



TIR Member Survey Review

March 2024



2024 Survey Questions and Scoring

- The recent survey was designed to ensure we could make it simpler for members to respond, We hoped these changes would enable members to respond more quickly due to being a more concise survey and provide feedback on current issues and future concerns.
- Because this survey's scoring and questions differ from previous member surveys, we can not compare results from before.
- It's also been twelve months since the last survey and a significant number of stores have changed ownership which means new members whose opinions may differ or may not have a lot of issues to comment on yet, this makes comparison difficult as well.
- **Scoring** - The survey asks "Please rate how satisfied you are ?", Members were asked to rate their level of satisfaction between :
 - 1 * Not Satisfied
 - 2 * Somewhat Unsatisfied
 - 3 * Neutral
 - 4 * Satisfied
 - 5 * Very Satisfied
- To gauge a total satisfaction percentage, only scores 4 and 5 are used.

Survey Contents and Overview

Potential Member Responses = 70

(due to Multi Store Owner "MSO" groups)

Actual Responses 41

Response Percentage 58 %

TIR Members Survey

March 2024

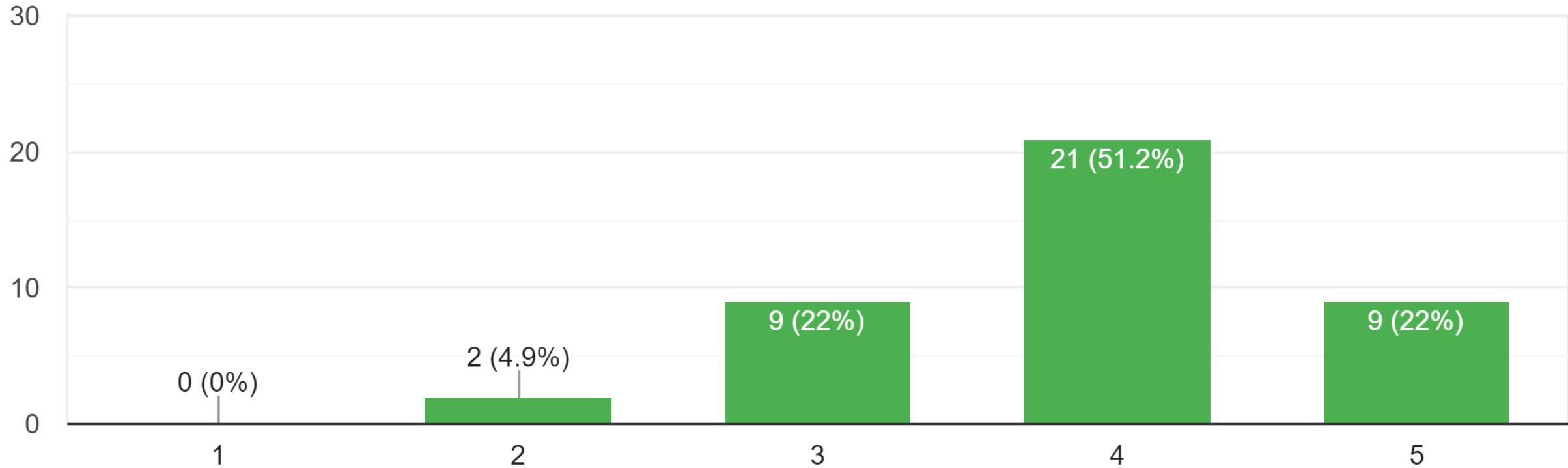
TIR Results & Commentary



Please rate how satisfied you are with TIR overall.

41 responses

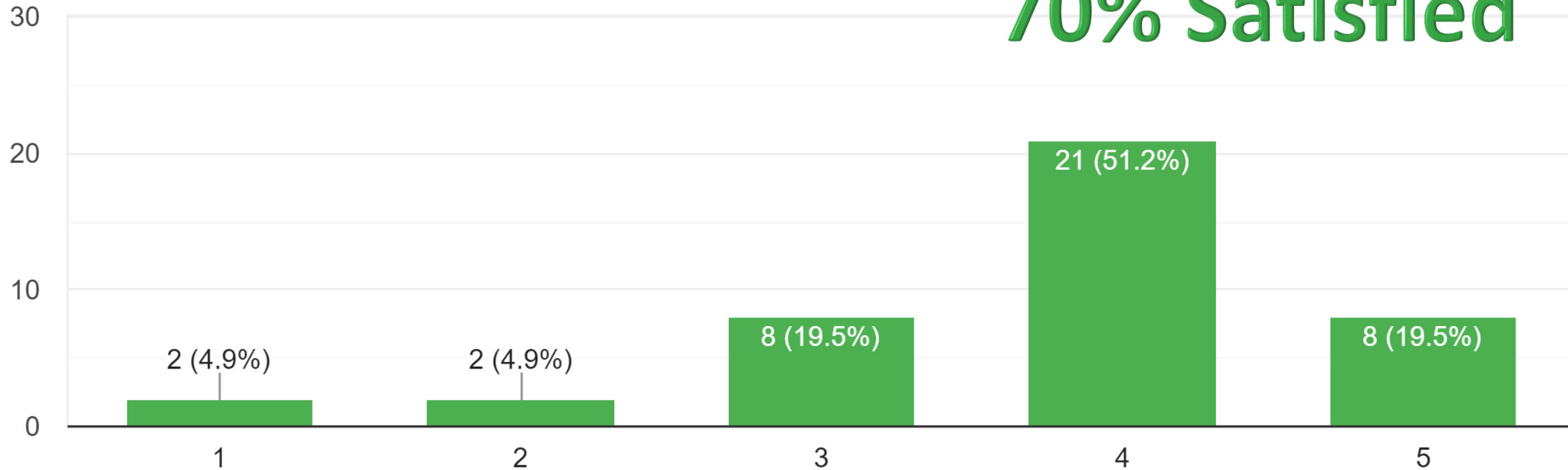
73% Satisfied



Please rate how satisfied you are with TIR Merchandising - "Price Management."

41 responses

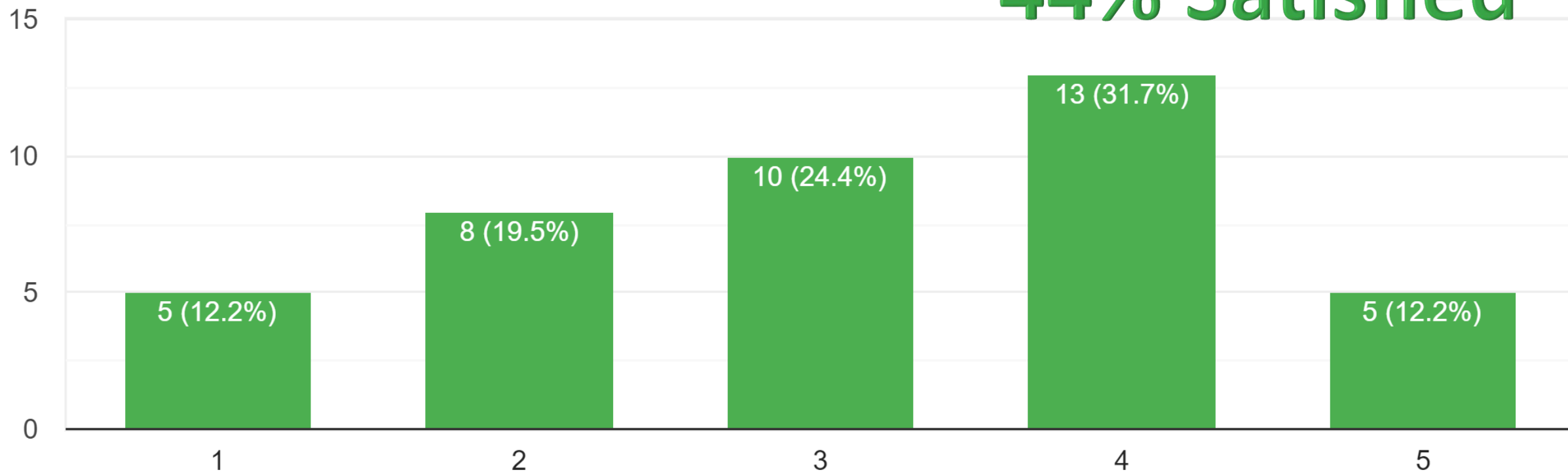
70% Satisfied



Please rate how satisfied you are with promotional margin.

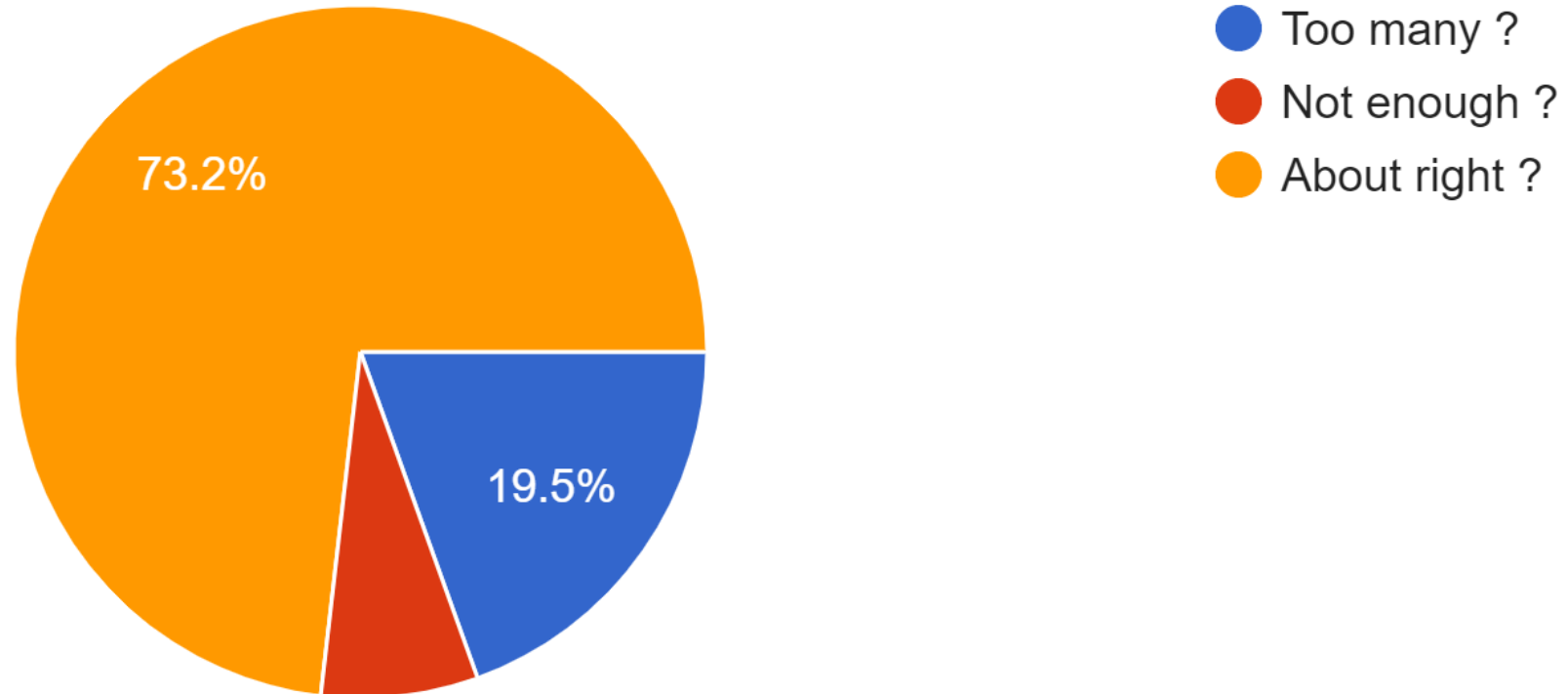
41 responses

44% Satisfied



Do you feel there are too many or too little products on "Special" each week?

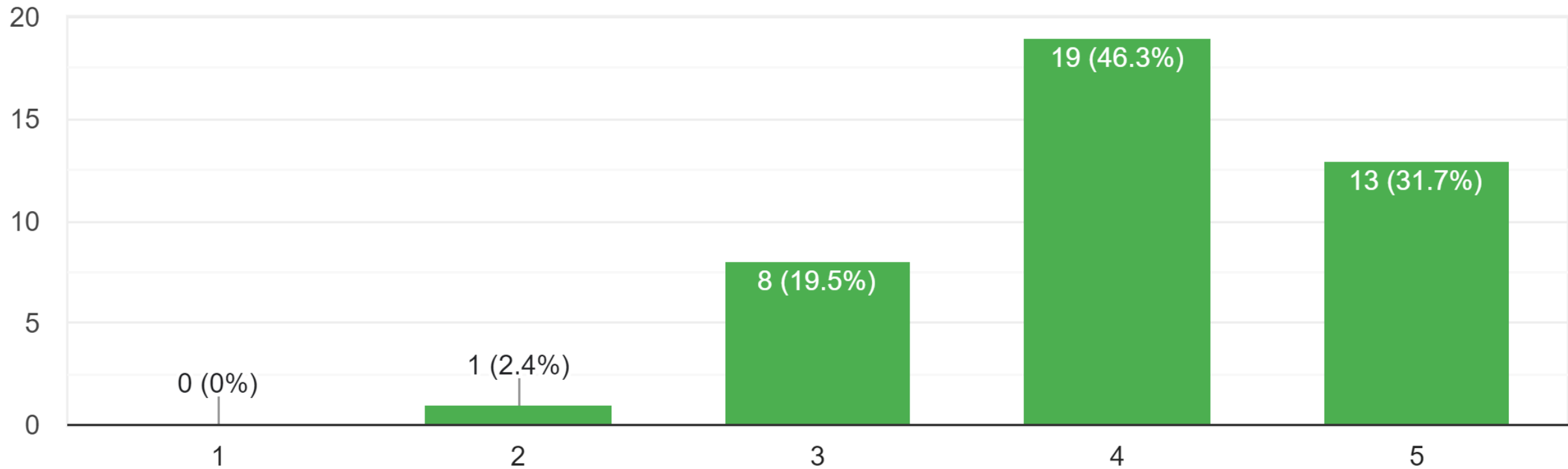
41 responses



Please rate how satisfied you are with TIR Marketing overall (this includes media advertising, catalogues, and consumer competitions)

41 responses

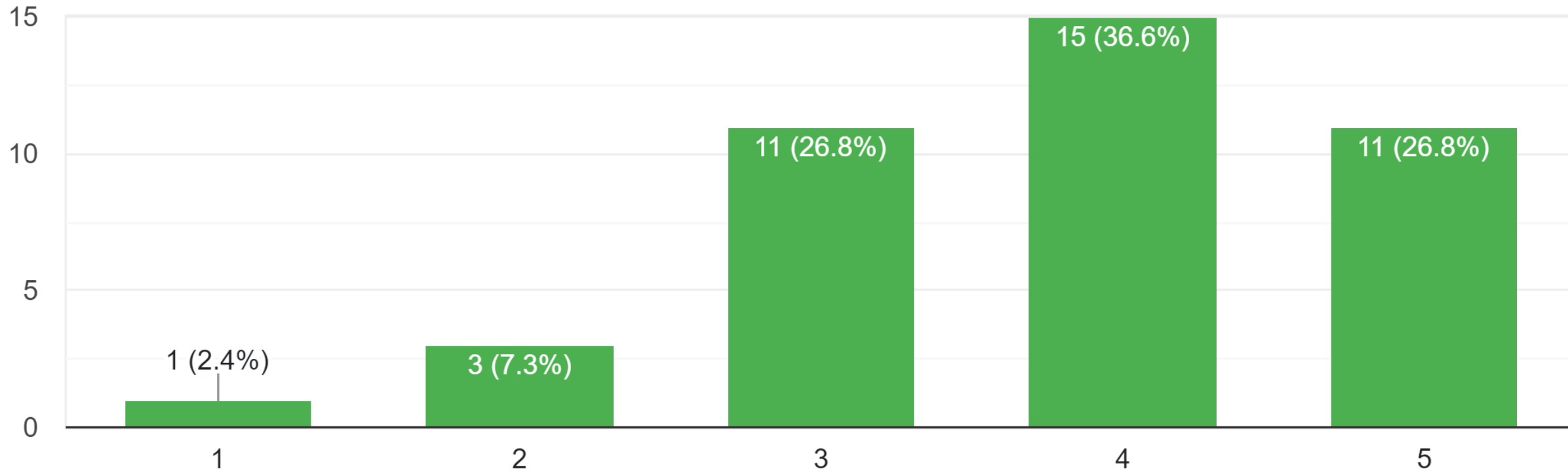
78% Satisfied



Please rate how satisfied you are with the seasonal focused newspaper lift outs.

41 responses

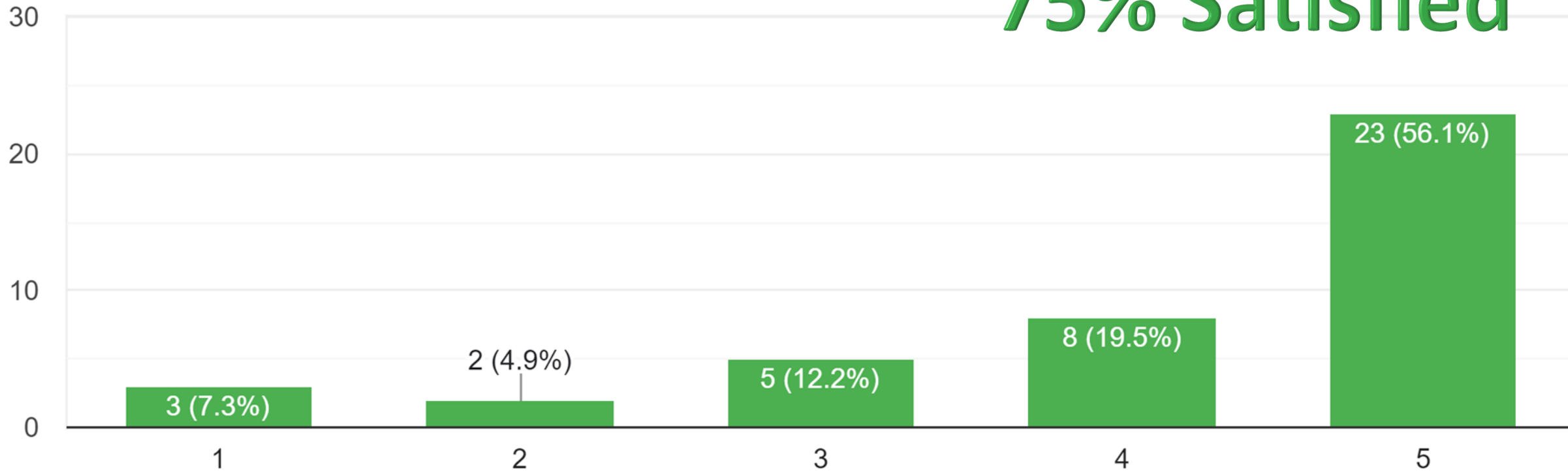
63% Satisfied



Please rate how satisfied you are with TIR Member Services (This includes your Area Manager Engagement, Operational Excellence Programs (OEP) and Food Safety Audits (FSA) and IGA training)

41 responses

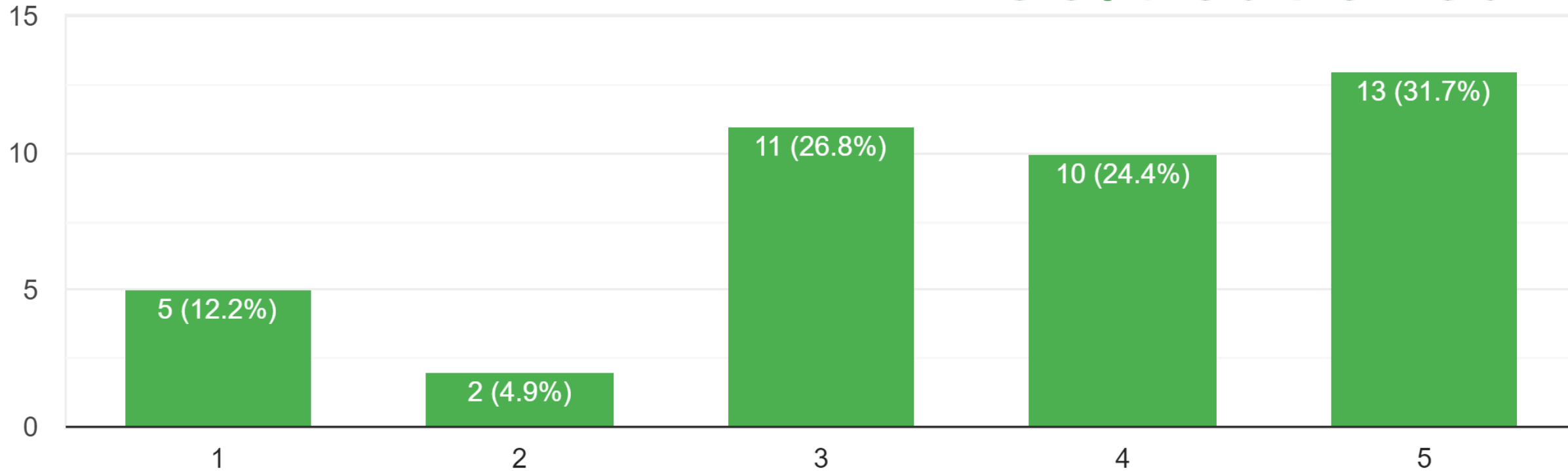
75% Satisfied



Please rate how satisfied you are with TIR Development, Refit and Equipment Services.

41 responses

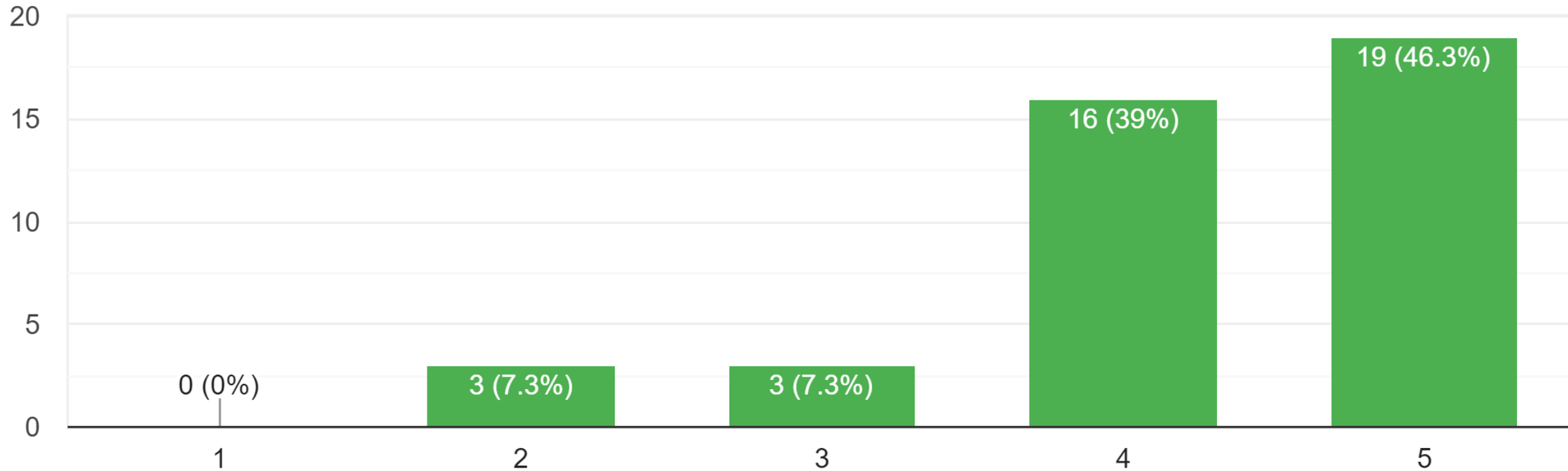
56% Satisfied



Please rate how satisfied you are with TIR Finance Support (this includes Rebates, "Charge Through" and Statement Management).

41 responses

85% Satisfied



Current Member TIR Feedback

Members were asked for comment on TIR overall, Price Programs, Marketing and Finance services.

1. TIR Satisfaction Results
 - Feedback on immediate concerns are mostly price increases and margin squeeze.
 - Member services have jumped from (2023) 31% very satisfied to (2024) 56%
2. Competitive Price Programs
 - The most comments were received on this area.
 - Members are concerned with LPE customer confusion and low margin.
 - Simplify the message, too many price programs.
 - Members suggested LPE should contain slower moving lines and higher volume lines kept for weekly specials.
3. TIR Marketing Results
 - Feedback suggested many were very satisfied with the overall marketing program although some would like to see a more local focus.
 - Seasonal Newspaper lift outs had a 15% lower satisfaction rating than general marketing activity. Which contrasts with the warehouse carton numbers of more than 20% volume increase for like for like products.
 - Some would also like to see a more aggressive transition for traditional media (Newspaper & TV) to digital and social marketing.
4. TIR Finance Team
 - The finance team still has a very high satisfaction rating 85%, the highest of any area.

TIR Members Survey

March 2024

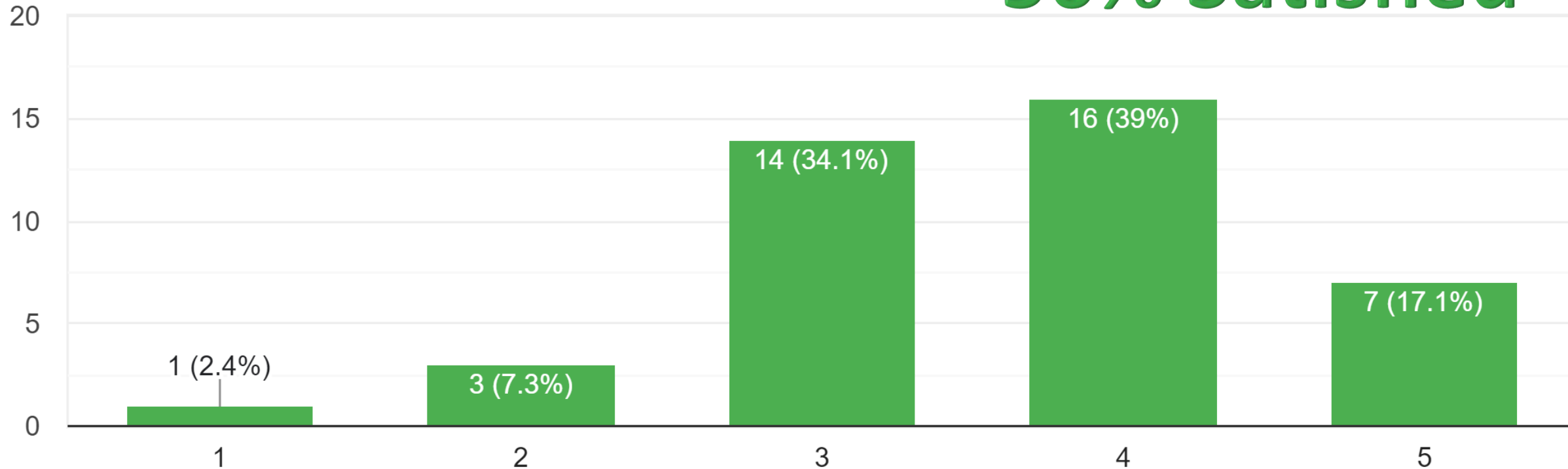
IFP Results & Commentary



Please rate how satisfied you are with Island Fresh Produce (IFP) overall.

41 responses

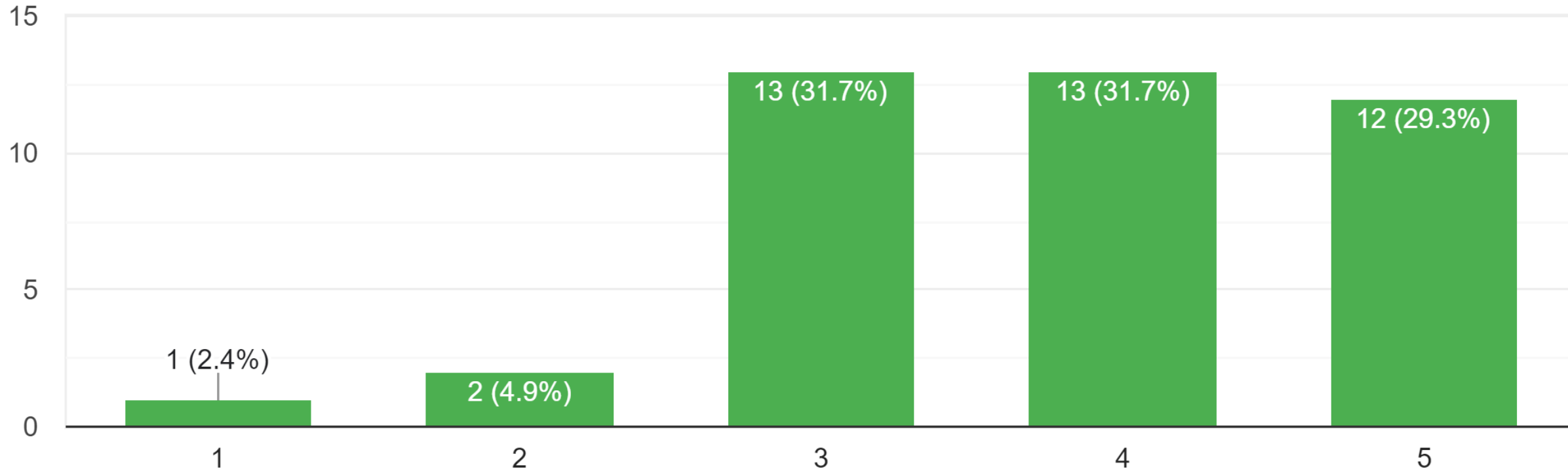
56% Satisfied



Please rate how satisfied you are with Island Fresh Produce (IFP) "Range."

41 responses

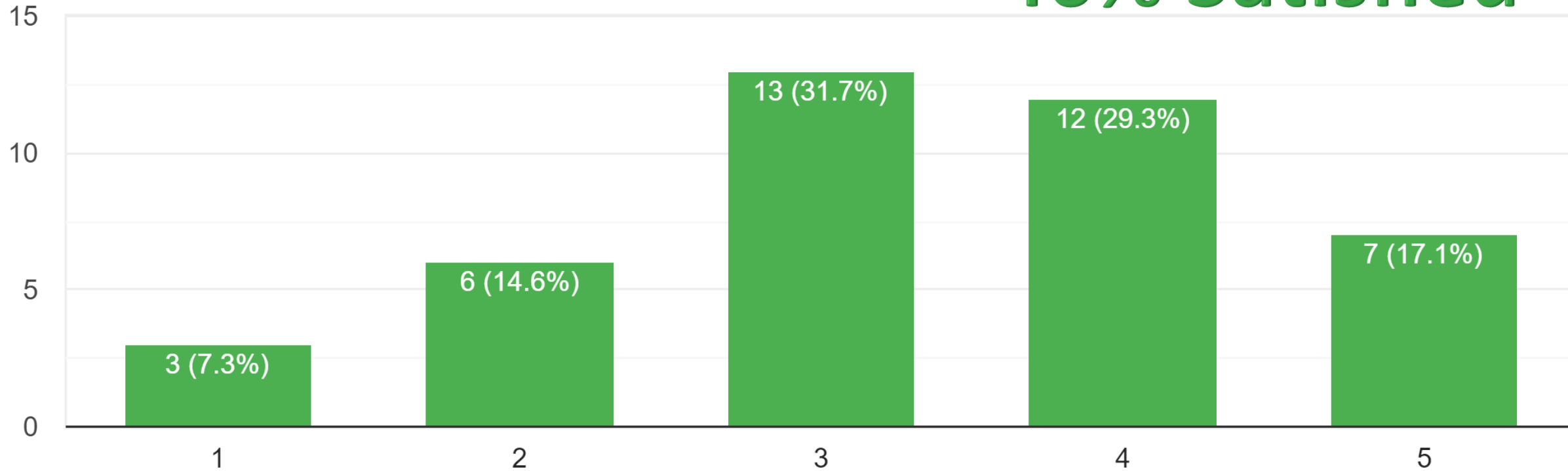
62% Satisfied



Please rate how satisfied you are with Island Fresh Produce (IFP) "Quality".

41 responses

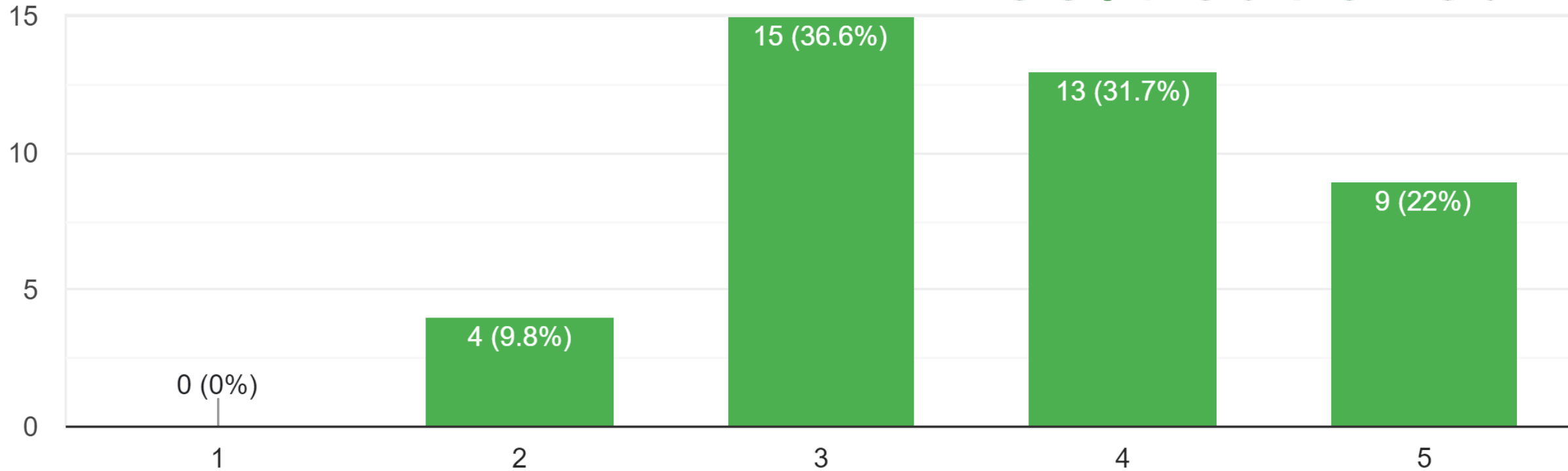
46% Satisfied



Please rate how satisfied you are with Island Fresh Produce (IFP) "Specials and Promotional offers."

41 responses

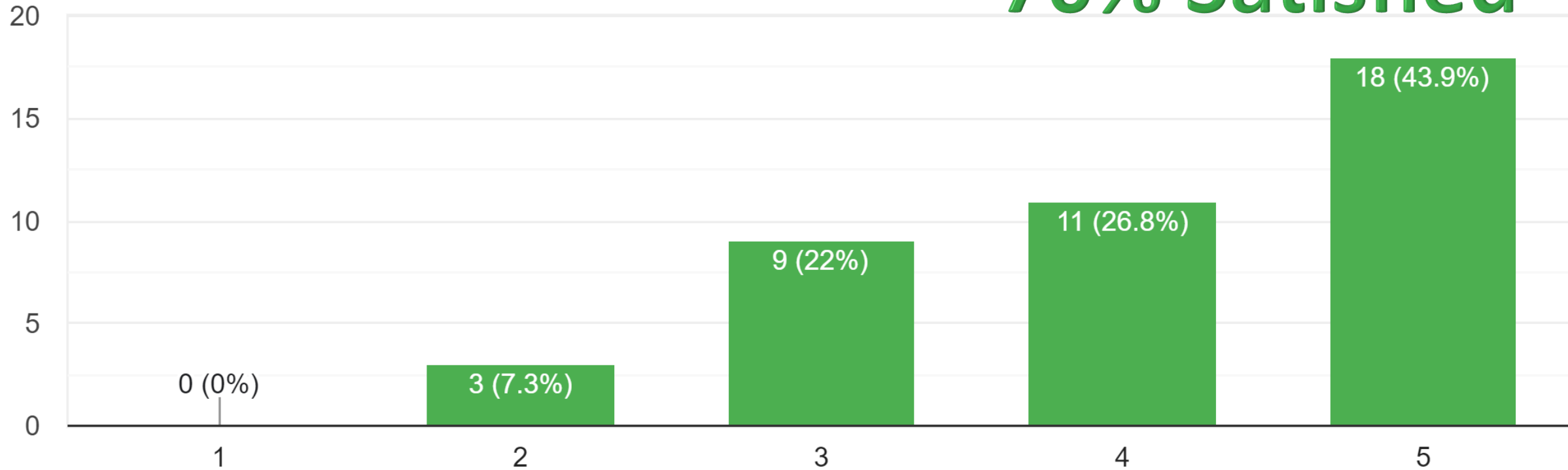
53% Satisfied



Please rate how satisfied you are with Island Fresh Produce (IFP) "Customer Service and Ordering".

41 responses

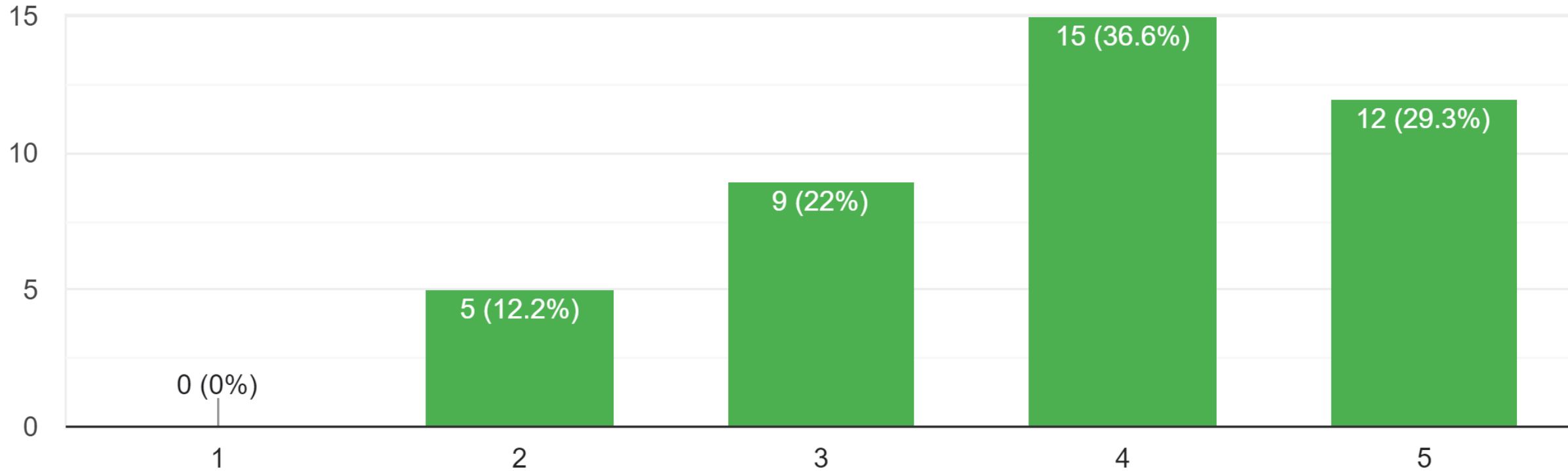
70% Satisfied



Please rate how satisfied you are with Island Fresh Produce (IFP) "Invoicing and Credits".

41 responses

66% Satisfied



Current Member IFP Feedback

Members were asked for comment on IFP support services and areas of focus.

Current Areas of Concern - Summary

- Despite a good satisfaction rating , quality issues (5) were mentioned in feedback “inconsistent”.
- Better day to day pricing were often mentioned in hand with quality concerns. (9)
- Slow to get credits. (4)
- Missing stock and miss-pick items , occasional late deliveries. (3)
- Seeking improvement to picking/invoicing. (3)
- Good drivers (2)
- Weekly specials have good pricing and margin. (1)
- Online ordering works well. (1)
- **Individual Responses within Member Feedback*

TIR Members Survey

March 2024

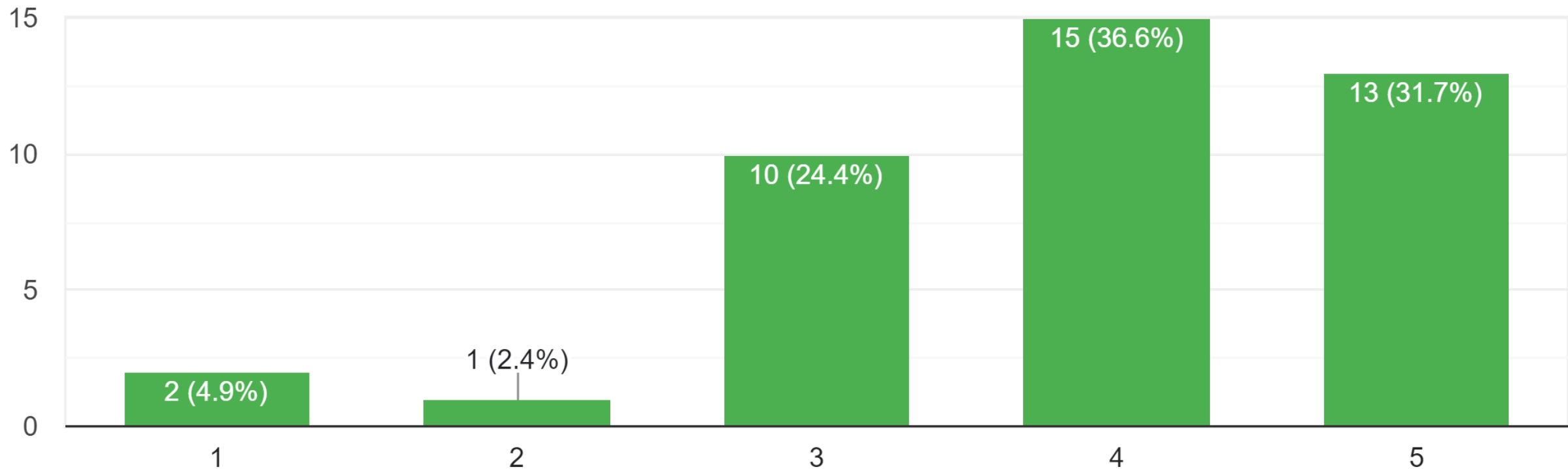
Member Engagement



Please rate how satisfied you are with TIR regarding member communications and engagement. This covers communication area... meetings, award dinners, conferences, study tours.

41 responses

68% Satisfied



Summary of Communications and Engagement Feedback and Concerns

- Too much information at times, focus on providing relevant information
- Focus on improving follow up to member enquiries.
- Increased store visits from executives would be good.
- Daily update via email is effective communication.
- More CEO or Chairman updates.



Thank you

