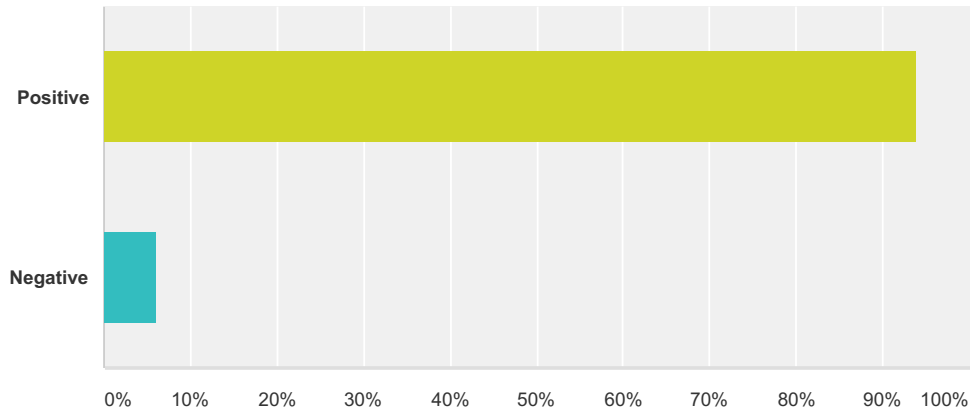


Q1 Generally speaking, how would you describe the current state of the speciality coffee industry?

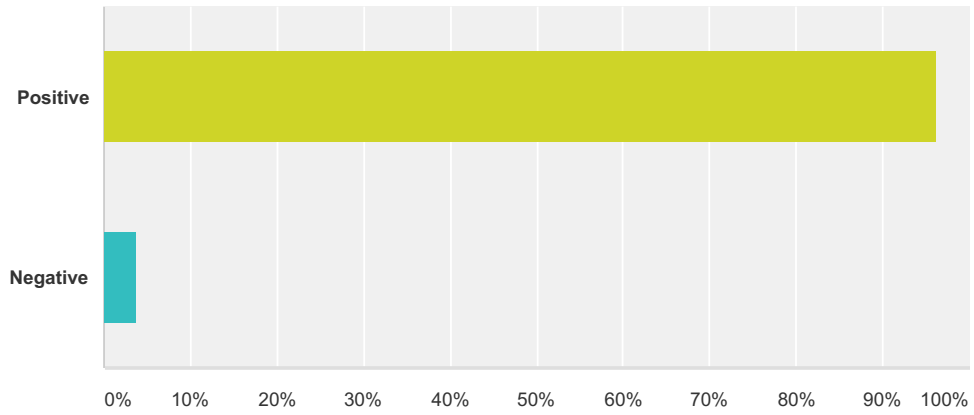
Answered: 683 Skipped: 5



Answer Choices	Responses
Positive	93.85% 641
Negative	6.15% 42
Total	683

Q2 What about the future? How would you describe your future outlook of the speciality coffee industry?

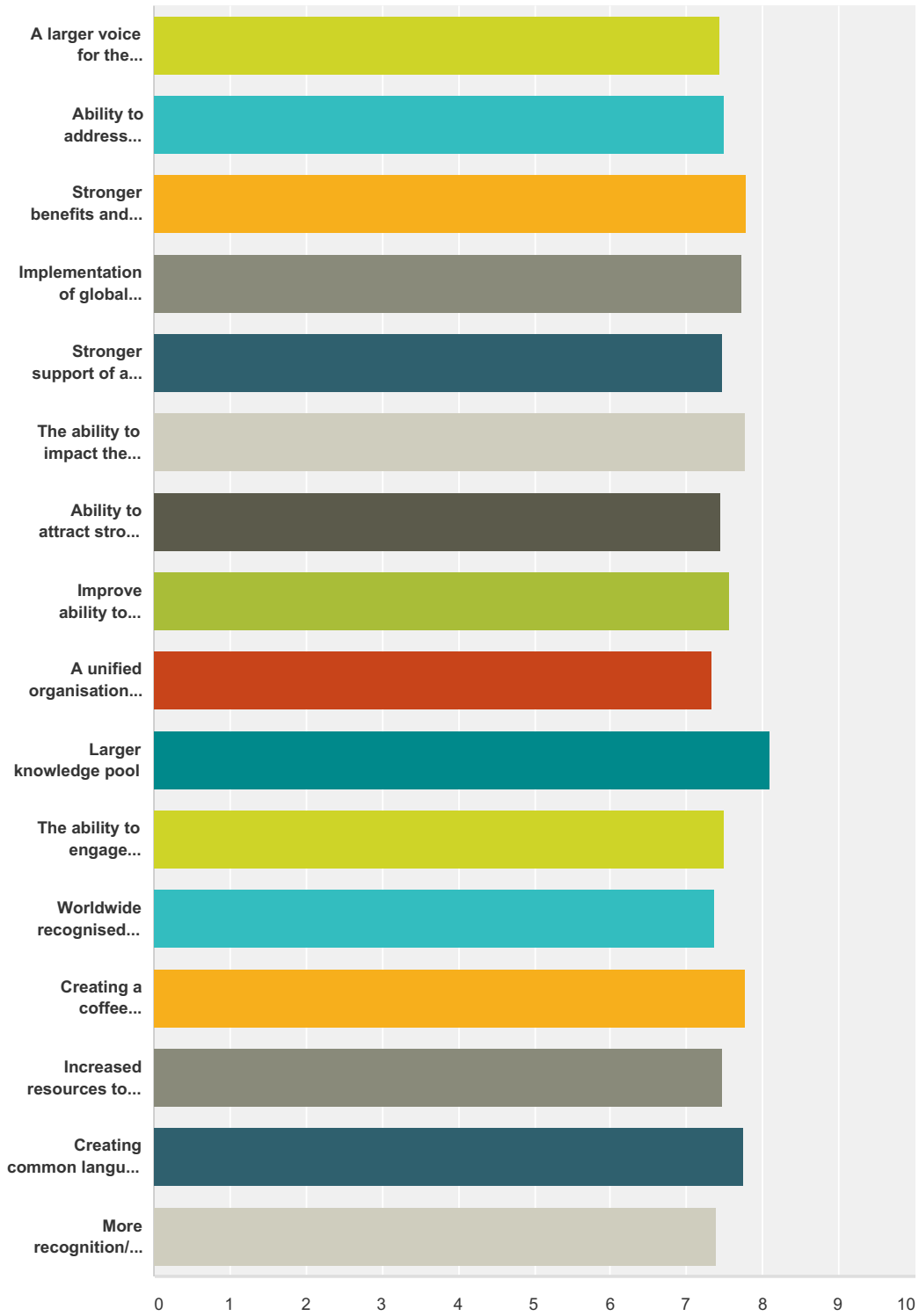
Answered: 683 Skipped: 5



Answer Choices	Responses
Positive	96.19% 657
Negative	3.81% 26
Total	683

Q3 The following is a list of what some people have identified as opportunities or benefits that could be created by a unified, global speciality coffee organisation. For each one, please indicate how important each is for you. Please use a scale of 1 to 10, where 1 means 'not at all important' and 10 means 'extremely important – the absolute most critical.' Of course, many of these are important but not everything is the most important, so please use the entire range of the scale of 1-10.

Answered: 484 Skipped: 204



	1	2	3	4	5	6	7	8	9	10	Total	Weighted Average
A larger voice for the industry	2.70% 13	2.08% 10	3.53% 17	6.44% 31	5.41% 26	9.56% 46	11.85% 57	17.26% 83	16.01% 77	25.16% 121	481	7.44
Ability to address sustainability issues	1.24% 6	3.31% 16	2.27% 11	2.89% 14	11.57% 56	8.26% 40	14.05% 68	15.29% 74	16.53% 80	24.59% 119	484	7.49
Stronger benefits and value through programmes for members	1.25% 6	3.13% 15	3.13% 15	2.29% 11	6.04% 29	8.13% 39	12.50% 60	16.88% 81	16.67% 80	30.00% 144	480	7.78
Implementation of global standards	1.89% 9	2.10% 10	3.35% 16	3.35% 16	7.34% 35	6.08% 29	12.37% 59	17.61% 84	16.35% 78	29.56% 141	477	7.73

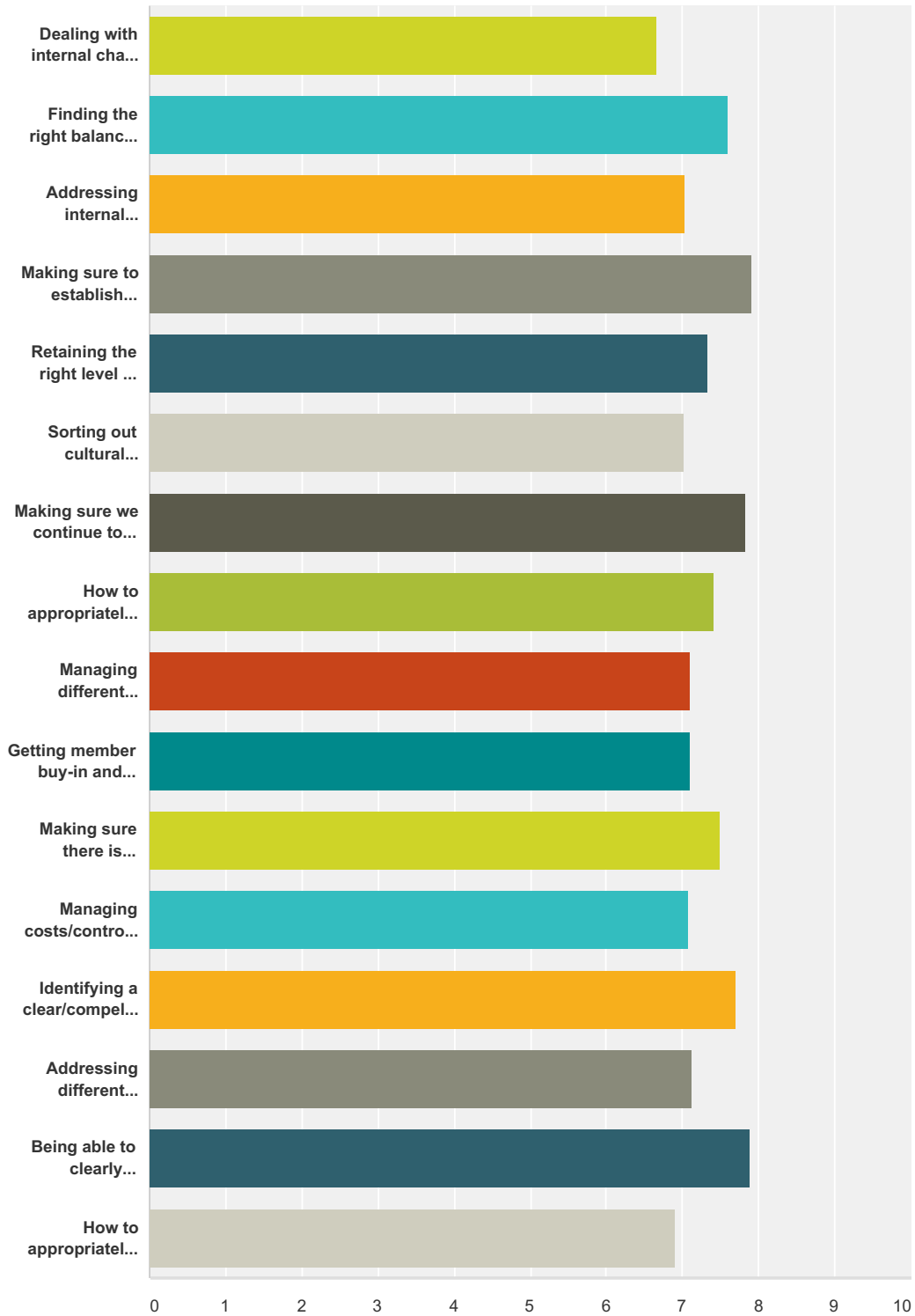
Stronger support of all partners across the value chain	1.25% 6	2.30% 11	4.38% 21	3.55% 17	7.52% 36	10.23% 49	13.15% 63	19.00% 91	14.61% 70	24.01% 115	479	7.48
The ability to impact the quality of speciality coffee	1.89% 9	2.53% 12	2.11% 10	2.95% 14	5.47% 26	8.42% 40	14.32% 68	15.58% 74	18.32% 87	28.42% 135	475	7.77
Ability to attract strong talent/expertise for SCAE	1.05% 5	2.52% 12	3.15% 15	4.20% 20	8.61% 41	9.24% 44	12.61% 60	21.85% 104	15.13% 72	21.64% 103	476	7.46
Improve ability to connect with source origin countries	0.84% 4	3.16% 15	1.89% 9	5.47% 26	9.05% 43	9.05% 43	11.58% 55	17.26% 82	14.53% 69	27.16% 129	475	7.56
A unified organisation with a unified mission - it energises us	3.78% 18	2.94% 14	4.62% 22	3.99% 19	7.35% 35	6.30% 30	15.55% 74	14.92% 71	15.97% 76	24.58% 117	476	7.32
Larger knowledge pool	0.63% 3	1.26% 6	1.47% 7	3.77% 18	6.08% 29	6.08% 29	11.32% 54	18.03% 86	18.03% 86	33.33% 159	477	8.09
The ability to engage consumers in a stronger way	1.88% 9	2.71% 13	2.71% 13	4.18% 20	9.39% 45	7.93% 38	12.32% 59	17.33% 83	17.33% 83	24.22% 116	479	7.50
Worldwide recognised brand	3.33% 16	3.54% 17	3.75% 18	6.04% 29	7.29% 35	7.50% 36	11.46% 55	13.96% 67	14.37% 69	28.75% 138	480	7.36
Creating a coffee community without borders	2.92% 14	2.08% 10	2.71% 13	3.75% 18	6.67% 32	7.71% 37	9.79% 47	15.63% 75	15.21% 73	33.54% 161	480	7.76
Increased resources to address challenges	1.05% 5	1.68% 8	3.36% 16	4.20% 20	8.61% 41	9.45% 45	14.08% 67	22.48% 107	12.18% 58	22.90% 109	476	7.48
Creating common language and message for global outreach	1.25% 6	1.46% 7	3.13% 15	3.97% 19	6.68% 32	9.19% 44	11.90% 57	17.33% 83	15.66% 75	29.44% 141	479	7.75
More recognition/visibility for a global association	2.09% 10	3.13% 15	3.76% 18	4.38% 21	7.52% 36	9.39% 45	12.53% 60	17.95% 86	14.82% 71	24.43% 117	479	7.40

Q4 Still thinking of possible opportunities or benefits presented by a unified, global speciality coffee organisation, what would you imagine could be the one key benefit to you of a unified, global speciality coffee organisation?

Answered: 224 Skipped: 464

Q5 Below is a list of what some people have identified as possible challenges or barriers that could face a unified, global speciality coffee organisation. For each one, please indicate how important it is to address that challenge or barrier. Please use a scale of 1 to 10, where 1 means 'not at all important to address' and 10 means 'extremely important to address.' As with the prior question, many of these are important to address but not everything is the most important, so please use the entire range of the scale of 1-10.

Answered: 405 Skipped: 283



	1	2	3	4	5	6	7	8	9	10	Total	Weighted Average
Dealing with internal change management issues	2.76% 11	3.27% 13	8.79% 35	5.03% 20	12.06% 48	11.31% 45	13.32% 53	18.59% 74	9.80% 39	15.08% 60	398	6.65
Finding the right balance between local/central and global	1.50% 6	2.01% 8	3.26% 13	3.01% 12	6.27% 25	10.03% 40	15.29% 61	18.05% 72	16.29% 65	24.31% 97	399	7.60
Addressing internal organisational governance and structure issues	1.26% 5	3.02% 12	5.54% 22	5.04% 20	11.34% 45	11.34% 45	14.36% 57	17.13% 68	13.35% 53	17.63% 70	397	7.03

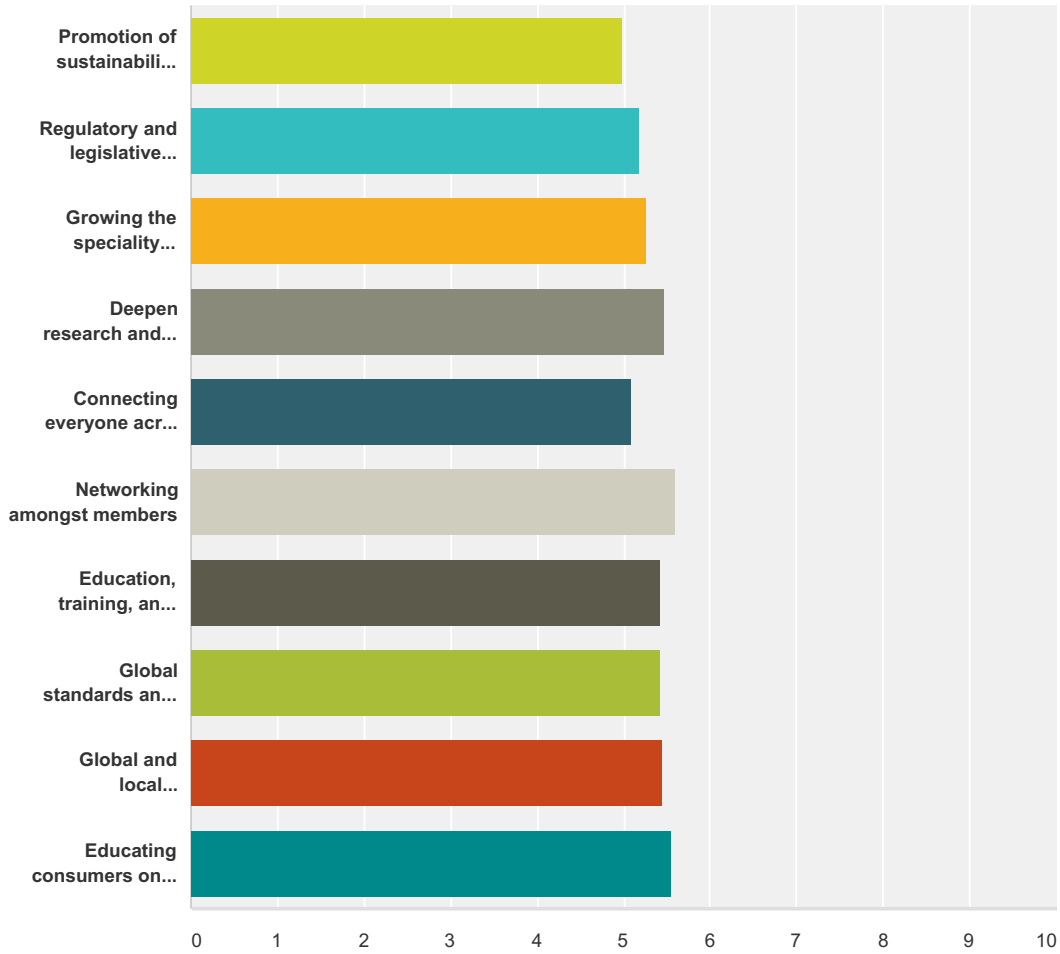
Making sure to establish proper levels of transparency	0.75% 3	1.75% 7	2.00% 8	3.99% 16	5.74% 23	8.48% 34	11.97% 48	18.45% 74	14.46% 58	32.42% 130	401	7.92
Retaining the right level of quick decision making	1.00% 4	2.01% 8	2.51% 10	4.26% 17	10.53% 42	12.03% 48	13.53% 54	21.05% 84	15.54% 62	17.54% 70	399	7.33
Sorting out cultural differences between organisations	1.25% 5	4.01% 16	5.76% 23	7.27% 29	10.28% 41	8.77% 35	13.53% 54	15.54% 62	13.28% 53	20.30% 81	399	7.01
Making sure we continue to drive member value	0.50% 2	1.76% 7	3.52% 14	1.76% 7	8.04% 32	8.29% 33	10.55% 42	19.10% 76	21.11% 84	25.38% 101	398	7.82
How to appropriately manage regional differences	1.01% 4	1.26% 5	6.80% 27	4.28% 17	7.05% 28	9.32% 37	12.59% 50	19.40% 77	17.13% 68	21.16% 84	397	7.41
Managing different member expectations	1.01% 4	3.02% 12	3.77% 15	4.77% 19	10.05% 40	13.07% 52	15.83% 63	20.60% 82	11.56% 46	16.33% 65	398	7.09
Getting member buy-in and input on the strategic direction of the organisation	1.00% 4	2.50% 10	3.50% 14	4.00% 16	12.75% 51	11.00% 44	17.00% 68	19.75% 79	14.25% 57	14.25% 57	400	7.10
Making sure there is alignment around key critical challenges for the speciality coffee value chain	1.00% 4	1.50% 6	2.50% 10	3.00% 12	9.75% 39	11.75% 47	14.50% 58	21.25% 85	12.00% 48	22.75% 91	400	7.50
Managing costs/controlling expenses	1.01% 4	2.77% 11	7.05% 28	5.29% 21	9.57% 38	9.82% 39	13.35% 53	20.40% 81	12.34% 49	18.39% 73	397	7.07
Identifying a clear/compelling unified vision	1.51% 6	2.51% 10	2.51% 10	1.51% 6	8.04% 32	10.55% 42	10.80% 43	17.34% 69	19.85% 79	25.38% 101	398	7.70
Addressing different consumer markets	1.52% 6	2.27% 9	6.31% 25	6.06% 24	8.59% 34	10.35% 41	13.38% 53	18.18% 72	15.66% 62	17.68% 70	396	7.11
Being able to clearly understand and deliver on the demand for education	1.26% 5	1.01% 4	2.51% 10	4.02% 16	5.78% 23	5.28% 21	14.07% 56	19.35% 77	17.59% 70	29.15% 116	398	7.90
How to appropriately engage other global organisations	2.02% 8	3.54% 14	4.80% 19	4.29% 17	9.85% 39	12.63% 50	15.91% 63	21.72% 86	11.36% 45	13.89% 55	396	6.92

Q6 Still thinking of possible challenges or barriers presented by a unified, global speciality coffee organisation, what is the one key concern that you have, personally, regarding a unified, global speciality coffee organisation?

Answered: 146 Skipped: 542

Q7 This next list contains items that some people have identified as service area benefits that a unified, global speciality coffee organisation could offer to members. Please rank these service area benefits in order from most (1) to least important (10) based on the value each benefit would present to you.

Answered: 378 Skipped: 310

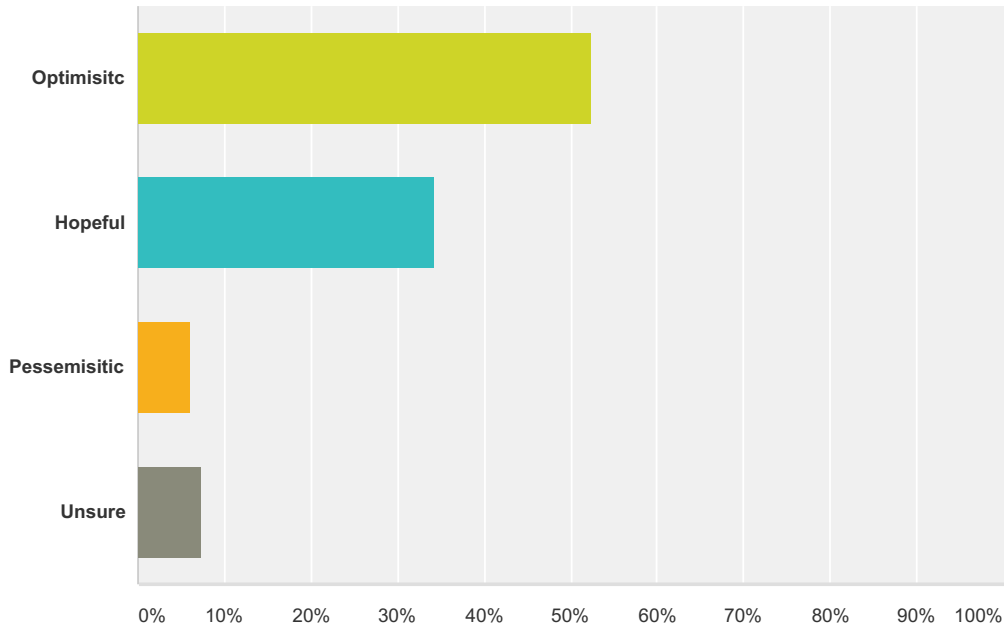


	1	2	3	4	5	6	7	8	9	10	Total	Score
Promotion of sustainability issues	8.33% 25	6.67% 20	7.00% 21	9.00% 27	10.00% 30	12.33% 37	8.00% 24	17.00% 51	11.67% 35	10.00% 30	300	5.00
Regulatory and legislative advocacy	14.80% 45	6.25% 19	6.25% 19	8.88% 27	9.54% 29	8.55% 26	9.54% 29	8.88% 27	8.88% 27	18.42% 56	304	5.17
Growing the speciality coffee industry	10.21% 29	8.45% 24	10.21% 29	7.75% 22	10.21% 29	9.15% 26	9.51% 27	10.21% 29	12.32% 35	11.97% 34	284	5.26
Deepen research and knowledge for members	6.46% 19	12.59% 37	12.24% 36	9.52% 28	8.84% 26	9.52% 28	10.20% 30	10.88% 32	10.88% 32	8.84% 26	294	5.47

Connecting everyone across the value chain from farmer to consumer	6.42% 19	8.45% 25	6.76% 20	12.16% 36	12.16% 36	8.78% 26	12.16% 36	9.46% 28	12.50% 37	11.15% 33	296	5.09
Networking amongst members	8.99% 25	10.79% 30	9.35% 26	11.15% 31	10.07% 28	10.07% 28	11.15% 31	14.75% 41	6.47% 18	7.19% 20	278	5.60
Education, training, and competitions	10.25% 29	12.72% 36	11.66% 33	7.07% 20	6.71% 19	8.13% 23	9.19% 26	9.19% 26	12.37% 35	12.72% 36	283	5.42
Global standards and certification	13.49% 39	8.30% 24	8.30% 24	7.96% 23	11.42% 33	8.30% 24	9.34% 27	10.03% 29	10.73% 31	12.11% 35	289	5.43
Global and local connectivity of members	4.50% 13	10.73% 31	12.11% 35	9.00% 26	11.42% 33	11.76% 34	15.57% 45	10.73% 31	7.61% 22	6.57% 19	289	5.45
Educating consumers on the benefits of speciality coffee	9.59% 28	8.90% 26	9.93% 29	9.25% 27	12.67% 37	12.67% 37	10.27% 30	8.90% 26	10.62% 31	7.19% 21	292	5.56

Q8 Lastly, which of the following best describes your thinking toward the possibility of a unified, global organisation promoting speciality coffee around the world?

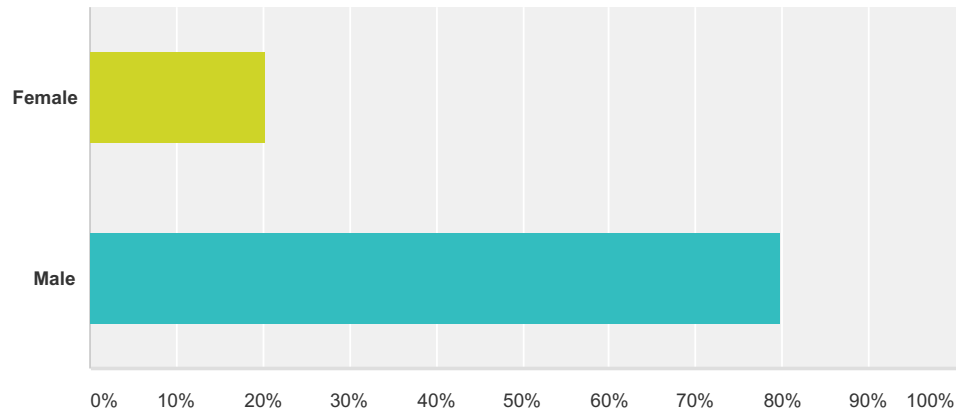
Answered: 383 Skipped: 305



Answer Choices	Responses
Optimisitic	52.48% 201
Hopeful	34.20% 131
Pessemisitic	6.01% 23
Unsure	7.31% 28
Total	383

Q9 What is your gender?

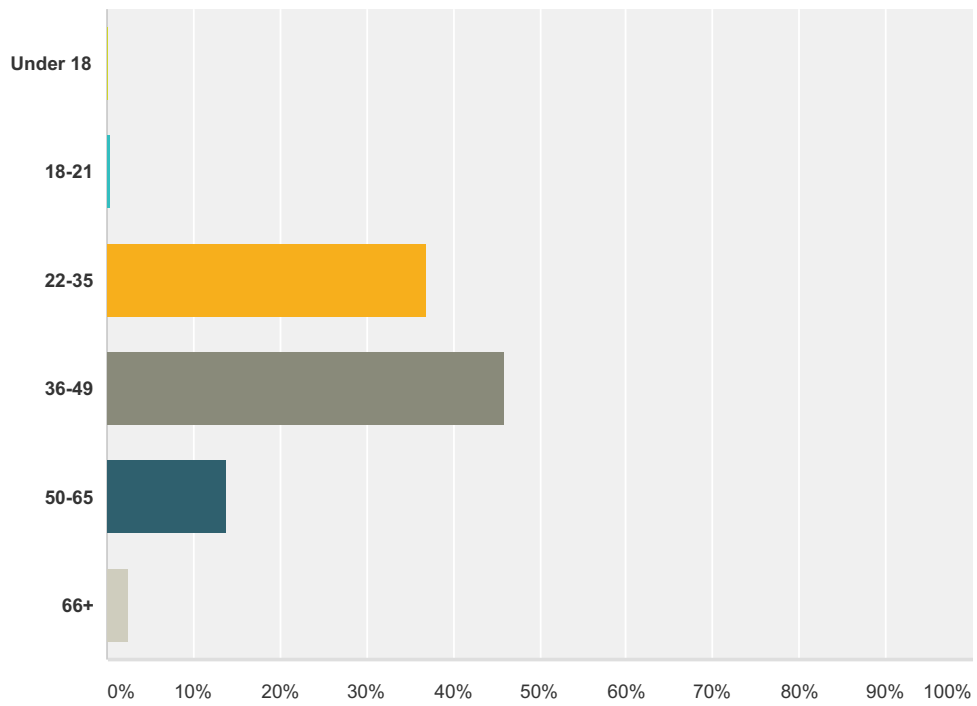
Answered: 384 Skipped: 304



Answer Choices	Responses
Female	20.31% 78
Male	79.69% 306
Total	384

Q10 What is your age?

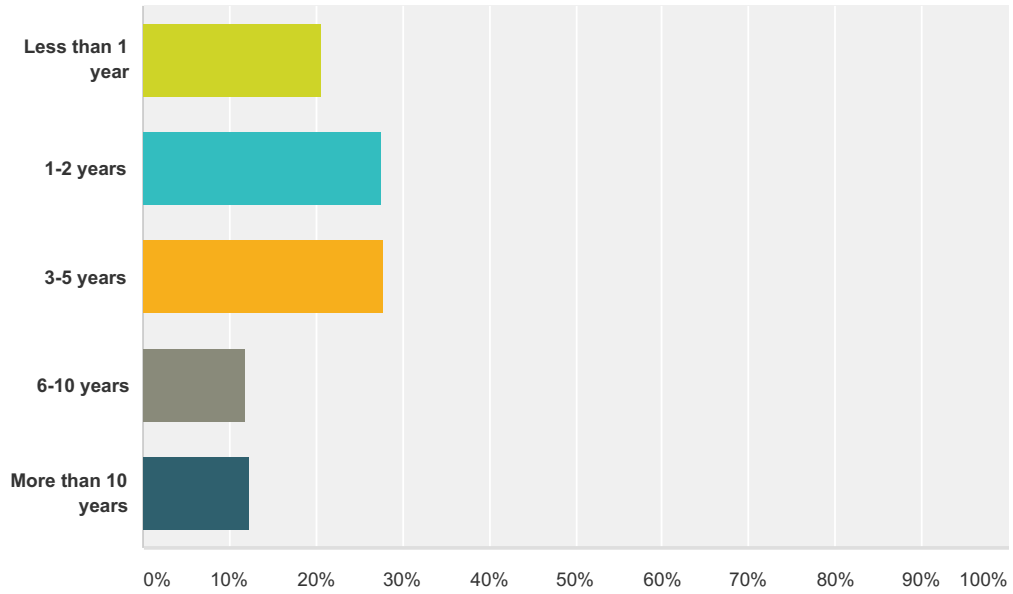
Answered: 390 Skipped: 298



Answer Choices	Responses	Count
Under 18	0.26%	1
18-21	0.51%	2
22-35	36.92%	144
36-49	45.90%	179
50-65	13.85%	54
66+	2.56%	10
Total		390

Q11 How many years have you been a member of SCAE?

Answered: 389 Skipped: 299



Answer Choices	Responses
Less than 1 year	20.57% 80
1-2 years	27.51% 107
3-5 years	27.76% 108
6-10 years	11.83% 46
More than 10 years	12.34% 48
Total	389

Q12 What is the primary country you live and work in?

Answered: 368 Skipped: 320