



GCA - Annual Survey Results 2015

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Who took part



Survey details

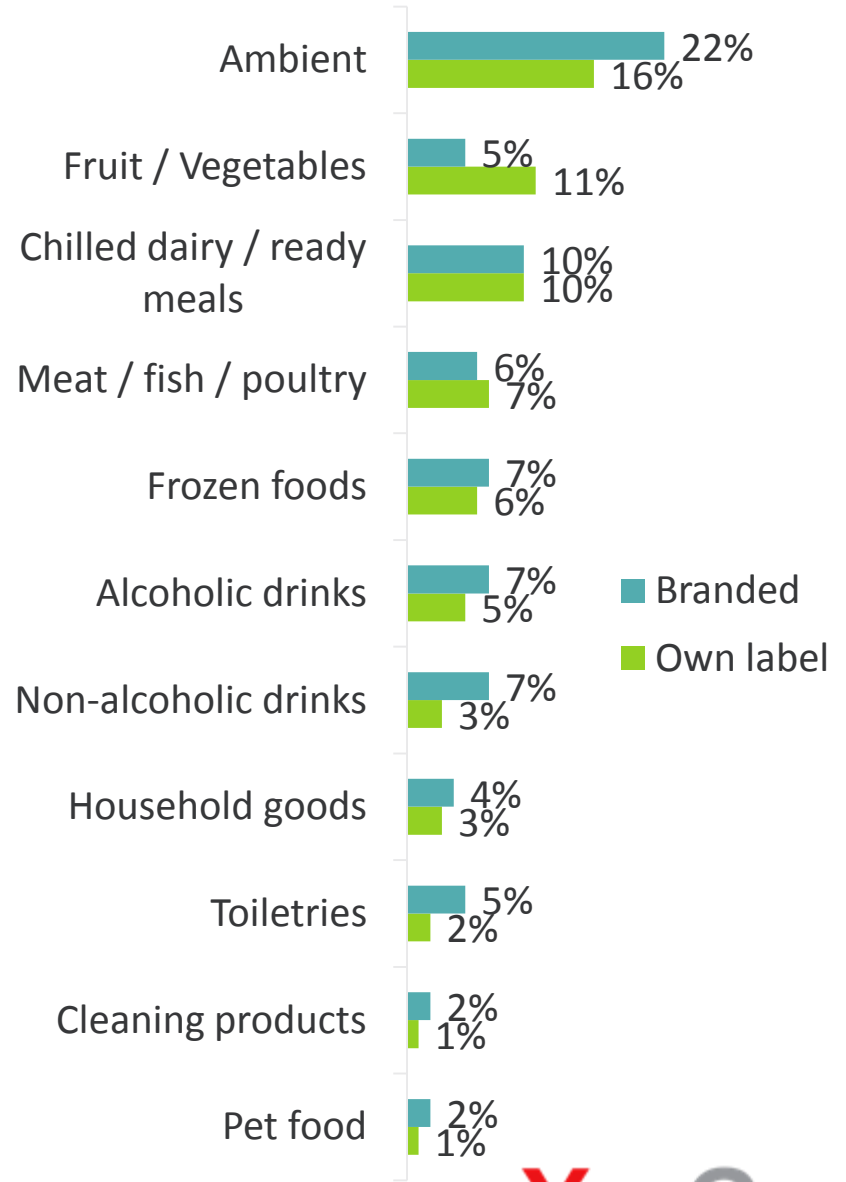
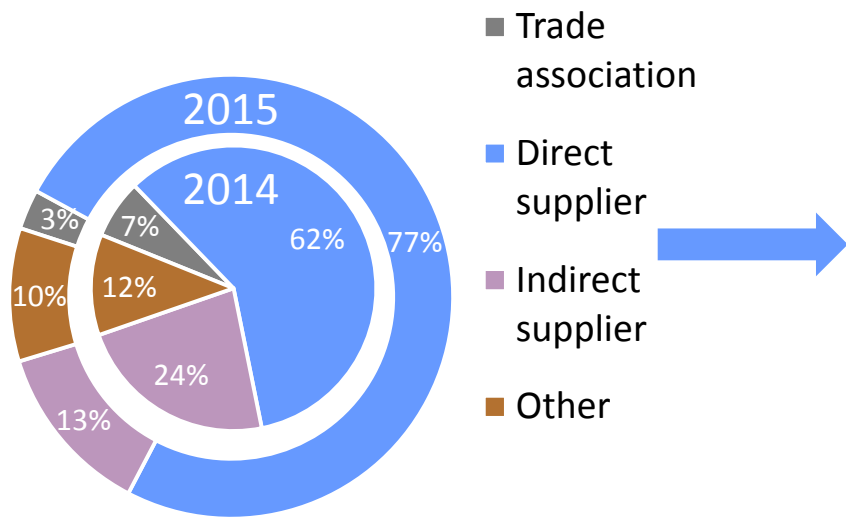
Responses doubled



- 978 Direct suppliers**
- 163 Indirect suppliers**
- 41 Trade Associations**

- It was live from 23rd March to 1st May 2015

Who took part?

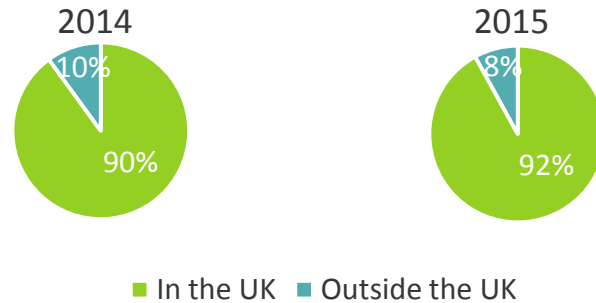


Supplier characteristics

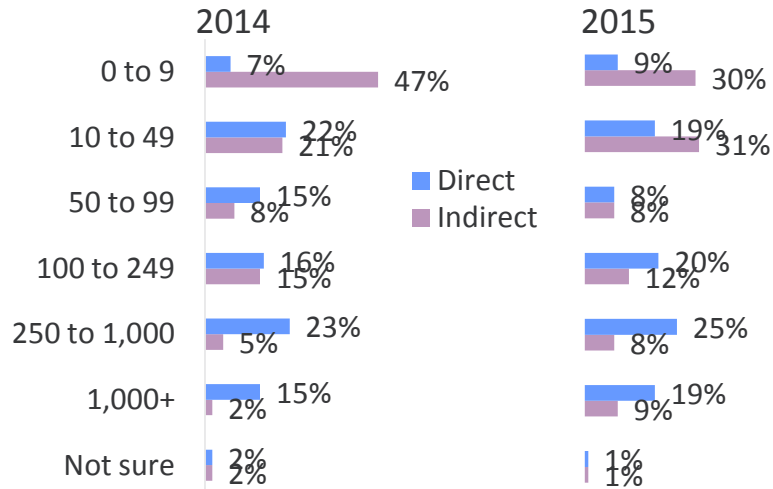
Head Office



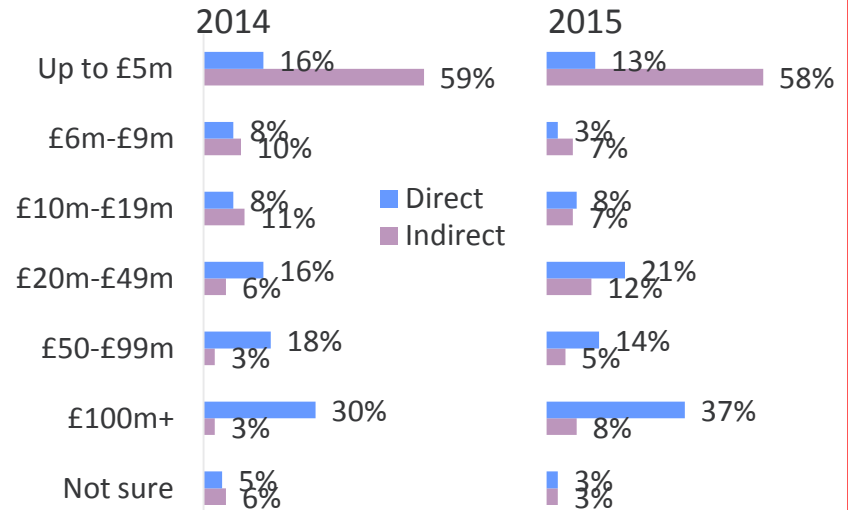
Personally based...



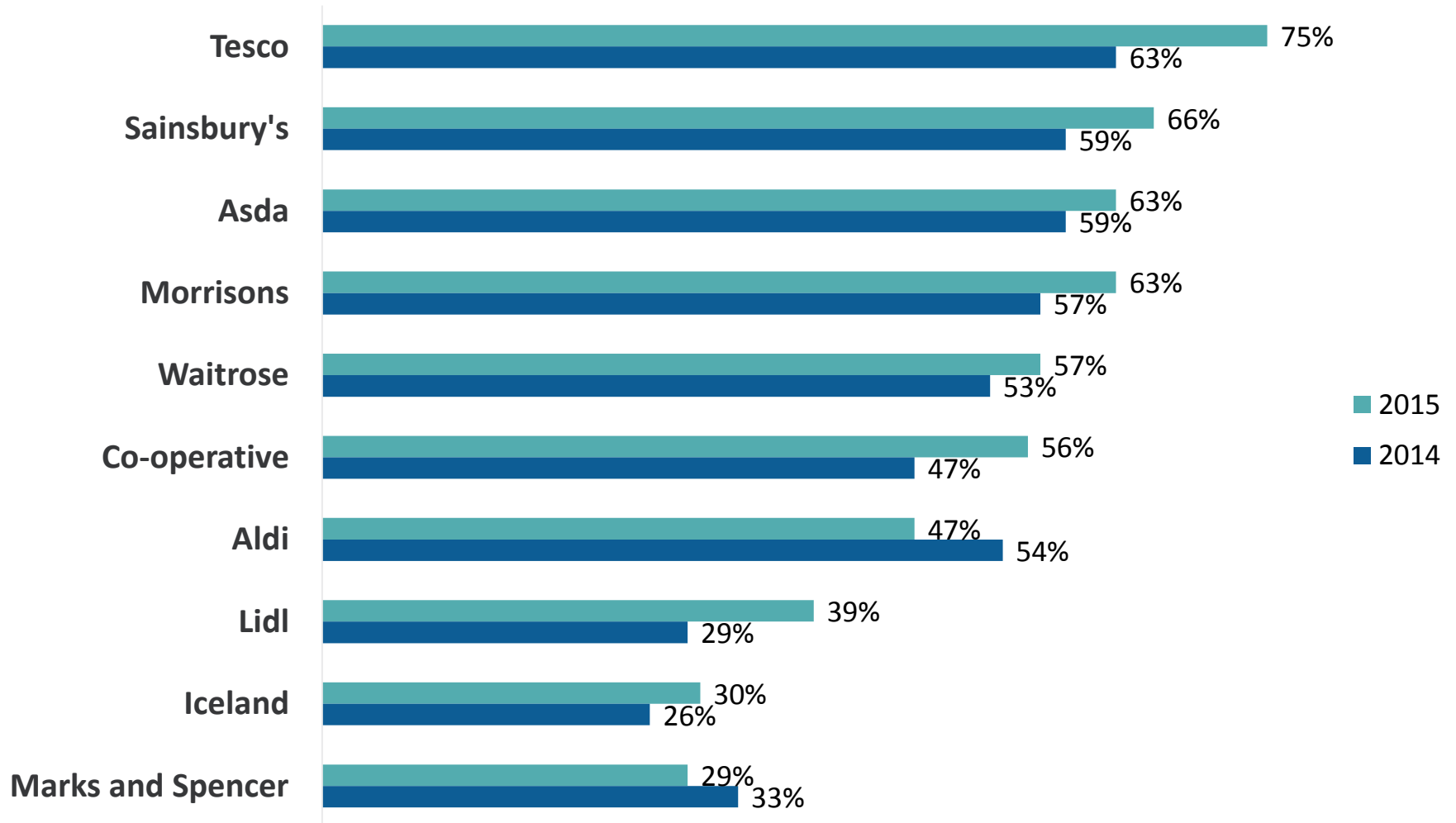
Size



Turnover



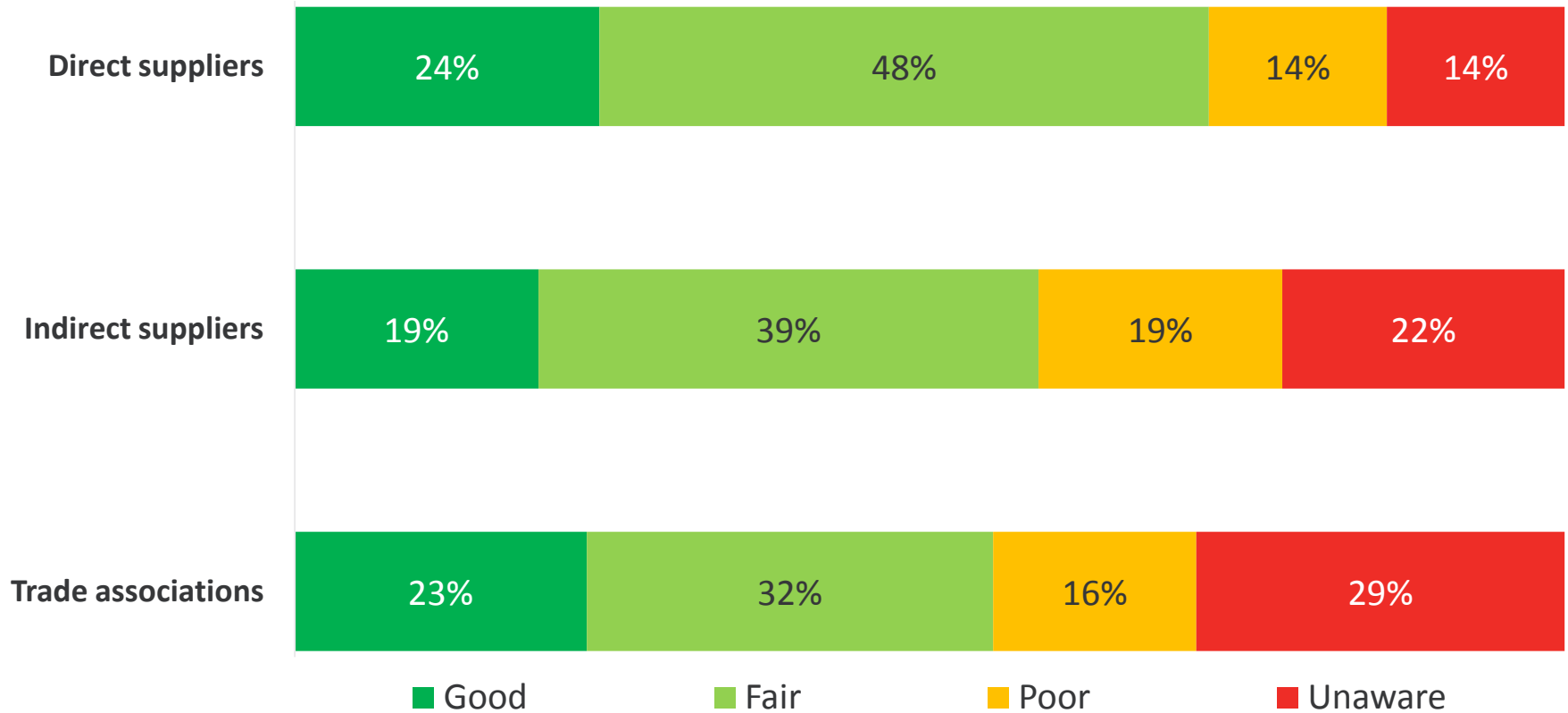
Which retailers supplied?



Awareness of the Code and GCA



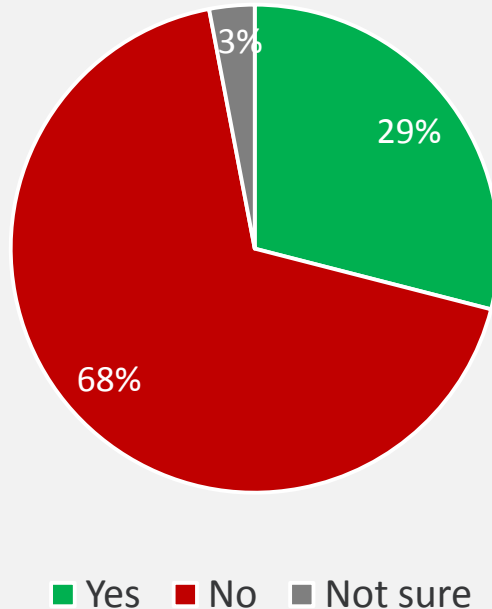
Code understanding



Micro suppliers have the highest proportion of respondents with a 'poor' understanding of the Code (15%)

Training on the Code

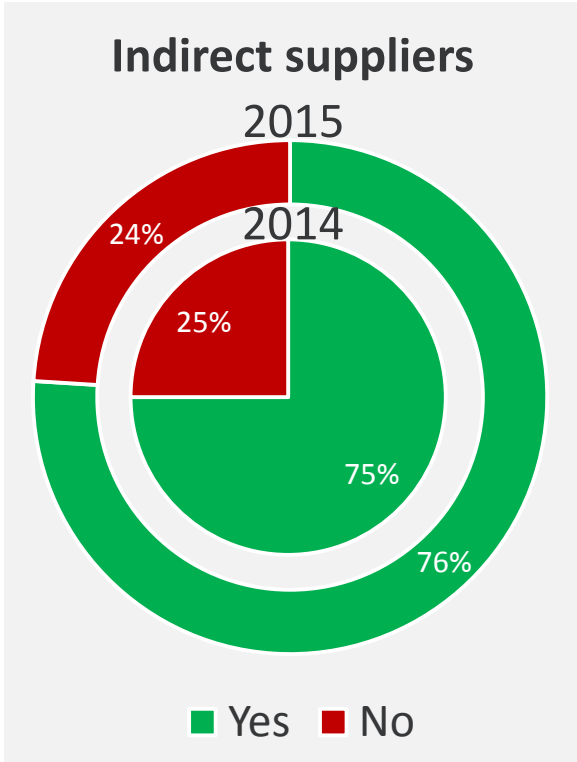
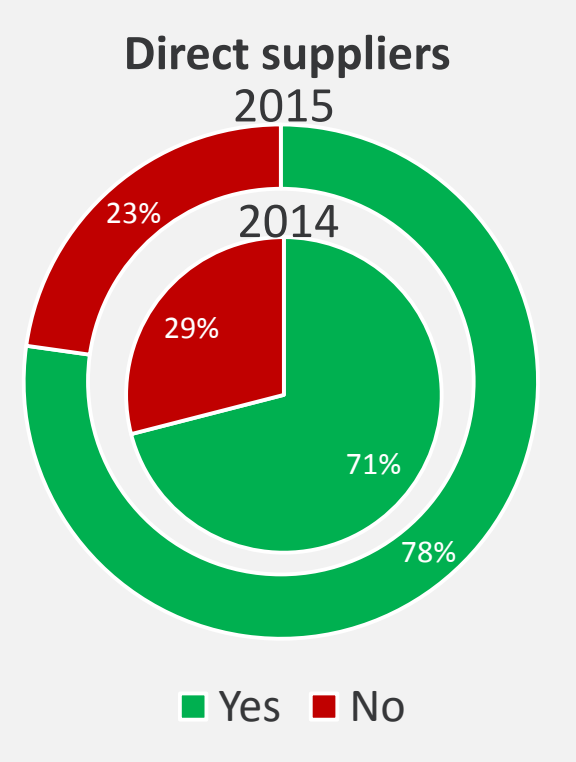
Have you received any training on the Code?



Larger suppliers are most likely to have had training on the Code (39%) - compared to 9% of micro suppliers, 24% of small, 32% of medium suppliers

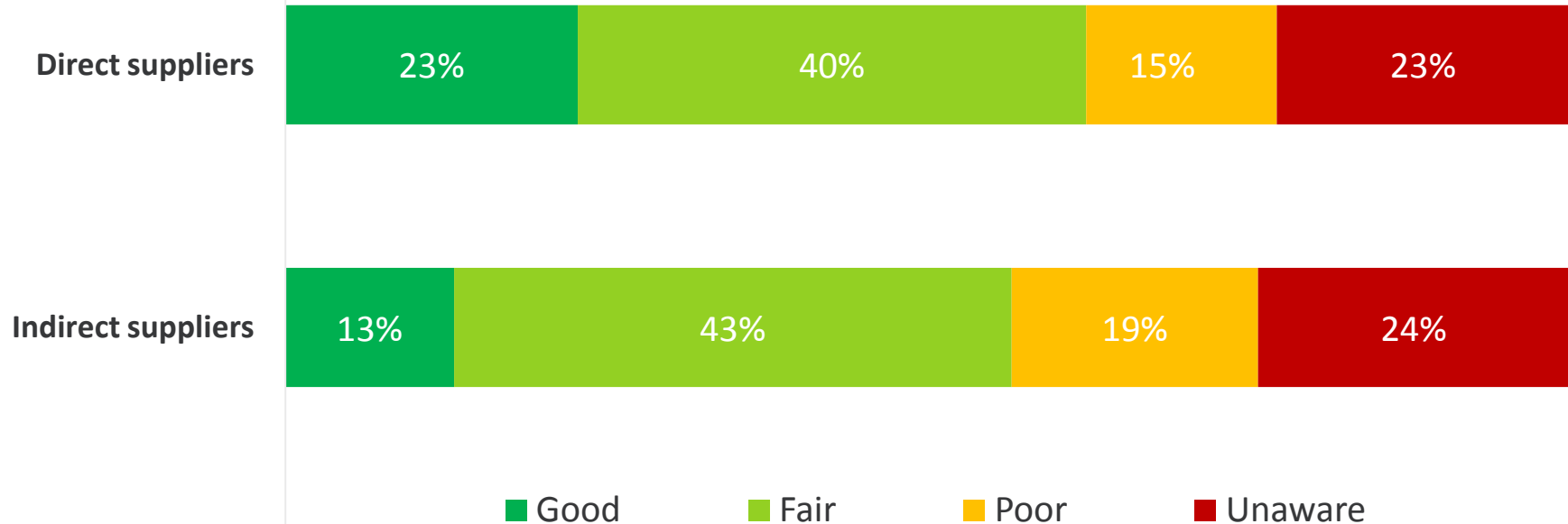
GCA Awareness

A 7 pp rise in GCA awareness among direct suppliers



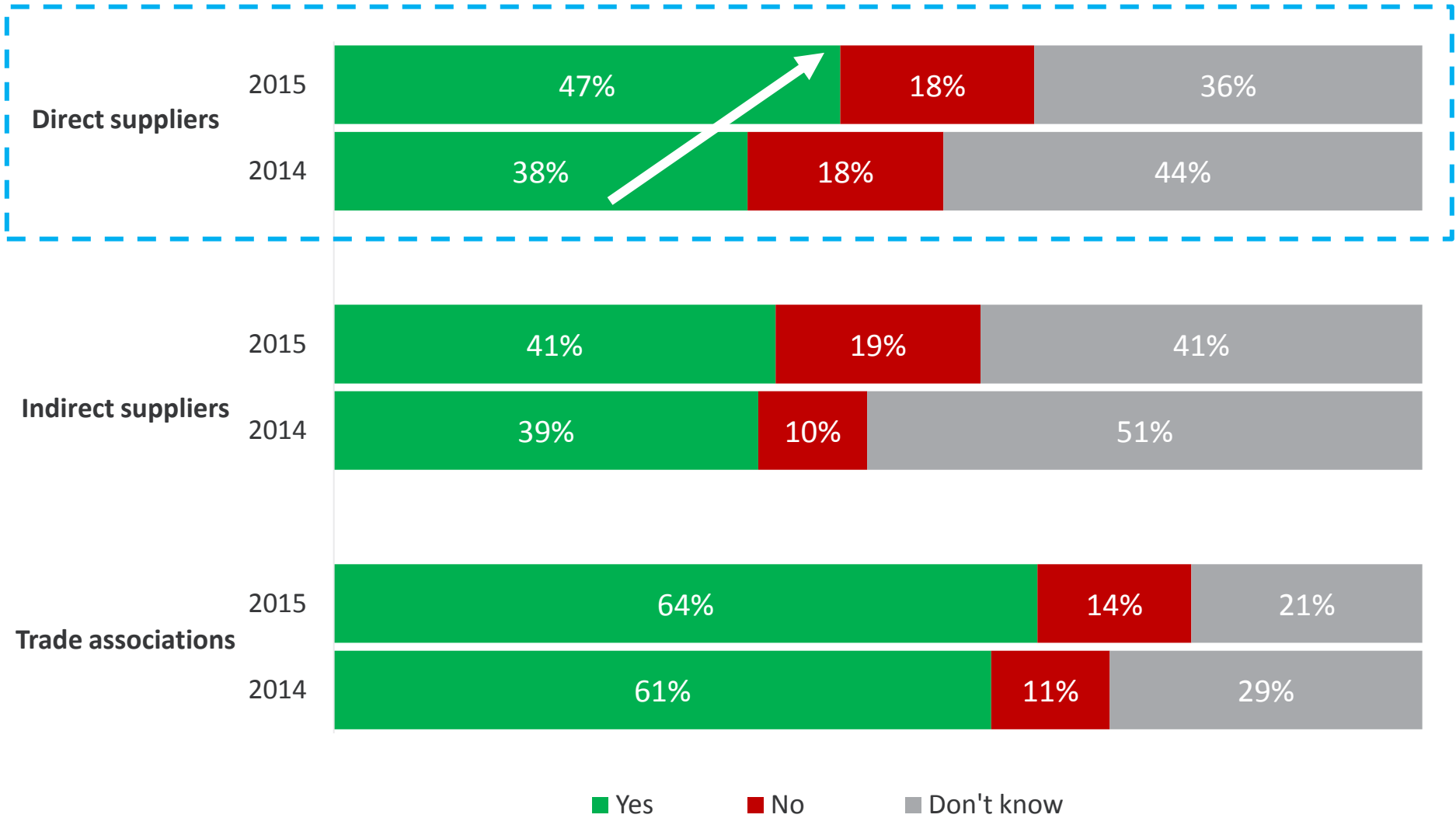
GCA awareness is lowest among micro suppliers (65%) and highest among small suppliers (88%)

Understanding of the GCA's role and responsibilities



30% of medium suppliers would rate their understanding as 'good', compared to 12% of micro suppliers

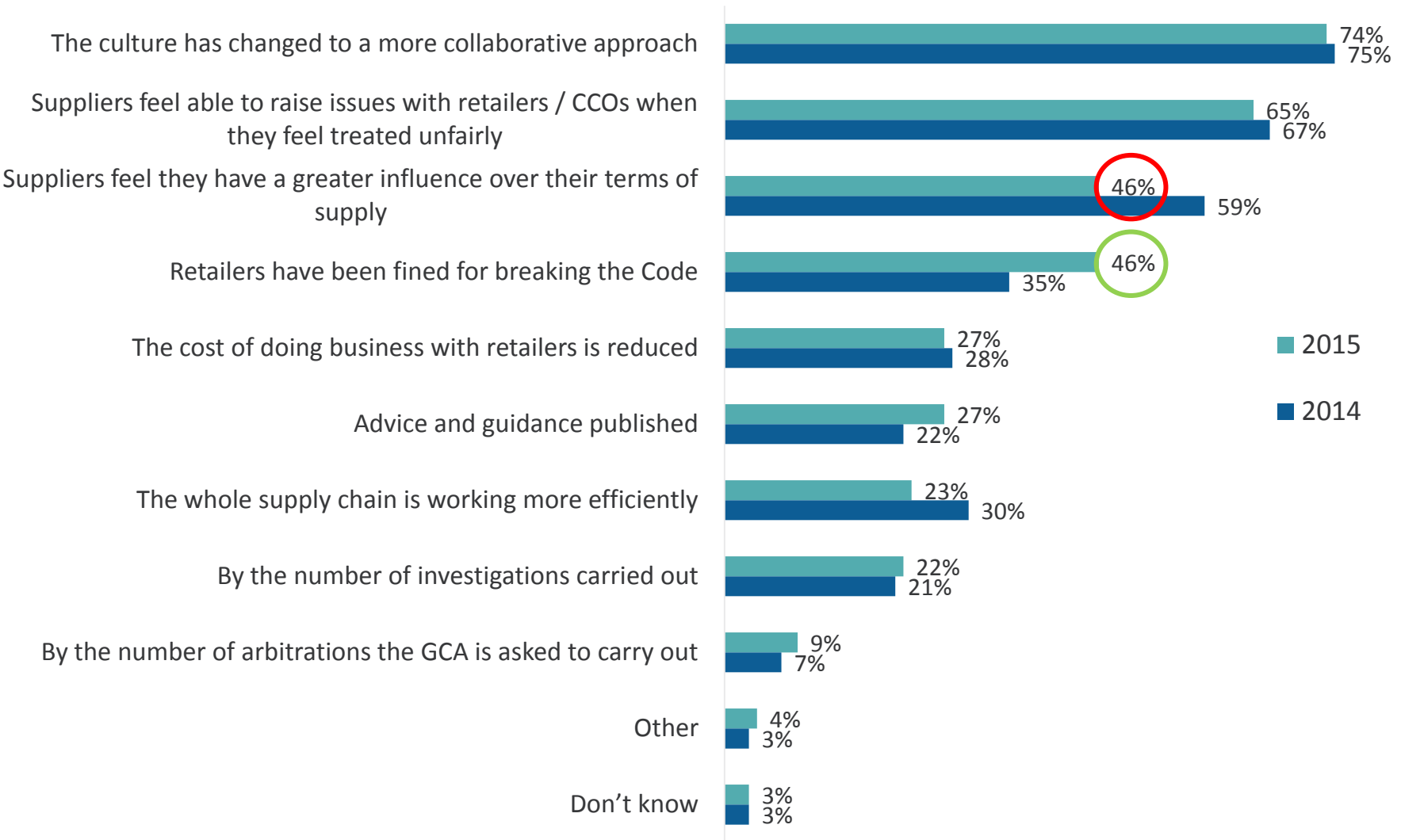
Would you consider raising issues with the GCA?



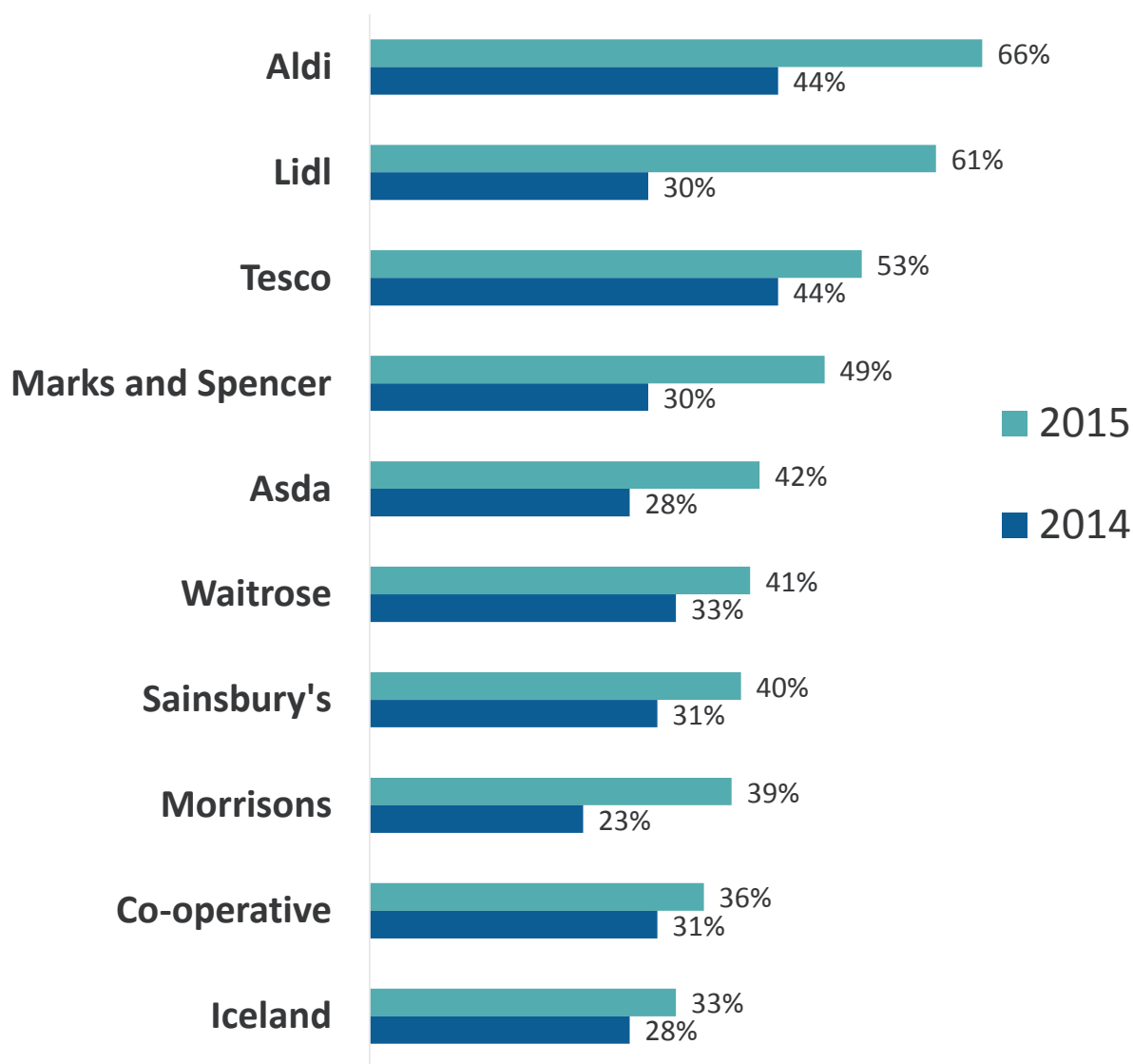
A fifth wouldn't raise an issue with the GCA? Why not?



The GCA's Critical Success Factors



Have a written supply agreement with these retailers?

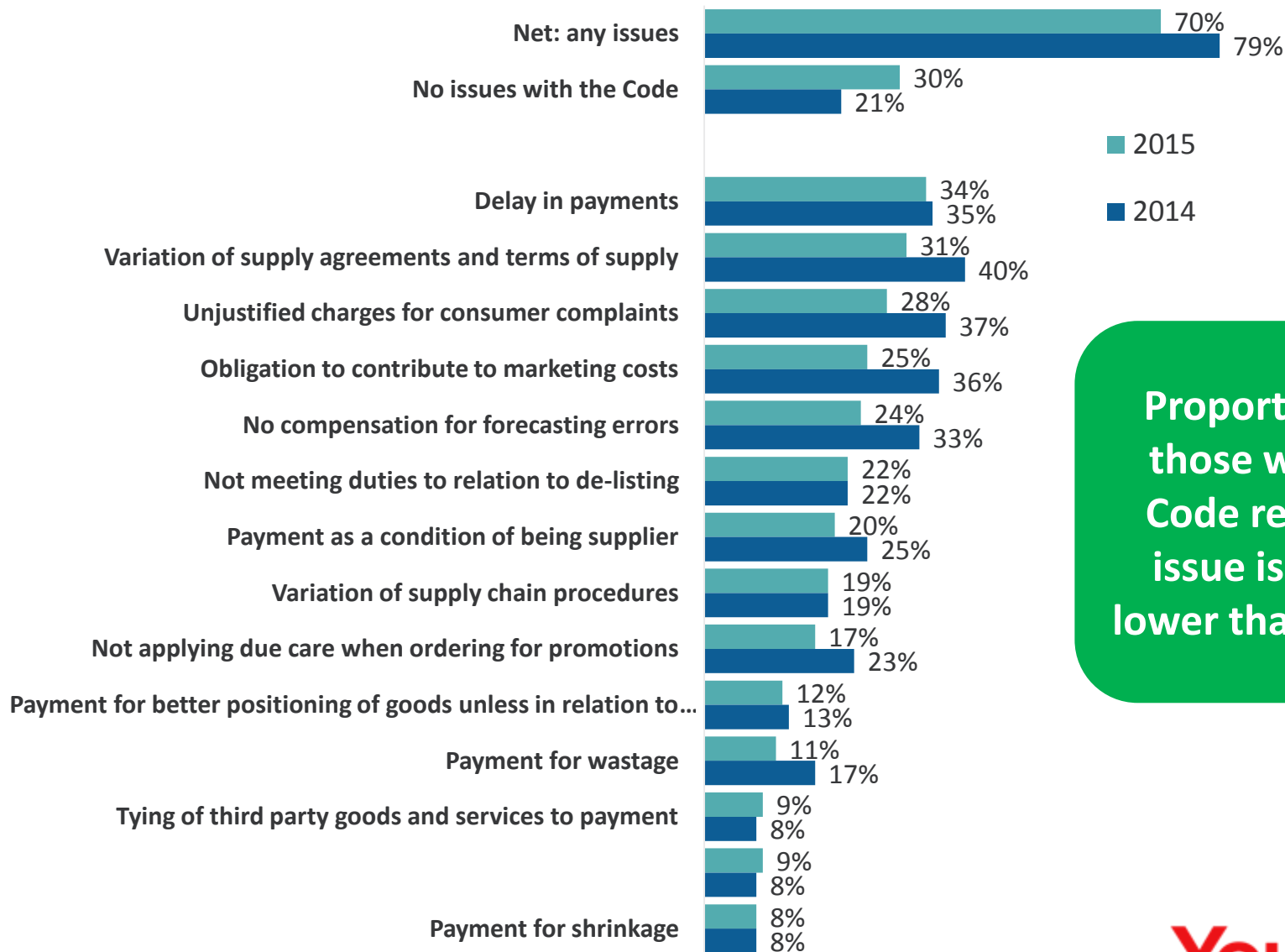


For most retailers large suppliers are more likely to recognise that they have a written supply agreement. For example – 45% of large suppliers to Morrisons compared to 18% of micro / small

Experience of issues and raising issues with the GCA

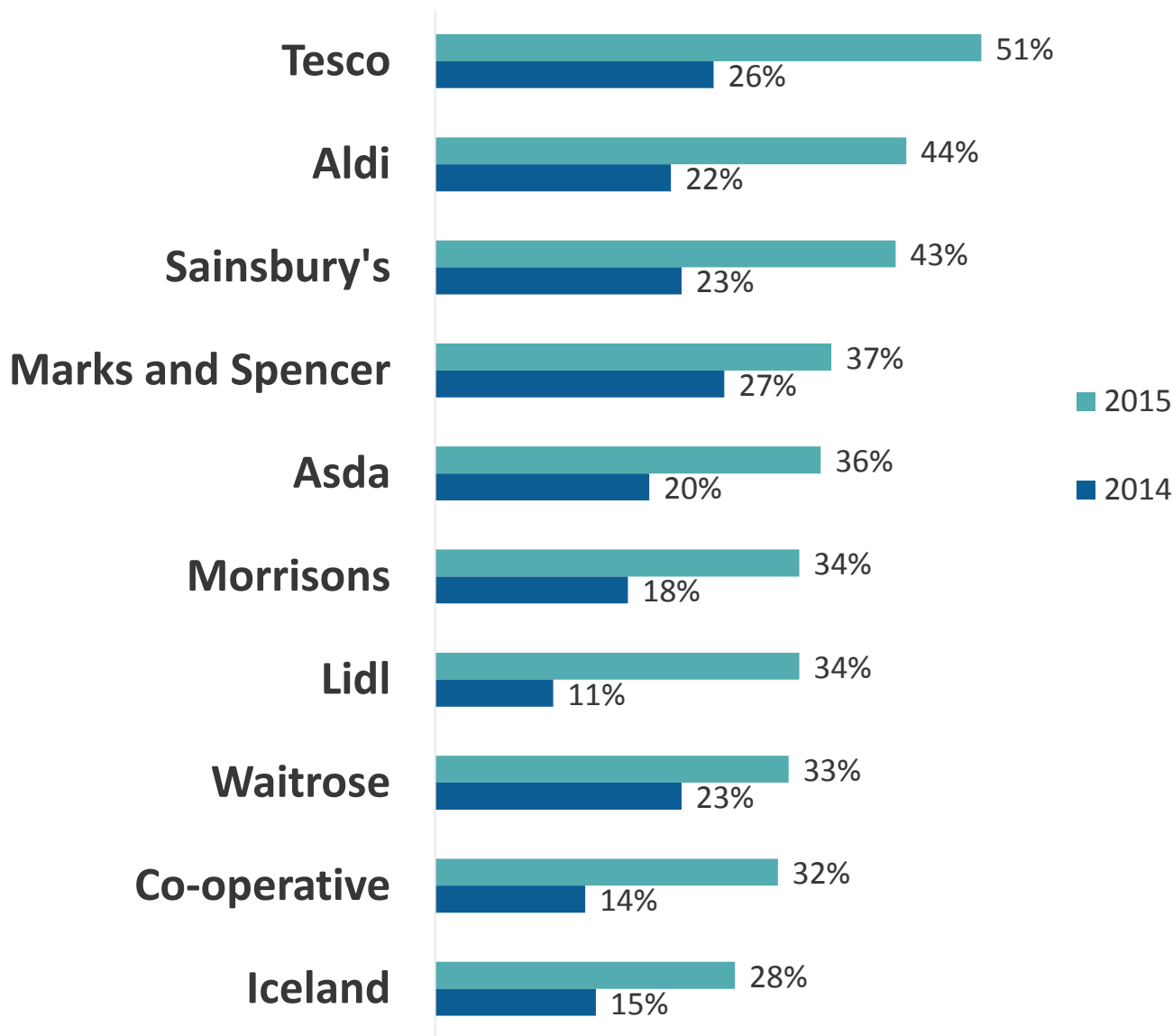


Which issues have direct suppliers experienced in the last year?



Proportion of those with a Code related issue is 9 pp lower than 2014

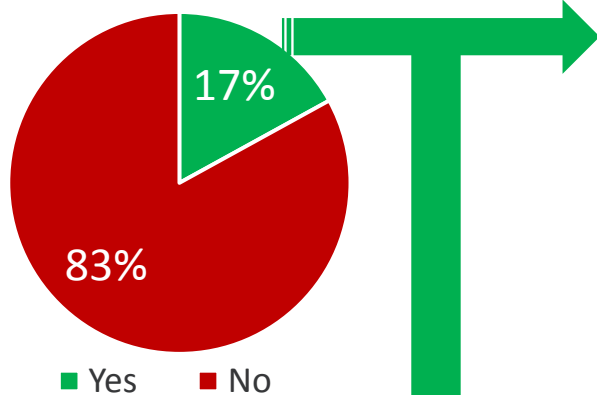
Knowing who is or where to find the CCO



Positive movement for all retailers as CCOs become more established in supplier's minds.

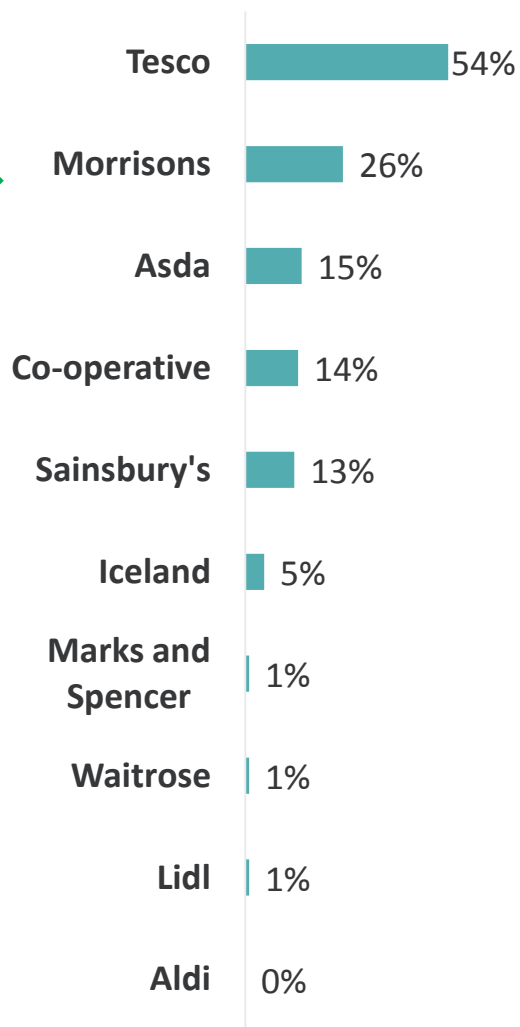
Raising issues with a retailer in the last year

Raised an issue in last 12 months?

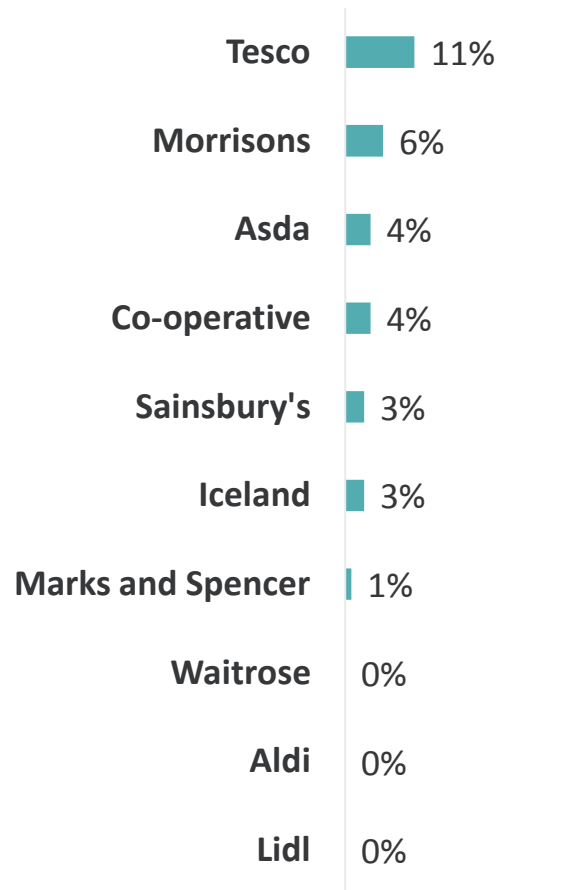


4% of micro, 12% of small, 17% of medium, 21% of large suppliers

About which retailer? (as % of those who raised issues)



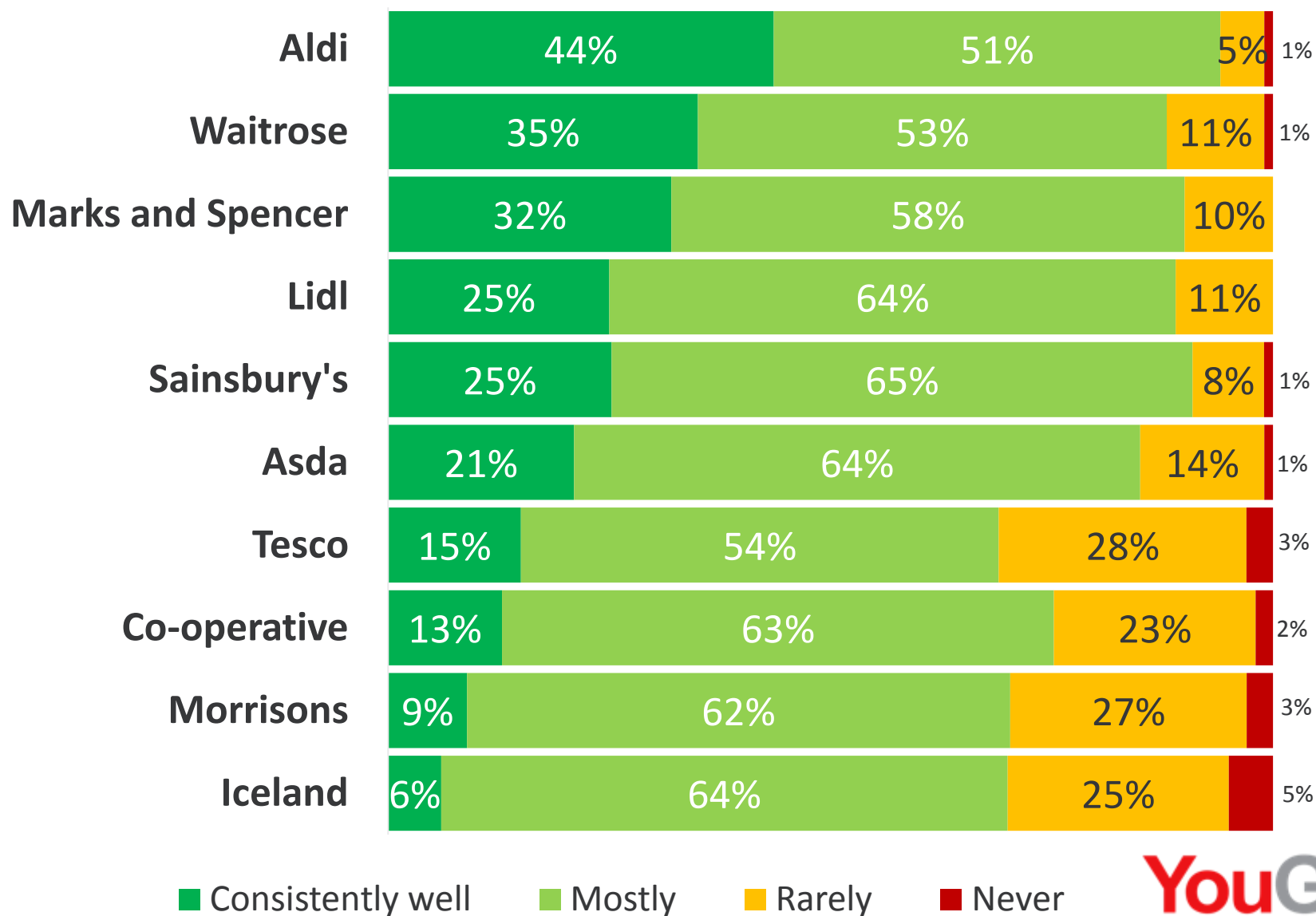
About which retailer? (as a % of their suppliers)



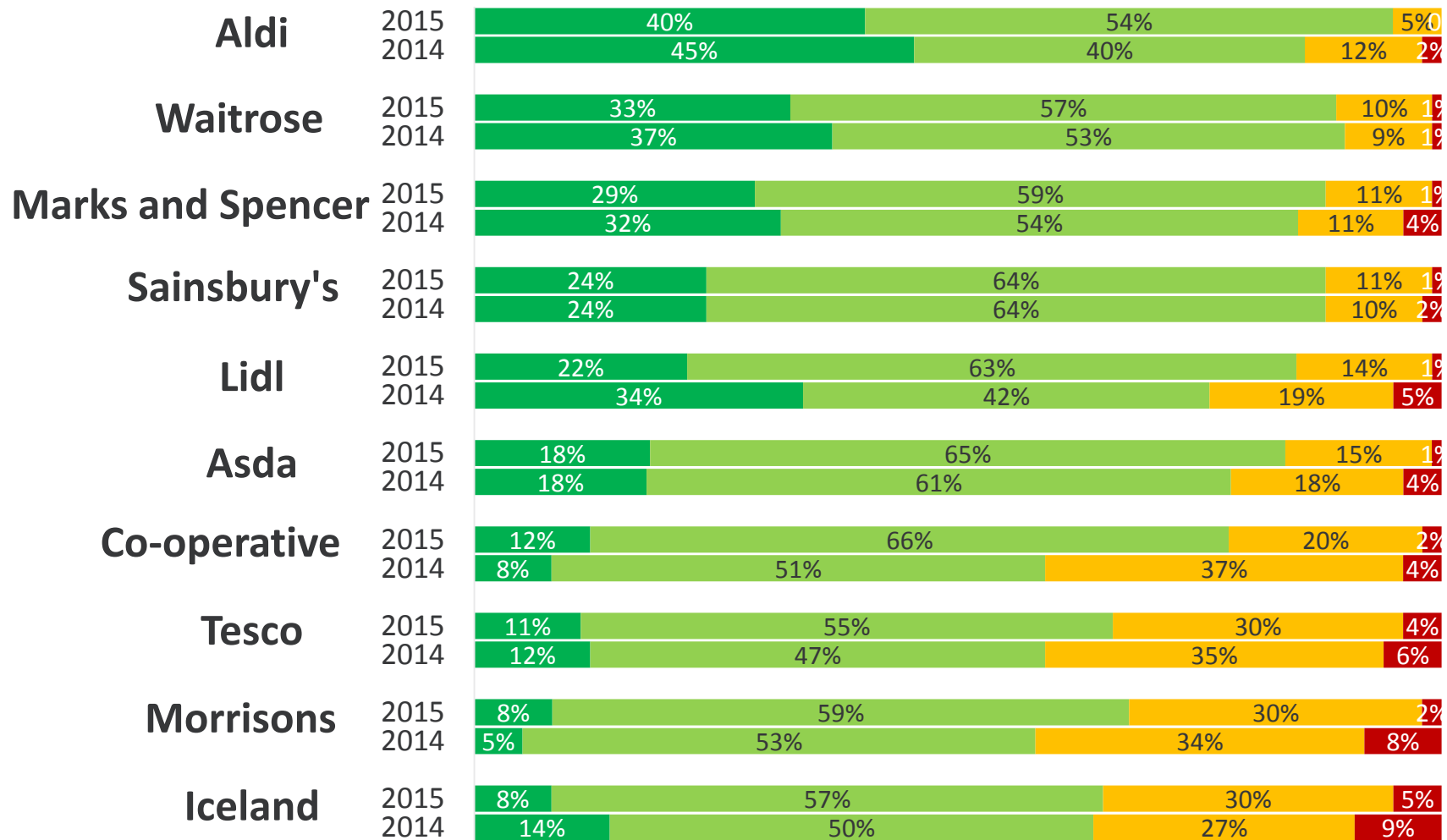
Overall assessment



New this year: How well do Buyers comply with the Code?



Overall assessment of compliance with the Code



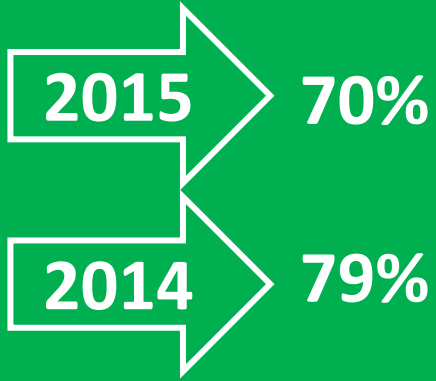
■ Consistently well
 ■ Mostly
 ■ Rarely
 ■ Never



Key points



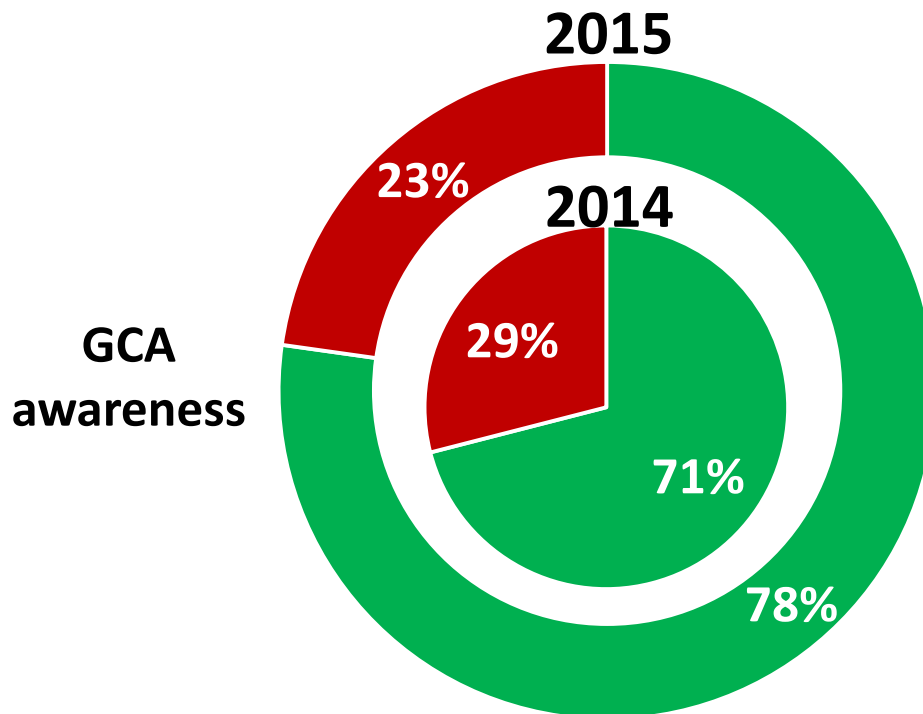
At least one Code related issue in the last year



47% would consider raising an issue with the GCA (38% in 2014)

Critical success factors

- 1 Collaborative Culture
- 2 Feeling able to raise issues with retailers/ CCOs
- 3 Greater influence over terms of supply
- 4 Retailers fined for breaking the Code



Rises of between 6 and 25pp in knowing where to find the CCO