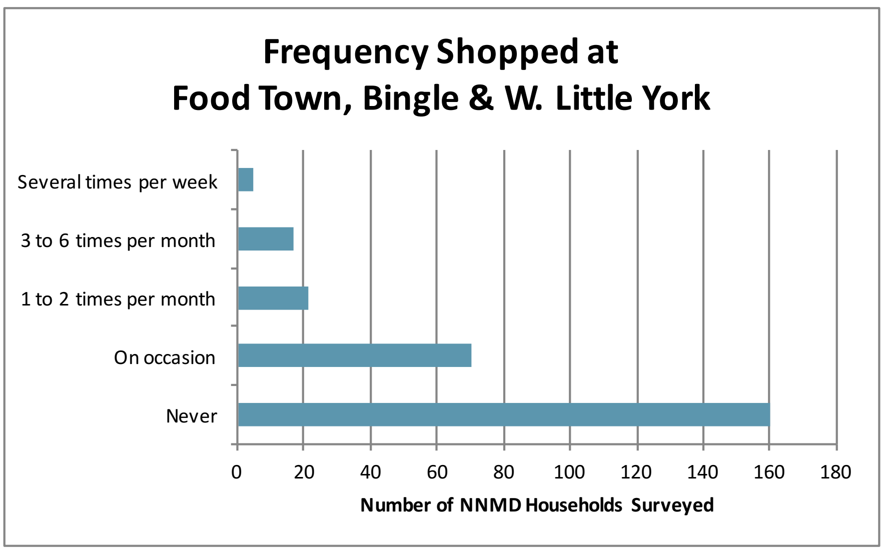
LOCAL GROCERY STORE FEEDBACK

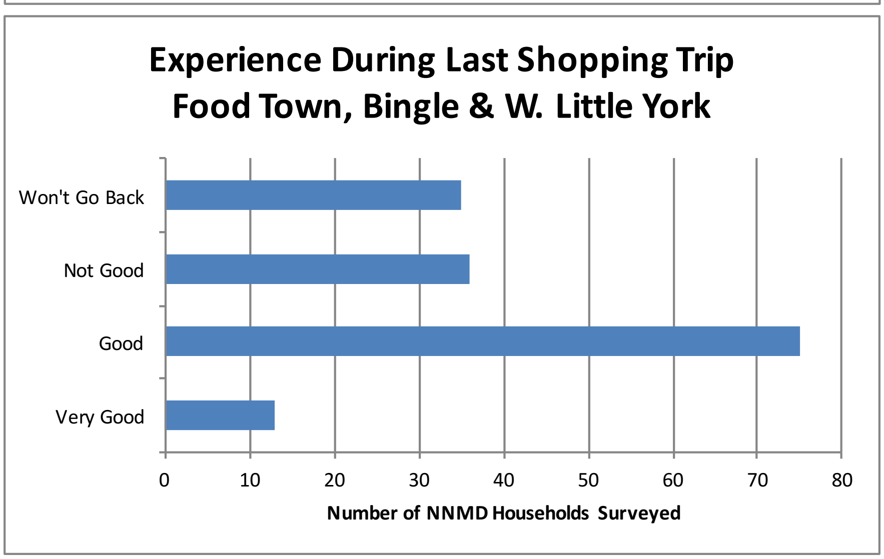
FOOD TOWN BINGLE & WEST LITTLE YORK

Of those surveyed, 59% (166) never visit Food Town located at Bingle & West Little York. A quarter surveyed (72) responded they visit Food Town "on occasion". About 15% of those surveyed visit between 1-2 times per month (7.5%), and several times per week (2%).
The majority of those surveyed (83%) spent less than $50 at Food Town the last time they shopped there.

Of those who answered the survey question (161) 47% indicated their experience was "good". Almost 50% of responders indicated their experience was either "not good" (23%) or they "won't go back" (22%).
Just 8% (13) indicated they had a "very good" experience shopping at Food Town.





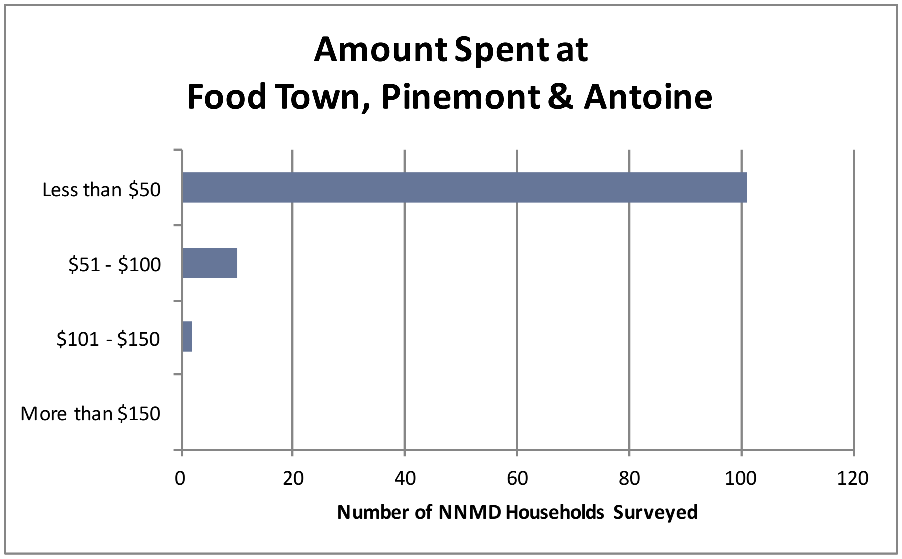


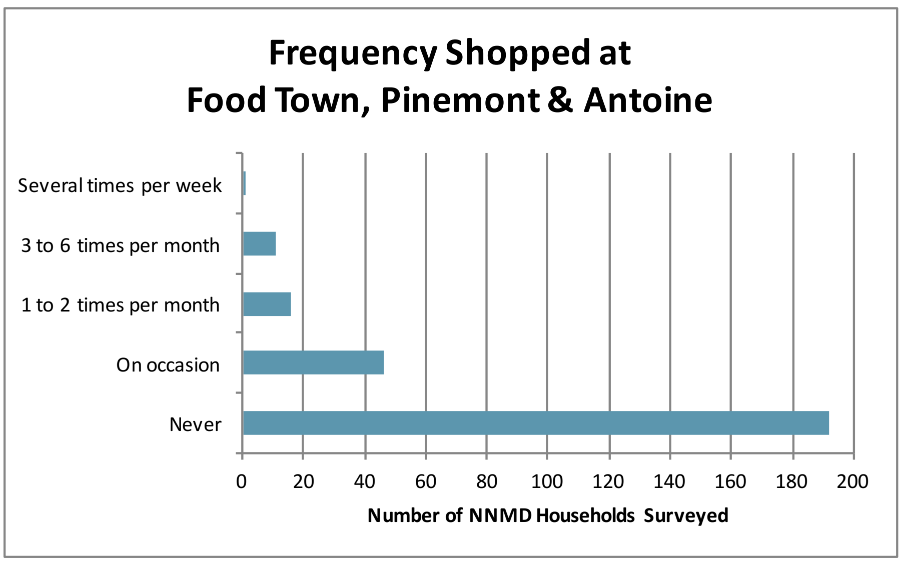
LOCAL GROCERY STORE FEEDBACK

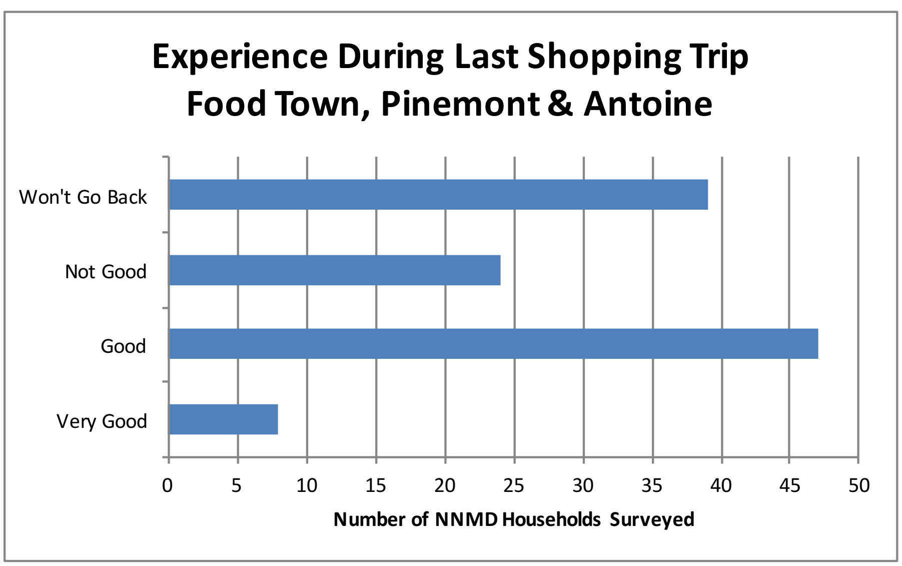
FOOD TOWN PINEMONT & ANTOINE

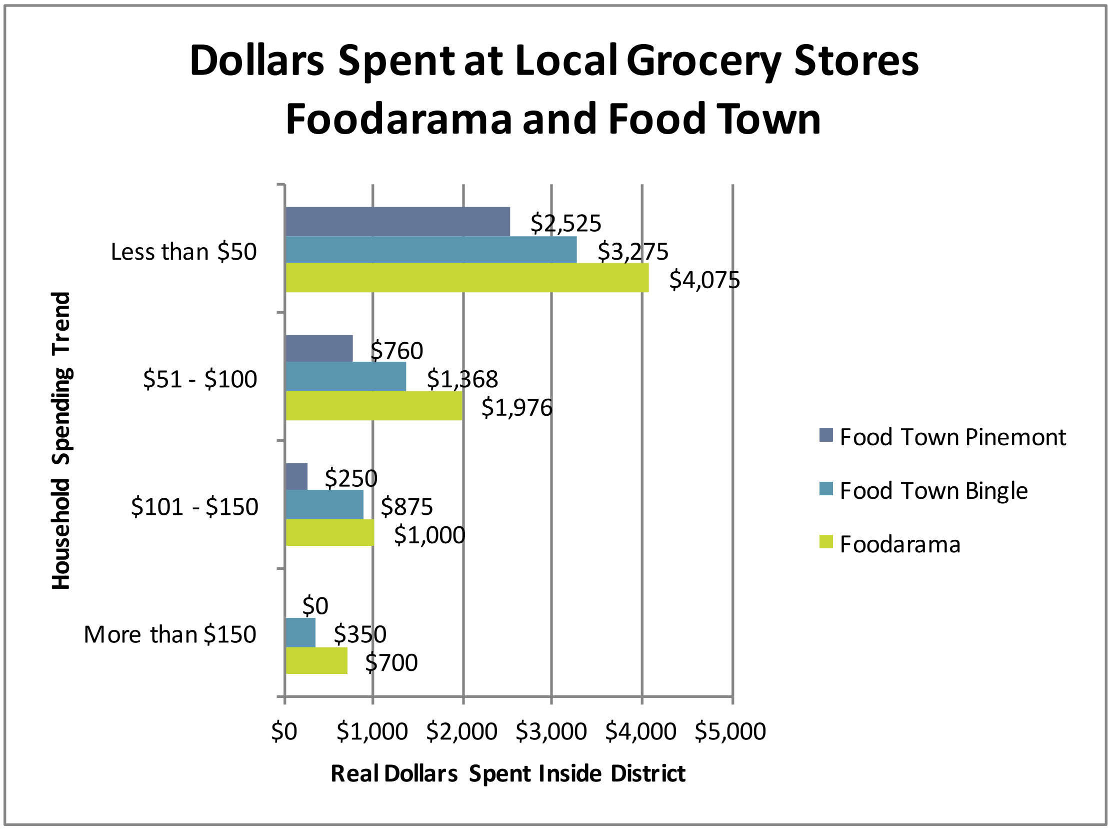
Of those surveyed, 72% (197) never visit Food Town located at Pinemont & Antoine. 18% surveyed (48) responded they visit Food Town "on occasion". Less than 11% (29) shop there regularly.
90% of the respondents (105) indicate they spent less than $50 on their last visit to the Pinemont & Antoine Food Town.

When asked how their shopping experience was, over half over respondents indicated they either "won't go back" (33%) or "not good" (21%). 40% of respondents (48) had a "good" experience, and just 6.5% of respondents had a "very good" experience (8).

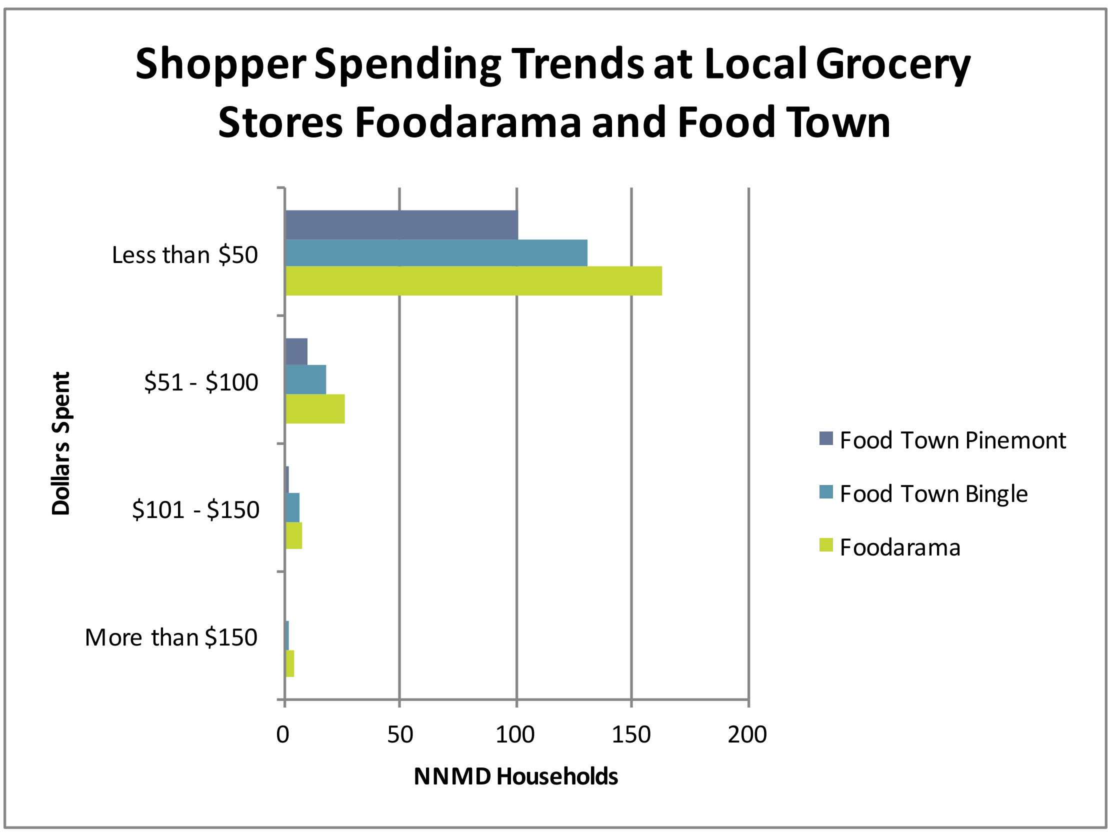






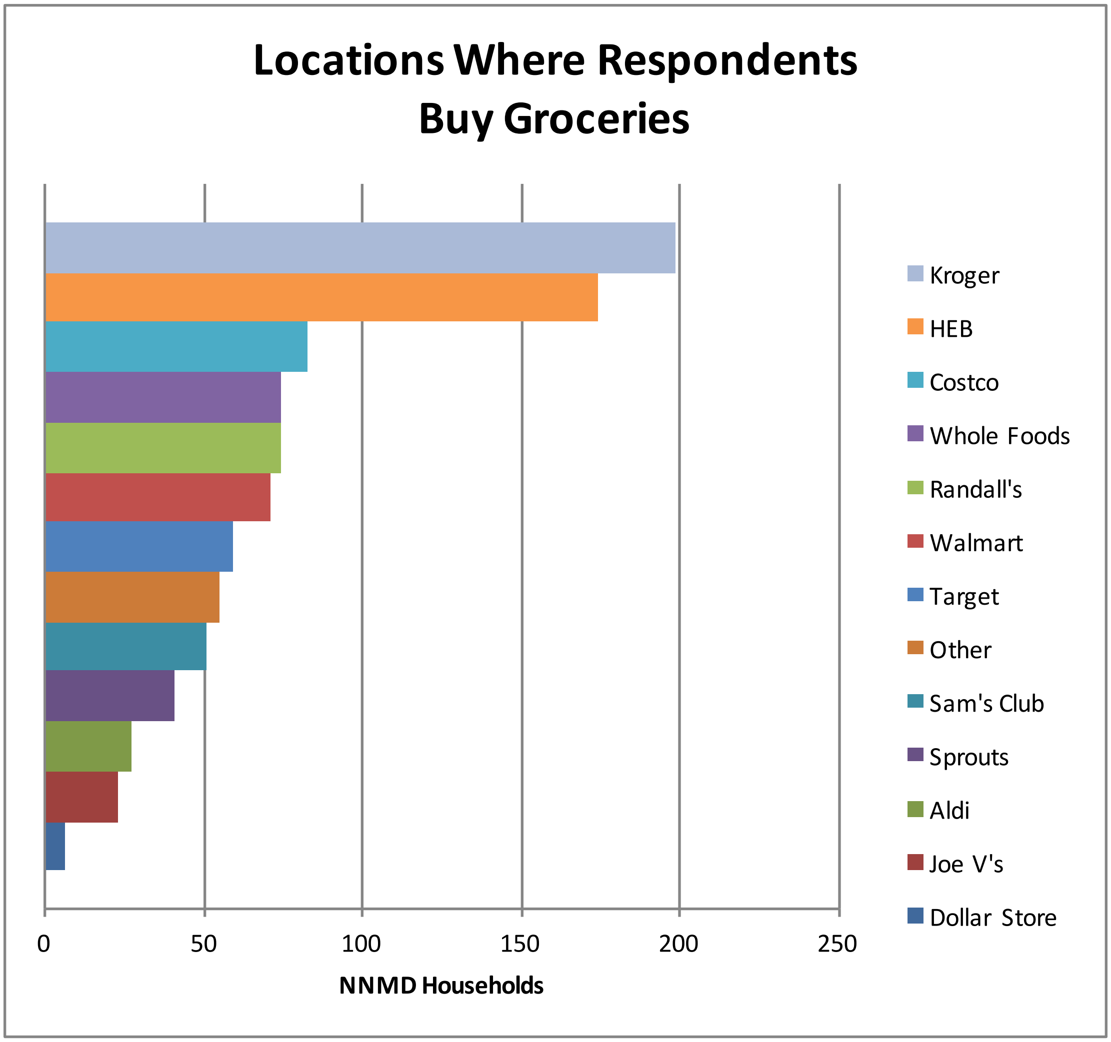


Dollars Spent at Local Grocery Stores Foodarama and Food Town
Household Spending Trend
Less than $50
$51 - $100
$101 - $150
More than $150
$2,525
$3,275
$4,075
$760
$1,368
$1,976
$250
$875
$1,000
$0
$350
$700
$0
$1,000
$2,000
$3,000
$4,000
$5,000
Real Dollars Spent Inside District
Food Town Pinemont
Food Town Bingle
Foodarama



Shopper Spending Trends at Local Grocery Stores Foodarama and Food Town
Dollars Spent
Less than $50
$51 - $100
$101 - $150
More than $150
0
50
100
150
200
NNMD Households
Food Town Pinemont
Food Town Bingle
Foodarama

Of the 277 surveyed — the two most popular stores where respondents buy groceries are:
Kroger, (72%* shop there) and HEB (63%* shop there).



STORE	# OF SHOPPERS	
Dollar Store	6	2.17%
Joe V’s	23	8.30%
Aldi	27	9.75%
Sprouts	41	14.80%
Sam’s Club	51	18.41%
Other	55	19.86%
Target	59	21.30%
Walmart	71	25.63%
Randall’s	74	26.71%
Whole Foods	74	26.71%
Costco	83	29.96%
HEB	174	62.82%
Kroger	199	71.84%

**percentage values not based on a 100% scale. Respondents could select multiple options.*

When asked the question, “**What would your ideal local grocery store contain in food/services?**” the Top 10 responses are (in order of most requested):

1. Fresh/quality produce
2. Variety of products (“good” local & international items / gourmet / specialty foods)
3. Deli / Uncured meats
4. Seafood & Meat Market
5. Organics / GMO-free
6. Bakery / Fresh breads
7. Fresh / healthy prepared foods
8. “like HEB”
9. Safe & Clean store, bathrooms & parking lots
10. Healthy options / quality vitamins

#1 and #2 were overwhelmingly mentioned in most responses.

The complete respondent-provided categorical list of "ideal local grocery food/services" is as follows, in order of popularity: *(notable commentary indicated in italics)*

-Fresh/quality produce
-Variety of products / "good" local & international items / gourmet / specialty foods
-Deli / Uncured meats
-Seafood & Meat market
-Organics / GMO-free
  Quality / hormone free / free range / organic meats, eggs
-Bakery / fresh breads
-Fresh / healthy prepared foods
-"Like HEB"
-Clean store, clean bathrooms & parking lot
-Healthy / quality vitamins
-Savings card (members savings) / affordable "quality" foods
-"Like Kroger"
-Experience
  "Taste-testing/food demos" "well-stocked shelves" "remove out-of-dates" "clear pricing" "recipes"
  "attractive environment pleasant to shop in"
-Weekly specials / sales (for quality foods)
  "Target's Cartwheel app" "selection and pricing of a major chain" "competitive pricing"
  "quality store brands" "quality products low prices"
-Wine selection & craft beer
-Frozen foods - variety / quality / "upscale" / healthy
-Friendly employees
  "knowledgable customer-service focused employees"
-Floral
-"Good" cheese selection
-"Like Randall's"
-Coffee / tea bar
-Parking (easy, generous size, safe, clean)
-Pharmacy
-"Like Central Market"
-"Like Trader Joes"
-Gluten free / vegetarian
-Hummus selection
-Salad / olive bar
-Bulk foods
-Diet / low fat / low sugar
-Fresh, quality sushi
-"Green" / chemical free product options
-Security (inside & parking lot)
-Smaller shopping carts
-Yogurt / Dairy Selection
-Diversity in price
-Home items