GCA - Annual Survey Results 2016

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Public Sector & NfP

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Who took part

Survey details

- Live from 14th March to 6th May 2016

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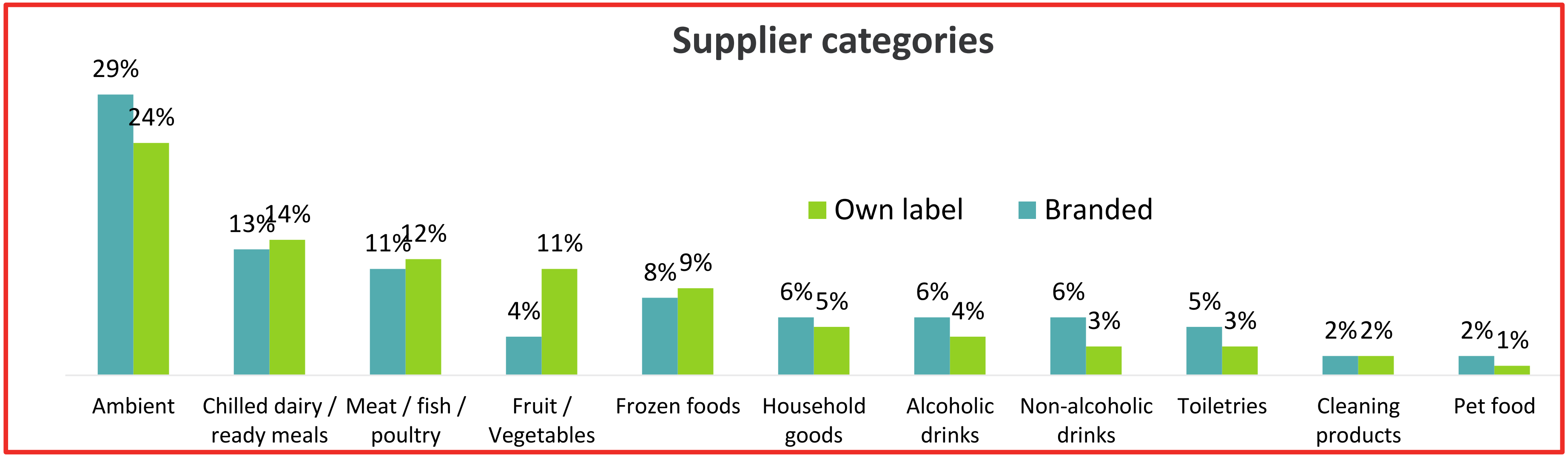
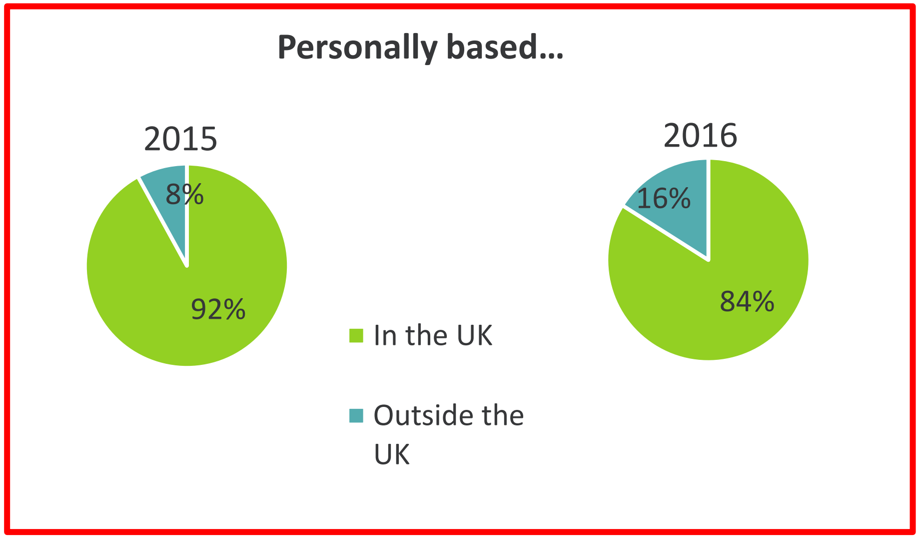
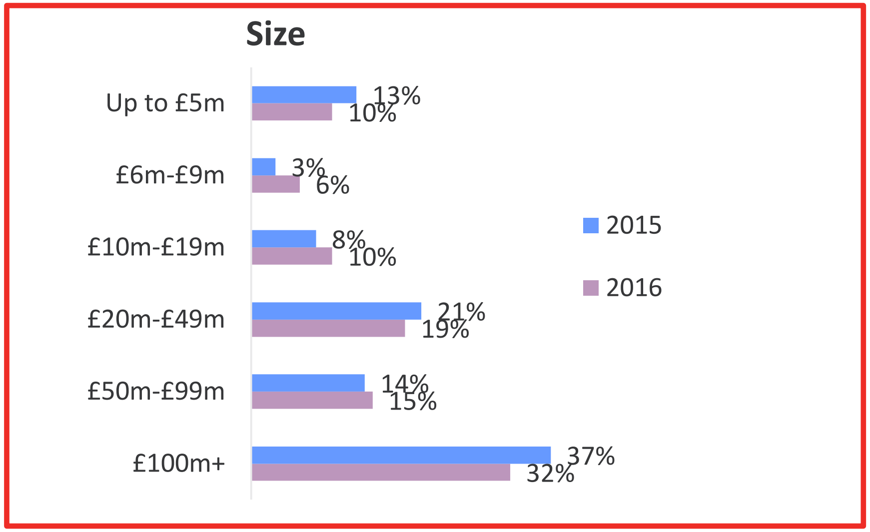
Who took part?







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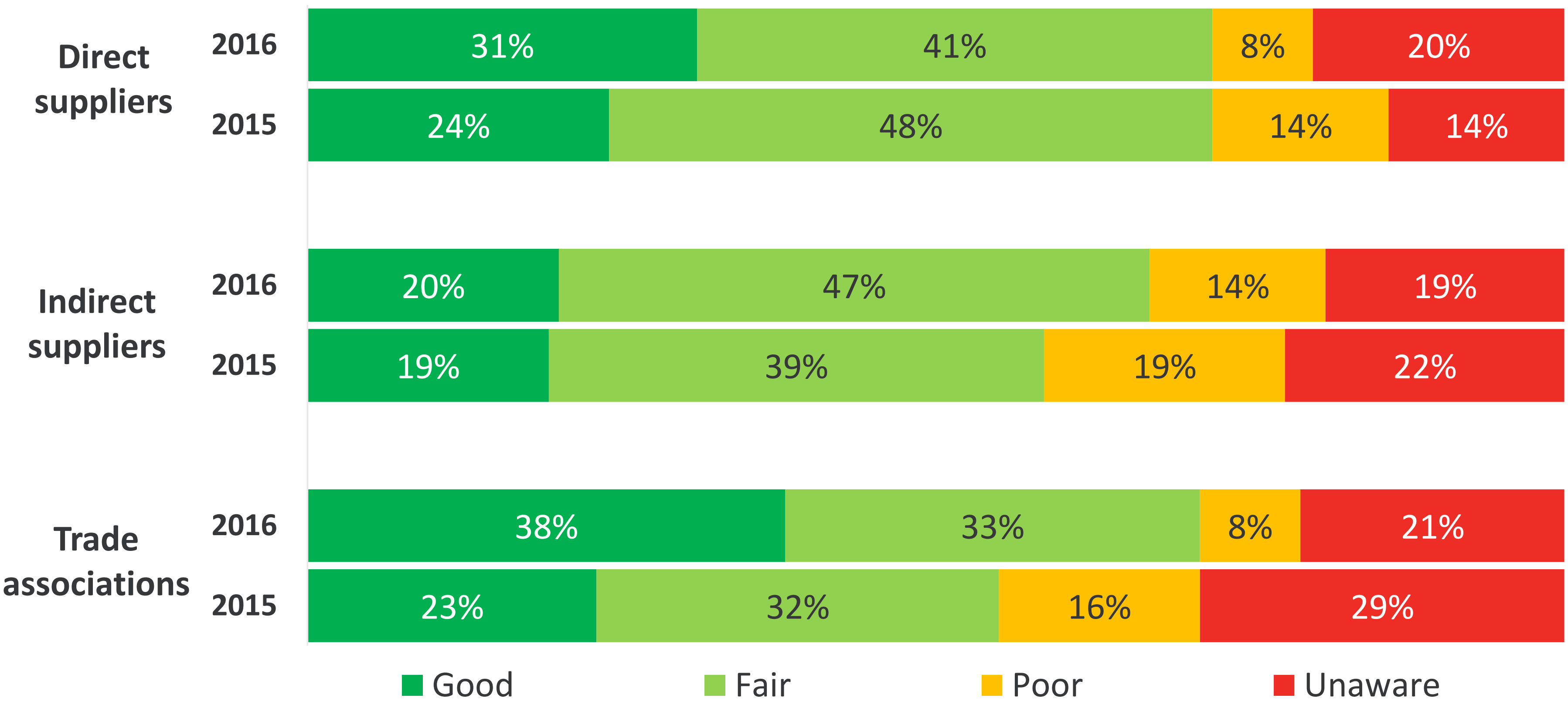
Awareness of the Code and GCA

‘Good’ level of Code understanding rises by 7pp



Large direct suppliers are most likely to have a ‘good’ understanding of the Code (40%).

Only 54% of direct suppliers outside the UK are aware of the Code.

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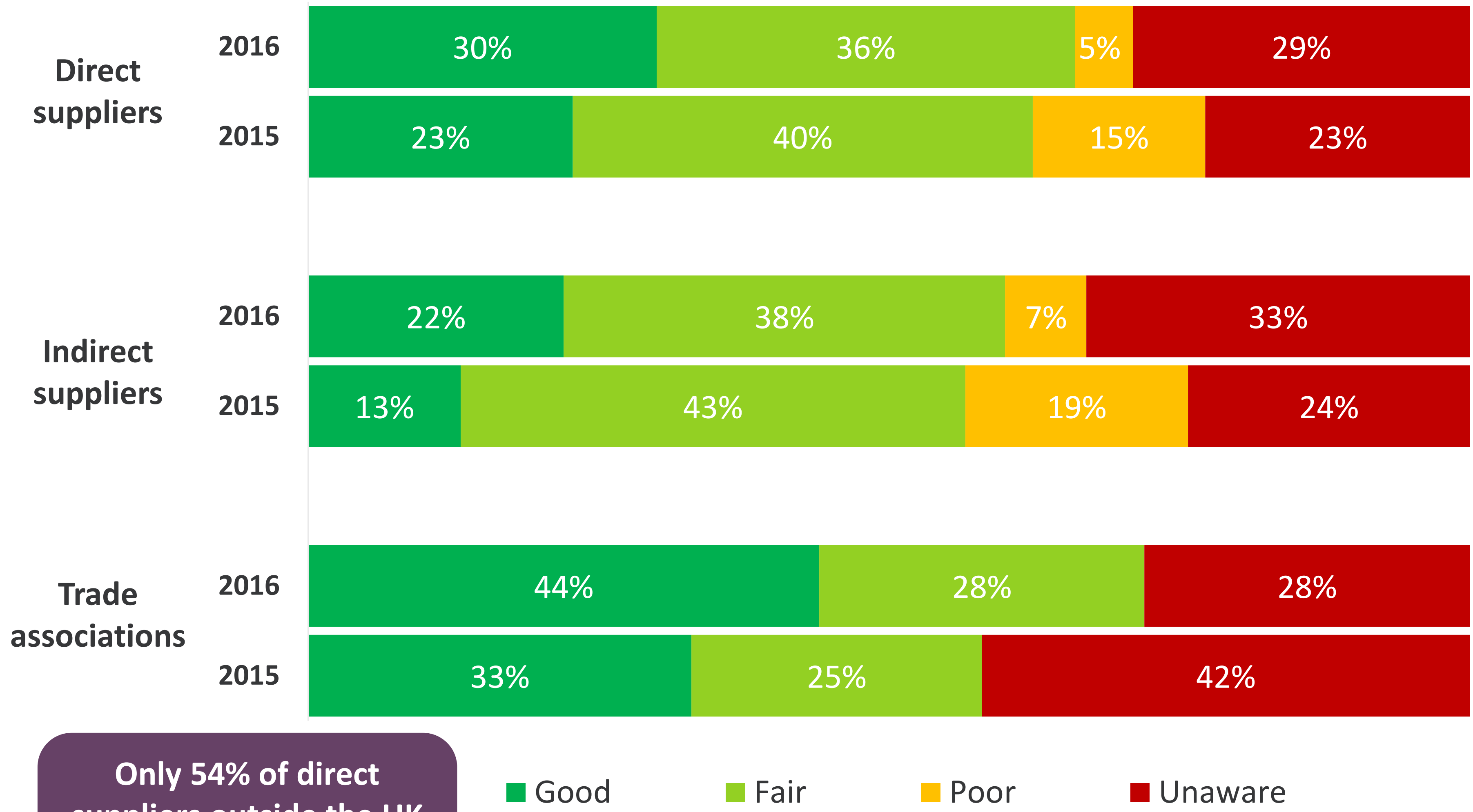
‘Good’ understanding of the GCA’s role and responsibilities rises by 7pp



Only 54% of direct suppliers outside the UK are aware of the Code (94% UK).

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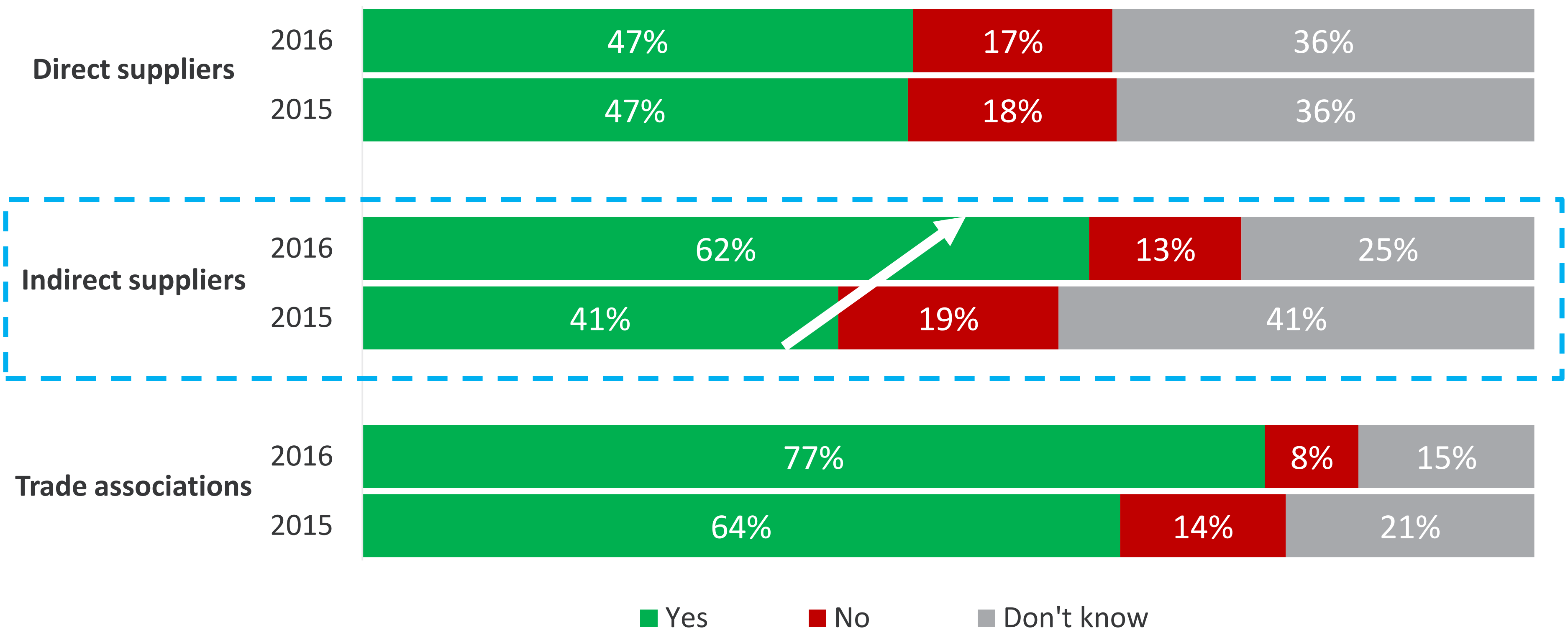
No increase in whether direct suppliers would raise issues with the GCA



Smaller suppliers are more likely to consider raising issues with the GCA than larger ones- 53% of micro & small suppliers say they would consider raising an issue, compared to 45% of large suppliers.

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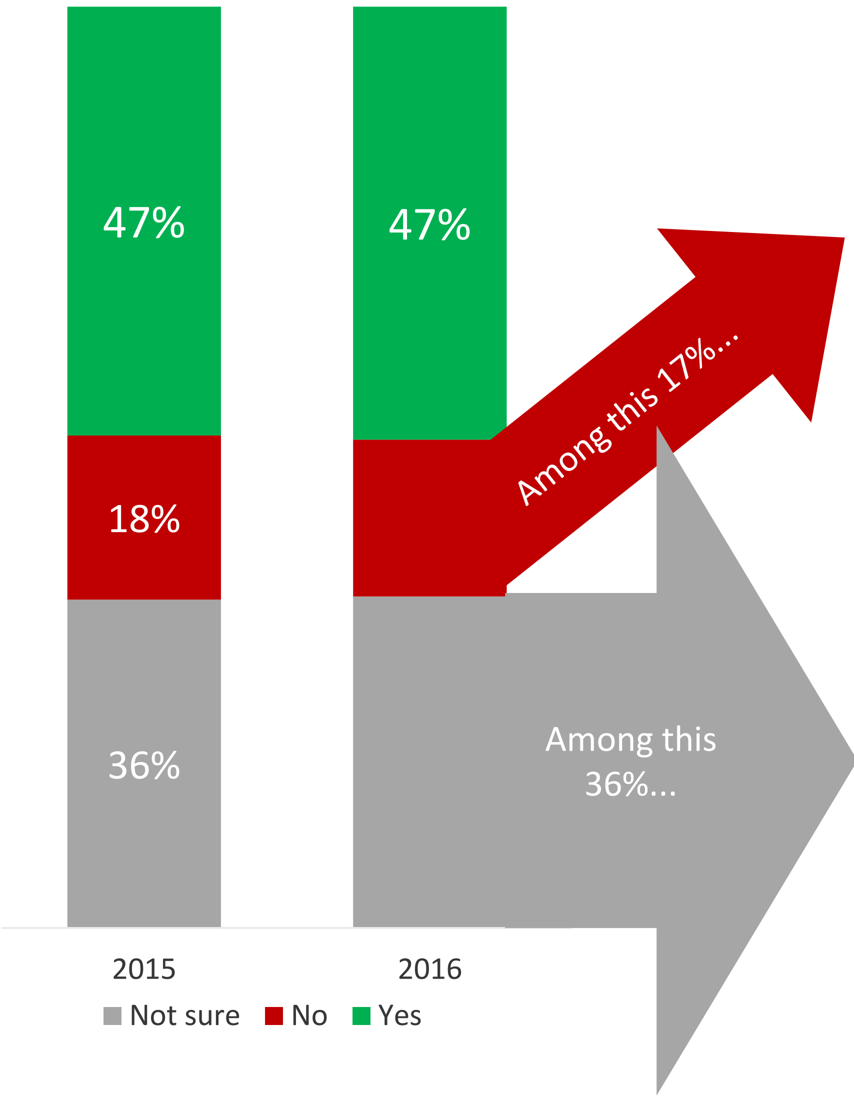
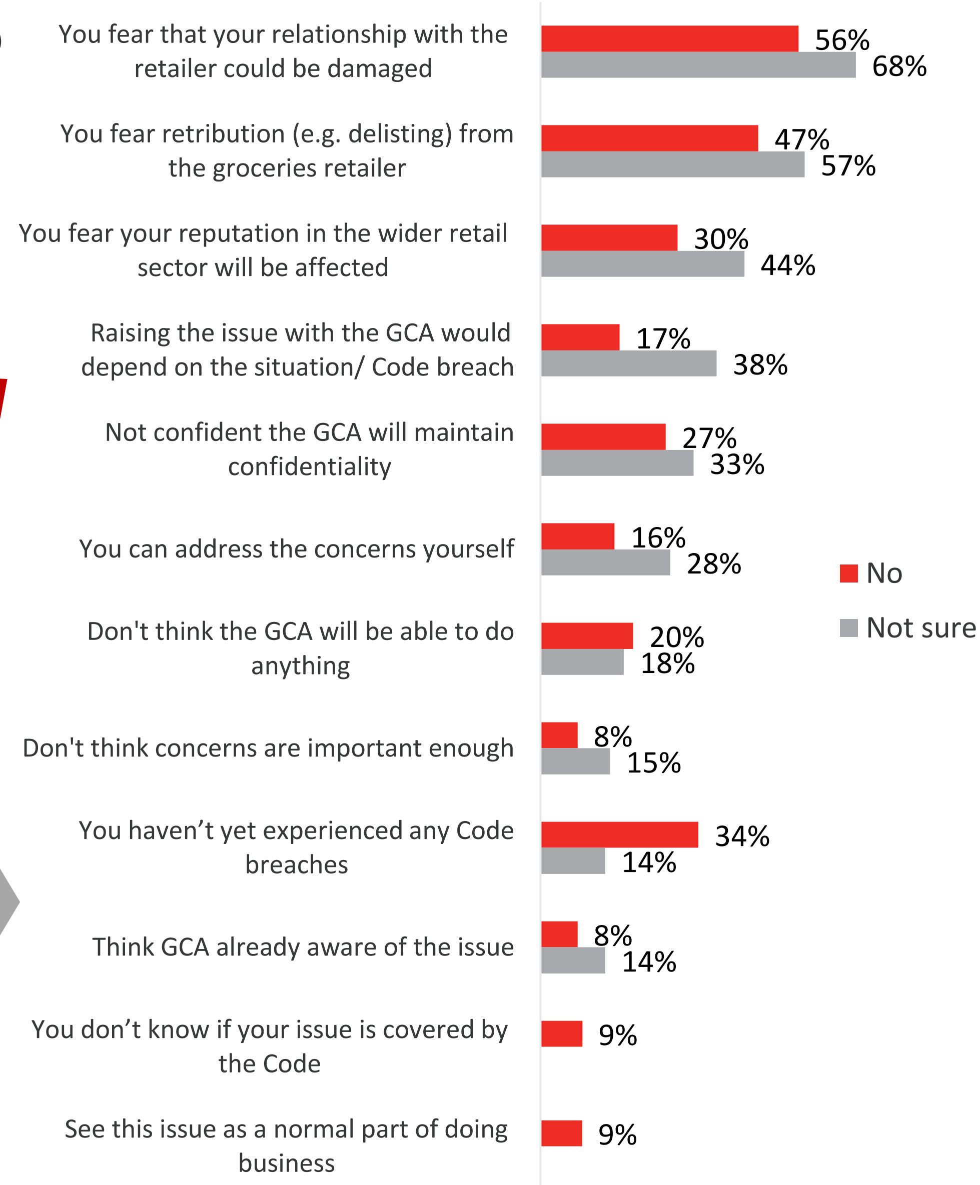
Why not raise an issue?

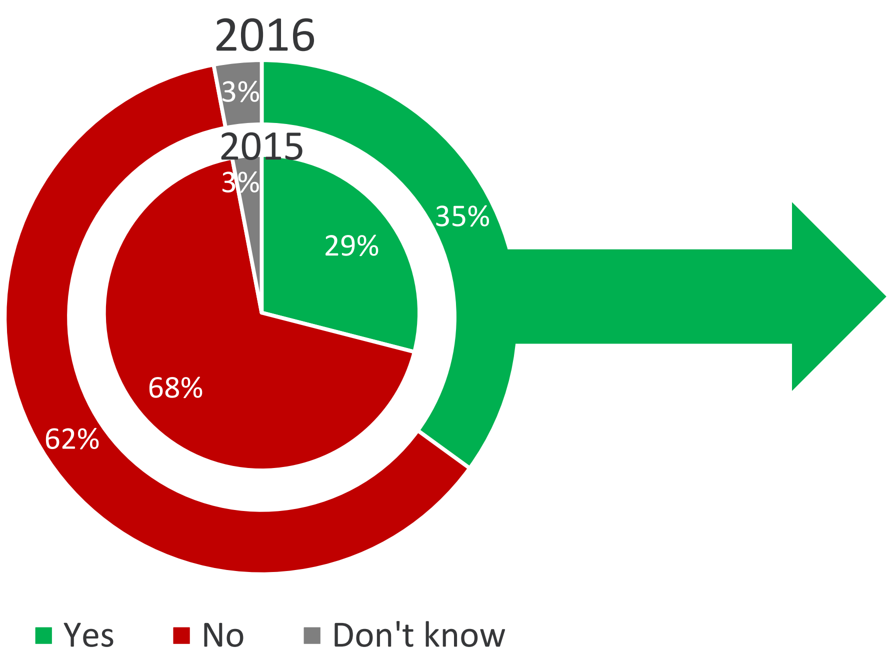




Training on the Code

A rise in the proportion of direct suppliers receiving training

Have you received any training on the Code?

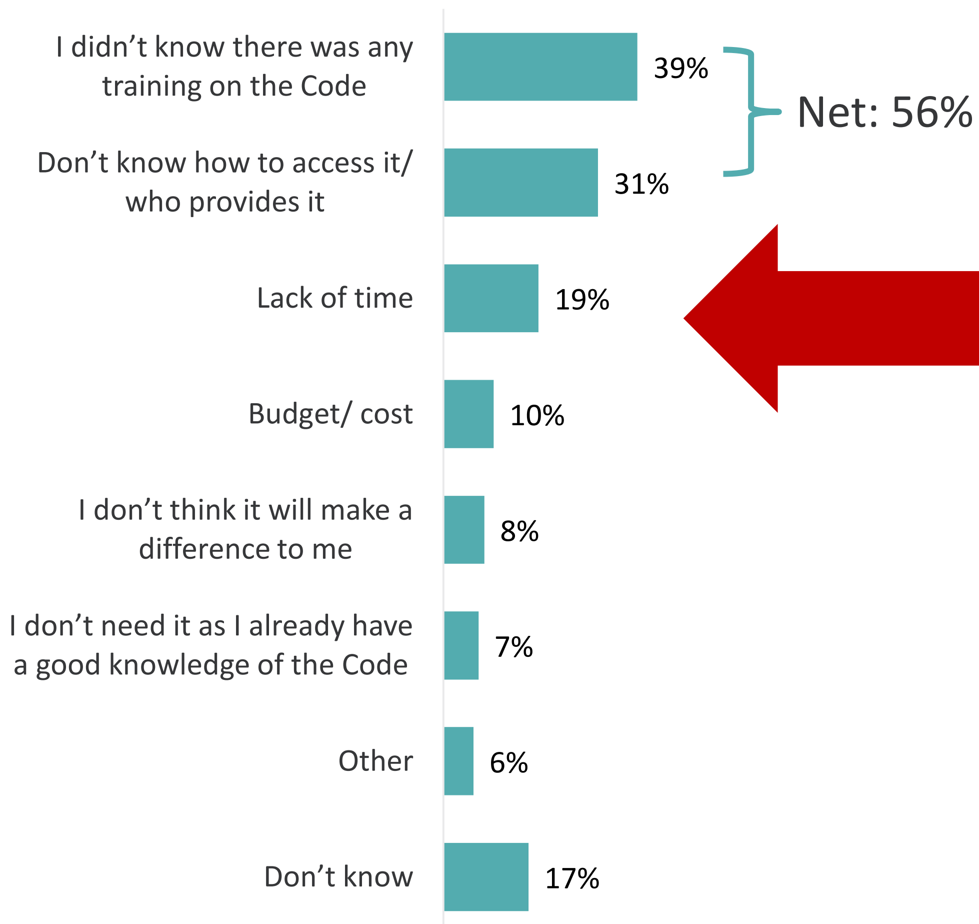


And who provided this training?

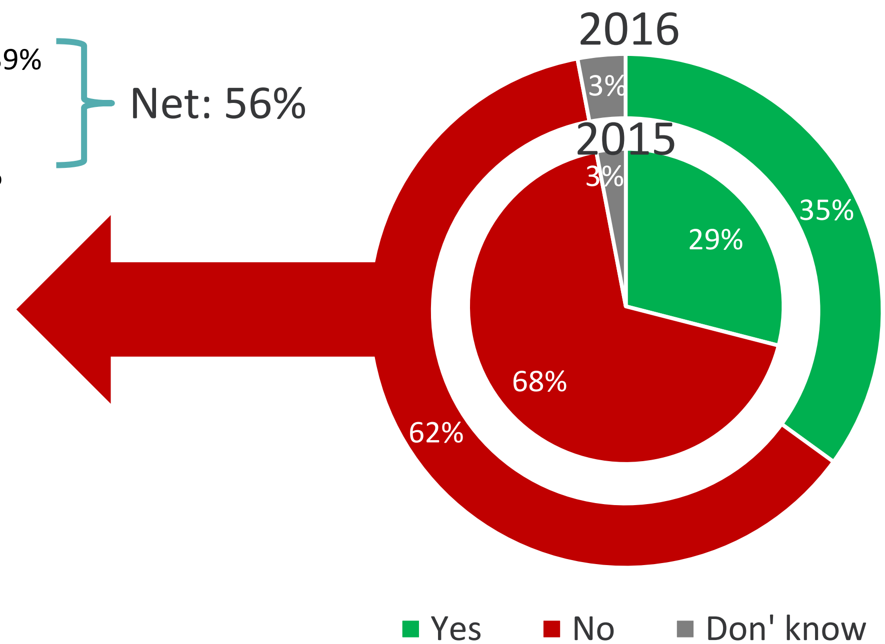
45% of Large suppliers say they have received training on the Code, compared to 29% of Micro & small suppliers and 28% of Medium sized suppliers.

Awareness of training is low

And why haven't you received any training on the Code?

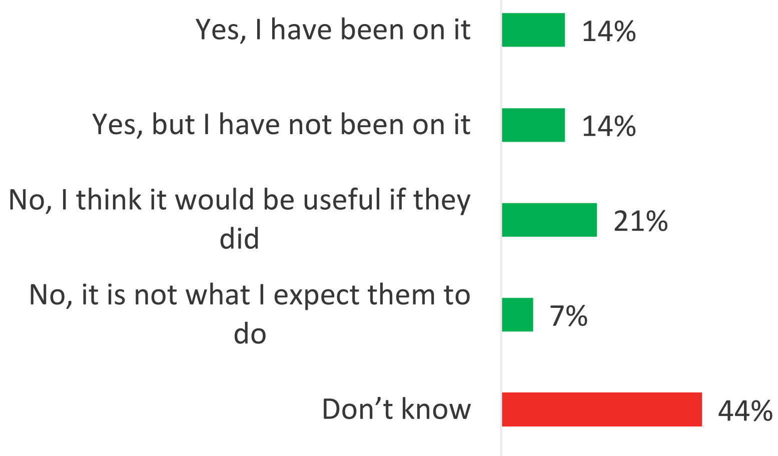


Have you received any training on the Code?

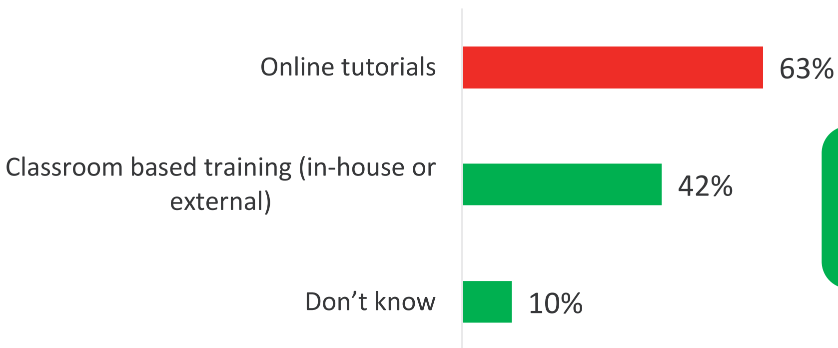


Many unsure whether their trade association offers training

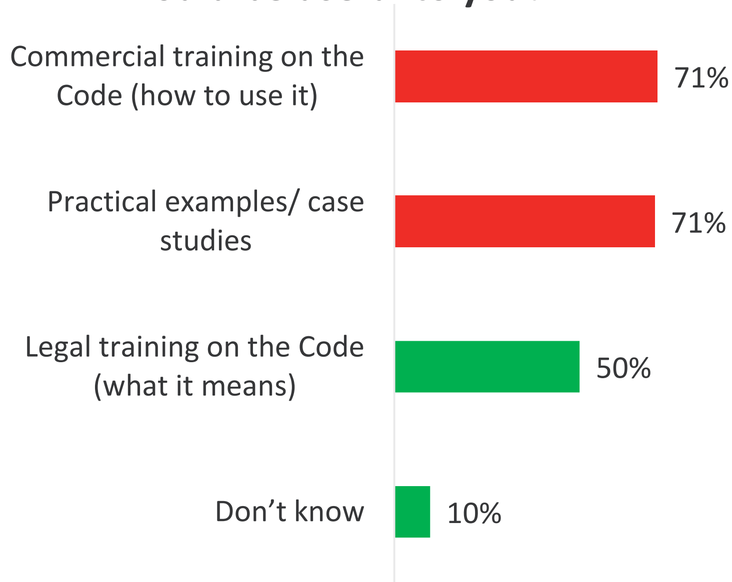
Does your trade association provide or facilitate/ organise training on the Code?



What format of training on the Code, if any, do you think would be useful to you?



Which, if any, of the following types of training on the Code would be useful to you?



Large suppliers were more likely to favour classroom based training (48%) than micro & small or medium suppliers (38% / 37%)

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Supply agreements and the CCO

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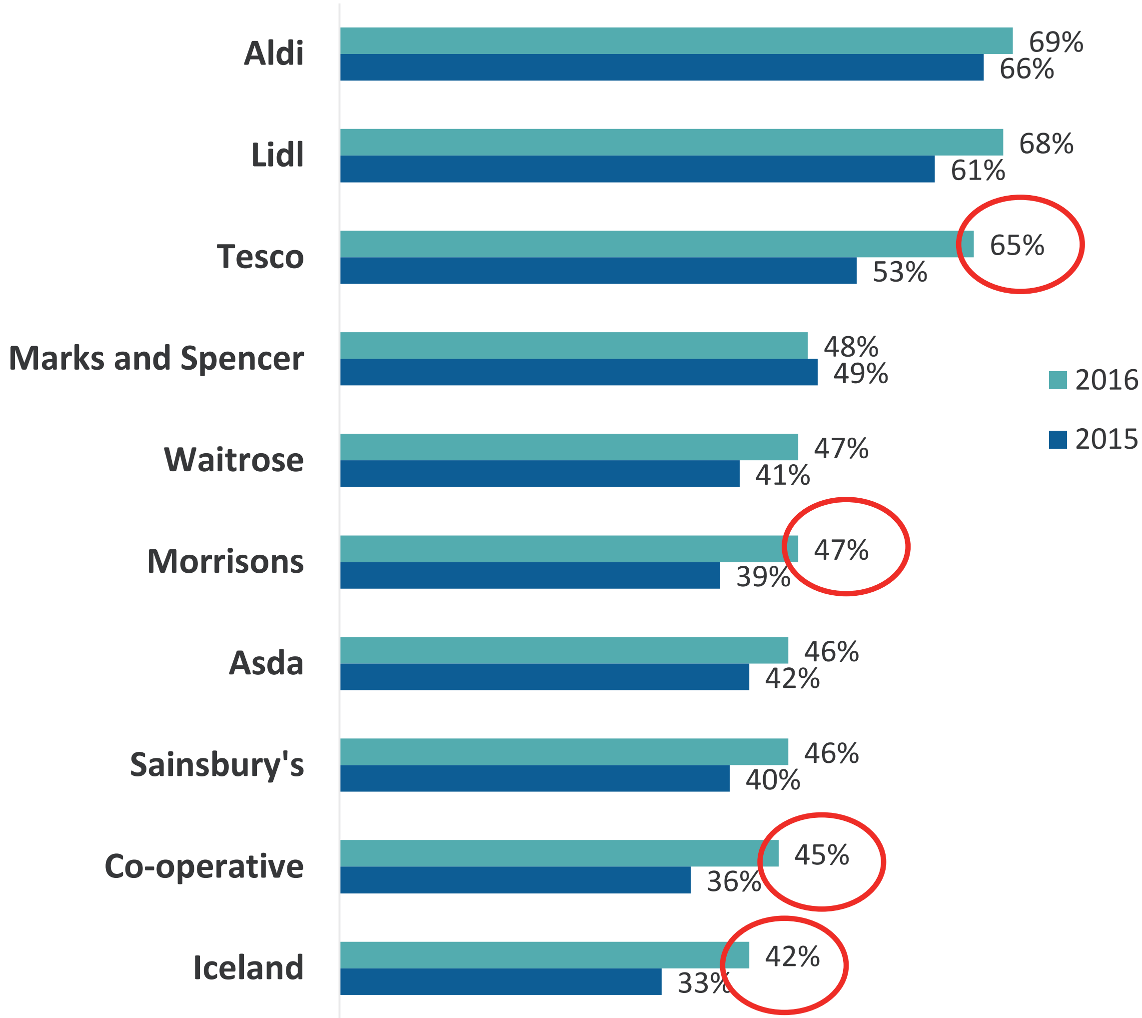
Have a written supply agreement with these retailers?



Average across the 10 retailers and 3 years:

2016: 52%
2015: 46%
2014: 40%

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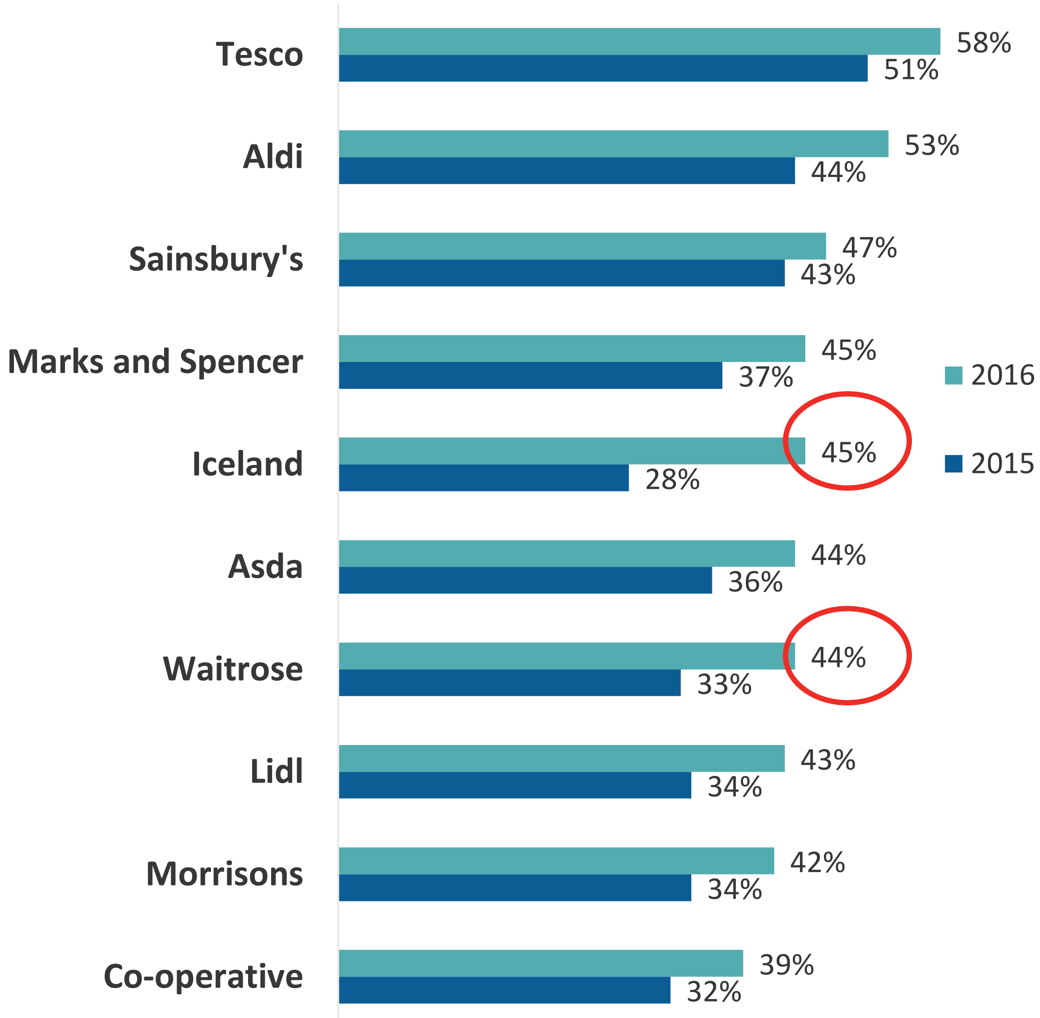
Knowing who is or where to find the CCO



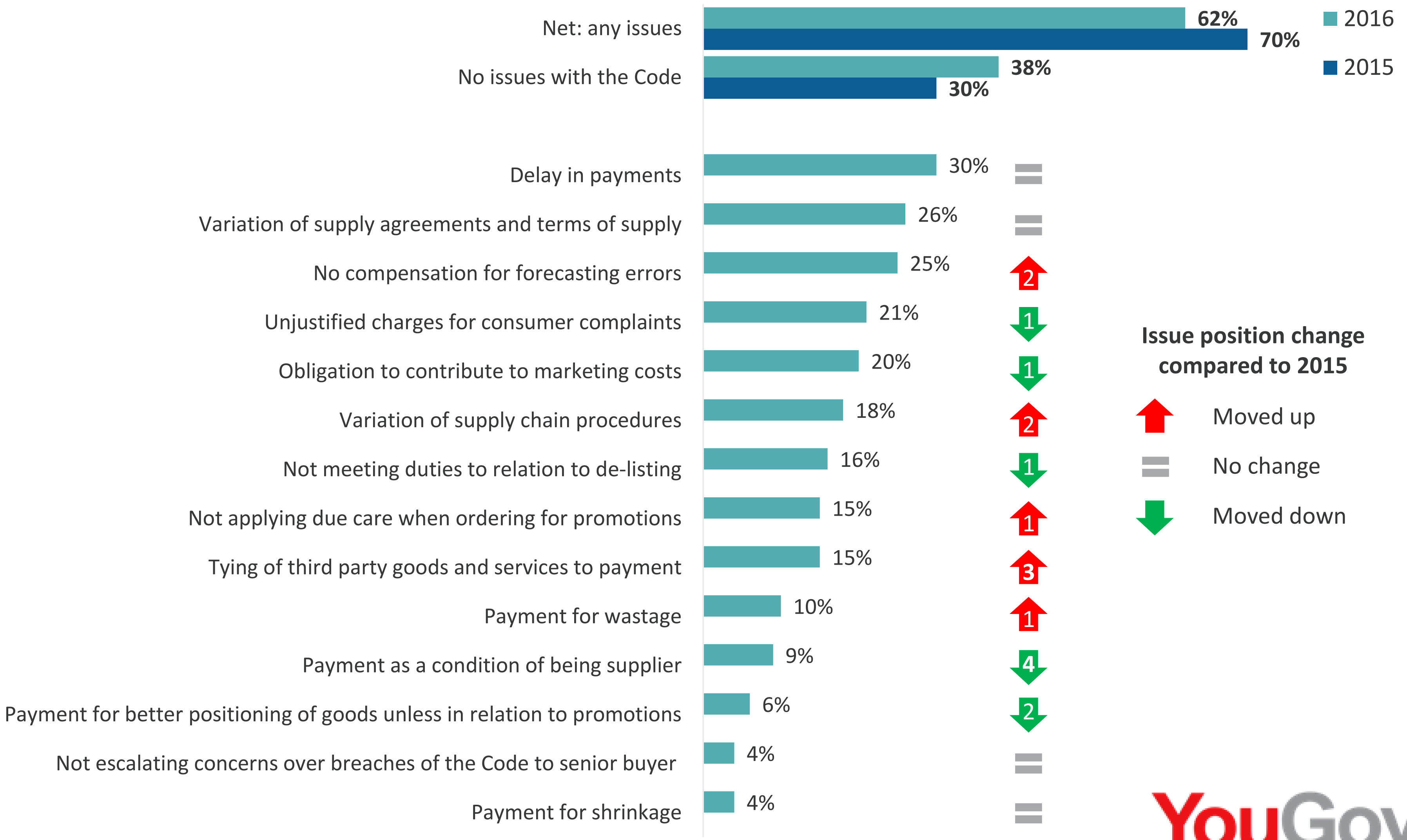
Average across the 10 retailers and 3 years:

2016: 46%
2015: 37%
2014: 26%

Experience of issues

Proportion of suppliers with issues falls by 8pp

Issues in the language of the Code



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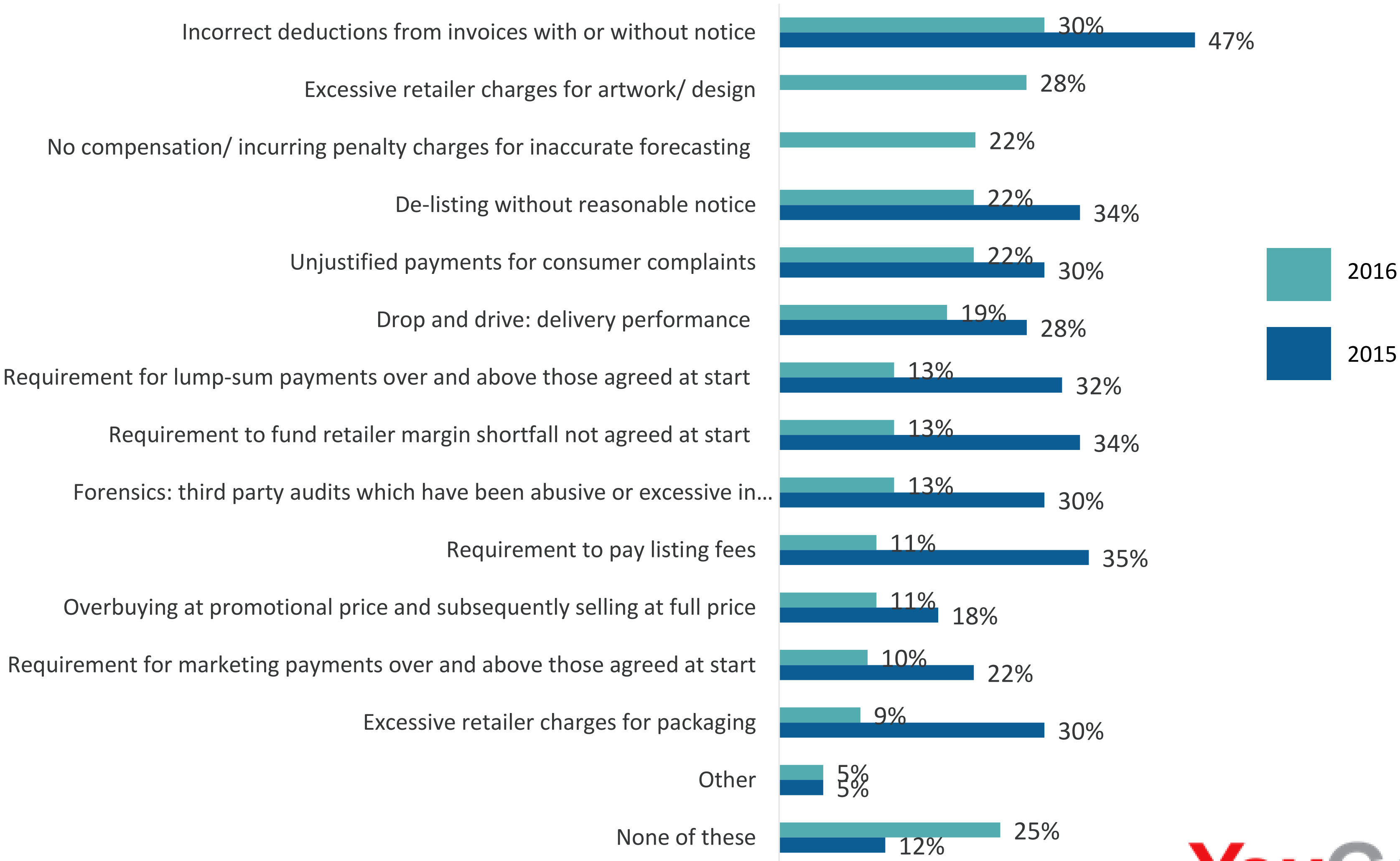
Incorrect deductions and excessive artwork charges: Issues in the language of suppliers



Aspects of retailer practice that have the most significant negative impact

‘Forecasting issues not being communicated effectively & resolved in a timely manner’

‘Delays in payments and attempts to change agreements already in place relating to payment terms’

‘Demands for payments for loss of profit which could result in delists. Requests to move marketing costs into cost of goods - failure to do could result in delists. Overrides demanded in order to engage on business growth initiatives such as NPD.’

‘The biggest issue with supplying is the expectation of increased rebates together with lower pricing. In some cases we trade for turnover only, and make no profit from trading. Also very late decisions on product/promotions makes operating without fines difficult.’

‘Technical charges for testing, audits, artwork costs and late payment’

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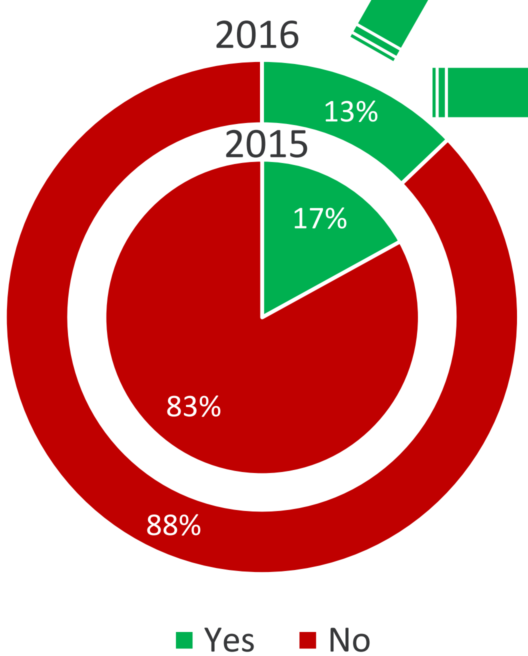
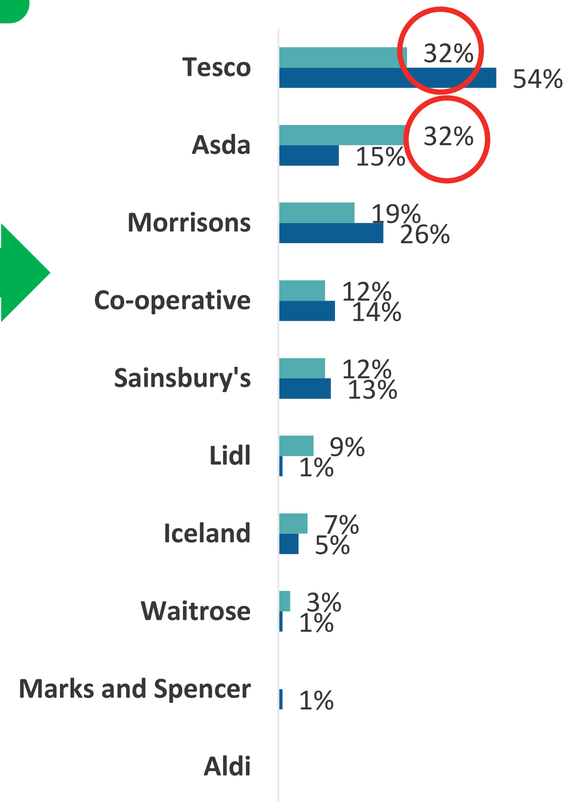
4pp fall in suppliers having raised an issue with a retailer

14% of micro & small, 14% of medium, 11% of large direct suppliers

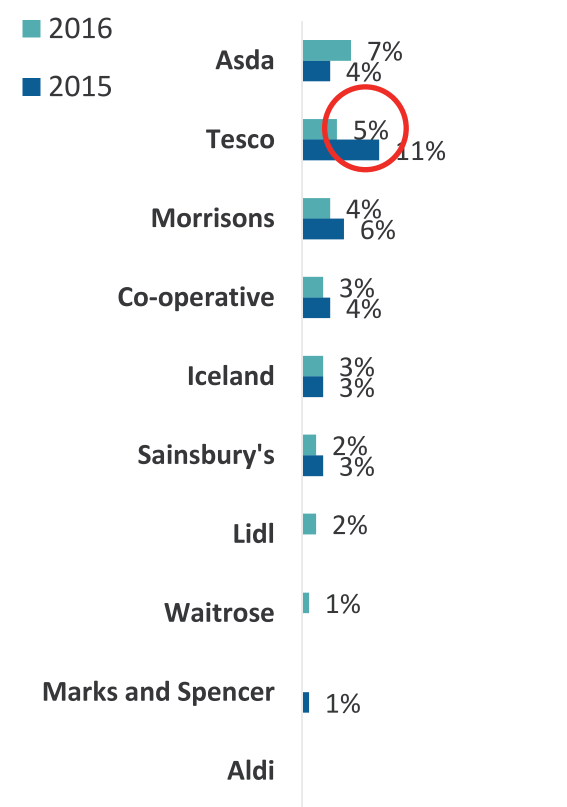
Raised an issue over the **last 12 months?**



About which retailer? (as % of those who raised issues in the last 12 months)



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



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Issues categorised by the Code: Which issues have direct suppliers experienced? – by retailer

	Retailer 1	Retailer 2	Retailer 3	Retailer 4	Retailer 5	Retailer 6	Retailer 7	Retailer 8	Retailer 9	Retailer 10
De-listing without giving reasonable notice	7%	4%	6%	2%	9%	3%	2%	2%	3%	3%
Incorrect deductions from invoices with or without notice	14%	8%	13%	2%	9%	5%	3%	5%	6%	5%
No compensation for/ incurring penalty charges as a result of inaccurate forecasting by the retailer	11%	3%	10%	3%	8%	6%	4%	3%	3%	5%
Excessive retailer charges for artwork/ design	10%	13%	9%	15%	11%	7%	3%	5%	7%	5%
Unjustified payments for consumer complaints	10%	10%	8%	0%	5%	9%	3%	0%	5%	6%
Drop and drive: delivery performance	8%	8%	9%	2%	6%	5%	1%	5%	5%	3%

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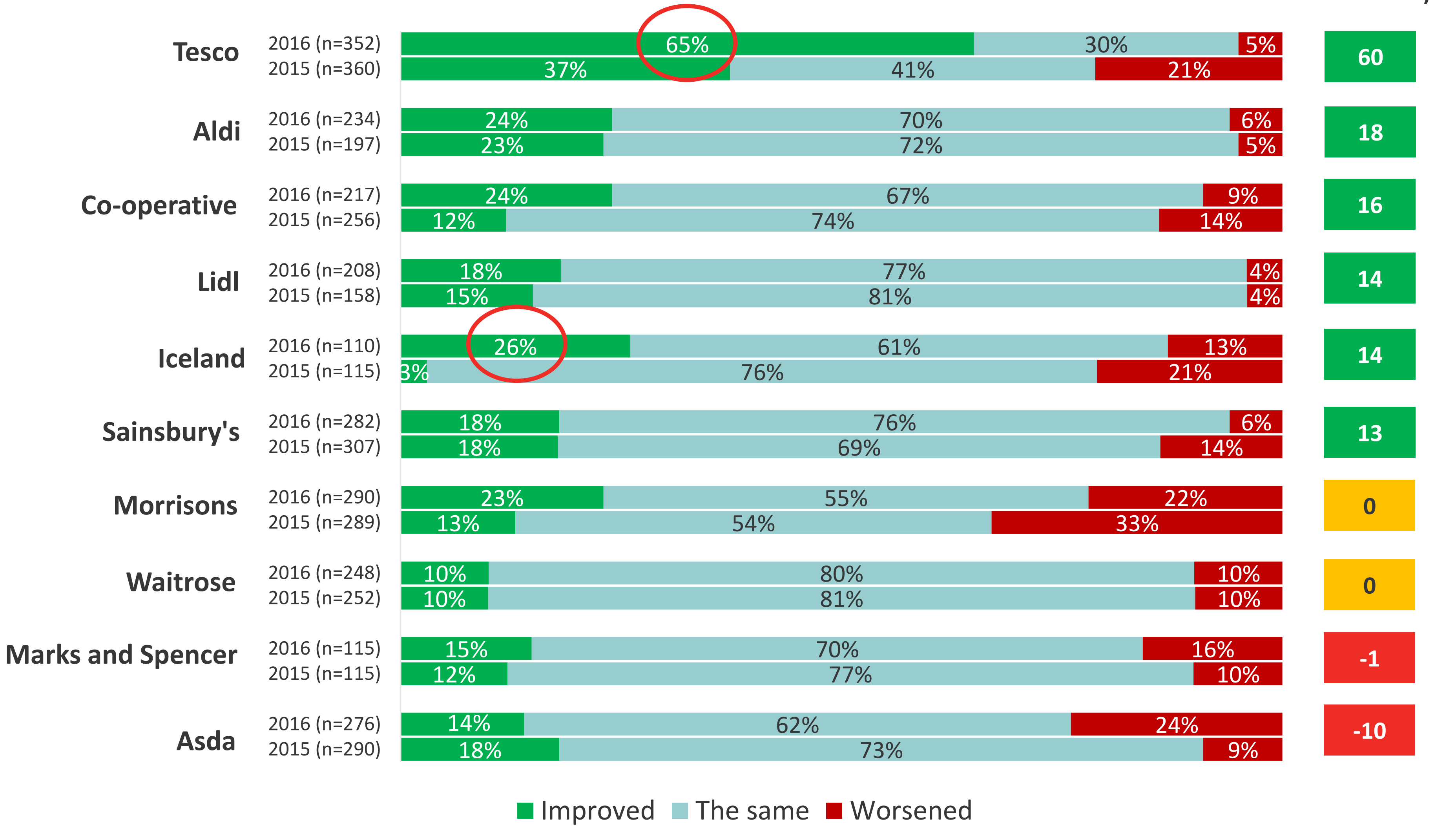
Overall assessment

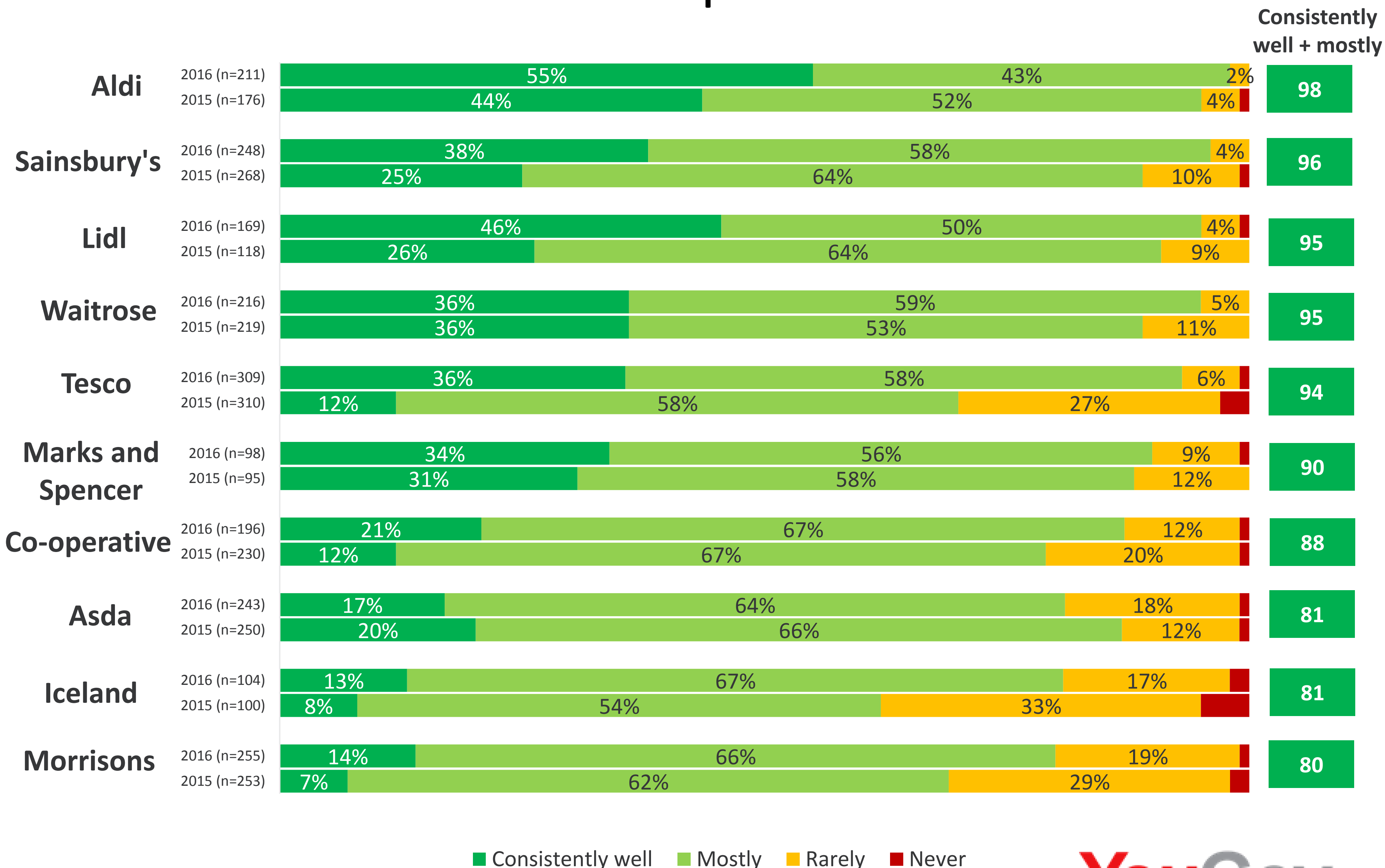
Change in retailer practice over the last year

Net improvement score (2016) (improved% minus worsened%)



Retailers ranked by net improvement minus worsened score

Overall assessment of compliance with the Code



Retailers ranked by net ‘consistently well’ and ‘mostly’

Key trends

Selected key trends 2014 to 2016