



# GCA - Annual Survey Results 2015

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*CEO & Co-Founder*  
*YouGov*

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# Who took part



# Survey details

*Responses doubled*



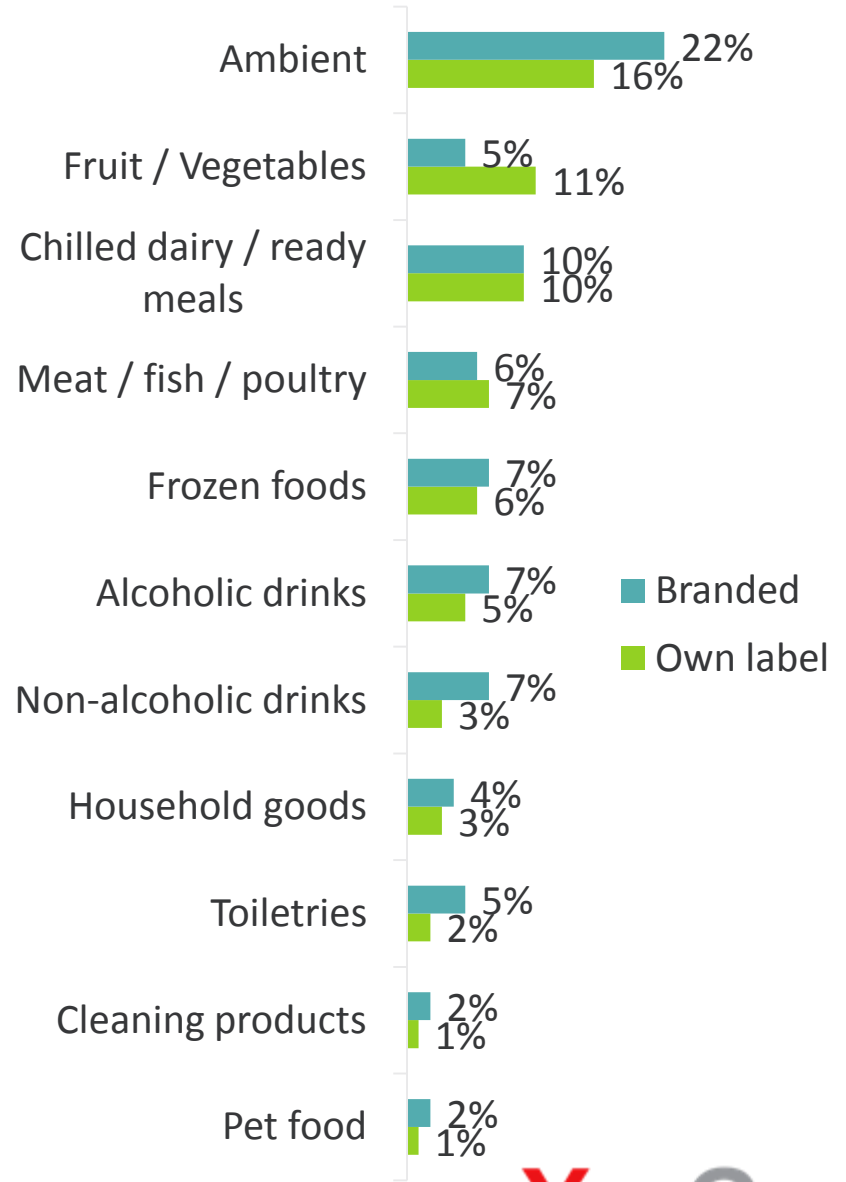
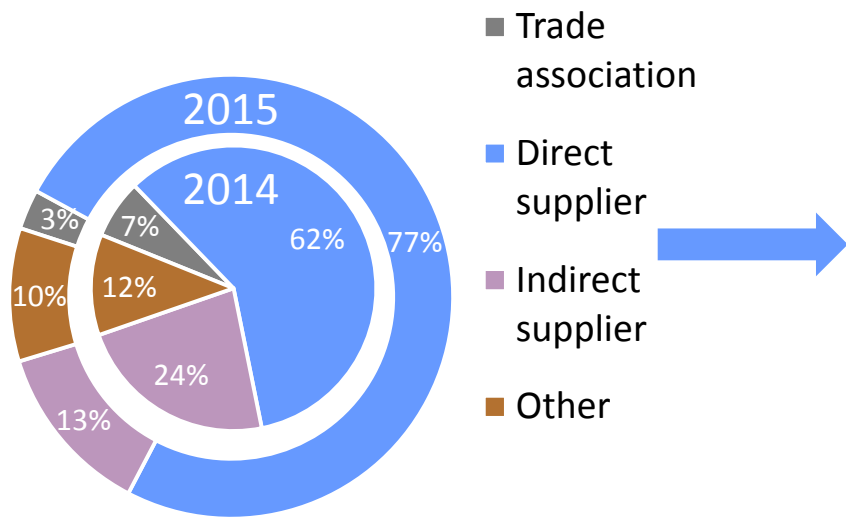
**978 Direct suppliers**

**163 Indirect suppliers**

**41 Trade Associations**

- It was live from 23<sup>rd</sup> March to 1<sup>st</sup> May 2015

# Who took part?

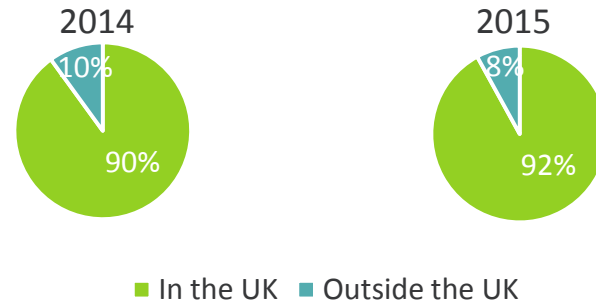


# Supplier characteristics

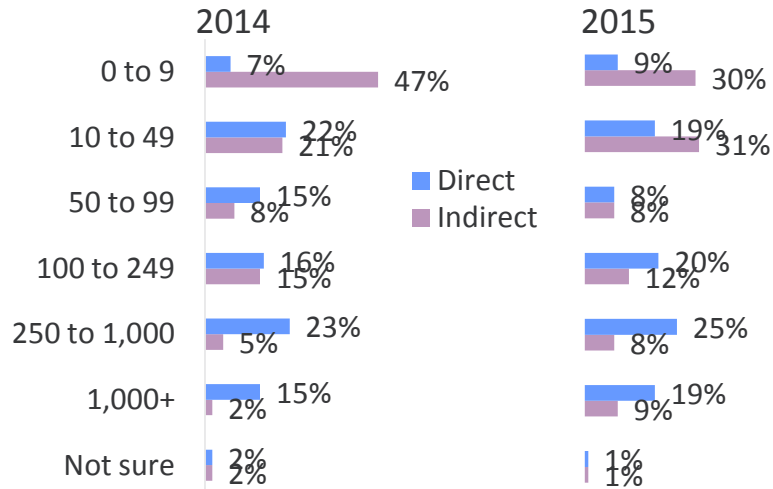
### Head Office



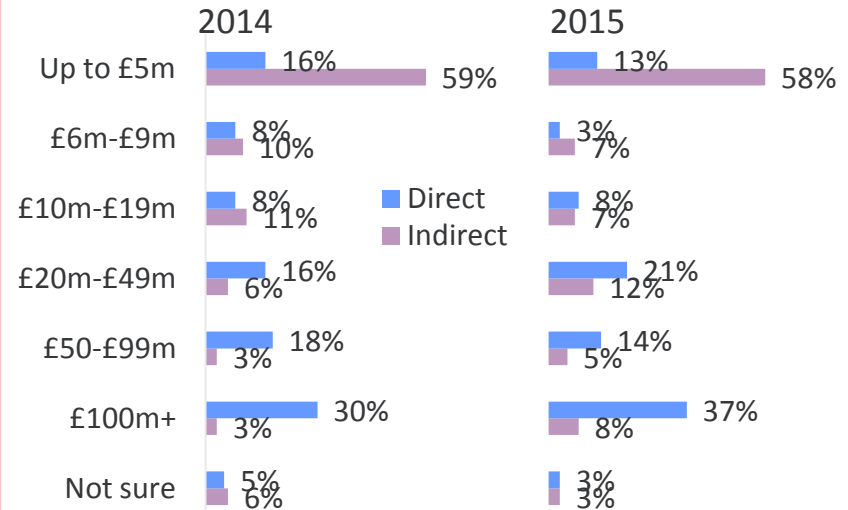
### Personally based...



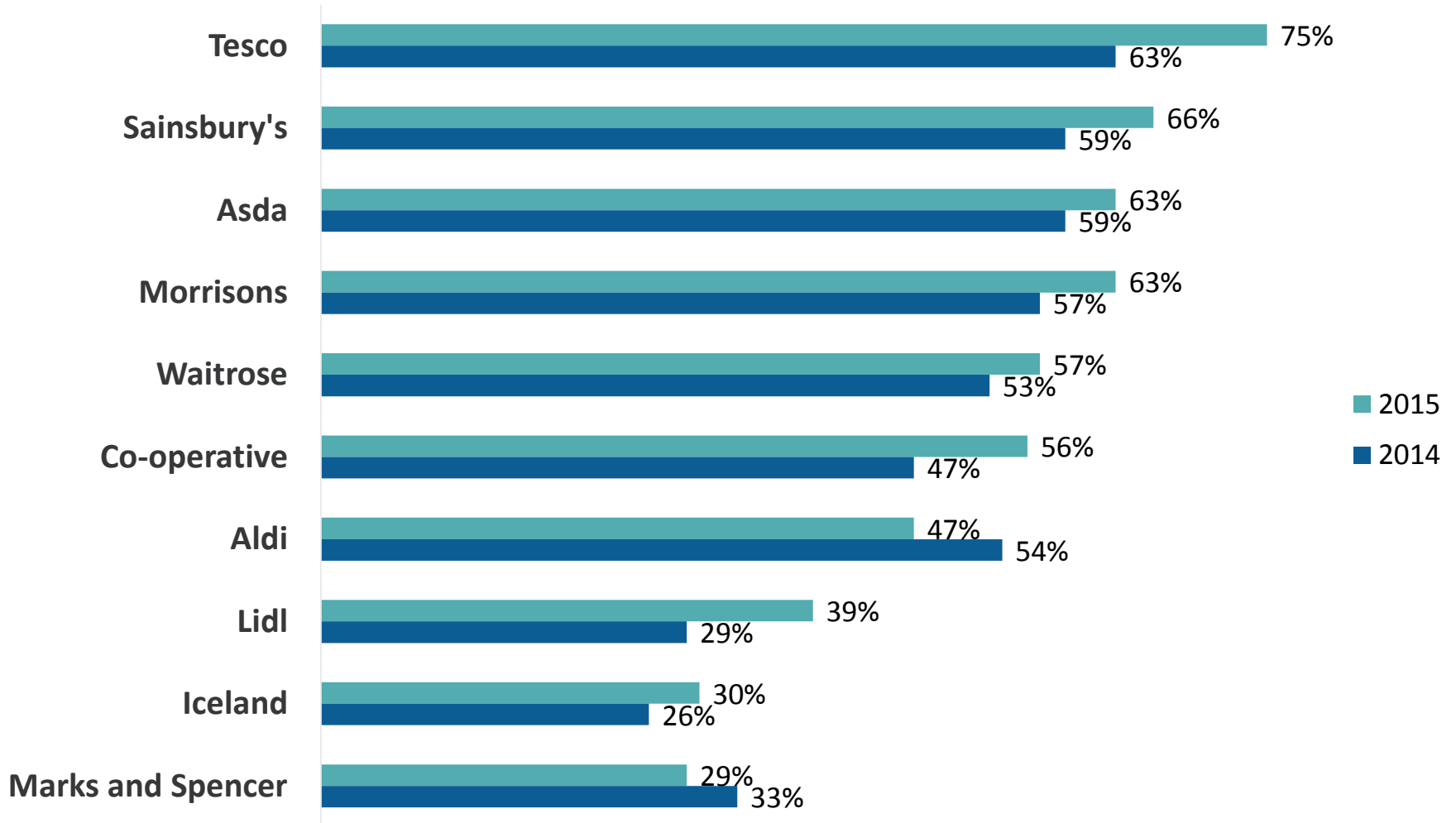
### Size



### Turnover



# Which retailers supplied?





# Awareness of the Code and GCA



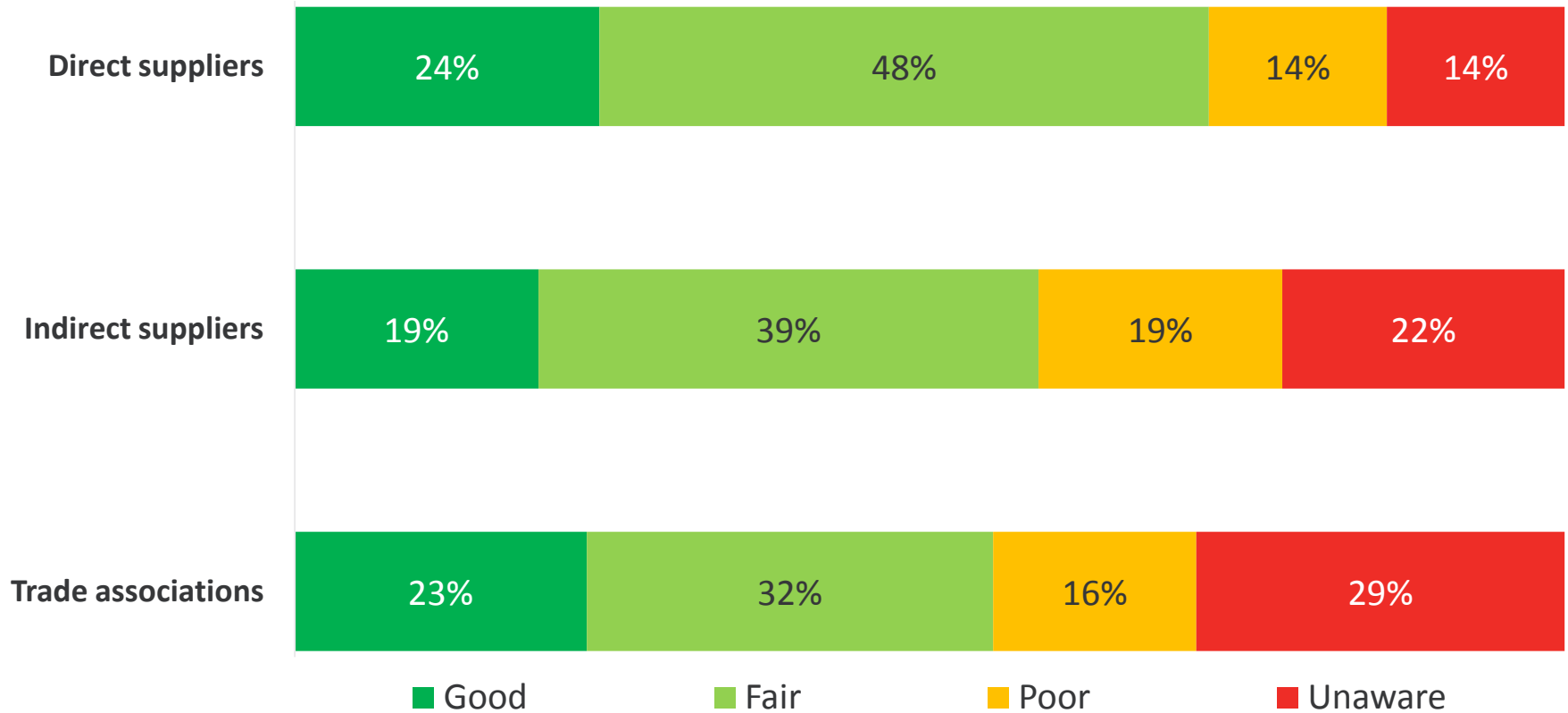
# Thinking about the Code, what aspects of it first come to mind?



- Fairness
- Relationships
- Behaviour
- Trading
- Agreements
- Power



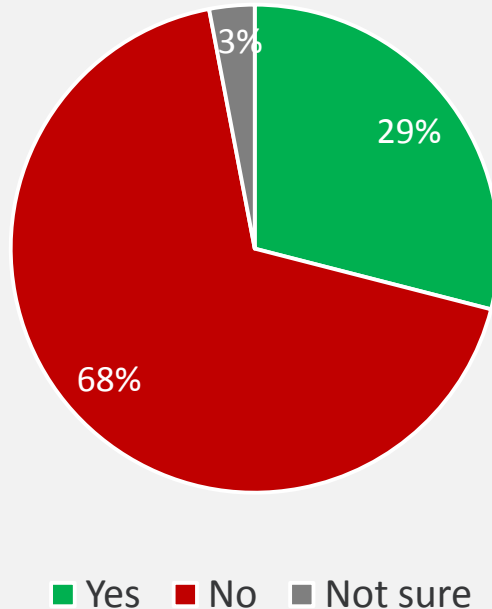
# Code understanding



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

# Training on the Code

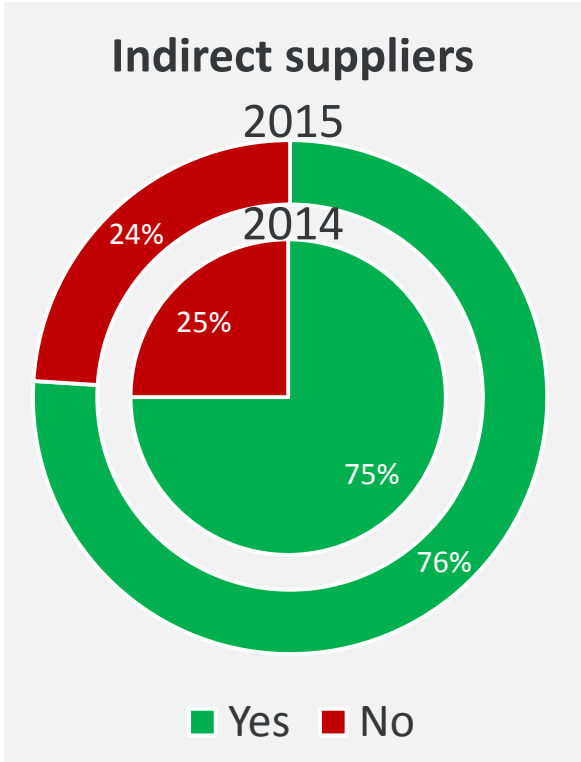
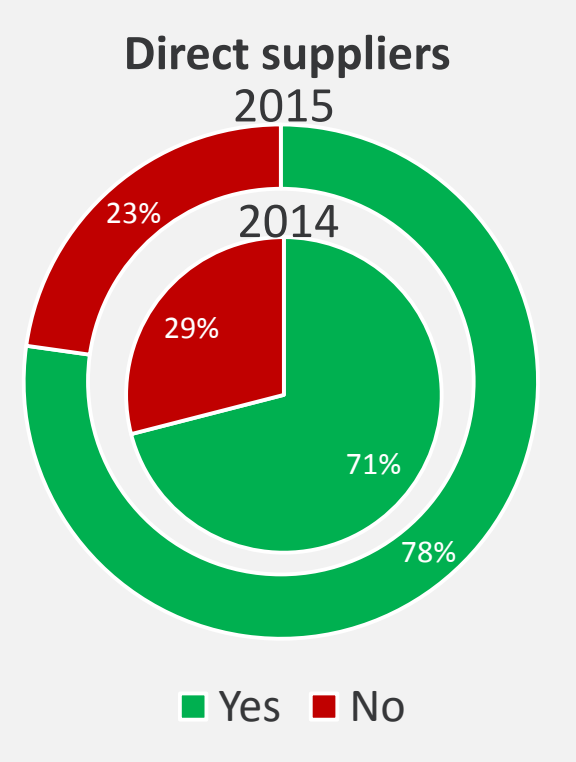
Have you received any training on the Code?



**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**

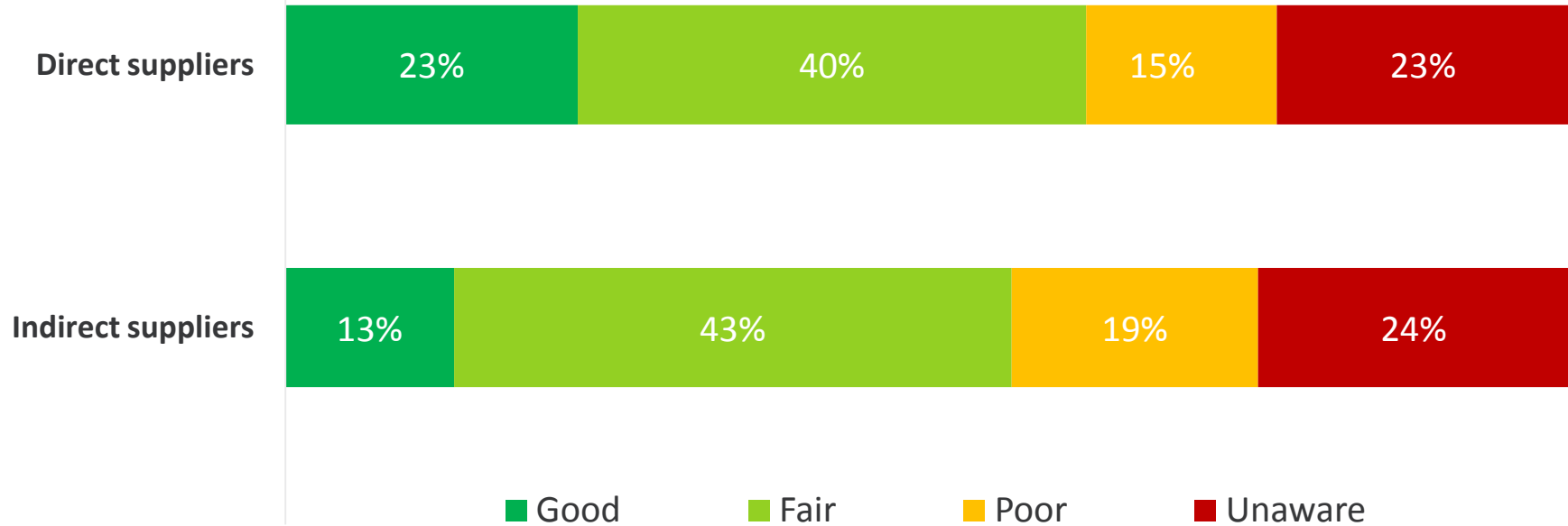
# GCA Awareness

**A 7 pp rise in GCA awareness among direct suppliers**



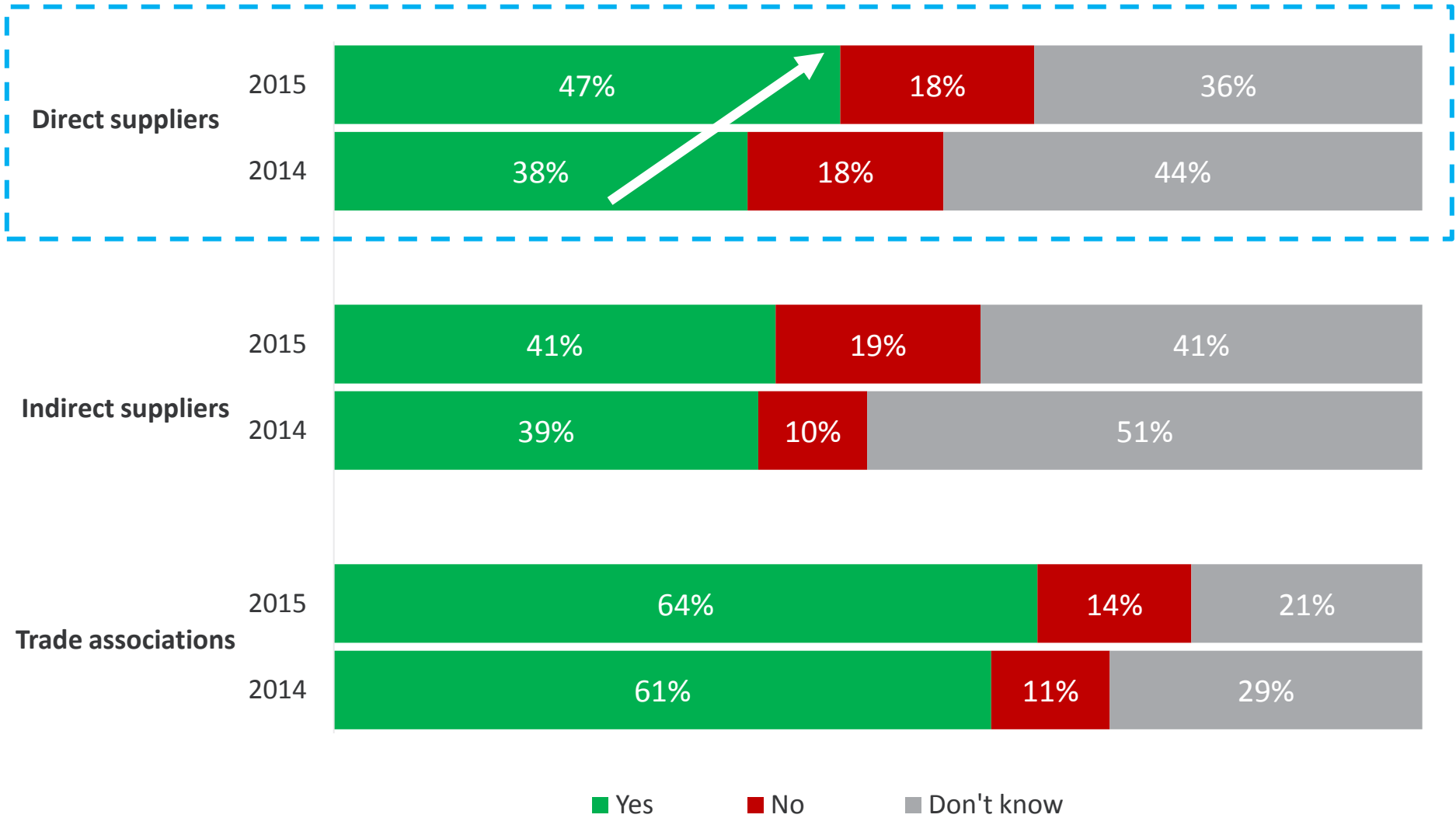
**GCA awareness is lowest among micro suppliers (65%) and highest among small suppliers (88%)**

# 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?

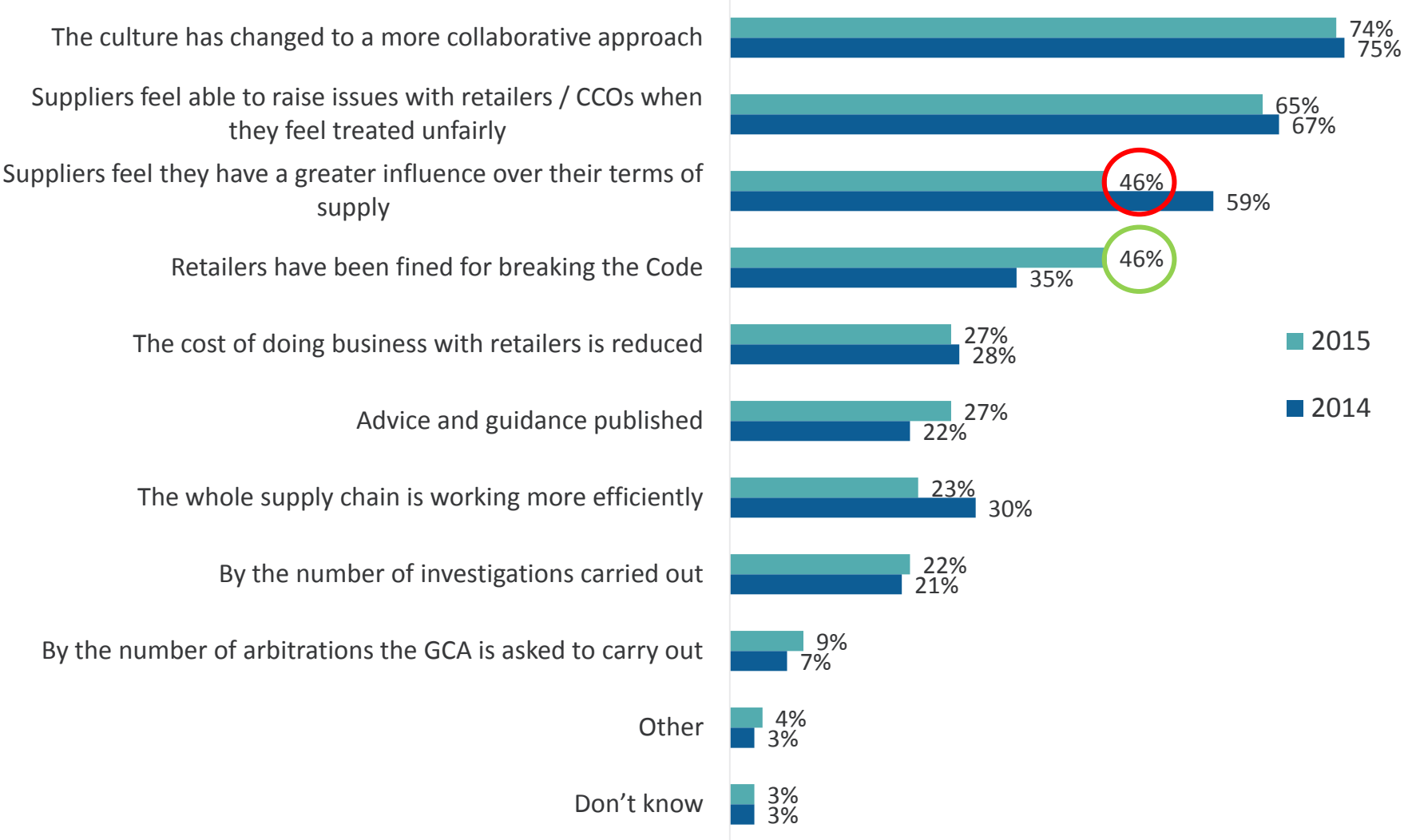




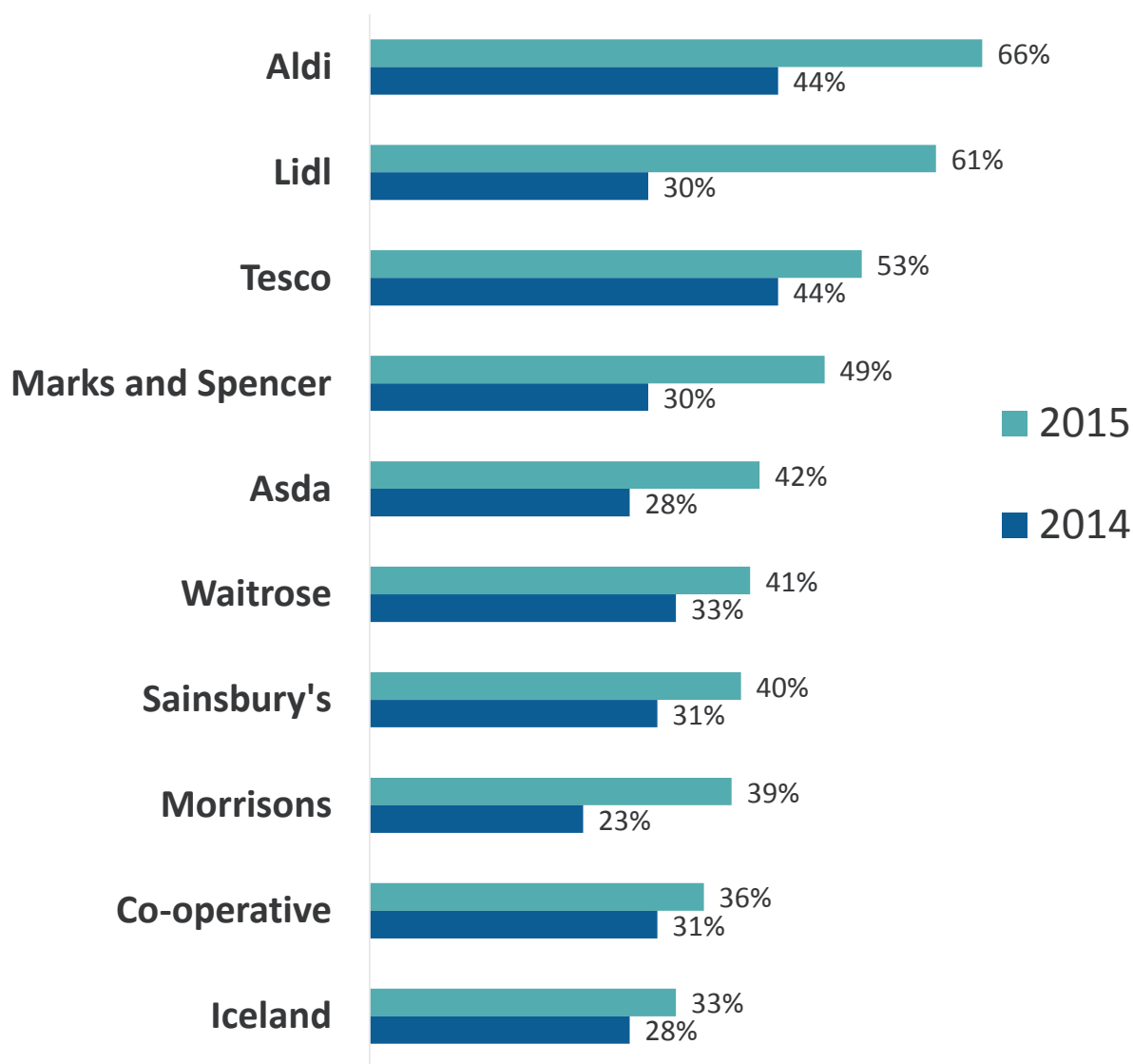
# A fifth wouldn't raise an issue with the GCA? Why not?



# The GCA's Critical Success Factors



# Have a written supply agreement with these retailers?

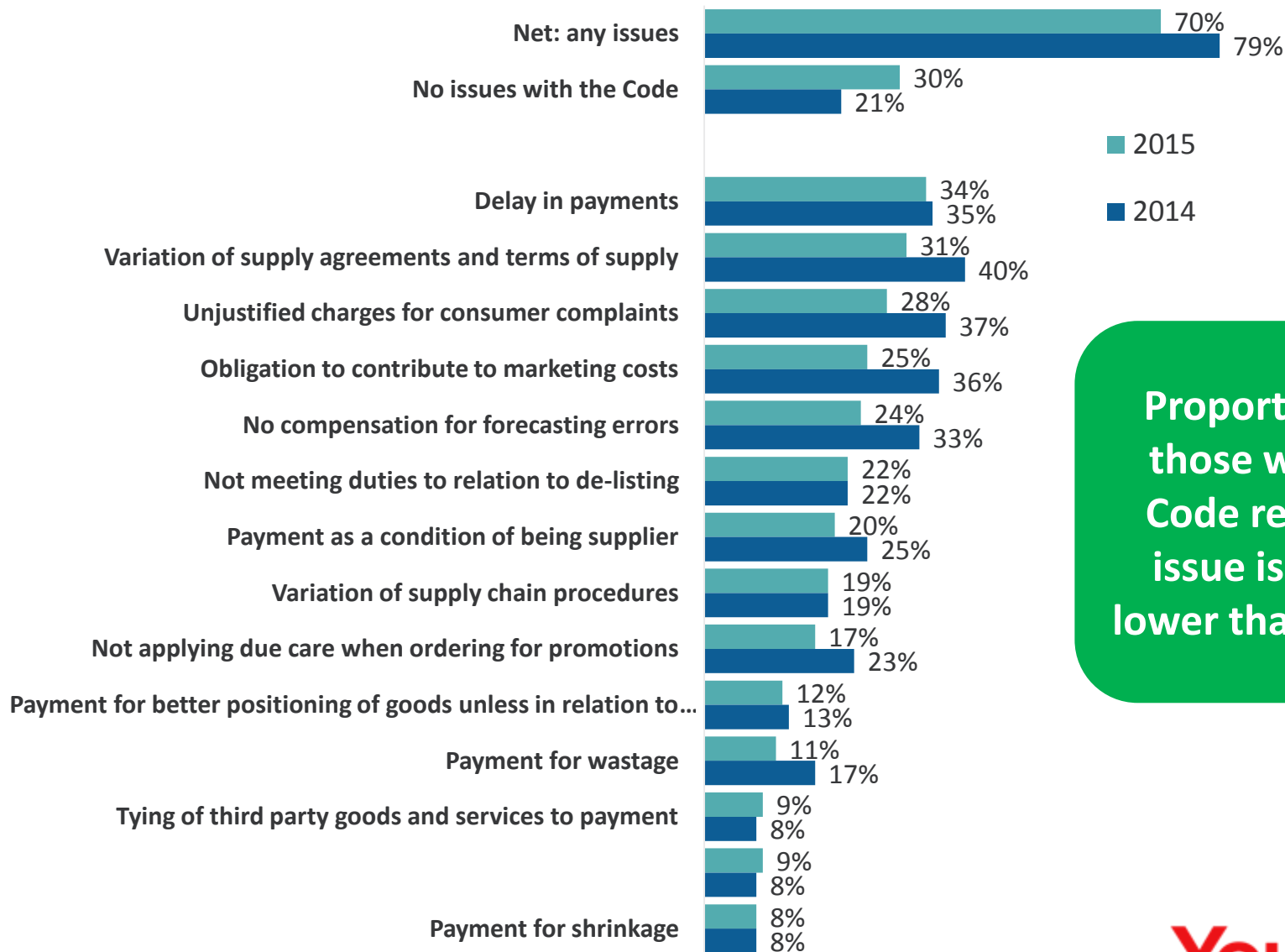


For most retailers large suppliers are more likely to recognise that they have a written supply agreement. For example – 45% of large suppliers to Morrisons compared to 18% of micro / small

# Experience of issues and raising issues with the GCA



# Which issues have direct suppliers experienced in the last year?

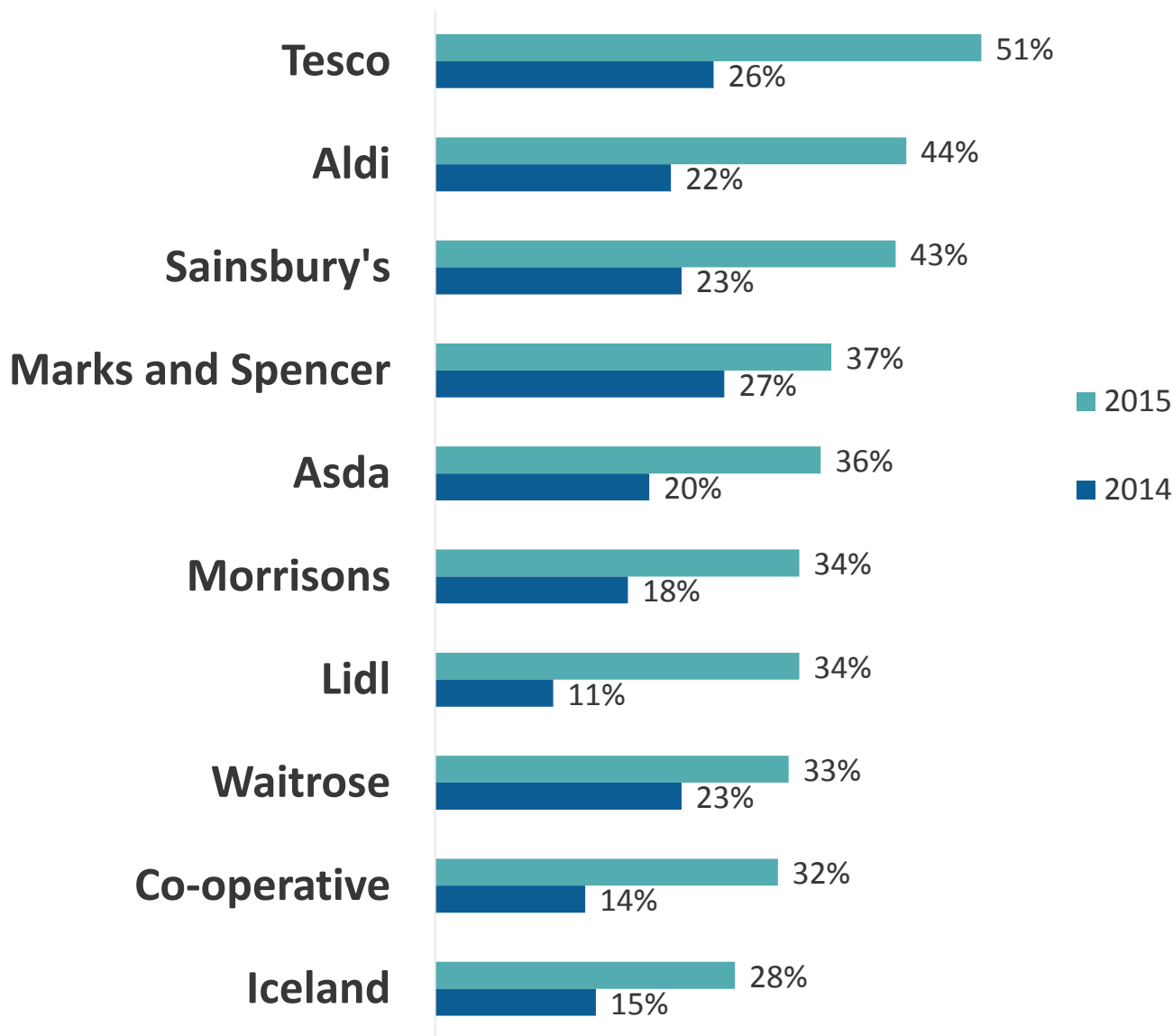


**Proportion of those with a Code related issue is 9 pp lower than 2014**





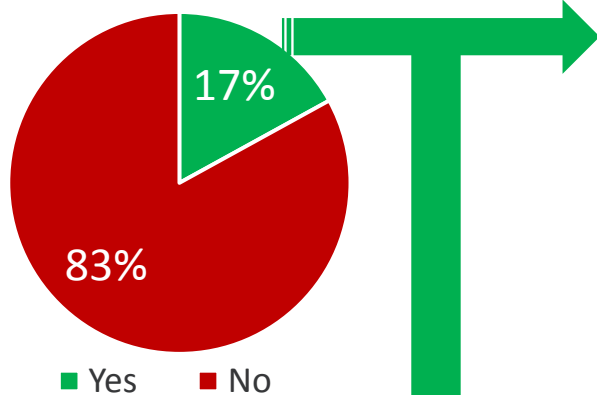
# Knowing who is or where to find the CCO



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

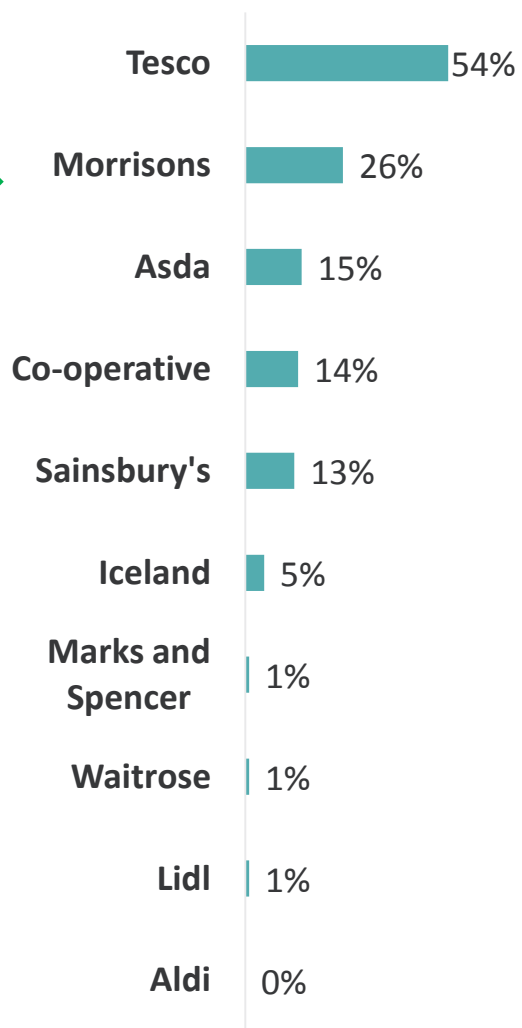
# Raising issues with a retailer in the last year

Raised an issue in last 12 months?

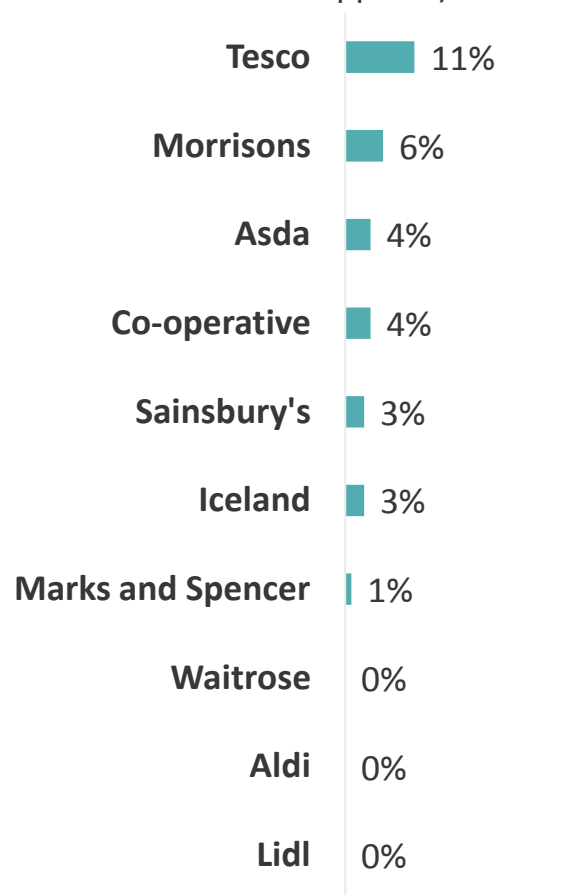


4% of micro, 12% of small, 17% of medium, 21% of large suppliers

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



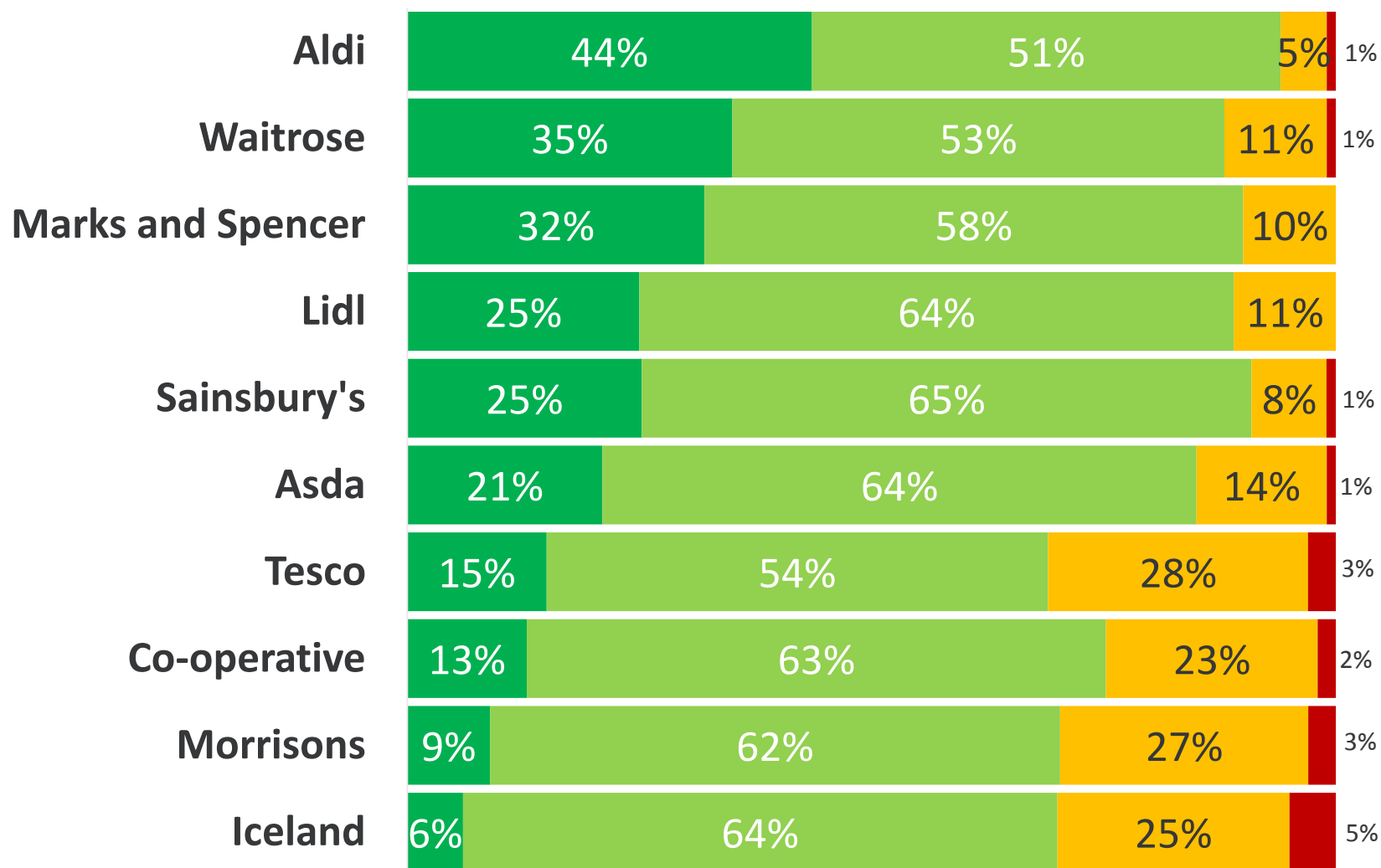
About which retailer? (as a % of their suppliers)



# Overall assessment



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

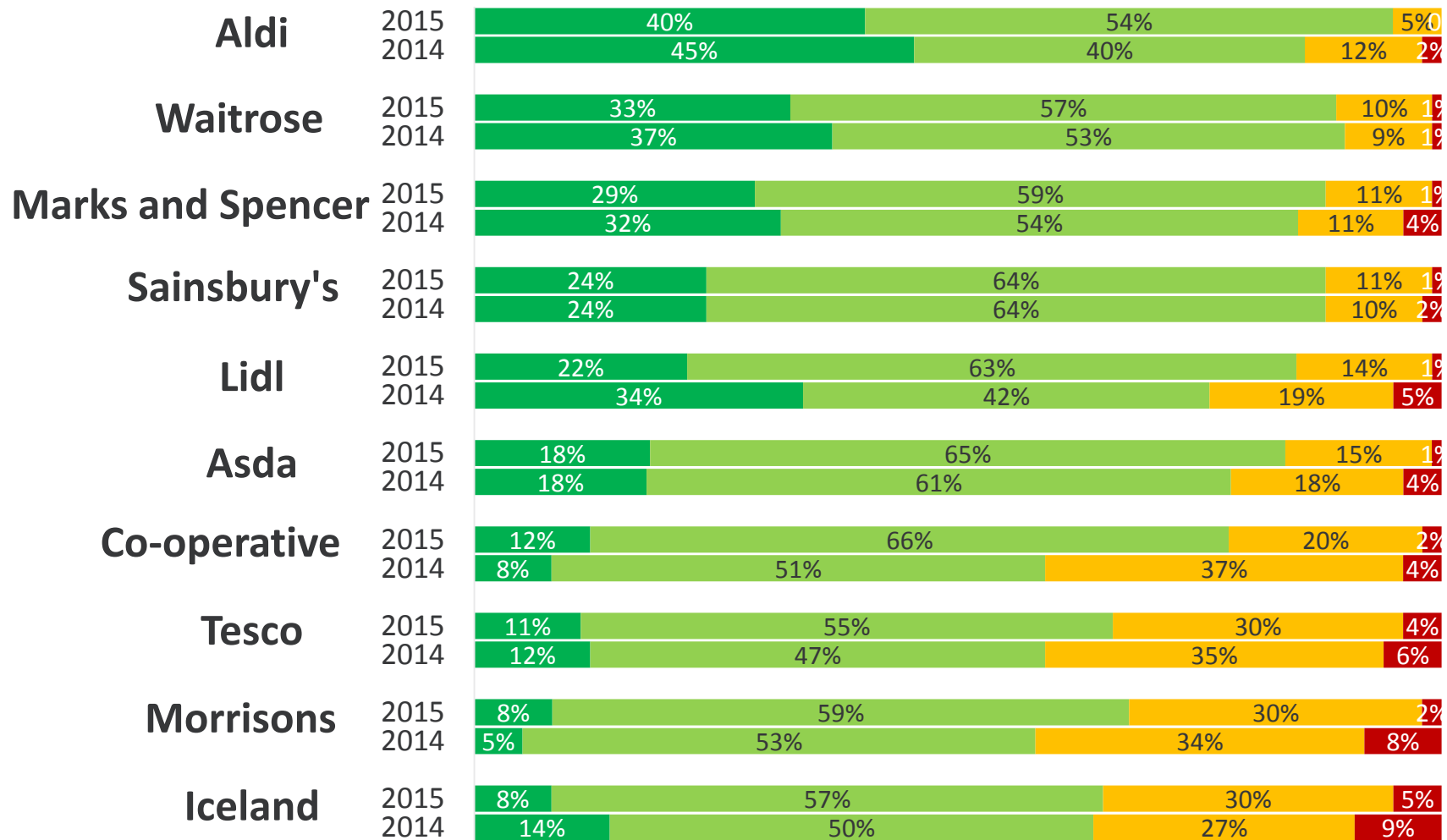


■ Consistently well
 ■ Mostly
 ■ Rarely
 ■ Never

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# Overall assessment of compliance with the Code



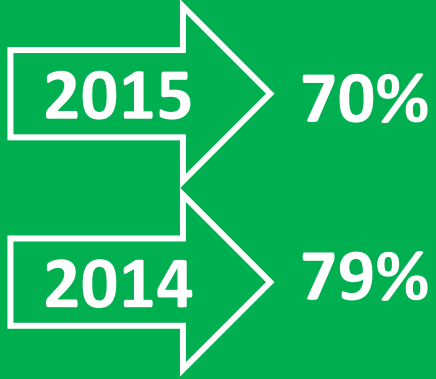
■ Consistently well    
 ■ Mostly    
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 ■ Never



# Key points



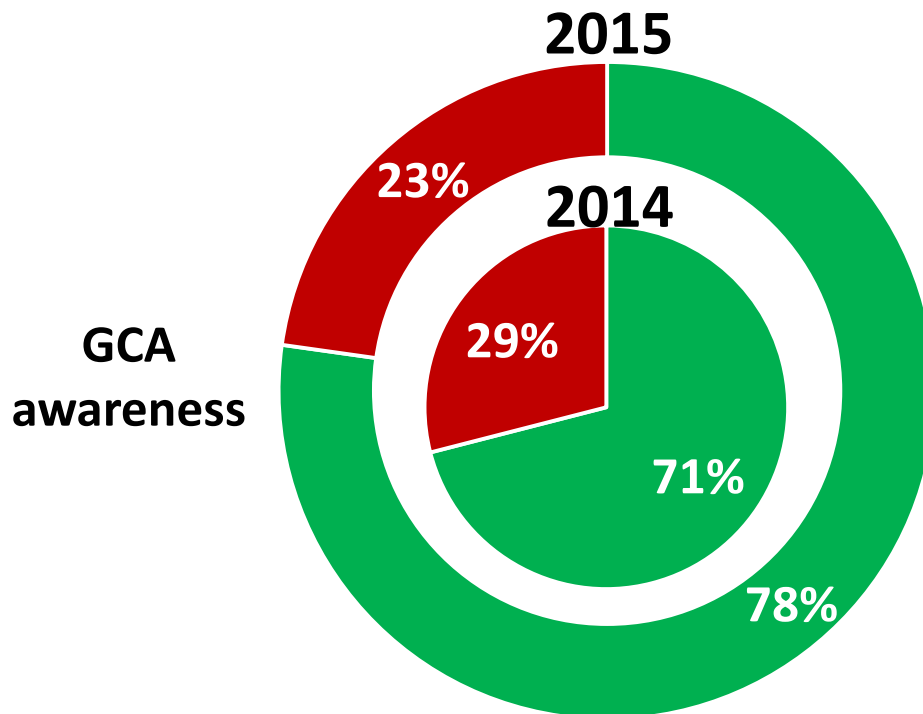
At least one Code related issue in the last year



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