



DIAGEO



# ON SHELF AVAILABILITY ALIGNMENT PROJECT

*2011 ASIA PAC SURVEY RESULTS*

The ECR Asia Pacific OSA working group conducted an online survey between July and September 2011 aimed at gaining insights and measuring current attitudes towards on shelf availability across the region.

The survey was anonymous and all inputs were aggregated with other respondents to provide ECR with valuable data on how OSA is perceived, how it's being addressed, and what can be done at an industry level to improve availability across Asia Pacific.

**Executive Summary:** Slides 4 to 15

**Detailed Survey Results:** Slides 16 to 101

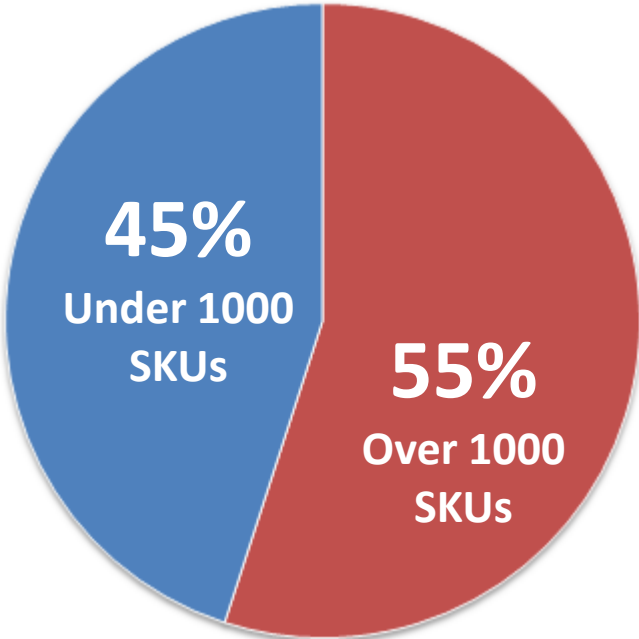
# **PART 1:**

## ***Executive Summary***

# Executive Summary

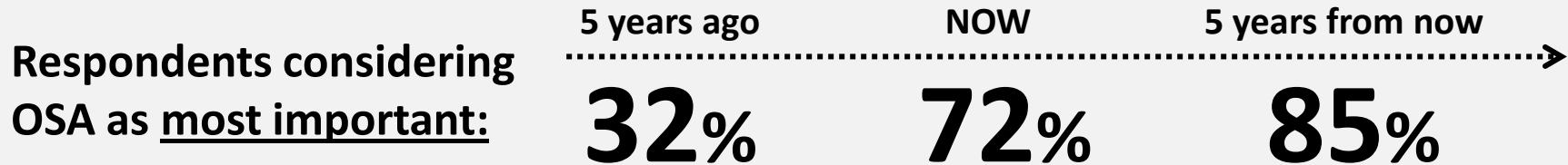
## Participant Information

**51** respondents from over **14** countries



# Executive Summary

## Importance of OSA



Importance is **driven by** the increase in:

- ➔ competition for sales
- ➔ service level demands

**1/2** of respondents measure their current OSA at **2%-5%**  
(out of stock items)

# Executive Summary

## Impact of Poor OSA

### Impact of poor OSA



All Respondents

### Impact of Poor OSA as Loss of Sales

**41%**

Vs.

**23%**

**Manufacturers**

**Retailers**

### Estimated Financial impact in terms of Lost Sales

**2%-5%**

Vs.

**2%**

**Manufacturers**

**Retailers**

### Top Reason for poor OSA:

**Manufacturers**



*Forecast Inaccuracy*

**Retailers**



*Supplier Availability*

*Promotions, advertising and display screenings is:*

**2<sup>nd</sup>** reason for poor OSA

**Over 1000 SKU companies**

Vs.

**9<sup>th</sup>** reason for poor OSA

**Under 1000 SKU companies**

# Executive Summary

## Measuring OSA (1/3)

**2/3** of respondents measure OSA as the:

➔ % of available SKUs vs. the total number of SKUs (or for a basket of goods)

➔ by **Physical Audits** (store surveys, mystery shoppers)

**Systems** are used to measure OSA by:

**35%**

Retailers

Vs.

**16%**

Manufacturers

**28%**

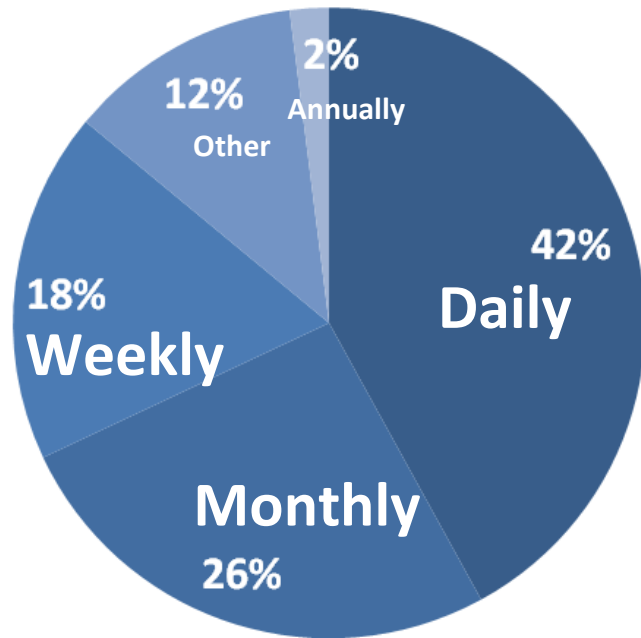
Over 1000 SKU

Vs.

**13%**

Under 1000 SKU

### Frequency for Measuring OSA



All Respondents

OSA is measured Daily by:

**64%**

**Retailers**

Vs.

**40%**

**Manufacturers**

According to the majority of respondents, the **ideal method** of measuring OSA is a combination of:

- ➡ automated tools
- ➡ manual checking
- ➡ and *aligning with the retailer's method of measurement*

**Barriers** to its implementation are:

- ➡ lack of resources
- ➡ technology
- ➡ the associated costs

### A majority of respondents perceive:

Investing in the improvement of store management:

- ➔ as the **most important** past initiative
- ➔ but the one with the **lowest level of activity**

Measuring and analyzing stocks outs to determine root causes

- ➔ as the **most successful** past initiative
- ➔ with the **highest level of activity**

# Executive Summary

*How OSA has been addressed over the past 5 years (2/2)*



## Understanding responsibilities in each stage of the Supply Chain

is the activity ranked: ➔ **1<sup>st</sup>** in importance **Under 1000 SKU**

➔ **5<sup>th</sup>** in importance **Over 1000 SKU**

To implement these OSA initiatives, the greatest :

- ➔ **Success factor** was the involvement of partners
- ➔ **Barrier** was the lack of senior management support

# Executive Summary

*How OSA should be addressed in the future*

## Retailers

**Biggest Challenge to Improve OSA** →

- increase in promotional activity

**Key Success Factor** →

- forecasting and planning

## Manufacturers

- ensuring a lean supply chain

- collaboration between retailers and suppliers

To address these challenges

## Manufacturers

are:

- implementing collaborative projects with their partners
- developing clear roadmaps
- researching into consumer buying behaviors.

**4/5** of respondents would like to see **industry wide initiatives** aimed at improving OSA

They consider as **priority**:

- ➡ creating a standard definitions measurements,
- ➡ sharing best practices and processes and
- ➡ ensuring collaboration between suppliers & retailers

# **PART 2:**

## ***Detailed Survey Responses***

## Key Metrics:

<b>Total number of respondents</b>	<b>51</b>
<b>Number of retailers</b>	<b>14</b>
<b>Number of manufacturers</b>	<b>32</b>
<b>Number of other</b>	<b>5</b>

*Note: As not all sections were mandatory for all respondents, the number of respondents may vary per question*

## Contents:

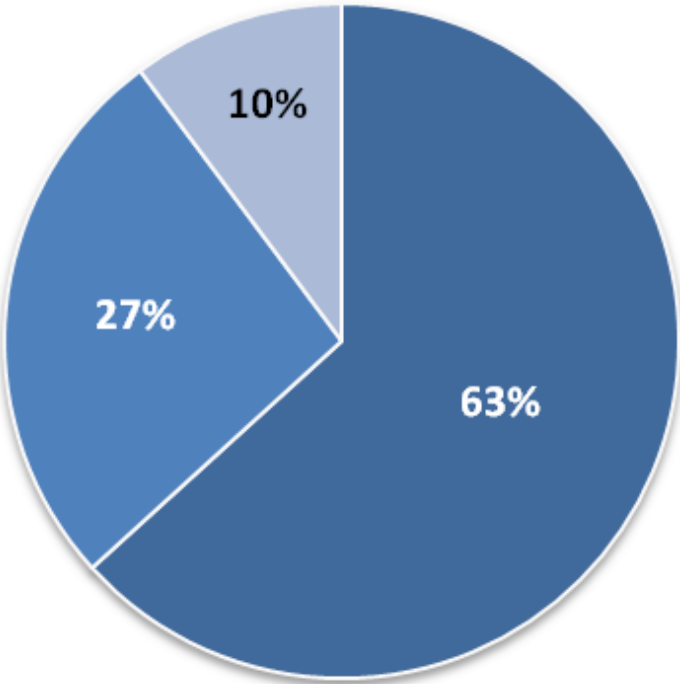
- A. Participant Information**
- B. The Importance of OSA**
- C. The Impact of Poor OSA**
- D. The Root Causes of Poor OSA**
- E. Measuring Poor OSA**
- F. How OSA has been addressed over the past 5 years**
- G. How OSA should be addressed in the future**
- H. Future Direction and OSA**

# **SECTION A**

## ***Participant Information***

# Section A

## Question 1 – Company type

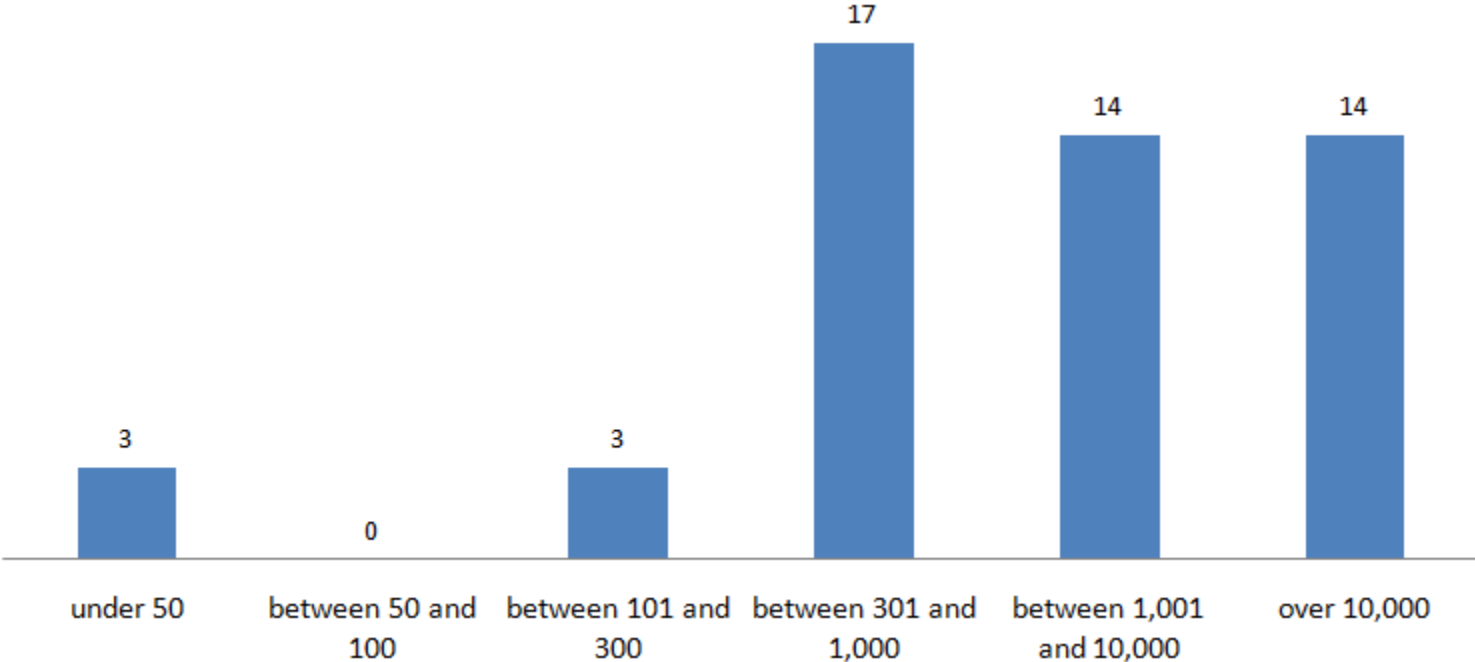


■ Manufacturer   ■ Retailer   ■ Other (please specify)

No. Respondents = 51

# Section A

## Question 2 – How many SKUs in range

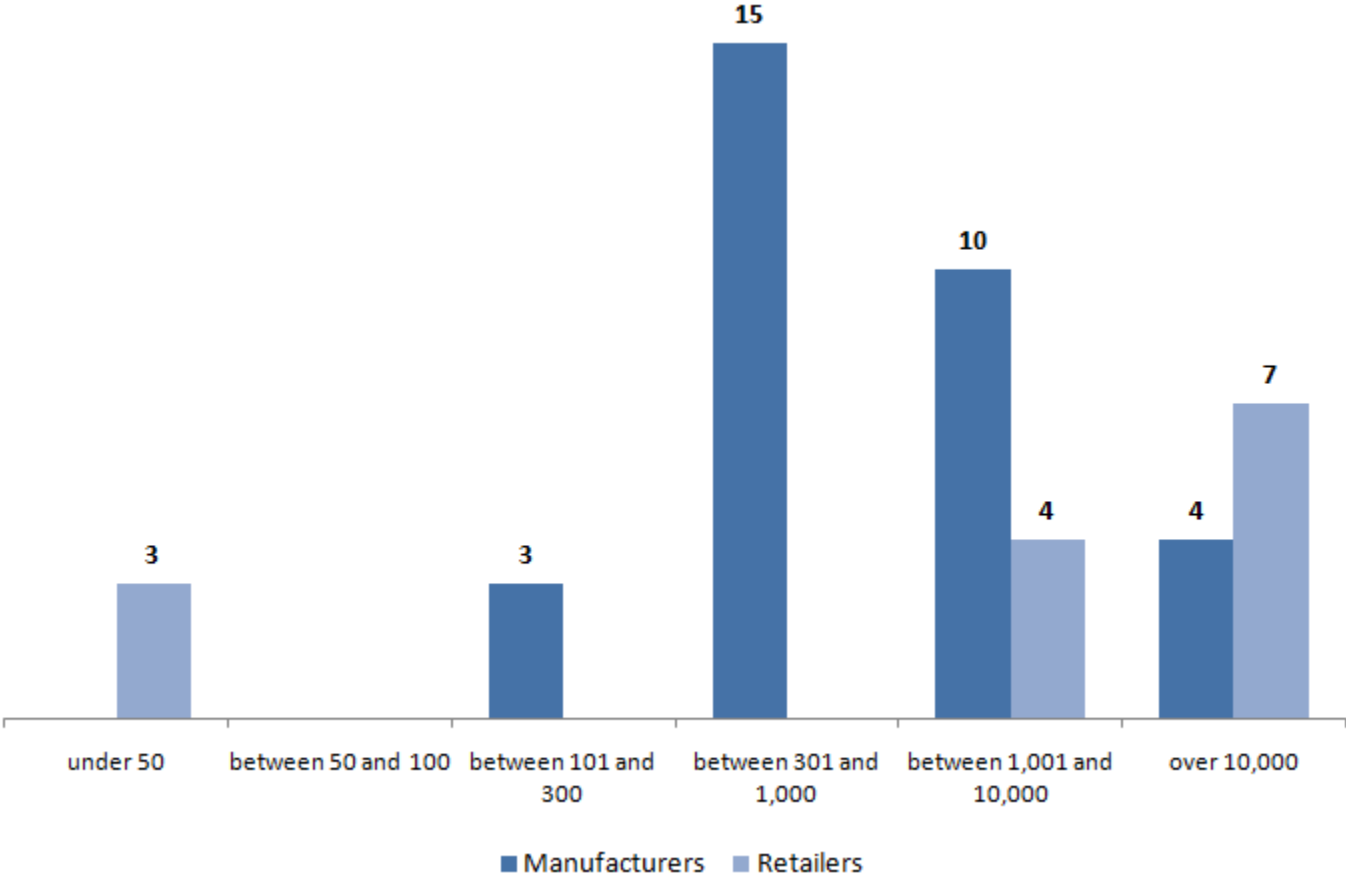


All Respondents

No. Respondents = 51

# Section A

## Question 2 – How many SKUs in range

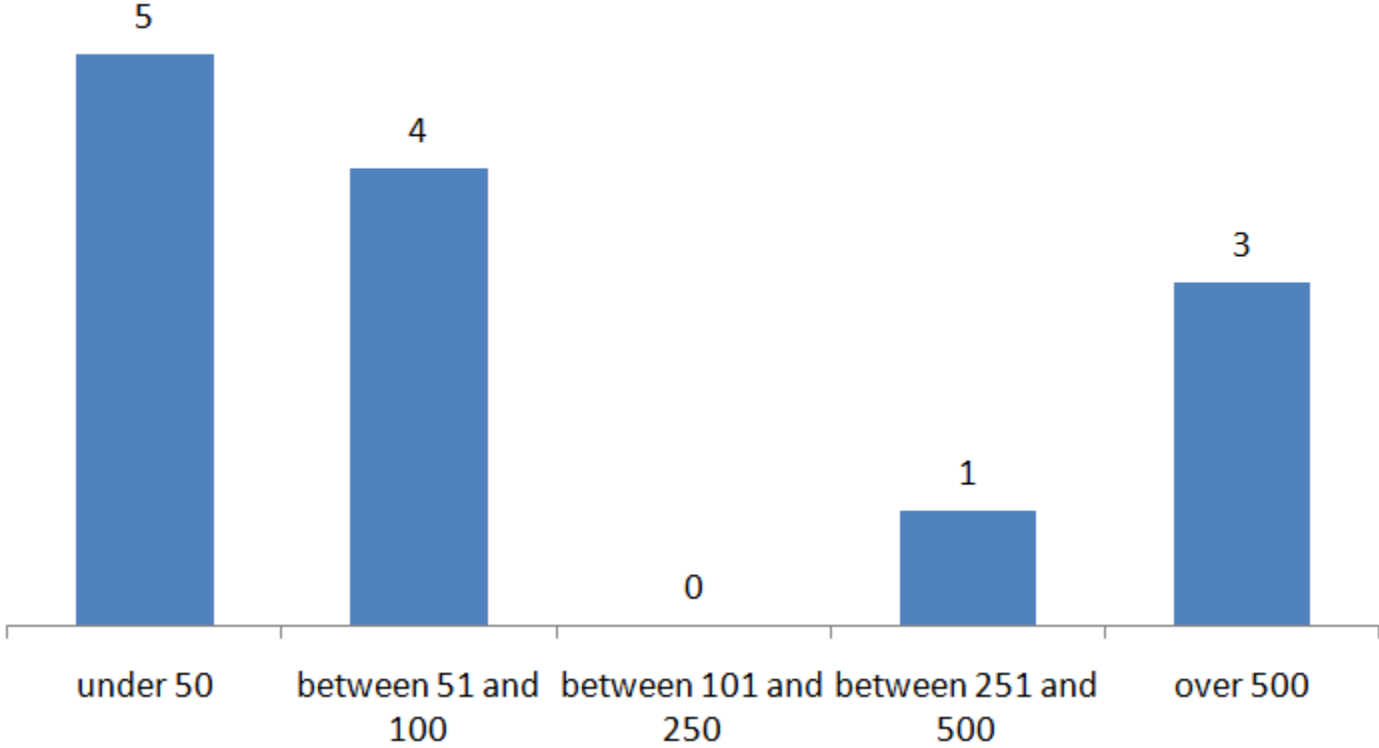


All Respondents, divided by type

No. Respondents = 46

# Section A

## Question 3 – How many stores do you operate (retailers)



Retailer Respondents Only

No. Respondents = 13

# Section A

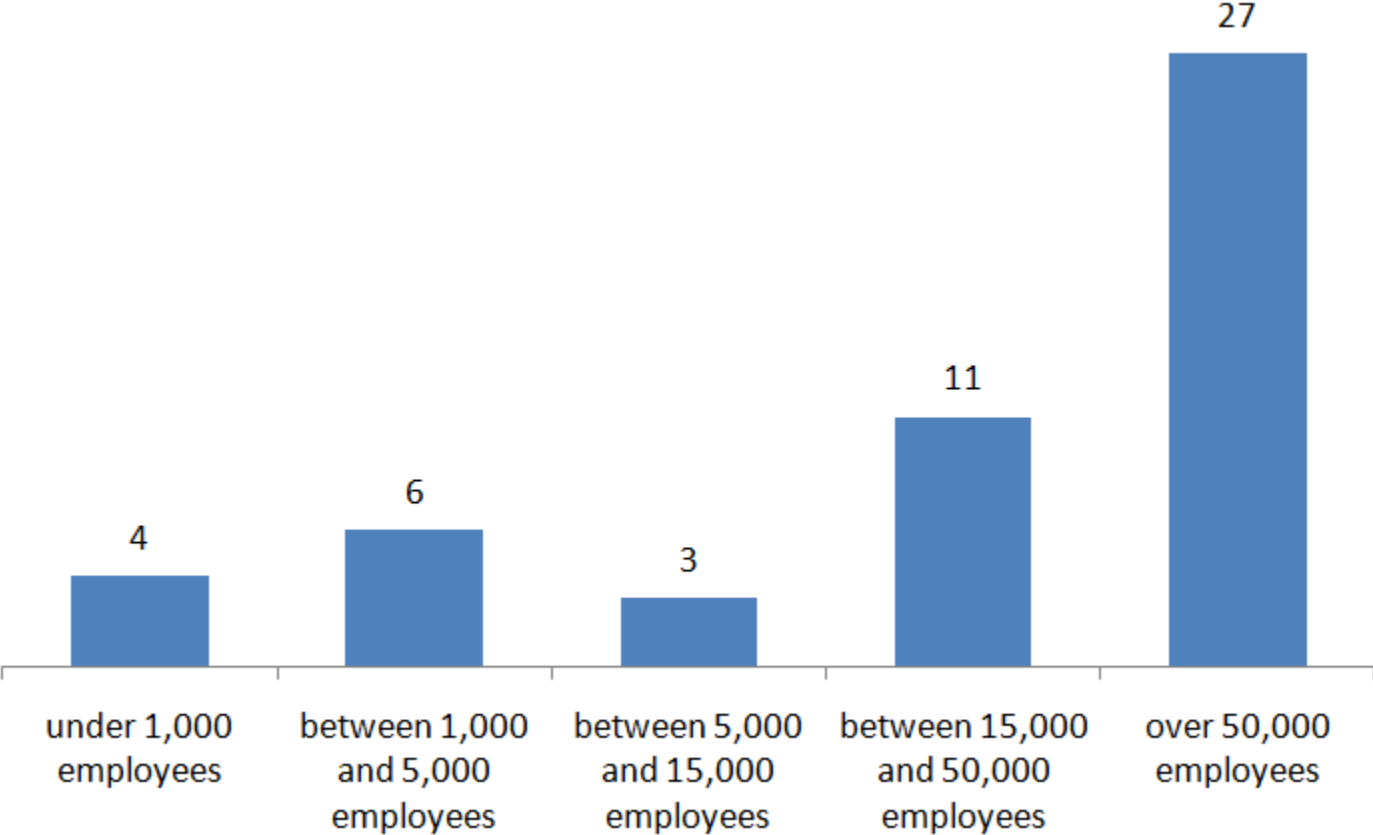
## Question 4 – What country are you located in

### Responses Include:

- Hong Kong
- Philippines
- India
- Thailand
- Taiwan
- Malaysia
- Singapore
- Vietnam
- Japan
- China
- Pakistan
- Australia
- Korea
- New Zealand
- *All Markets in Asia*

# Section A

## Question 5 – What is the size of your company globally



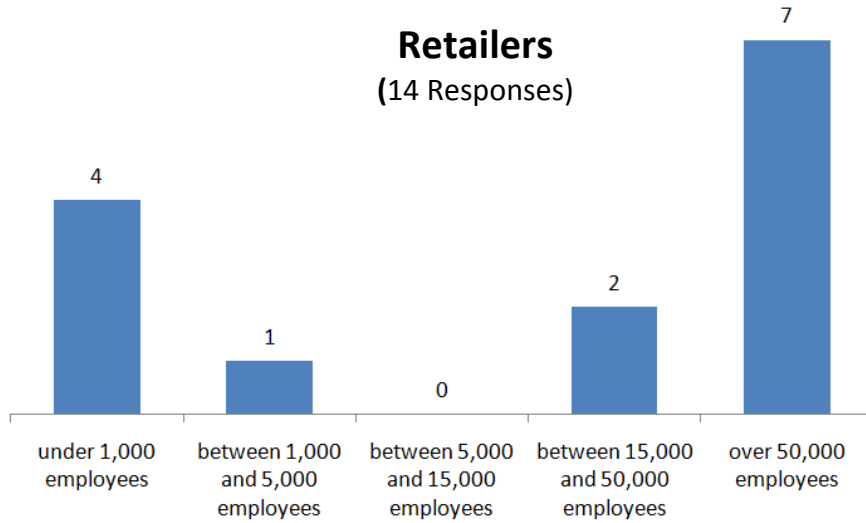
All Respondents

No. Respondents = 51

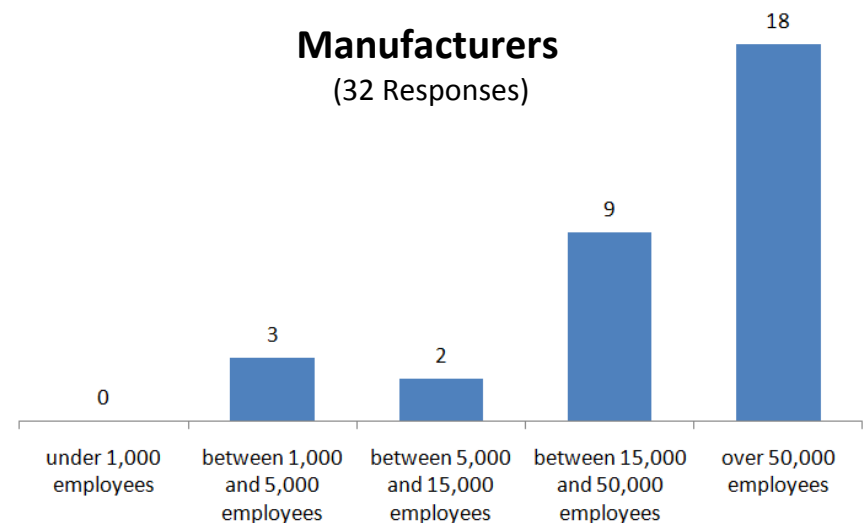
# Section A

## Question 5 – What is the size of your company globally

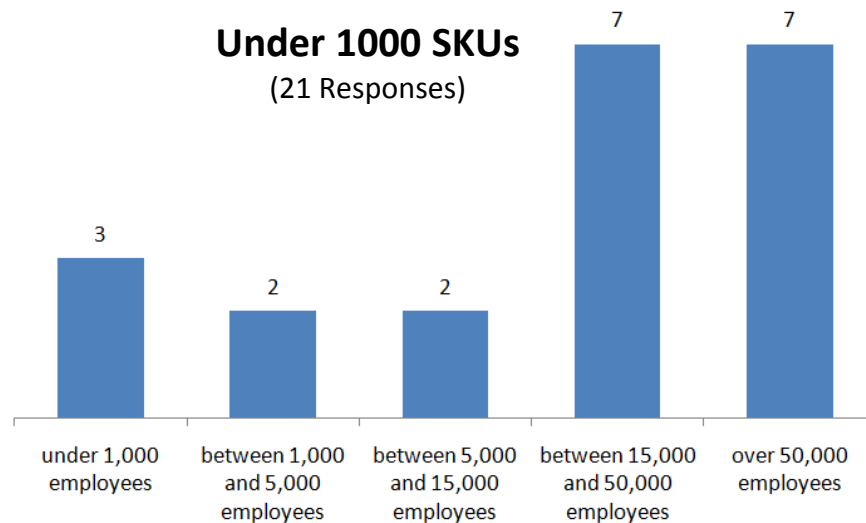
**Retailers**  
(14 Responses)



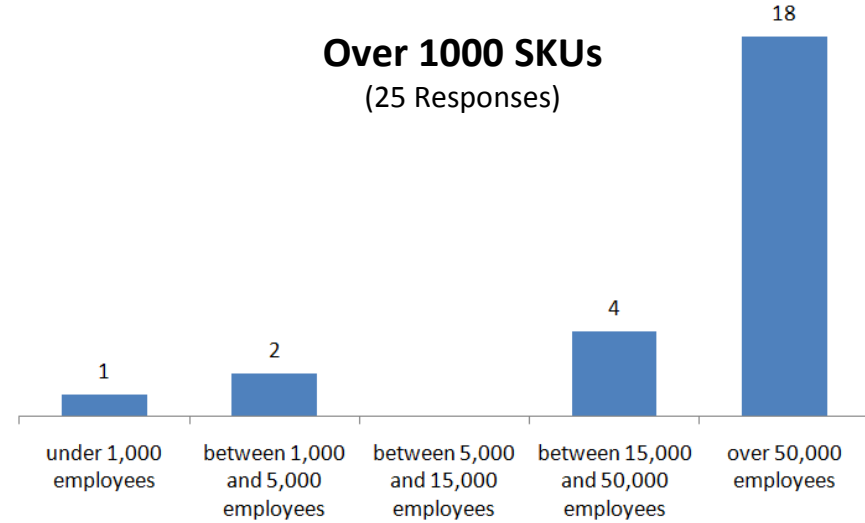
**Manufacturers**  
(32 Responses)



**Under 1000 SKUs**  
(21 Responses)

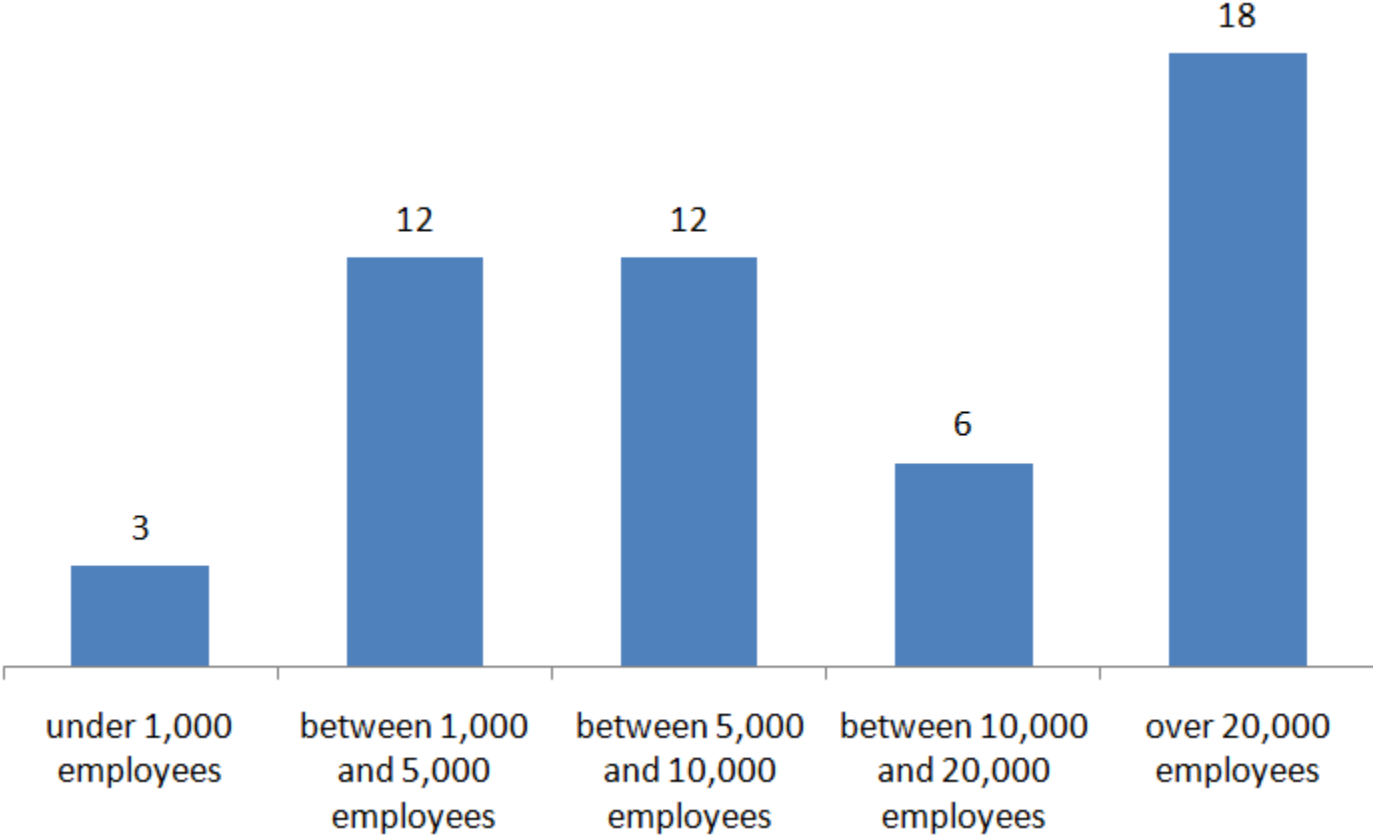


**Over 1000 SKUs**  
(25 Responses)



# Section A

## Question 6 – What is the size of your company in APAC



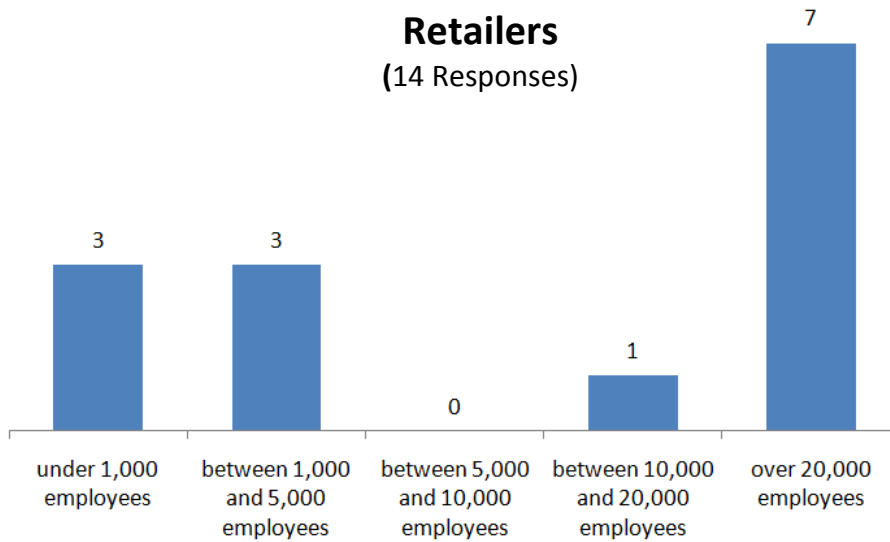
All Respondents

No. Respondents = 51

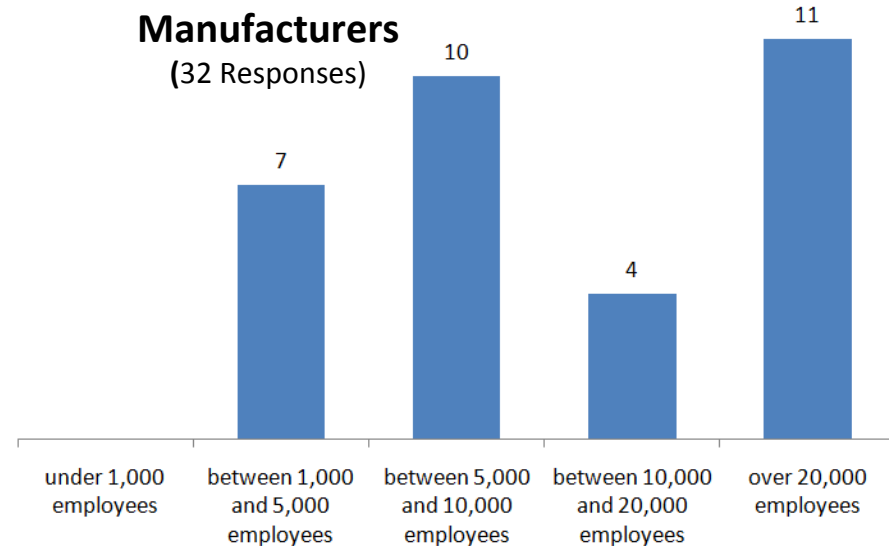
# Section A

## Question 6 – What is the size of your company in APAC

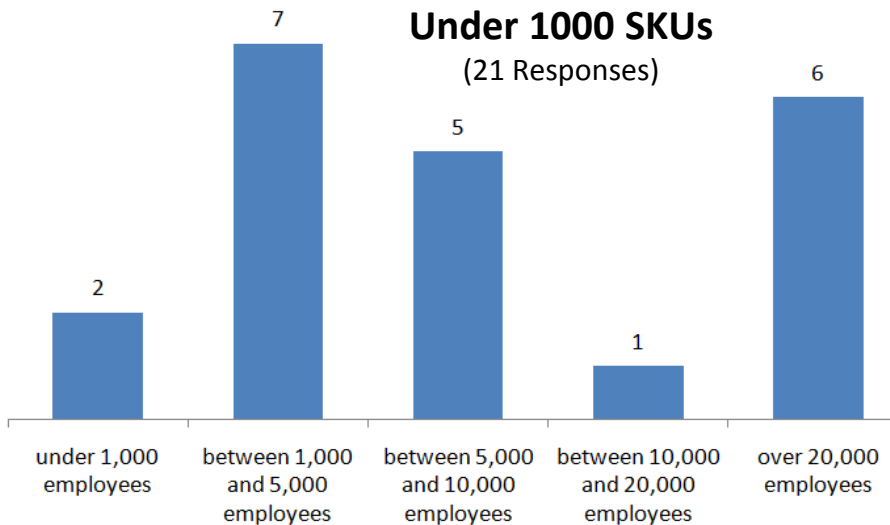
### Retailers (14 Responses)



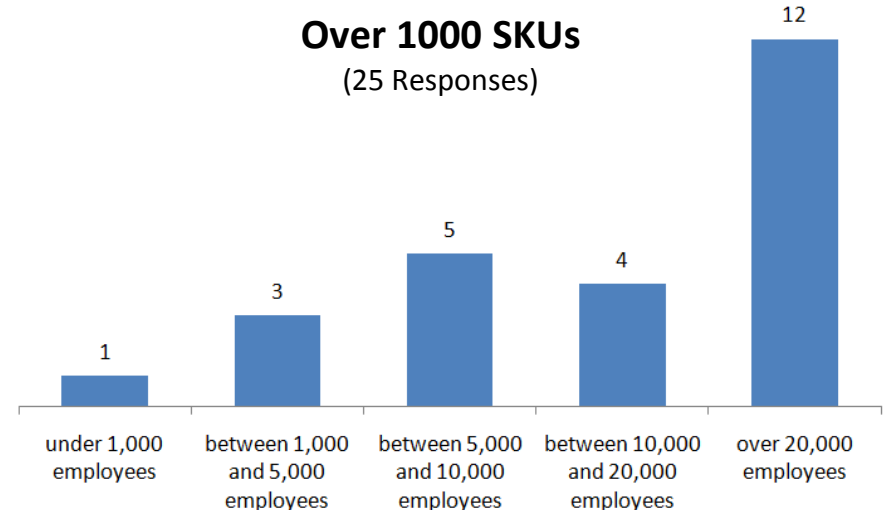
### Manufacturers (32 Responses)



### Under 1000 SKUs (21 Responses)



### Over 1000 SKUs (25 Responses)

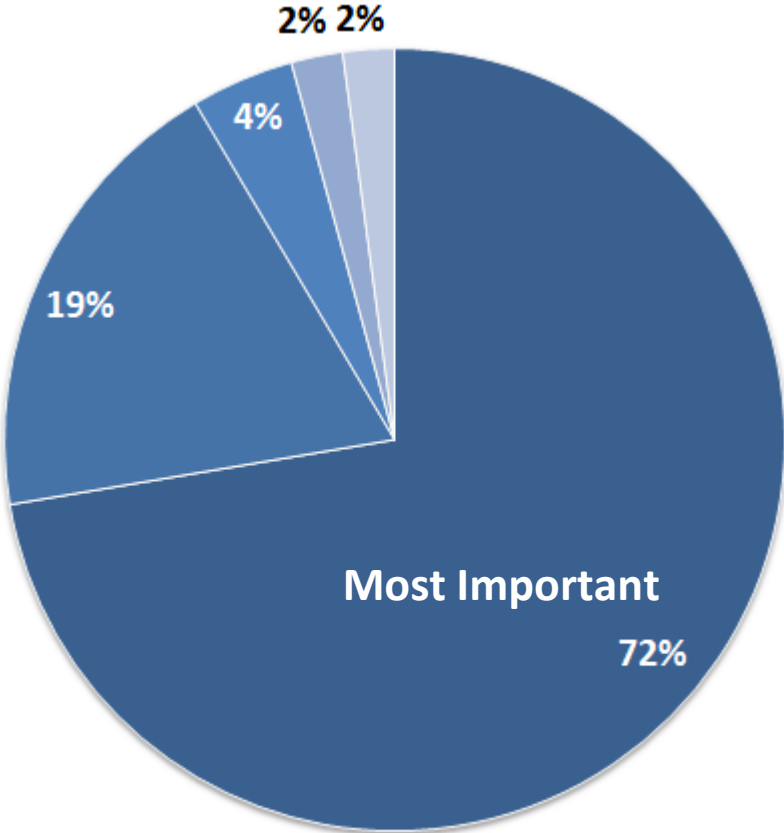


## **SECTION B**

### ***The Importance of OSA***

# Section B

## Question 1 – Current importance of OSA to your company



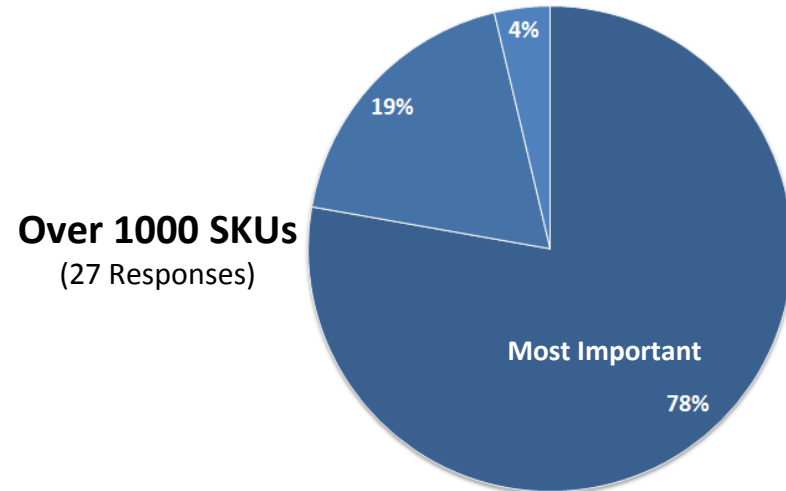
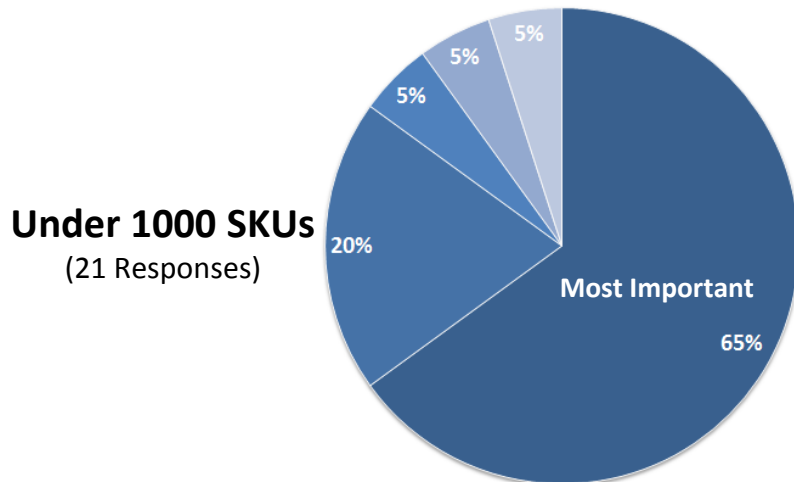
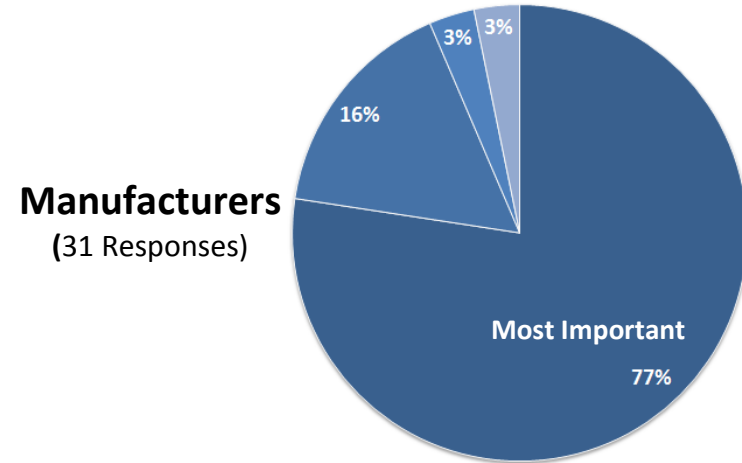
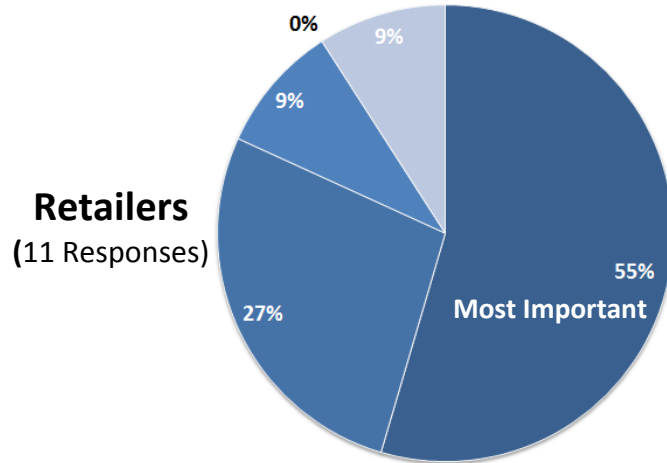
■ 5- Most Important ■ 4 ■ 3 ■ 2 ■ 1 - Not Important

All Respondents

No. Respondents = 47

# Section B

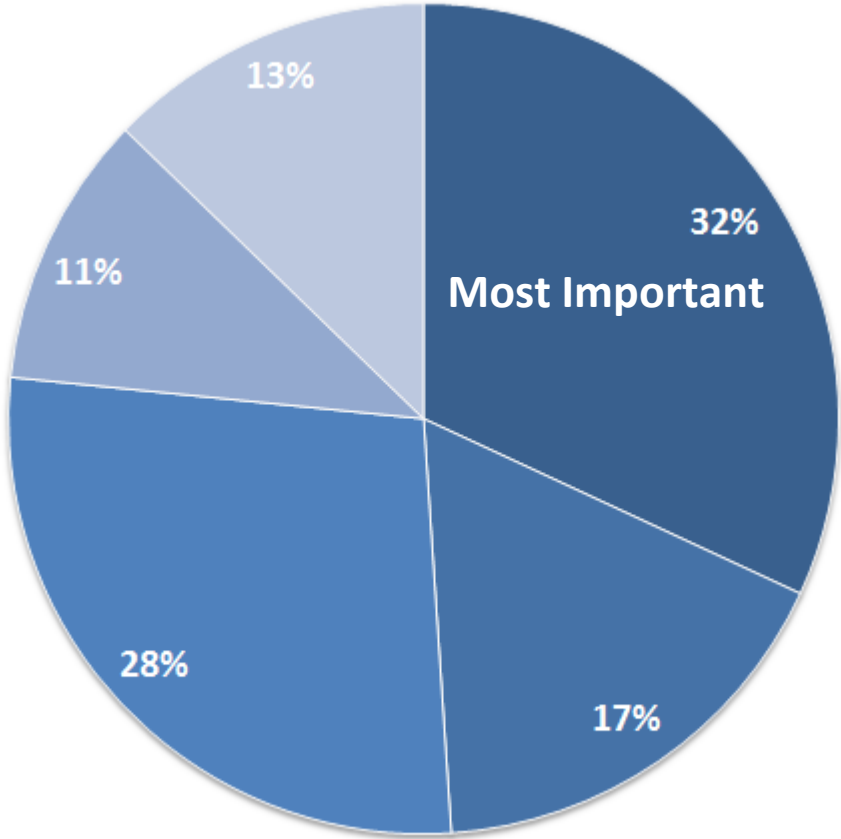
## Question 1 – Current importance of OSA to your company



■ 5 - Most Important ■ 4 ■ 3 ■ 2 ■ 1 - Not Important

# Section B

## Question 2 – Importance of OSA 5 years ago



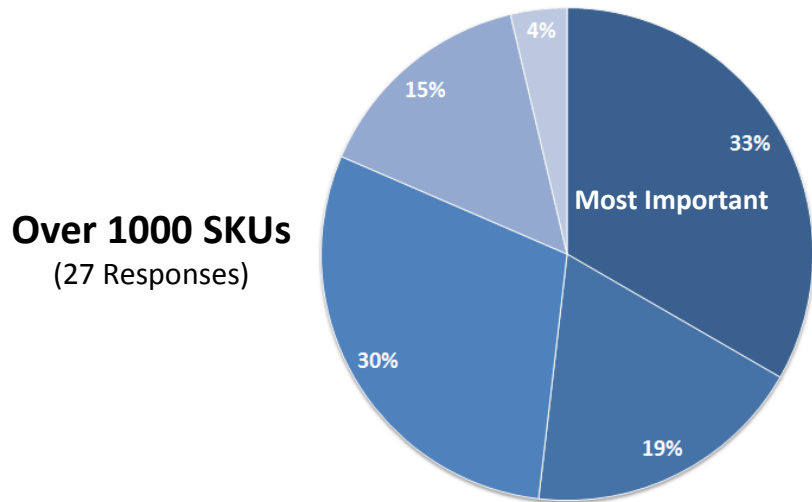
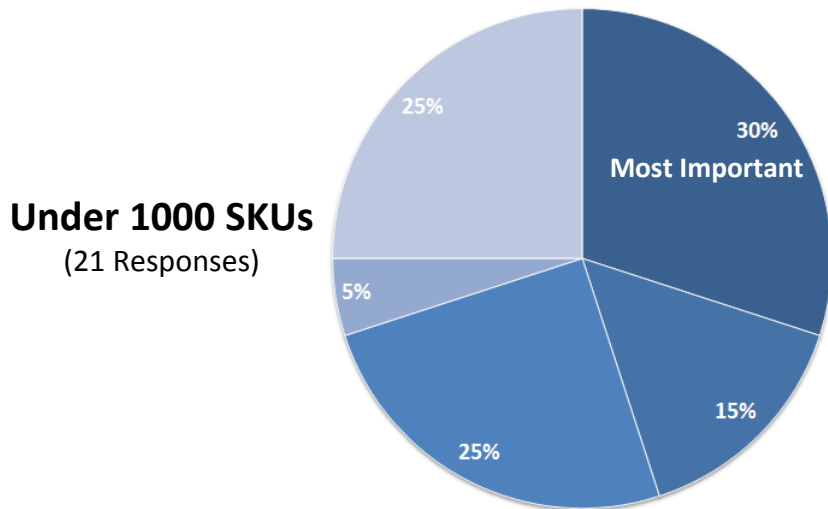
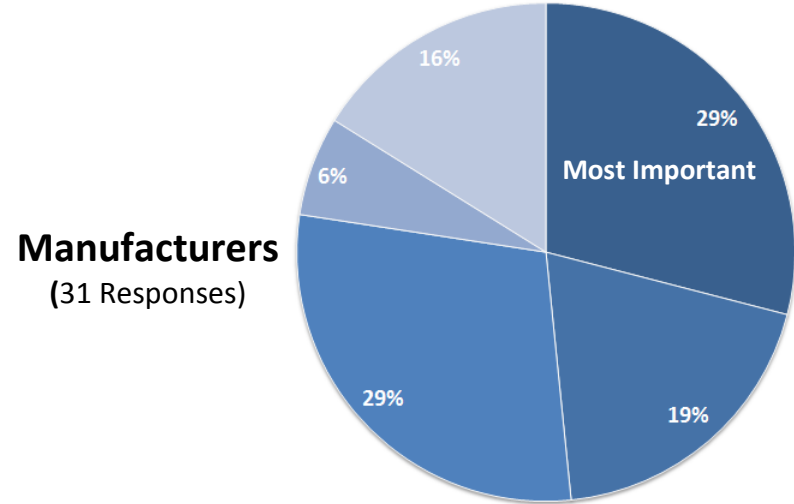
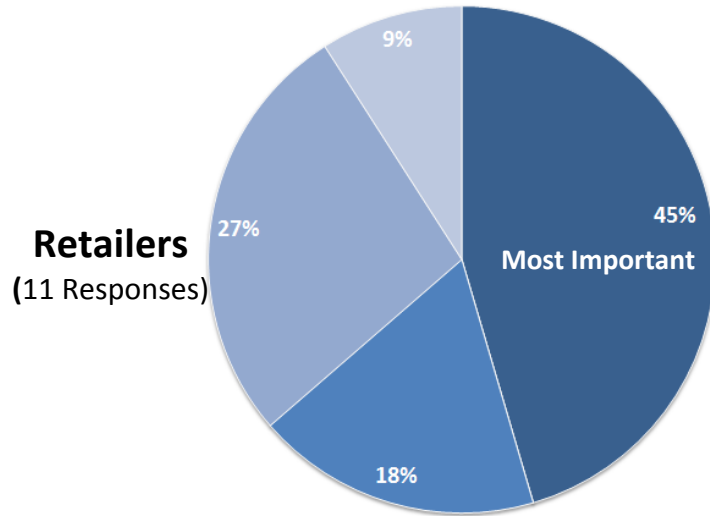
■ 5- Most Important ■ 4 ■ 3 ■ 2 ■ 1 - Not Important

All Respondents

No. Respondents = 47

# Section B

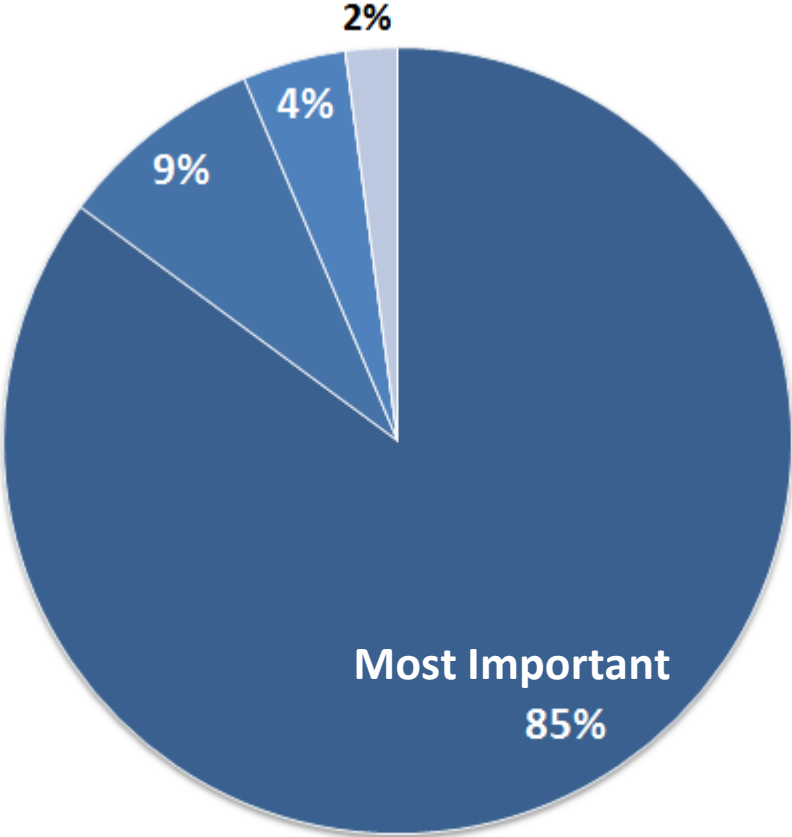
## Question 2 – Importance of OSA 5 years ago



■ 5- Most Important ■ 4 ■ 3 ■ 2 ■ 1 - Not Important

# Section B

## Question 3 – Perceived importance in 5 years time



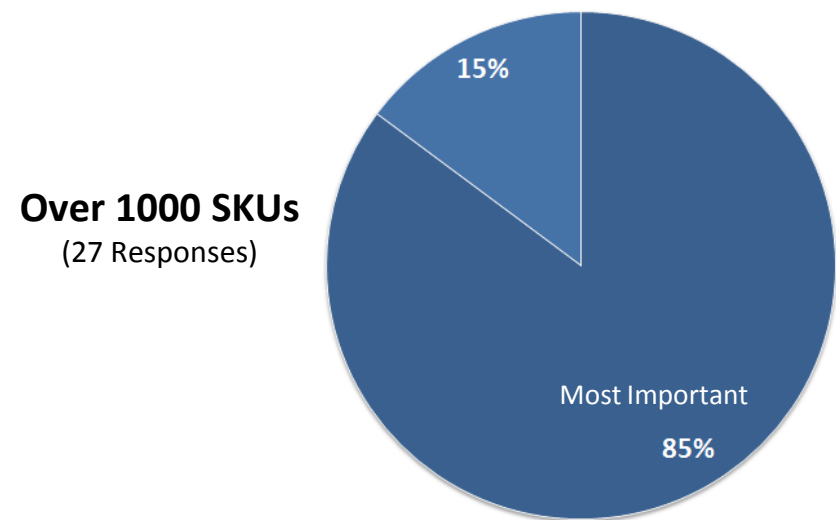
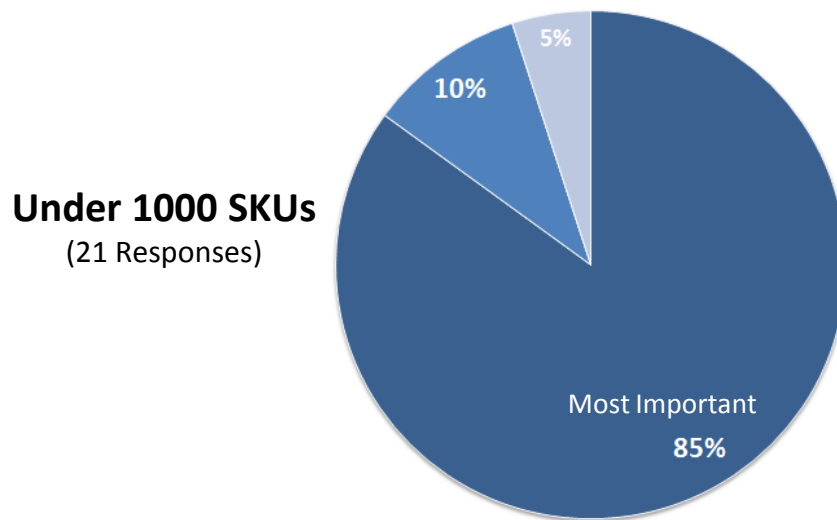
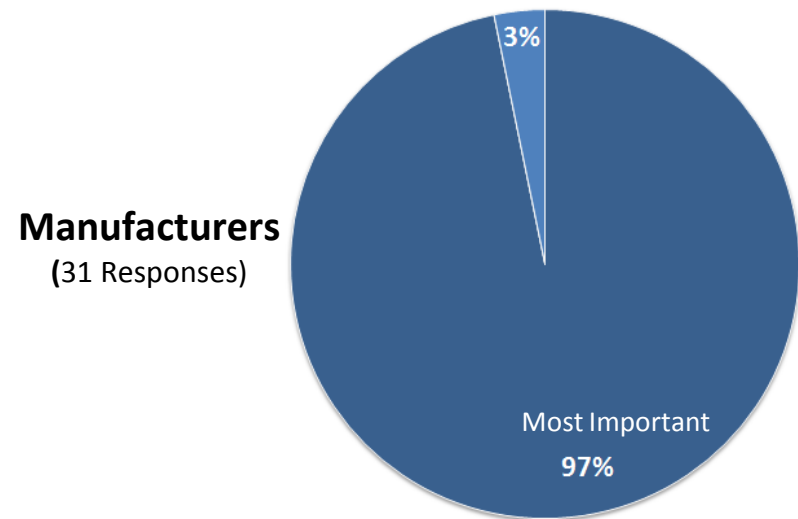
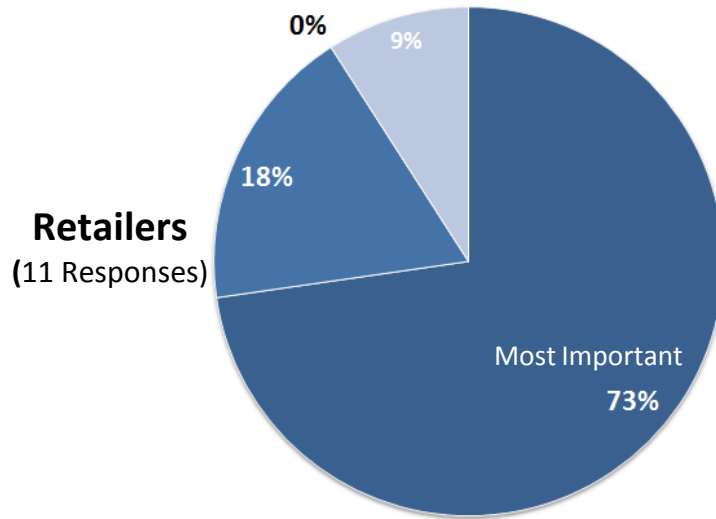
■ 5- Most Important ■ 4 ■ 3 ■ 2 ■ 1 - Not Important

All Respondents

No. Respondents = 47

# Section B

## Question 3 – Perceived importance in 5 years time

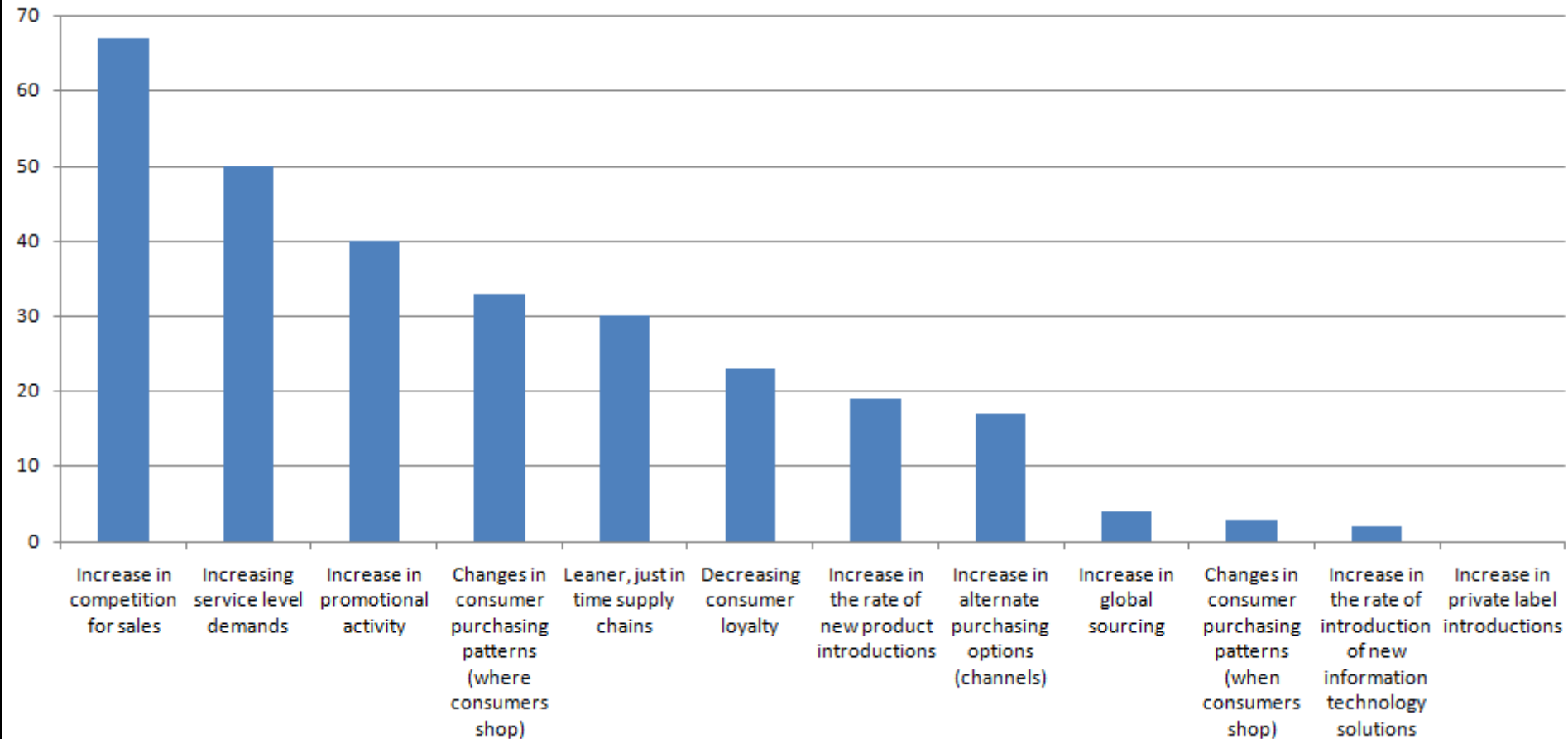


■ 5- Most Important ■ 4 ■ 3 ■ 2 ■ 1 - Not Important

# Section B

## Question 4 – Top trends in driving the importance of OSA

What trends, in your opinion, are driving the importance of on-shelf availability?



All Respondents

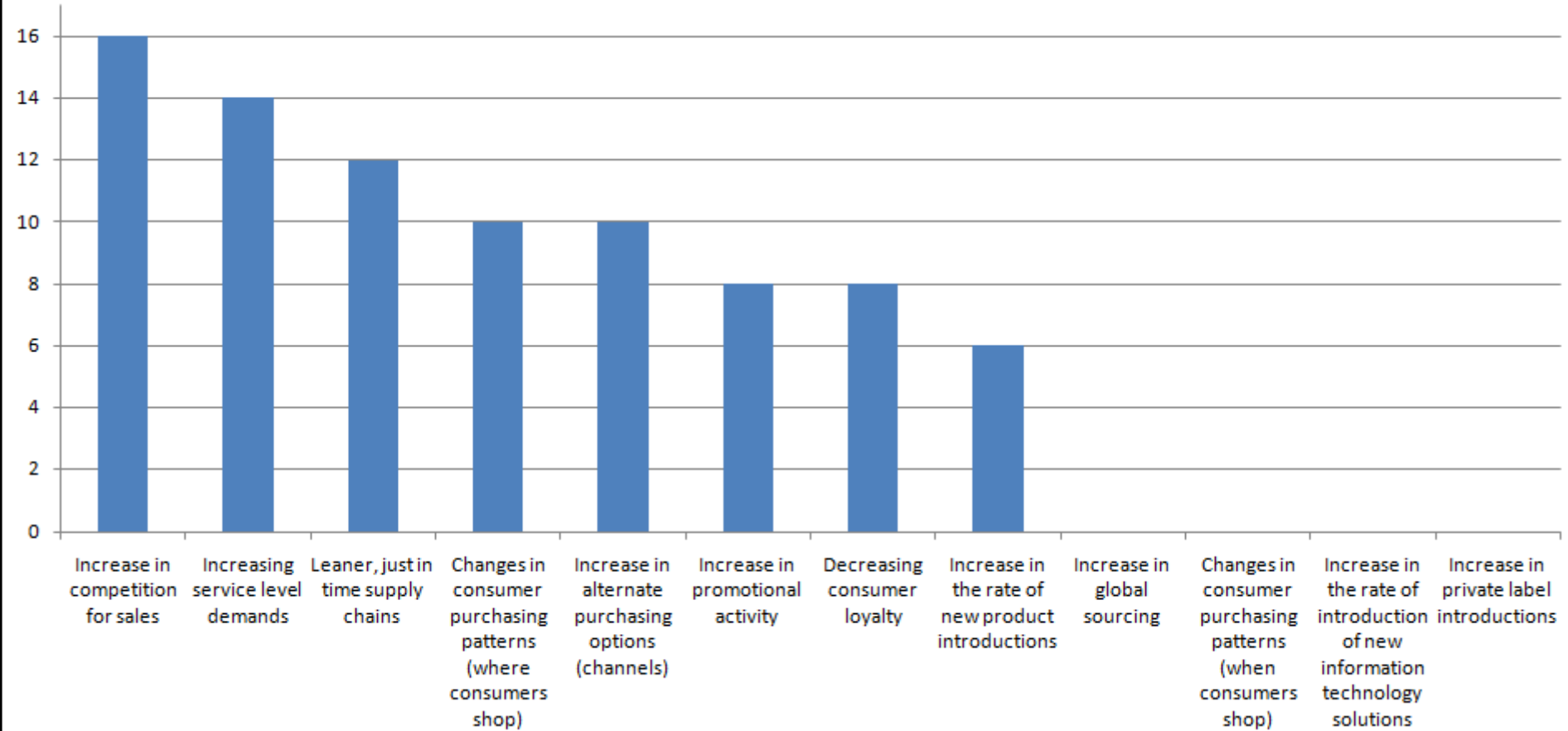
No. Respondents = 48

\*Respondents were allowed to choose 3 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section B

## Question 4 – Top trends in driving the importance of OSA

What trends, in your opinion, are driving the importance of on-shelf availability?



**Retailers Respondents Only**

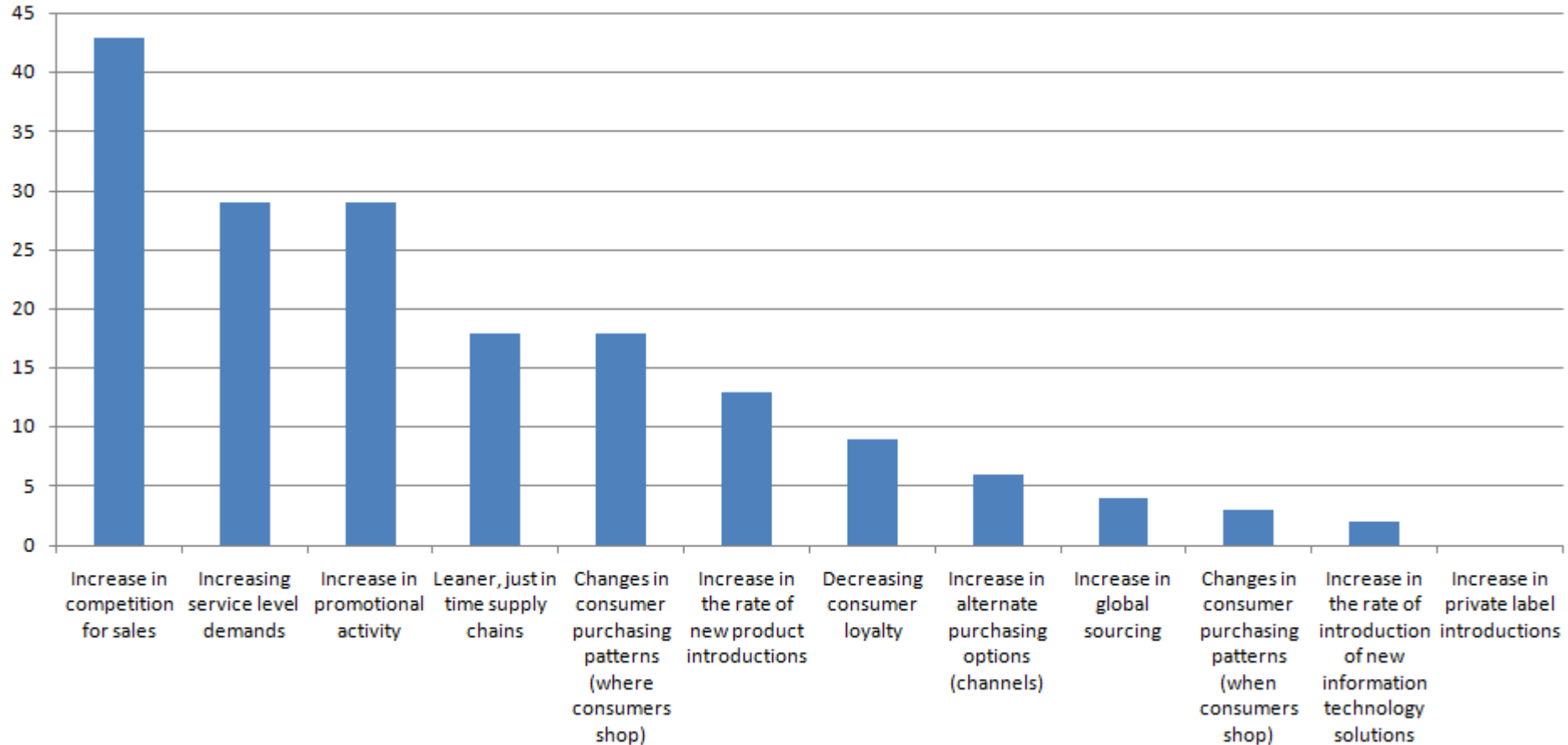
**No. Respondents = 14**

\*Respondents were allowed to choose 3 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section B

## Question 4 – Top trends in driving the importance of OSA

What trends, in your opinion, are driving the importance of on-shelf availability?



### Manufacturer Respondents Only

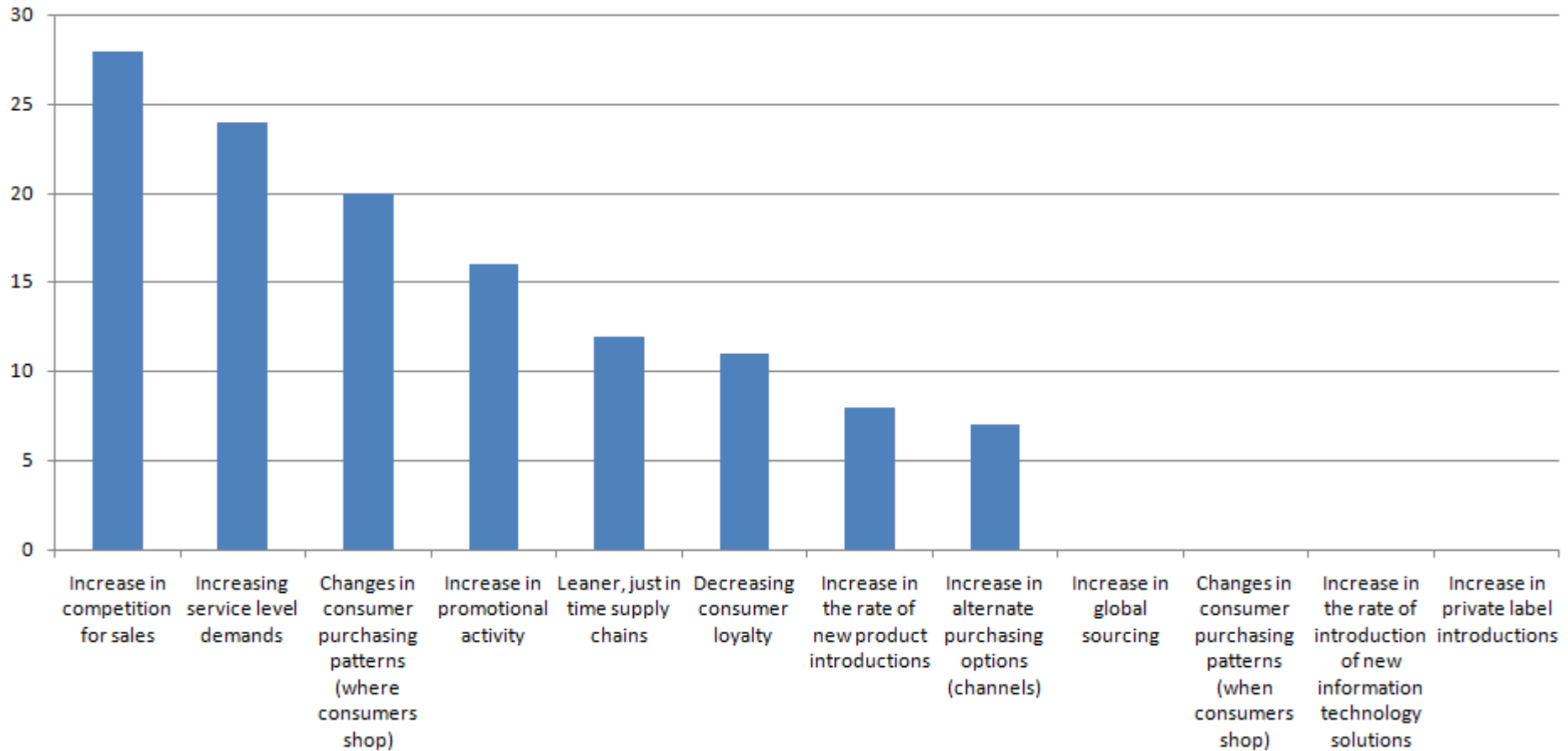
No. Respondents = 29

\*Respondents were allowed to choose 3 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section B

## Question 4 – Top trends in driving the importance of OSA

What trends, in your opinion, are driving the importance of on-shelf availability?



**Under 1000 SKUs Companies Only**

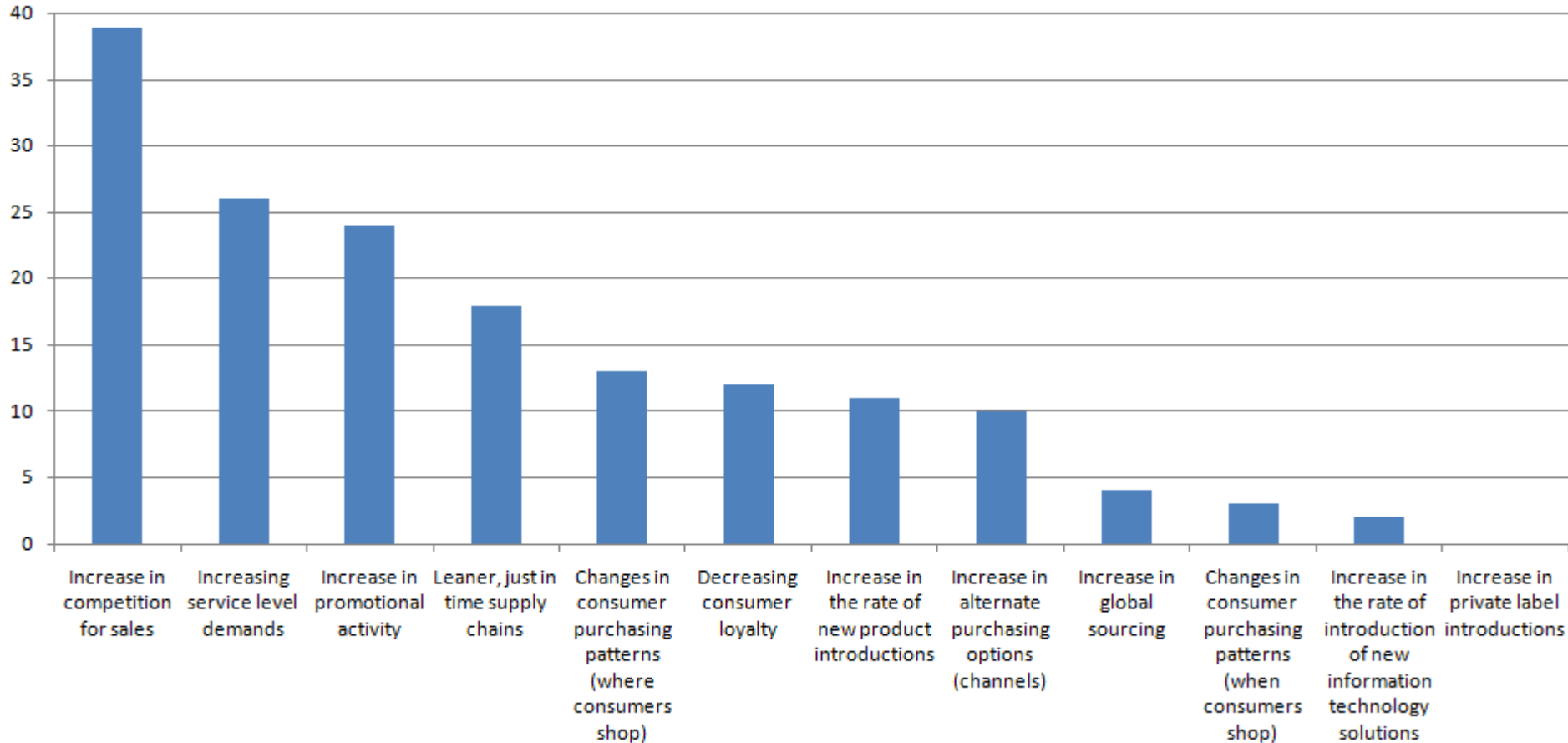
**No. Respondents = 21**

\*Respondents were allowed to choose 3 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section B

## Question 4 – Top trends in driving the importance of OSA

What trends, in your opinion, are driving the importance of on-shelf availability?



**Over 1000 SKUs Companies Only**

**No. Respondents = 27**

\*Respondents were allowed to choose 3 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

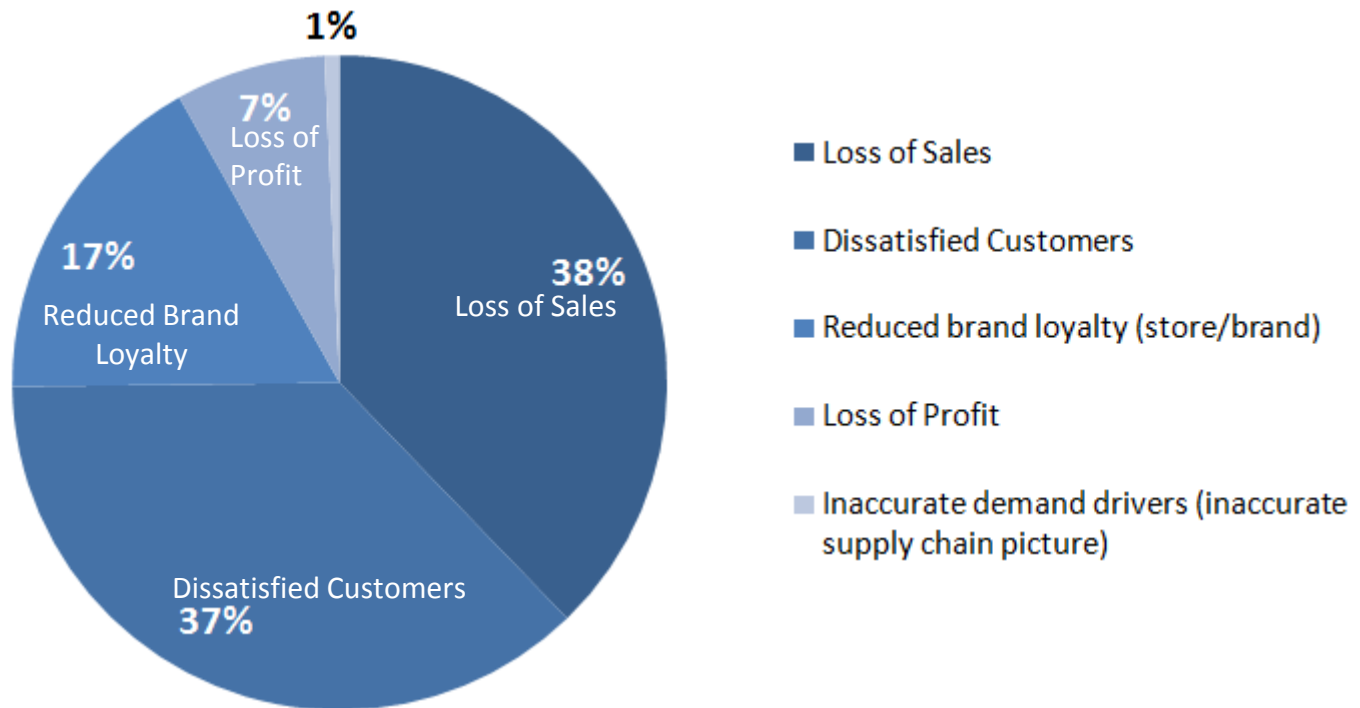
## **SECTION C**

### ***The Impact of Poor OSA***

# Section C

## Question 1 – The most significant consequences of poor OSA on companies

What are the most significant consequences of poor on-shelf availability on companies?



All Respondents

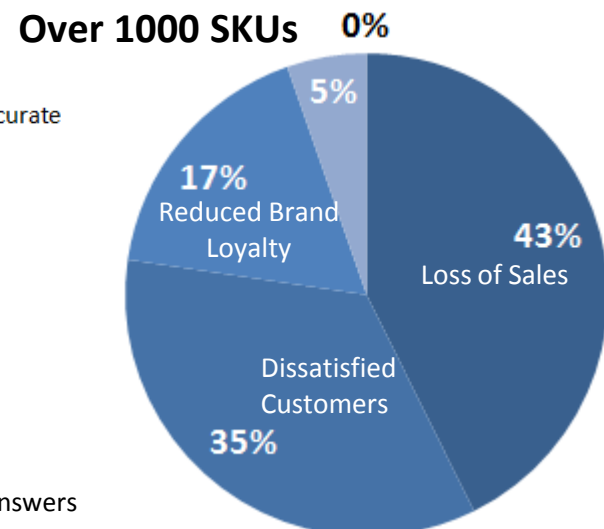
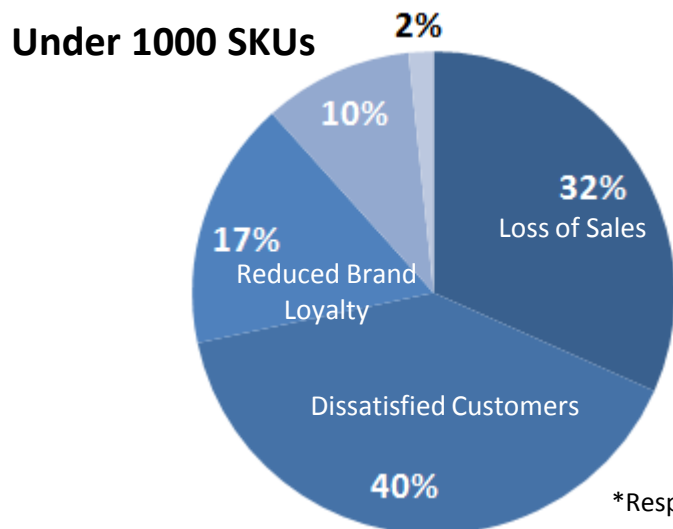
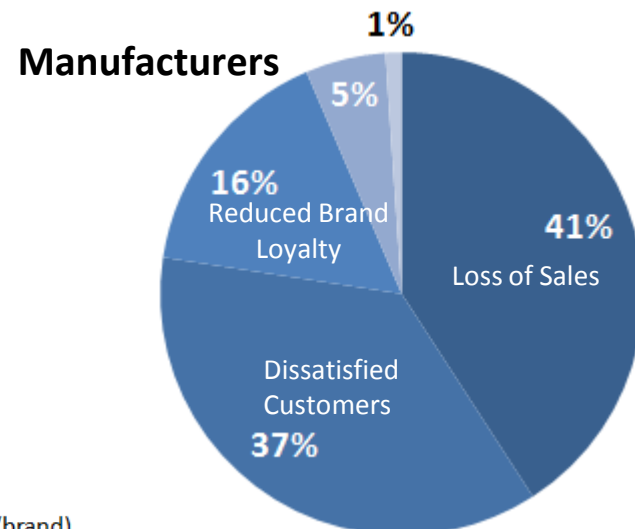
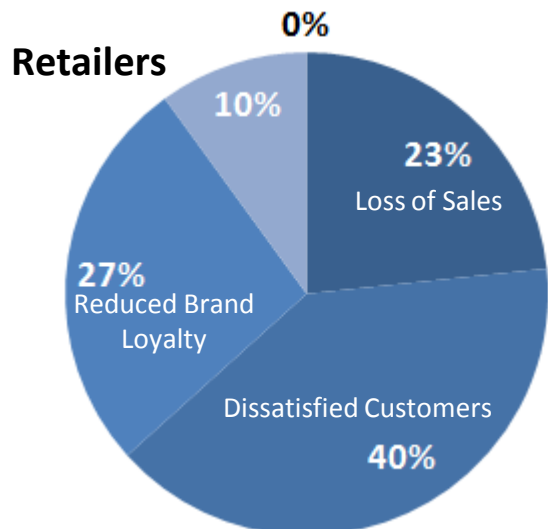
No. Respondents = 47

\*Respondents were allowed to choose 2 answers

# Section C

## Question 1 – The most significant consequences of poor OSA on companies

What are the most significant consequences of poor on-shelf availability on companies?



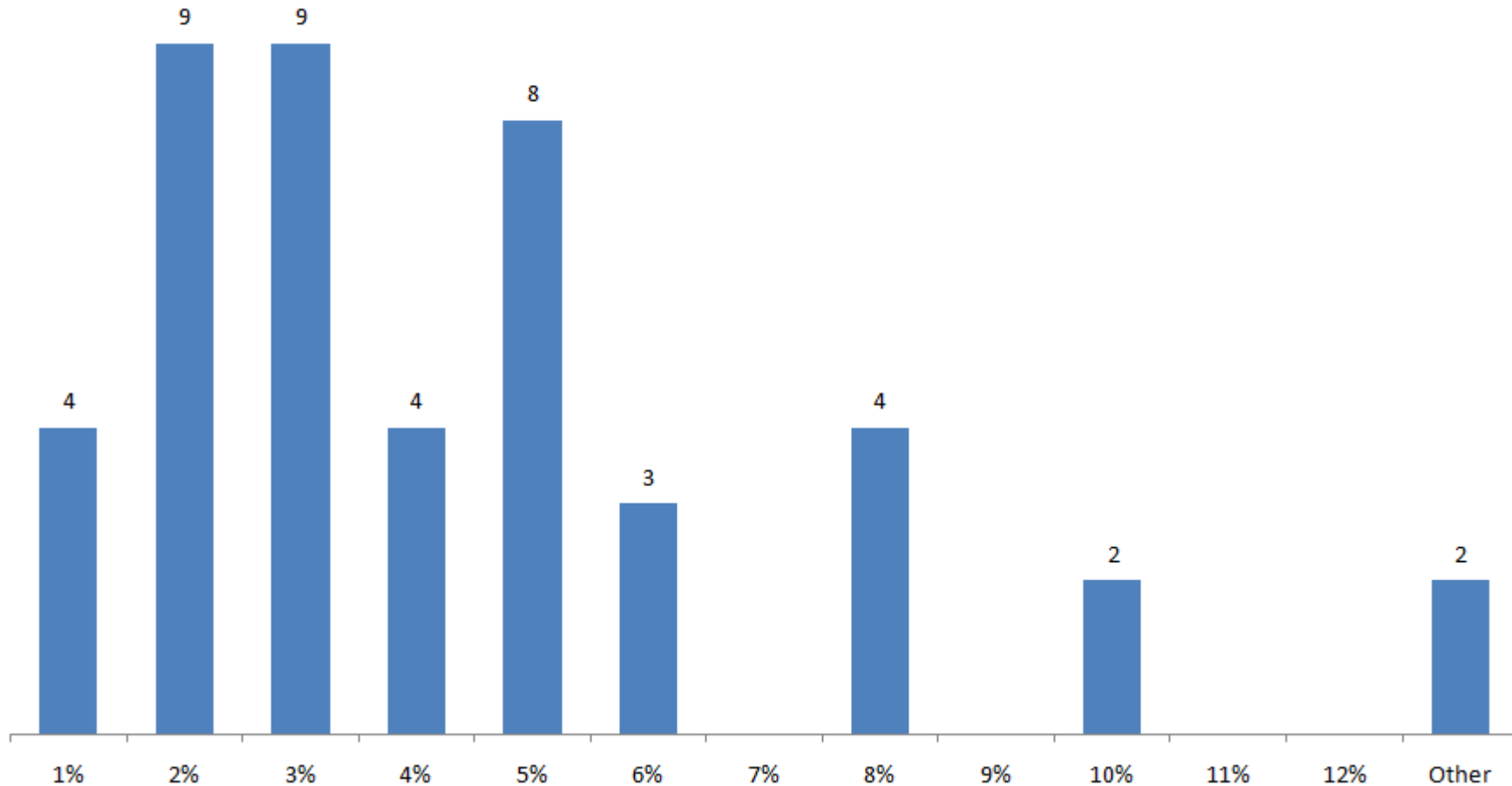
- Loss of Sales
- Dissatisfied Customers
- Reduced brand loyalty (store/brand)
- Loss of Profit
- Inaccurate demand drivers (inaccurate supply chain picture)

\*Respondents were allowed to choose 2 answers

# Section C

## Question 2 – The financial impact to your organization in terms of loss of sales, as a result of poor OSA)

Estimated financial impact to your organization of the loss of sales as a result of poor or no availability



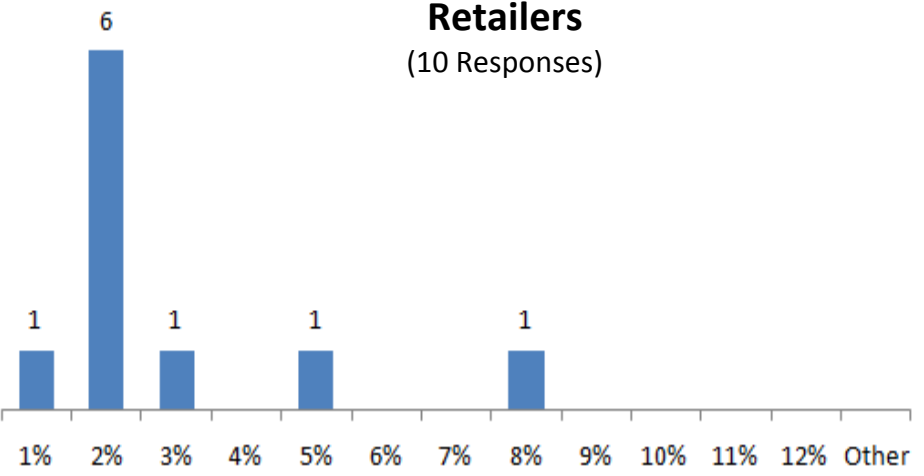
No. Respondents = 45

All Respondents

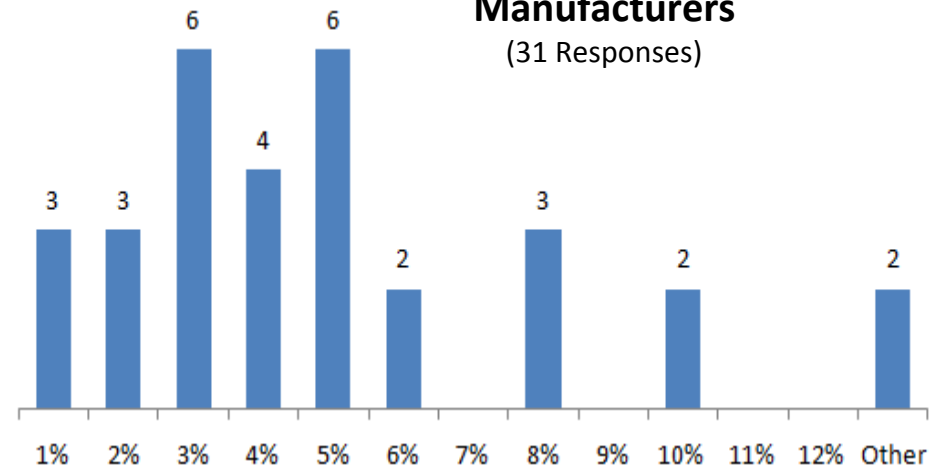
# Section C

## Question 2 – The financial impact to your organization in terms of loss of sales, as a result of poor OSA)

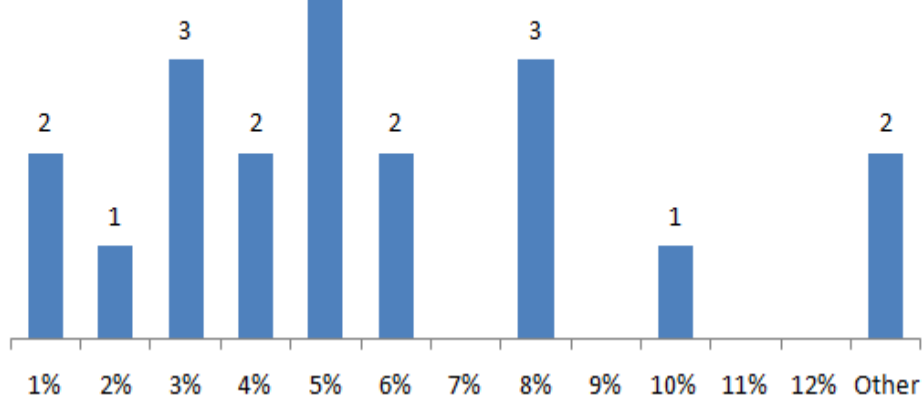
**Retailers**  
(10 Responses)



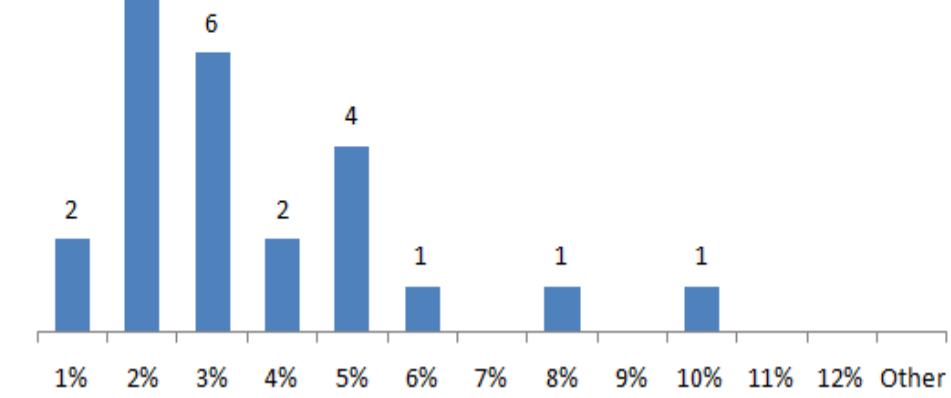
**Manufacturers**  
(31 Responses)



**Under 1000 SKUs**  
(20 Responses)



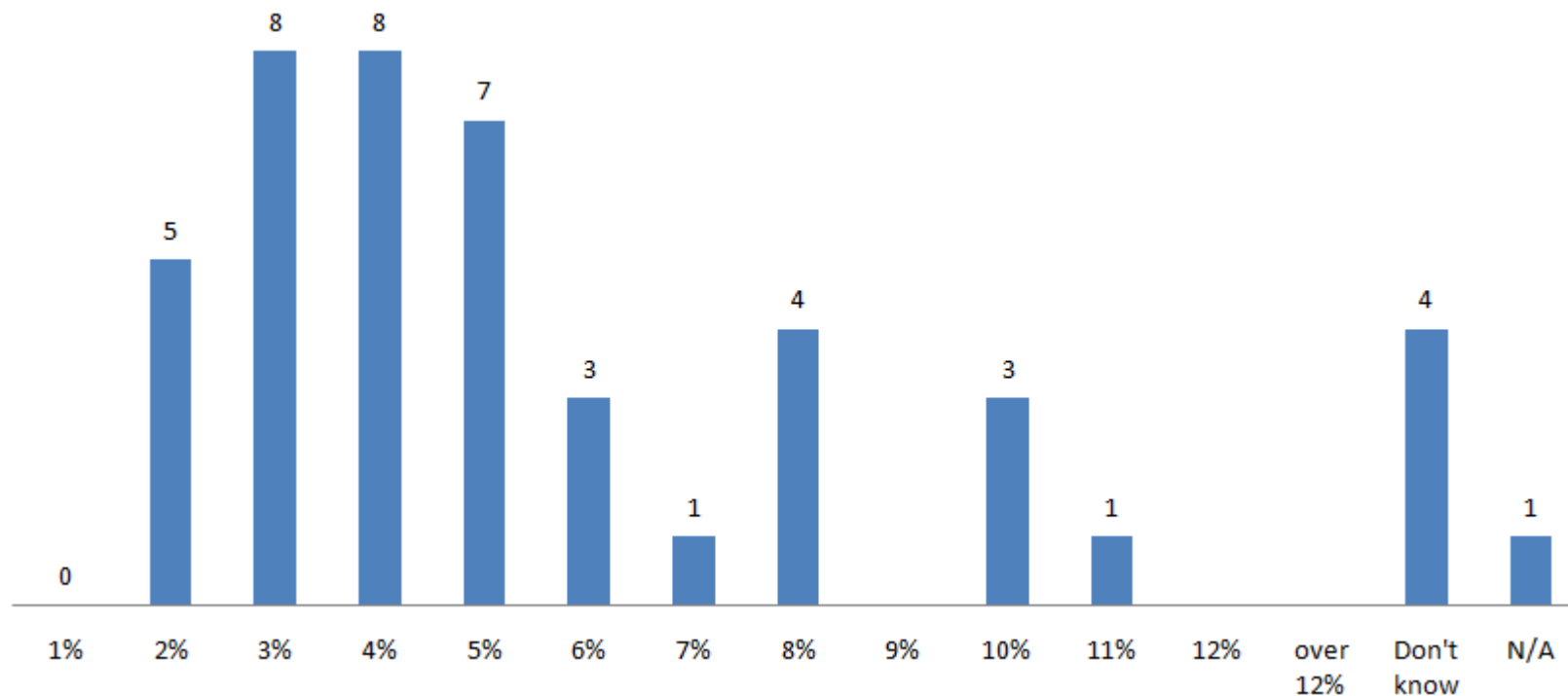
**Over 1000 SKUs**  
(25 Responses)



# Section C

## Question 3 – Current level of OSA within your organization

**Current level of OSA within your organization**  
(in terms of percentage out of stock)



**All Respondents**

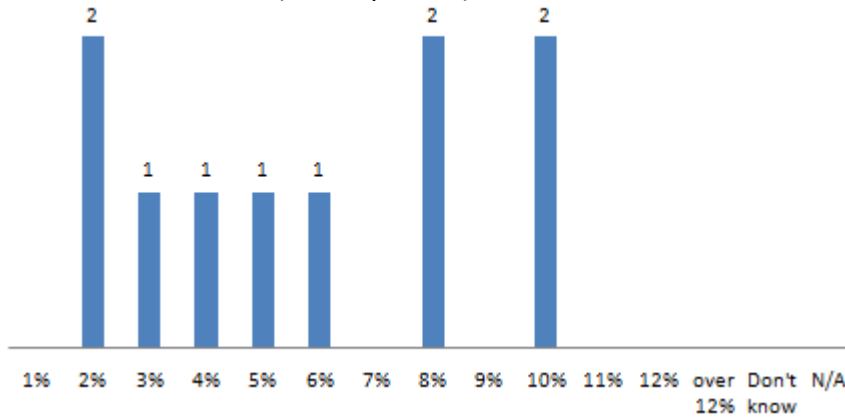
**No. Respondents = 45**

# Section C

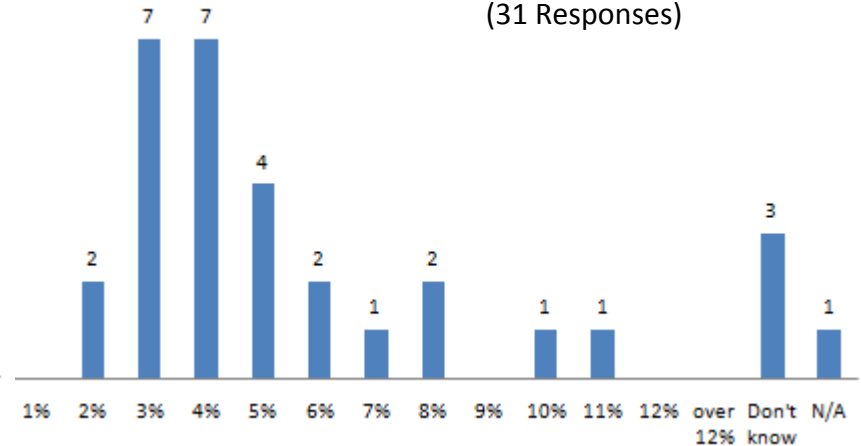
## Question 3 – Current level of OSA within your organization

### Current level of OSA within your organization (in terms of percentage out of stock)

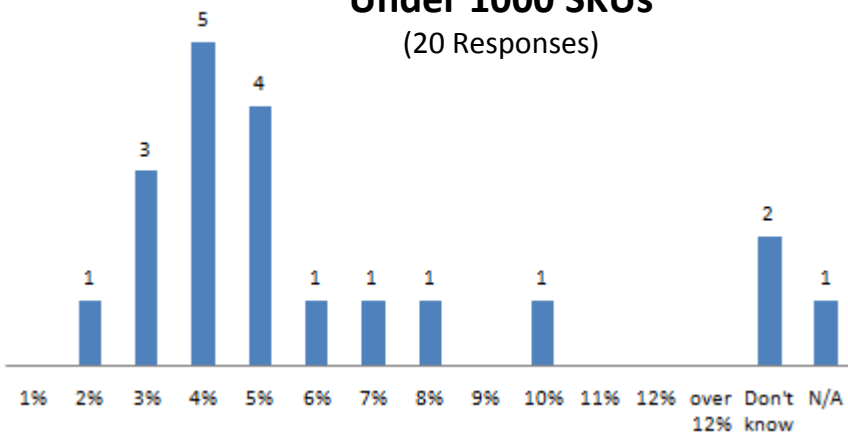
**Retailers**  
(10 Responses)



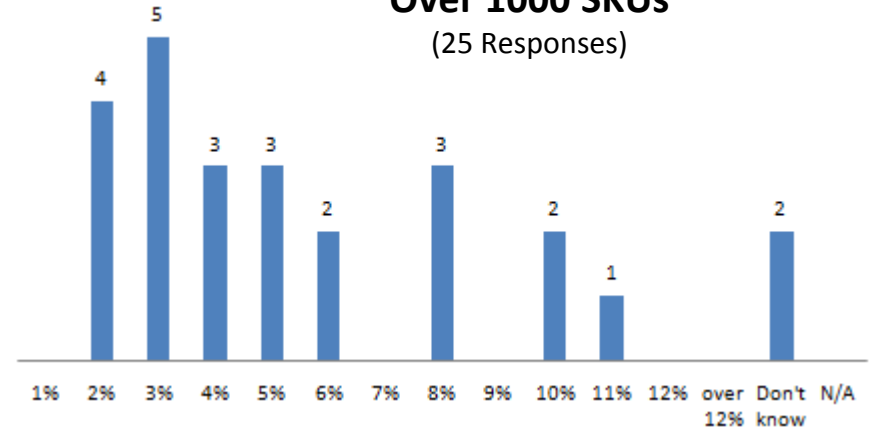
**Manufacturers**  
(31 Responses)



**Under 1000 SKUs**  
(20 Responses)



**Over 1000 SKUs**  
(25 Responses)



## **SECTION D**

# ***The Root Causes of Poor OSA***

# Section D

## Question 1 – Top root causes of poor OSA within your supply chain

### Top root causes of poor OSA within your supply chain



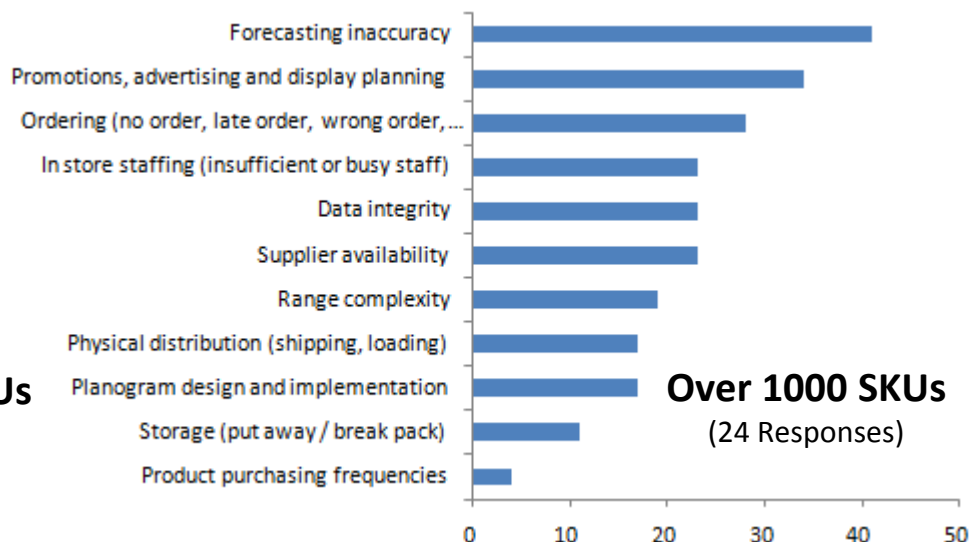
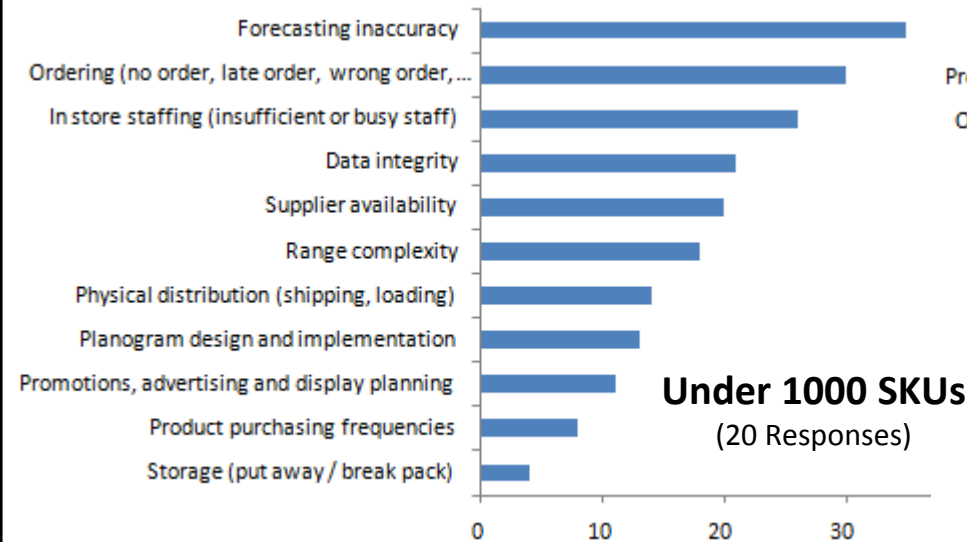
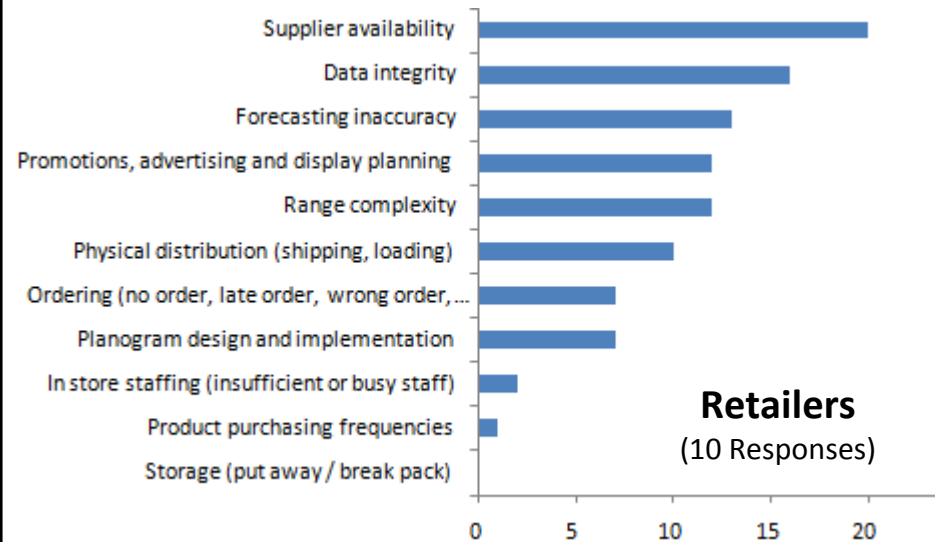
All Respondents

No. Respondents = 44

\*Respondents were allowed to choose 4 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section D

## Question 1 – Top root causes of poor OSA within your supply chain



## **SECTION E**

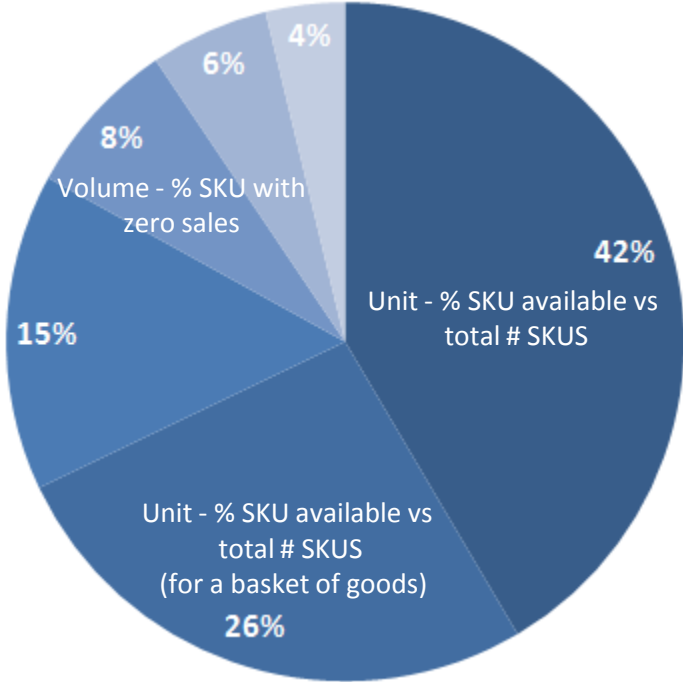
# ***Measuring On Shelf Availability***

# Section E

## Question 1 – Method of measuring OSA



Top Methods of measuring OSA within your company



- Unit - % stock keeping units (SKU) available vs. total number of SKUs
- Unit - % SKUs available vs. total number of SKUs (for a basket of goods)
- Other
- Volume - % SKUs that have zero sales (for high volume sales)
- Volume - % SKUs that have zero sales (for fast moving goods with low sales volatility)

All Respondents

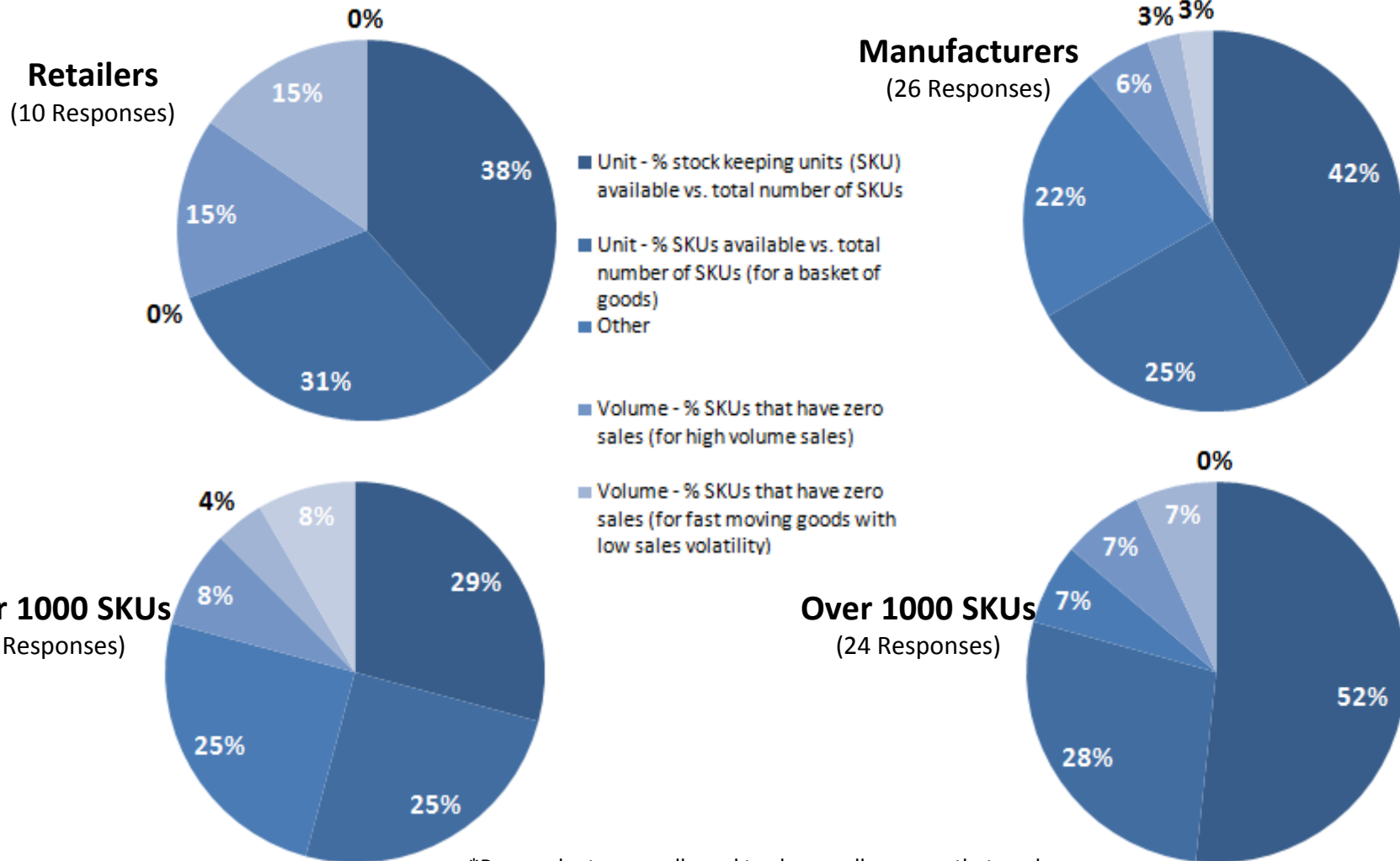
No. Respondents = 40

\*Respondents were allowed to choose all answers that apply

# Section E

## Question 1 – Method of measuring OSA

Top Methods of measuring OSA within your company\*

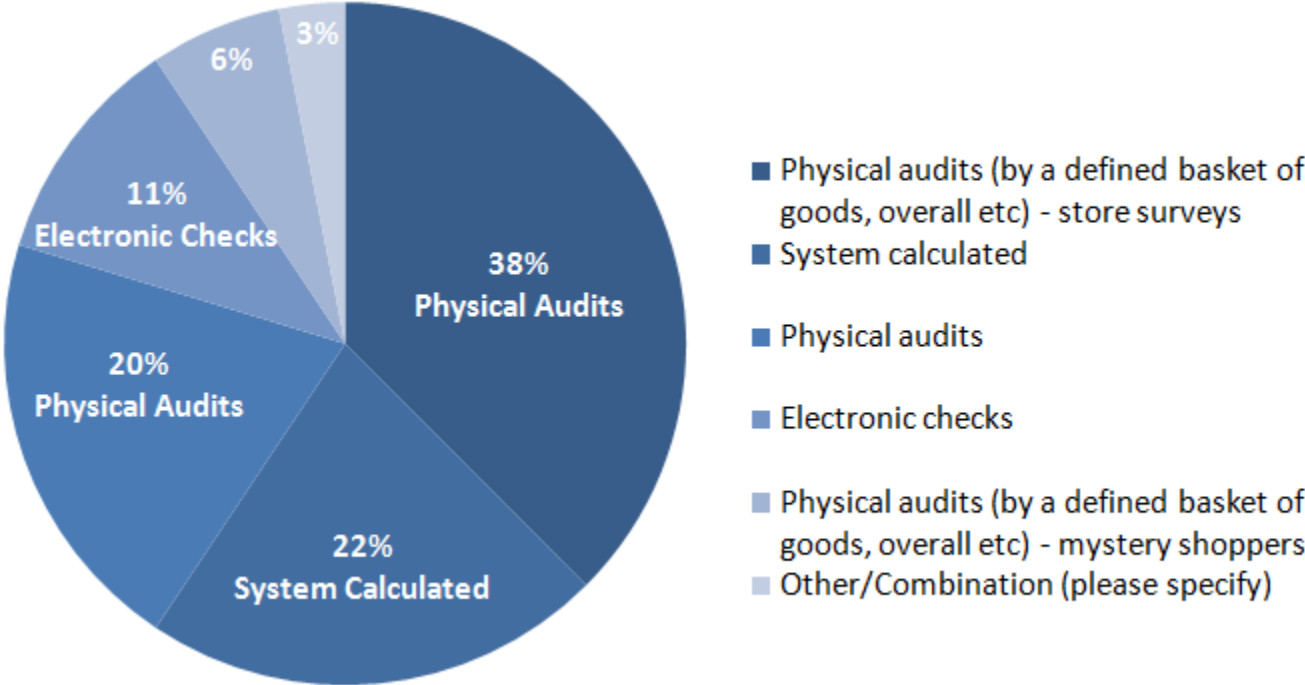


\*Respondents were allowed to choose all answers that apply

# Section E

## Question 2 – Method of data collection

Top Methods of data collection within your company\*



All Respondents

No. Respondents = 40

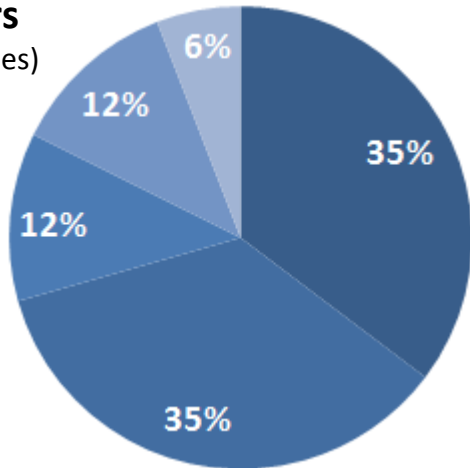
\*Respondents were allowed to choose all answers that apply

# Section E

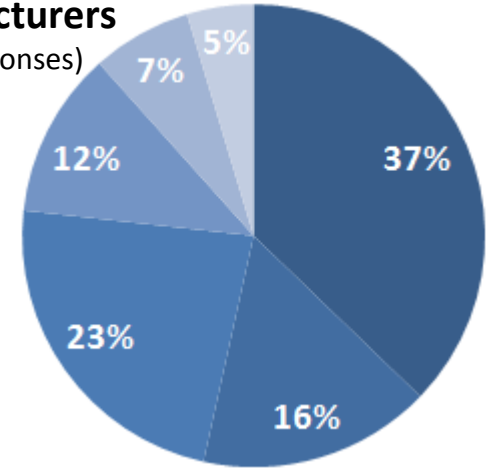
## Question 2 – Method of data collection

**Top Methods of data collection within your company\***

**Retailers**  
(10 Responses)

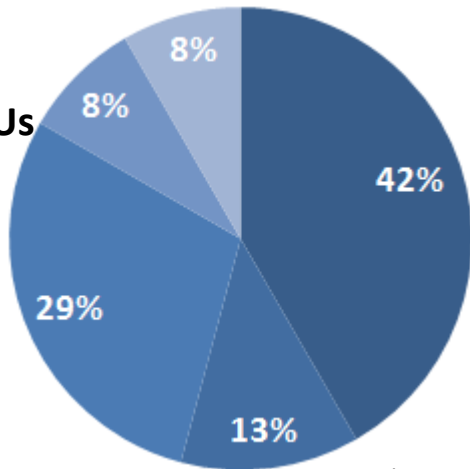


**Manufacturers**  
(26 Responses)

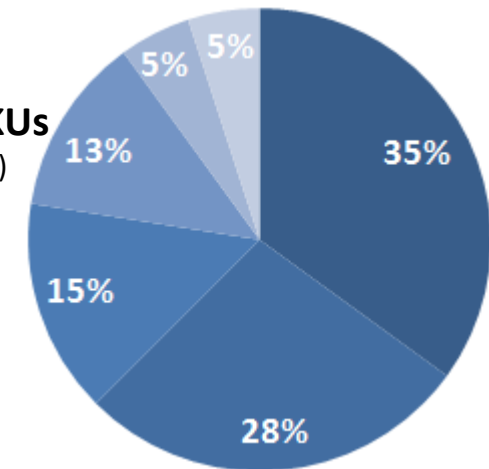


- Physical audits (by a defined basket of goods, overall etc) - store surveys
- System calculated
- Physical audits
- Electronic checks
- Physical audits (by a defined basket of goods, overall etc) - mystery shoppers
- Other/Combination (please specify)

**Under 1000 SKUs**  
(16 Responses)



**Over 1000 SKUs**  
(24 Responses)



\*Respondents were allowed to choose all answers that apply

# Section E

## Question 3 – Reasons for chosen method of data collection

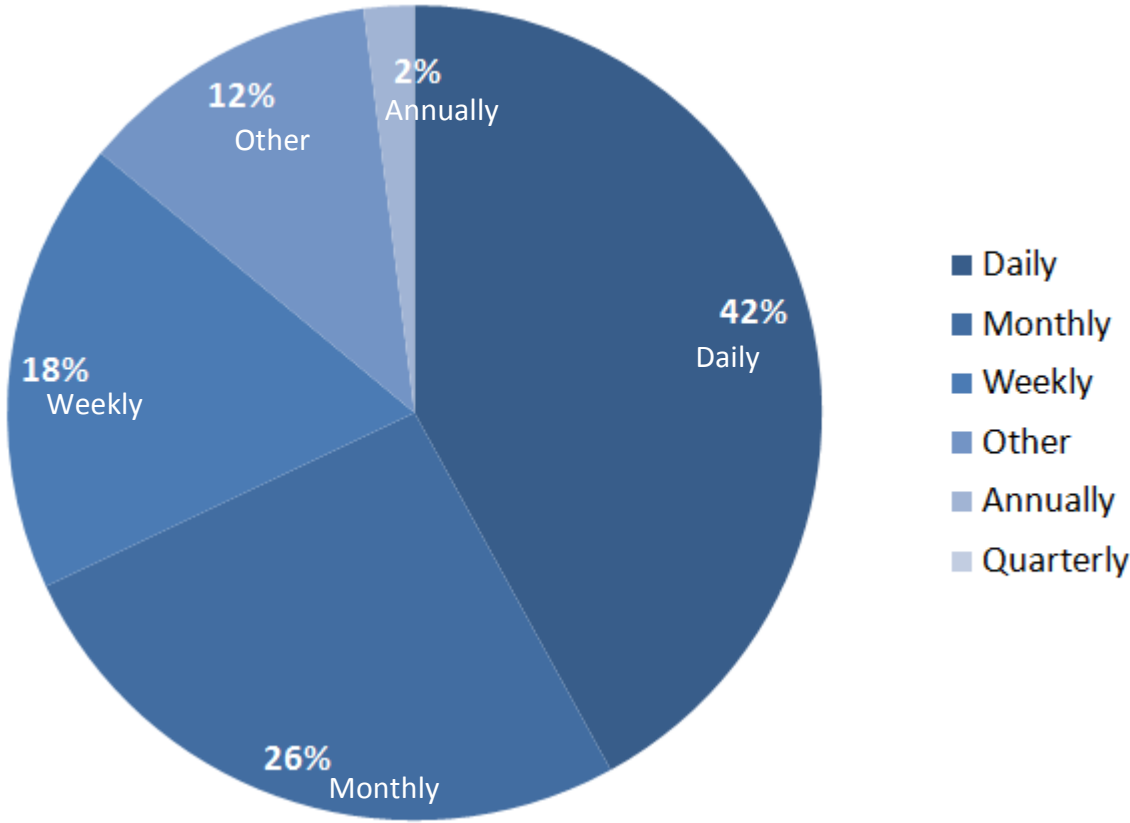
Method	Reason For Using
<b>Physical Audits / Store Surveys</b>	High level of accuracy. Global standard, mandated by head office. To save costs. High reliability. No system support is available. Highest perceived value
<b>System Calculated</b>	To understand data in near real time. Only practical way to evaluate the whole product range
<b>Combination of Physical and System Calculated</b>	Best of both worlds. Results can be cross matched to ensure consistency and accuracy
<b>Physical Audits Only</b>	As a manufacturer, having merchandising people doing physical audits is the only options
<b>Electronic Checks</b>	No comment
<b>3<sup>rd</sup> Party Purchased Data</b>	Simple and easy

No. Respondents = 40

# Section E

## Question 4 – Frequency of measuring OSA

How frequently do you measure on-shelf availability?\*



All Respondents

No. Respondents = 40

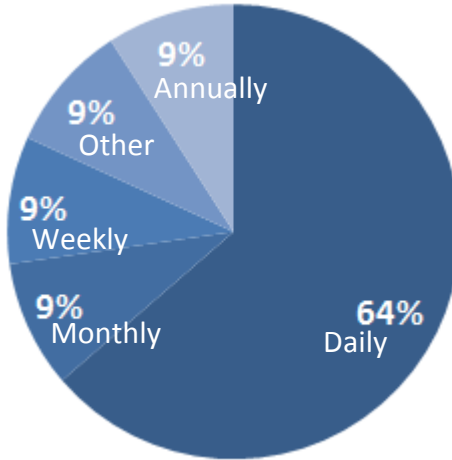
\*Respondents were allowed to choose all answers that apply

# Section E

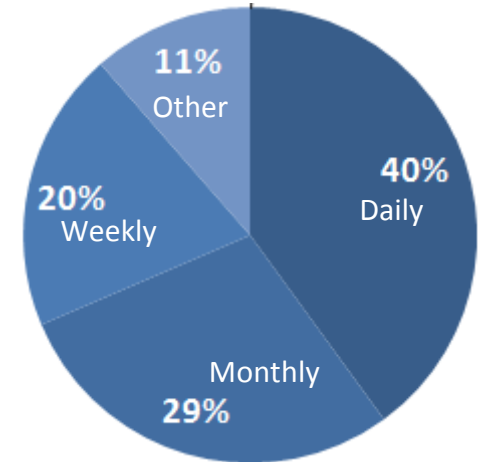
## Question 4 – Frequency of measuring OSA

### Top Levels of Frequency for measuring OSA\*

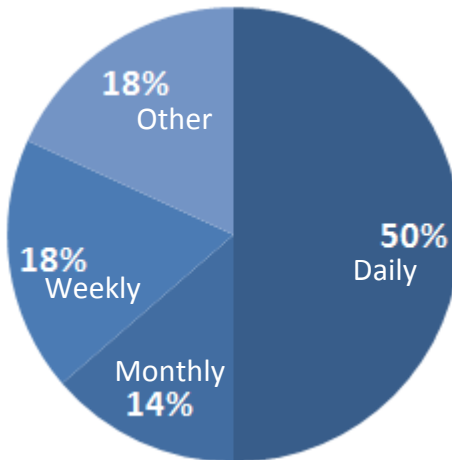
**Retailers**  
(10 Responses)



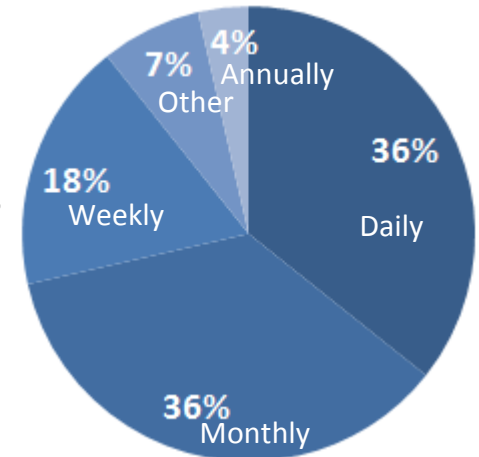
**Manufacturers**  
(26 Responses)



**Under 1000 SKUs**  
(16 Responses)



**Over 1000 SKUs**  
(24 Responses)



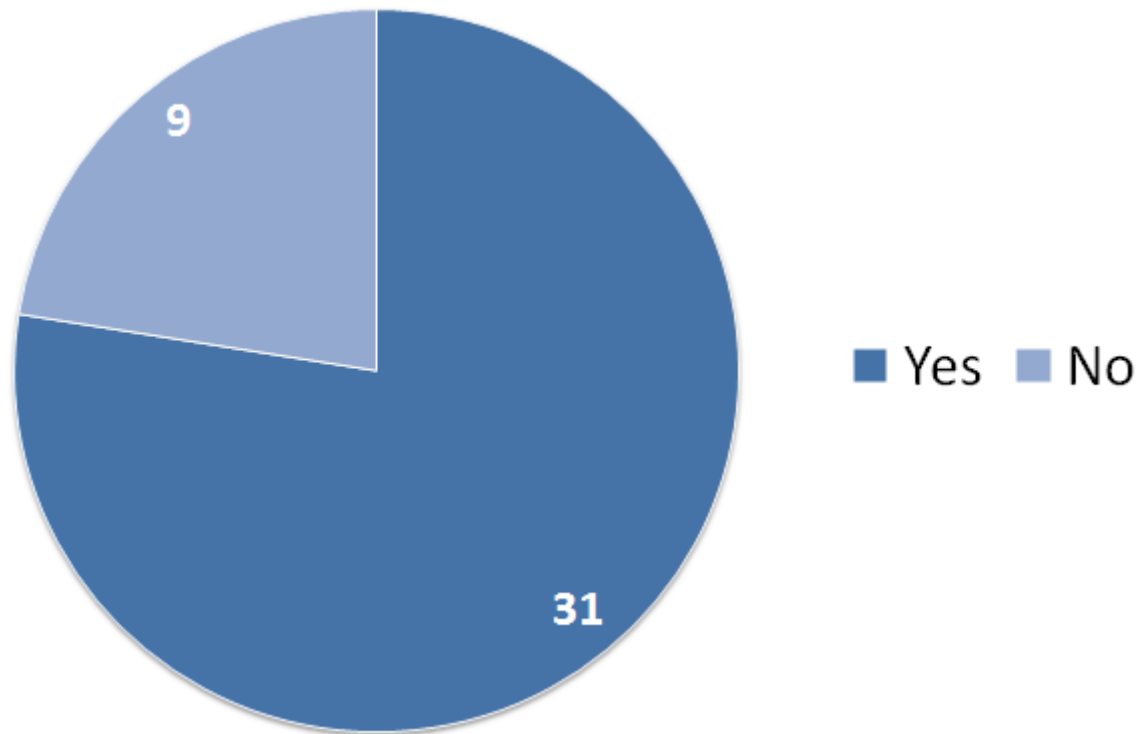
- Daily
- Monthly
- Weekly
- Other
- Annually
- Quarterly

\*Respondents were allowed to choose all answers that apply

## Section E

### Question 5 – Is measuring OSA one of your companies key performance indicators?

Is measuring OSA a KPI for your company?



All Respondents

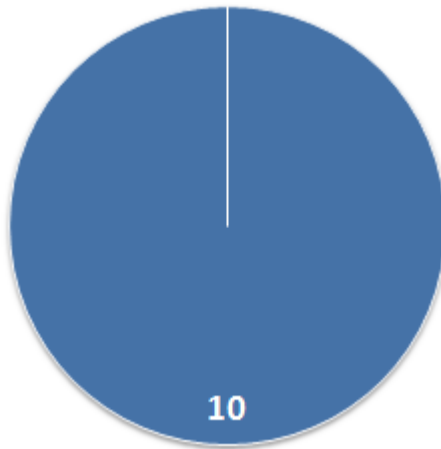
No. Respondents = 40

# Section E

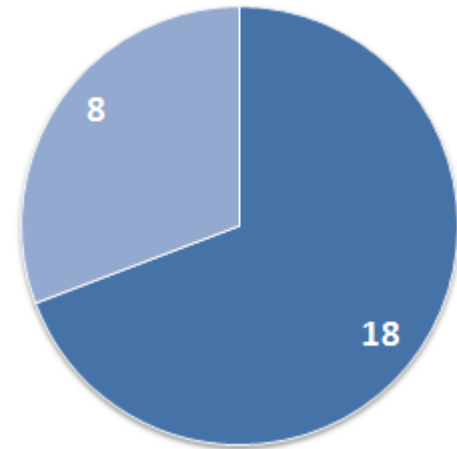
## Question 5 – Is measuring OSA one of your companies key performance indicators?

Is measuring OSA a KPI for your company?

**Retailers**  
(10 Responses)

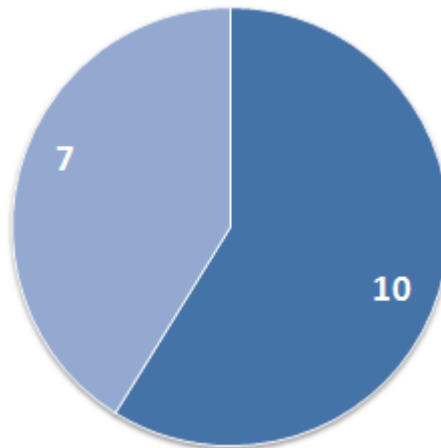


**Manufacturers**  
(26 Responses)

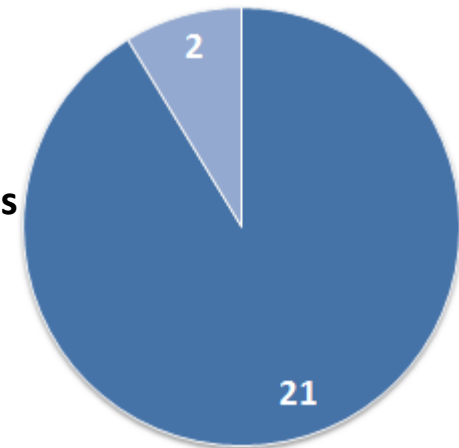


■ Yes ■ No

**Under 1000 SKUs**  
(17 Responses)

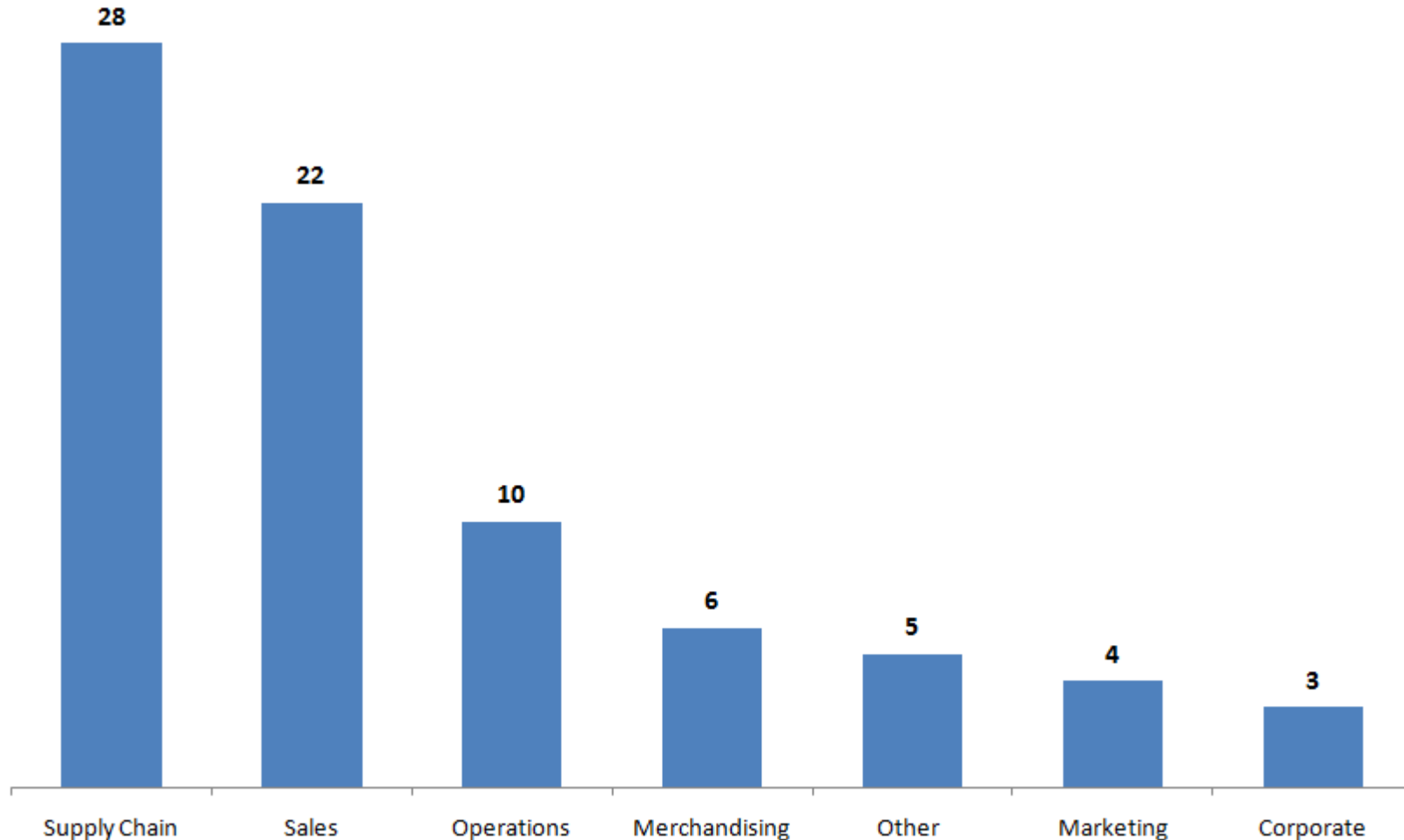


**Over 1000 SKUs**  
(23 Responses)



# Section E

## Question 6 – Which part of your organization has ownership for on shelf availability metrics?



**All Respondents**

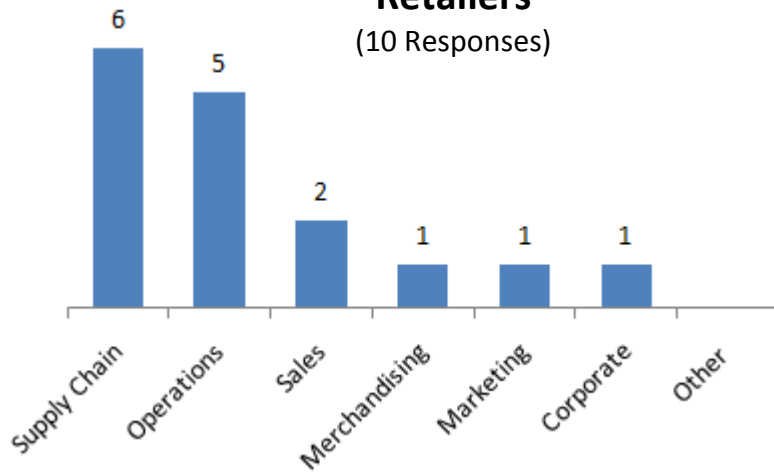
**No. Respondents = 40**

\*Respondents were allowed to choose all answers that apply

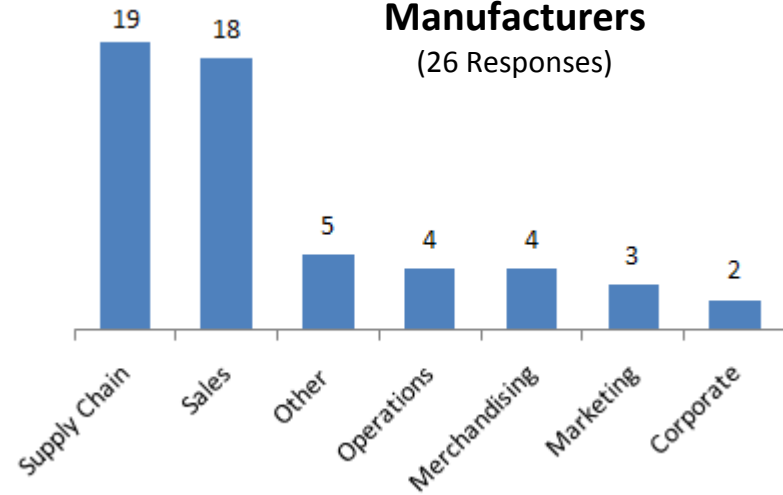
# Section E

## Question 6 – Which part of your organization has ownership for on shelf availability metrics?

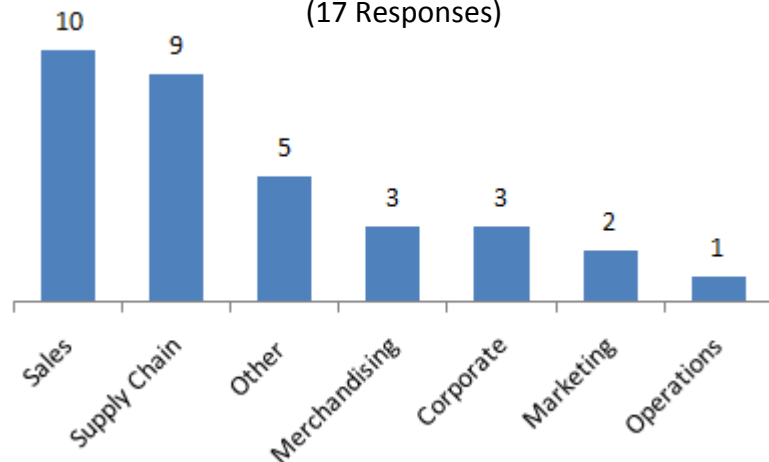
### Retailers (10 Responses)



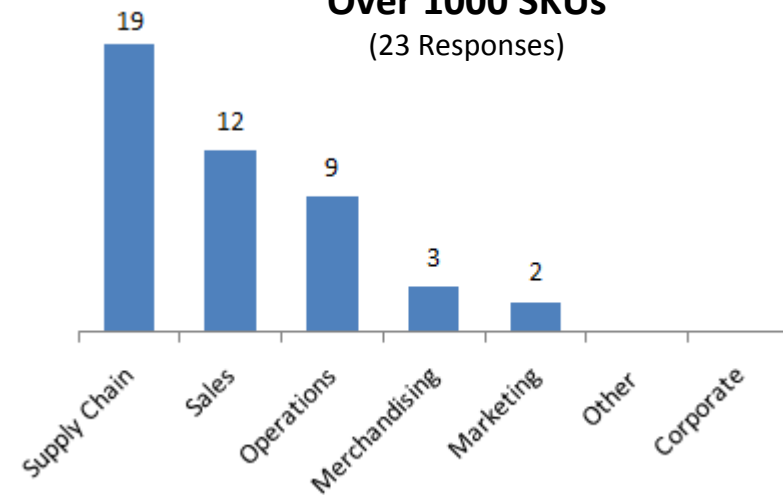
### Manufacturers (26 Responses)



### Under 1000 SKUs (17 Responses)



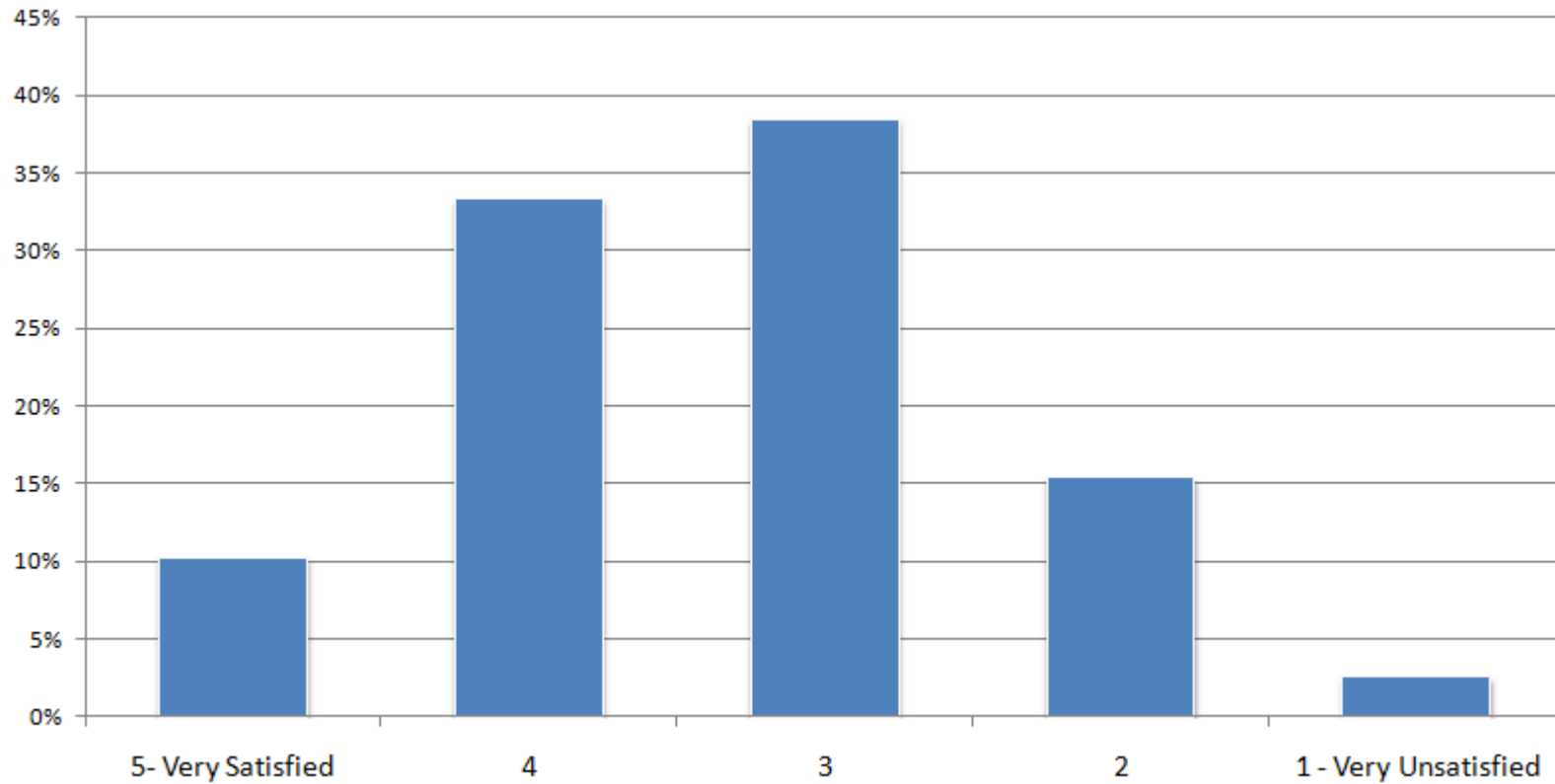
### Over 1000 SKUs (23 Responses)



\*Respondents were allowed to choose all answers that apply

# Section E

## Question 7 – Level of satisfaction with your company's method of measuring OSA



All Respondents

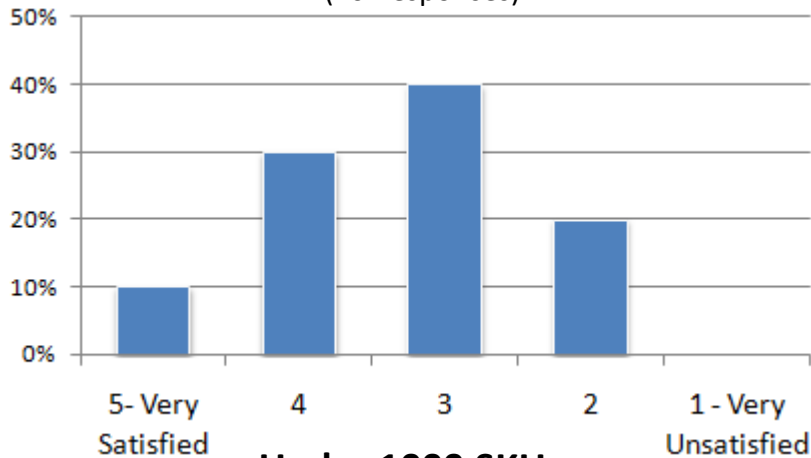
No. Respondents = 40

# Section E

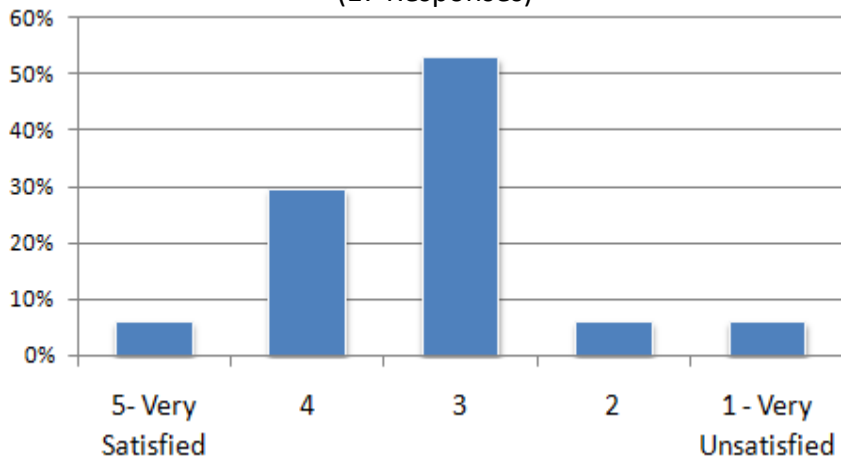
## Question 7 – Level of satisfaction with your company's method of measuring OSA



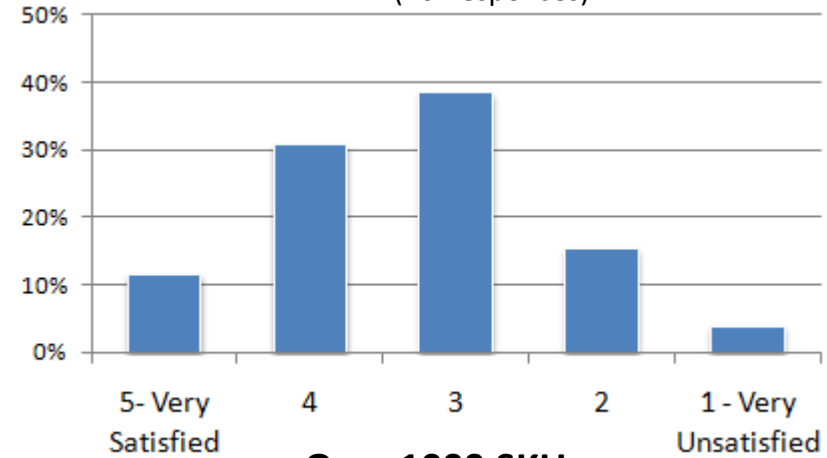
**Retailers**  
(10 Responses)



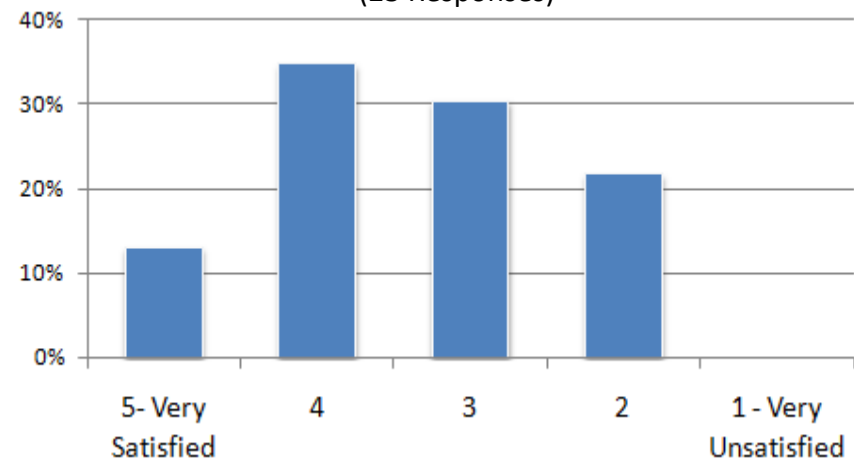
**Under 1000 SKUs**  
(17 Responses)



**Manufacturers**  
(26 Responses)



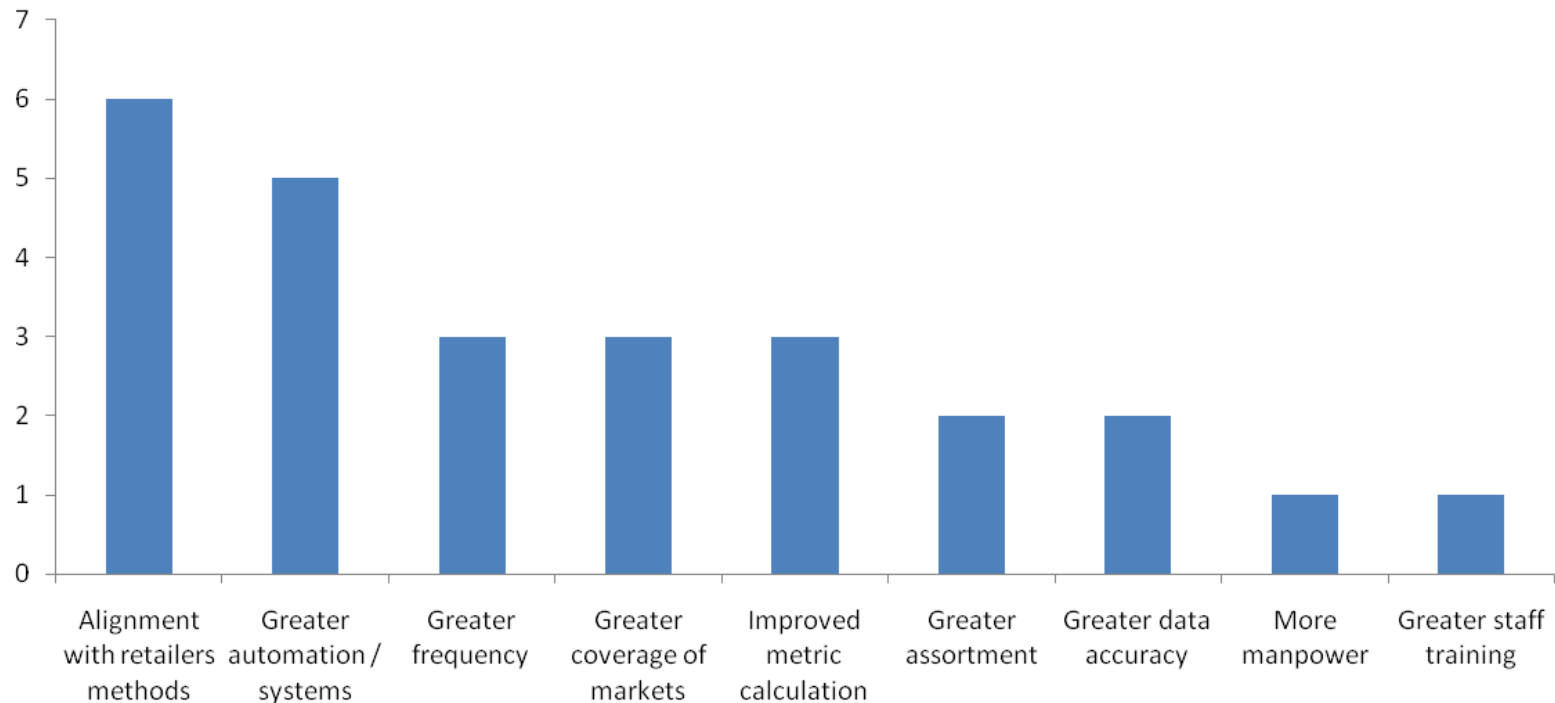
**Over 1000 SKUs**  
(23 Responses)



# Section E

## Question 8 – How could the effectiveness of your companies measurement method be improved

### How Could the Effectiveness Of Your Company's Measurement Method Be Improved?



All Respondents

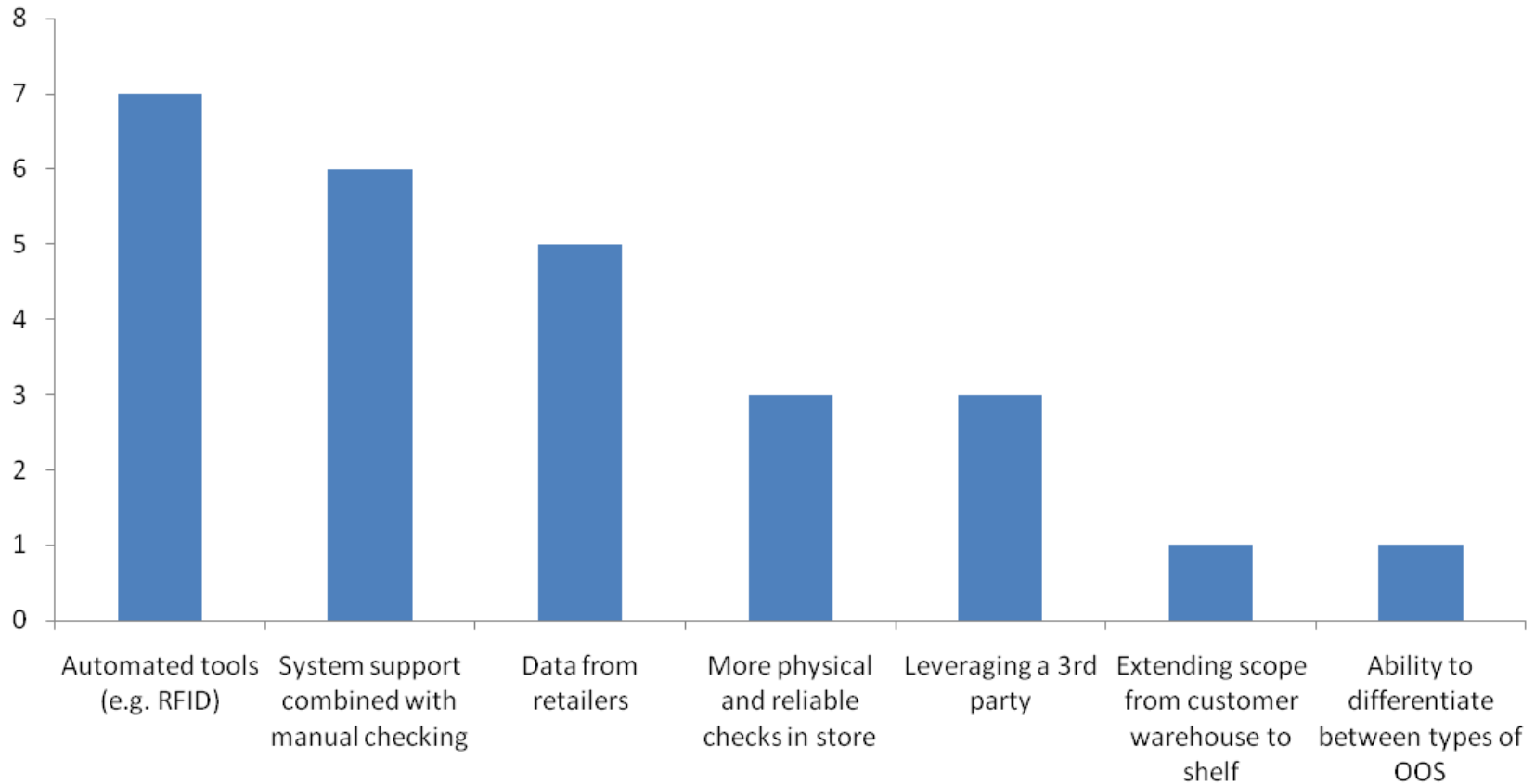
No. Respondents = 26

\*Respondents provided free text answers, which have been grouped into the above categories

# Section E

## Question 9 – Ideal method of measuring OSA

What is your ideal method of measuring on-shelf availability?



All Respondents

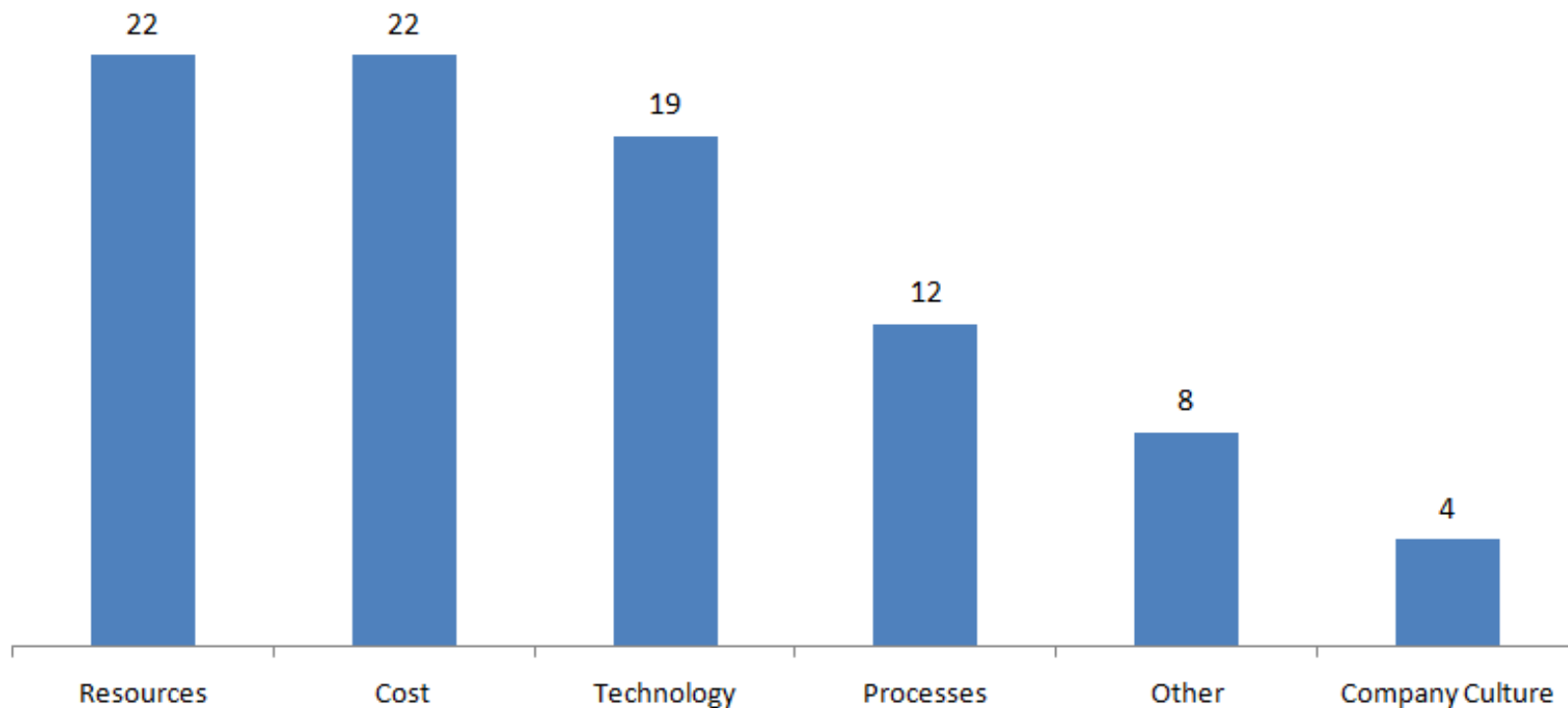
No. Respondents = 26

\*Respondents provided free text answers, which have been grouped into the above categories

# Section E

## Question 10 – Key barriers to Implementing Improvements in OSA Measurement

### Top Barriers to Implementing Improvements to Measuring OSA



All Respondents

No. Respondents = 40

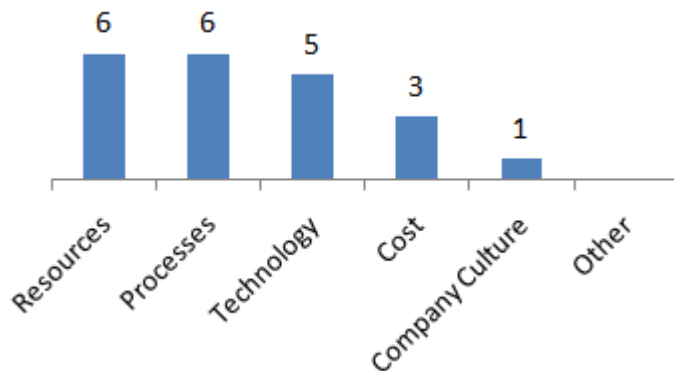
\*Respondents were allowed to choose all answers that apply

# Section E

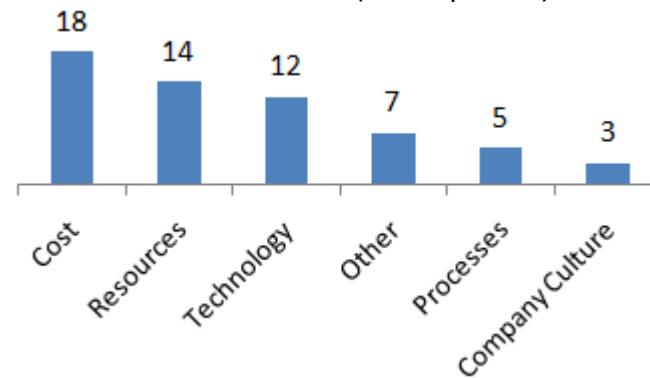
## Question 10 – Key barriers to Implementing Improvements in OSA Measurement

### Top Barriers to Implementing Improvements to Measuring OSA

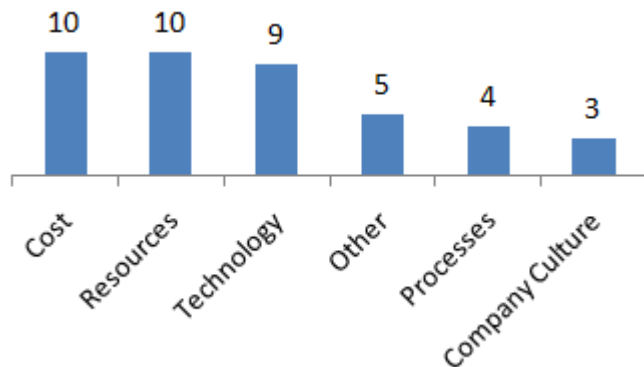
**Retailers**  
(10 Responses)



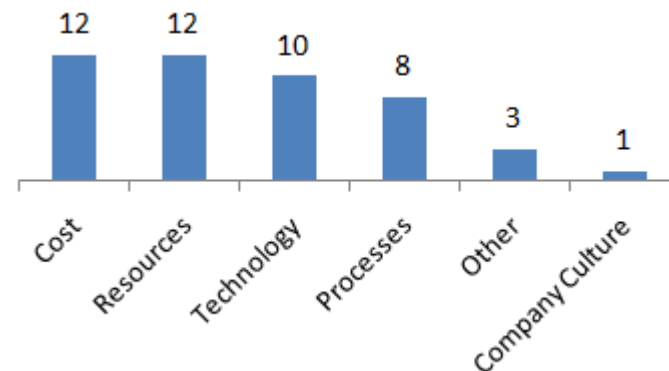
**Manufacturers**  
(26 Responses)



**Under 1000 SKUs**  
(17 Responses)



**Over 1000 SKUs**  
(23 Responses)



\*Respondents were allowed to choose all answers that apply

## **SECTION F**

# ***How OSA Has Been Addressed Over the Past 5 Years***

# Section F

## Question 1 – Level of importance within your organization of the following initiatives

### Importance of Each Initiative Over the Past 5 Years

(Level 0-5)



All Respondents

No. Respondents = 36

# Section F

## Question 1 – Level of importance within your organization of the following initiatives

### Importance of Each Initiative Over the Past 5 Years

(Level 0-5)



**Retailer Respondents Only**

**No. Respondents = 10**

# Section F

## Question 1 – Level of importance within your organization of the following initiatives

### Importance of Each Initiative Over the Past 5 Years

(Level 0-5)



**Manufacturer Respondents Only**

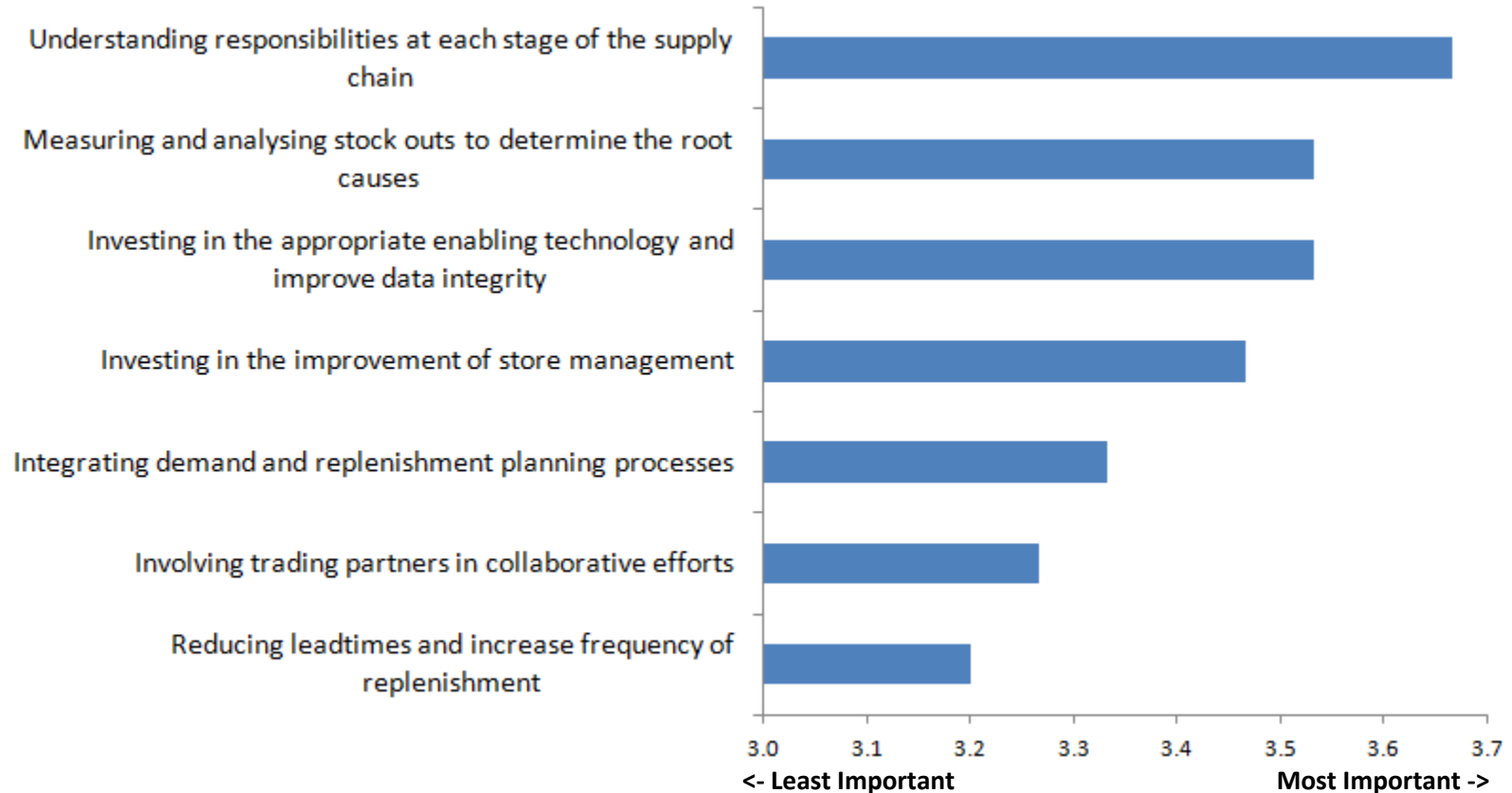
**No. Respondents = 22**

# Section F

## Question 1 – Level of importance within your organization of the following initiatives

### Importance of Each Initiative Over the Past 5 Years

(Level 0-5)



**Under 1000 SKUs Respondents Only**

**No. Respondents = 15**

# Section F

## Question 1 – Level of importance within your organization of the following initiatives

**Importance of Each Initiative Over the Past 5 Years**  
(Level 0-5)



**Over 1000 SKUs Respondents Only**

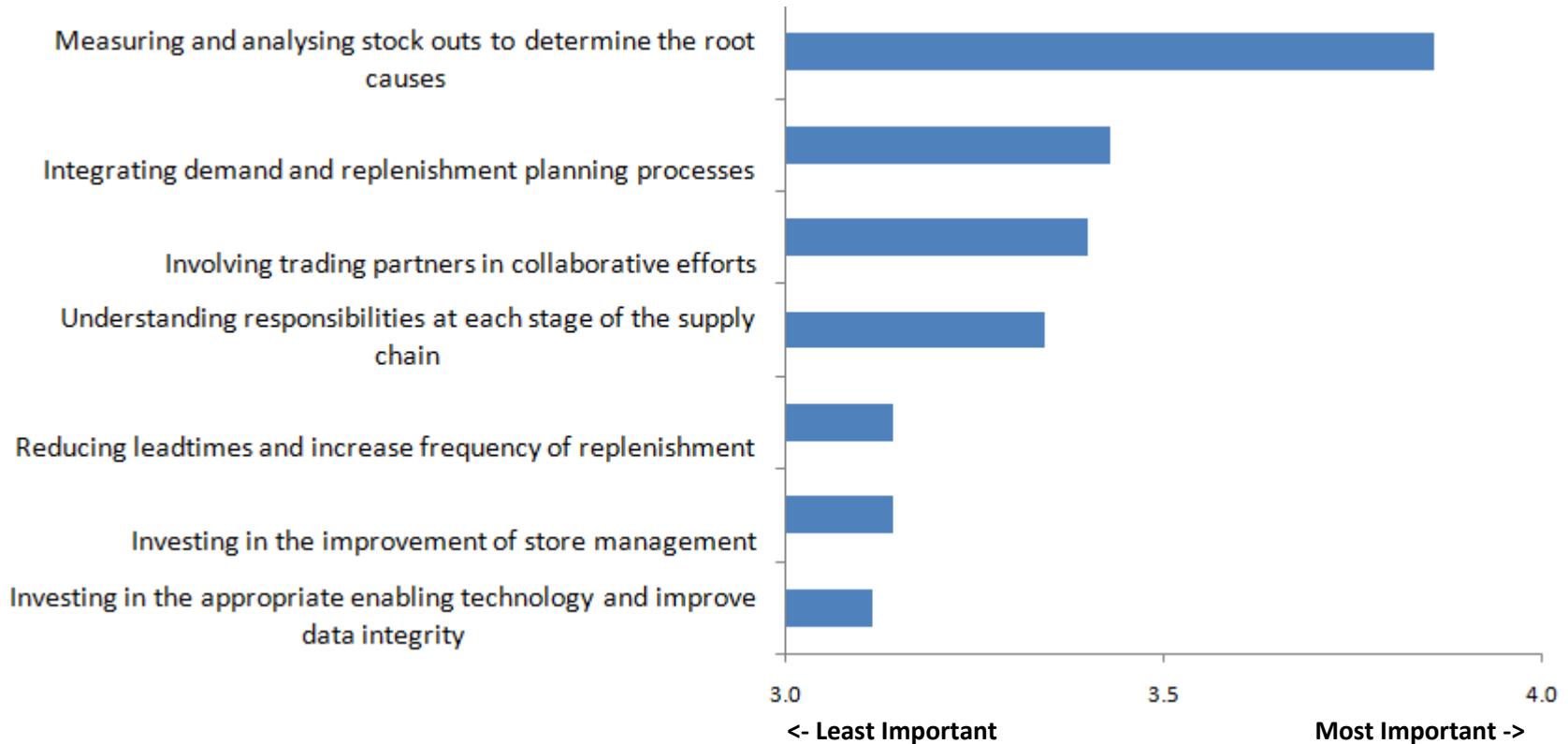
**No. Respondents = 21**

# Section F

## Question 2 – Level of activity within your organization of the following initiatives

### Level of Activity of each Initiative Over the Past 5 Years

(Level 0-5)



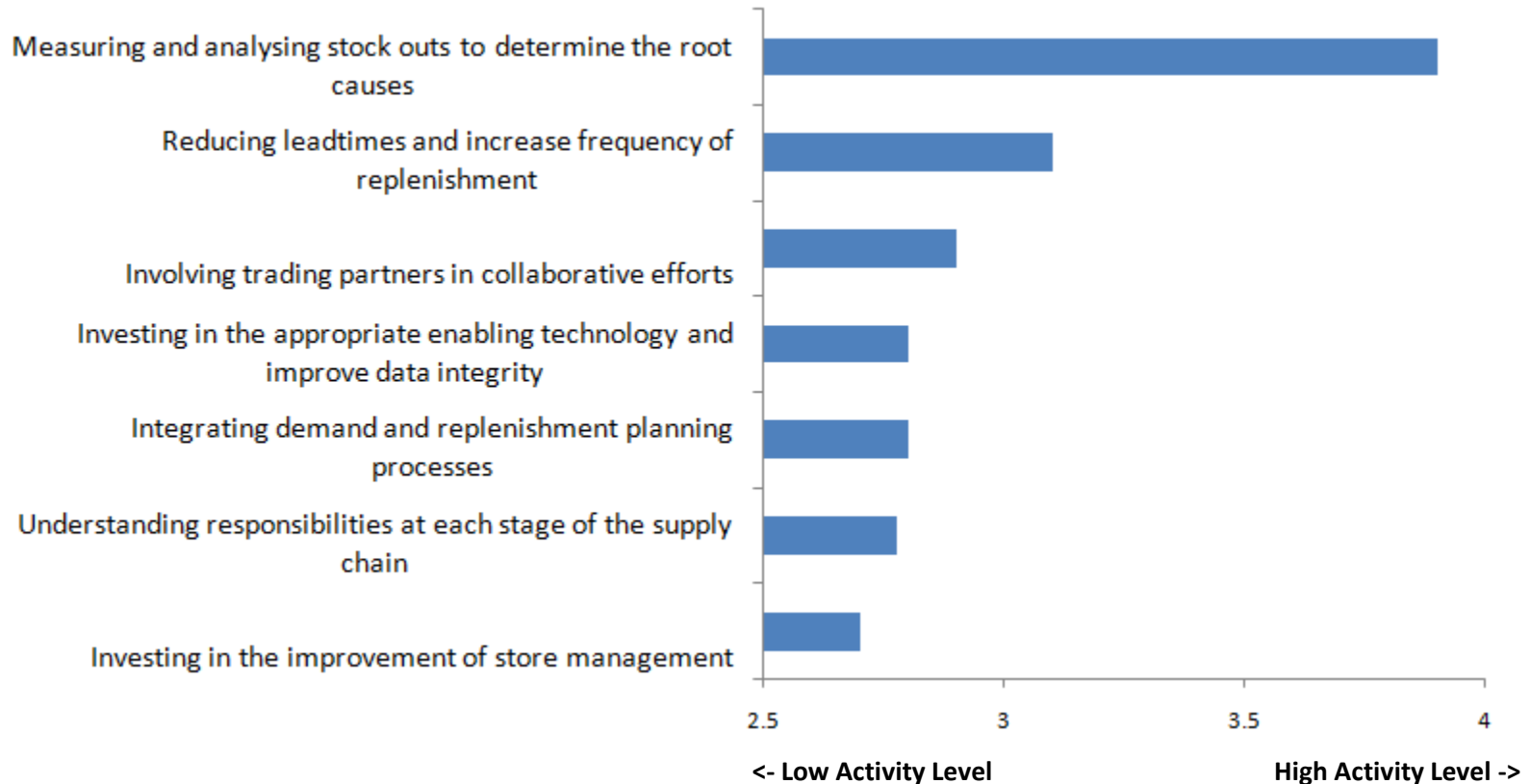
All Respondents

No. Respondents = 36

# Section F

## Question 2 – Level of activity within your organization of the following initiatives

**Level of Activity of each Initiative Over the Past 5 Years**  
(Level 0-5)



**Retailers Respondents Only**

**No. Respondents = 10**

# Section F

## Question 2 – Level of activity within your organization of the following initiatives



**Level of Activity of each Initiative Over the Past 5 Years**  
(Level 0-5)



**Manufacturer Respondents Only**

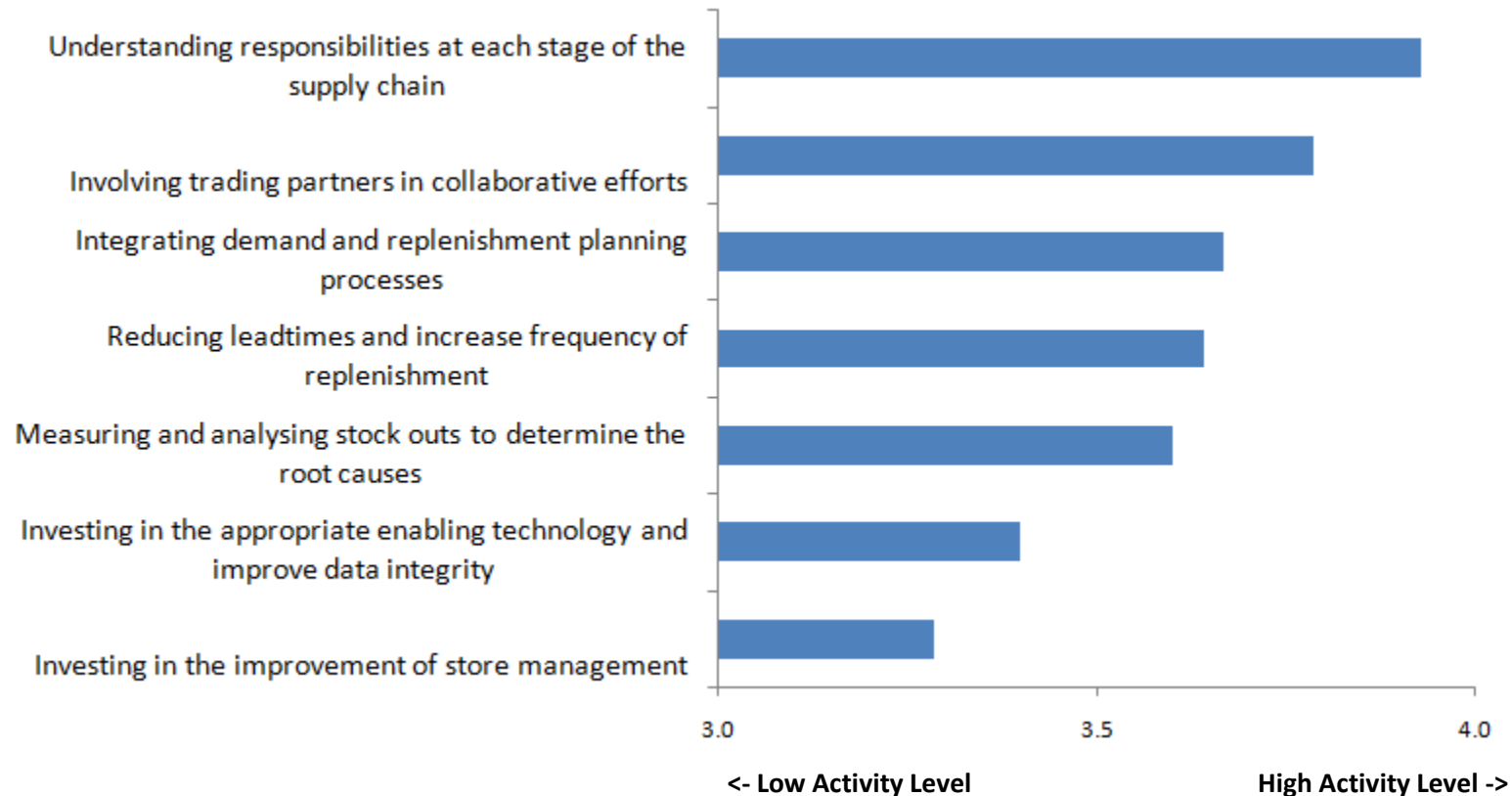
**No. Respondents = 22**

# Section F

## Question 2 – Level of activity within your organization of the following initiatives

### Level of Activity of each Initiative Over the Past 5 Years

(Level 0-5)



**Under 1000 SKUs Respondents Only**

**No. Respondents = 15**

# Section F

## Question 2 – Level of activity within your organization of the following initiatives

### Level of Activity of each Initiative Over the Past 5 Years

(Level 0-5)



Over 1000 SKUs Respondents Only

No. Respondents = 21

# Section F

## Question 3 – Level of success your organization has experienced by implementing the following initiatives

**Success Experienced by implementing Each Initiative Over the Past 5 years**  
(Level 0-5)



**All Respondents**

**No. Respondents = 36**

# Section F

## Question 3 – Level of success your organization has experienced by implementing the following initiatives

**Success Experienced by implementing Each Initiative Over the Past 5 years**  
(Level 0-5)



**Retailer Respondents Only**

**No. Respondents = 10**

# Section F

## Question 3 – Level of success your organization has experienced by implementing the following initiatives



**Success Experienced by implementing Each Initiative Over the Past 5 years**  
(Level 0-5)



**Manufacturer Respondents Only**

**No. Respondents = 22**

# Section F

## Question 3 – Level of success your organization has experienced by implementing the following initiatives

**Success Experienced by implementing Each Initiative Over the Past 5 years**  
(Level 0-5)



**Under 1000 SKUs Respondents Only**

**No. Respondents = 15**

# Section F

## Question 3 – Level of success your organization has experienced by implementing the following initiatives

**Success Experienced by implementing Each Initiative Over the Past 5 years**  
(Level 0-5)



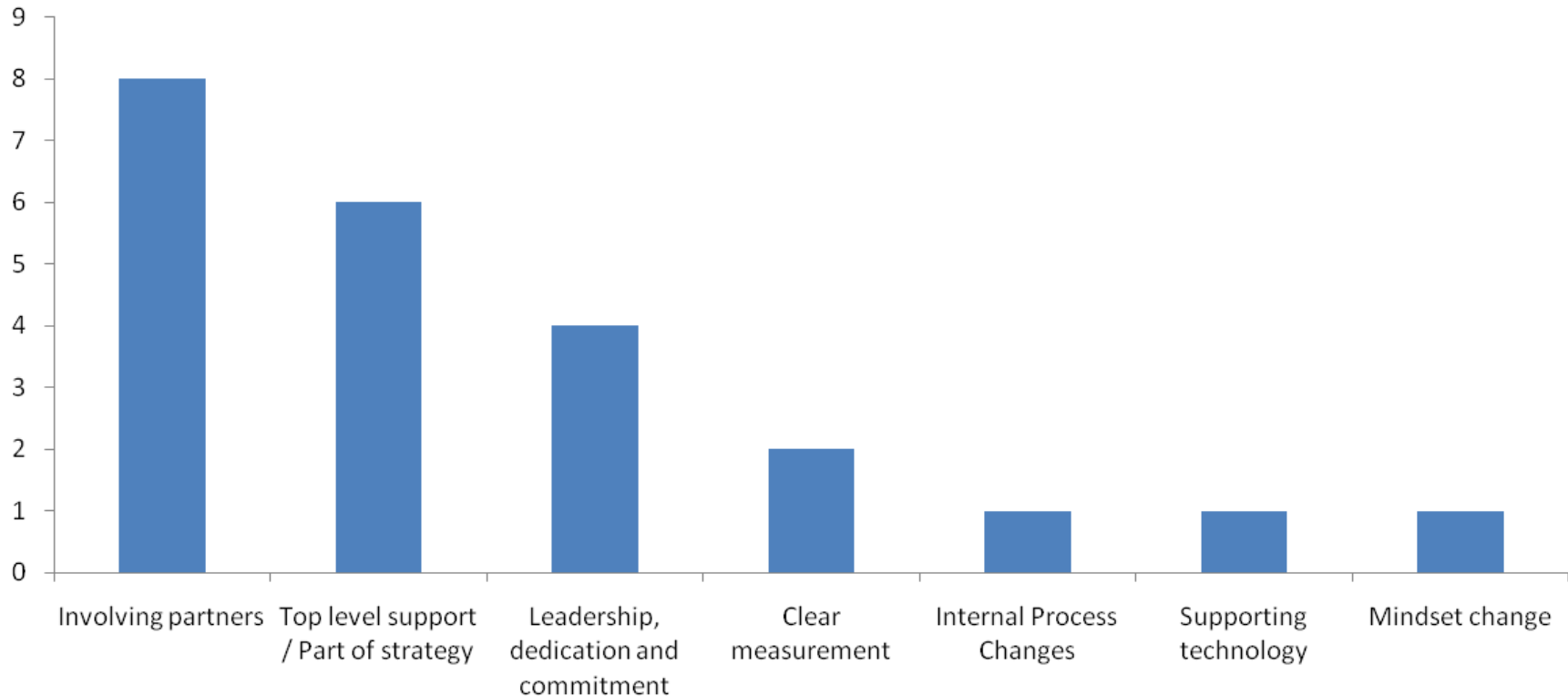
**Over 1000 SKUs Respondents Only**

**No. Respondents = 21**

# Section F

## Question 4 – Key success factors to implementing these initiatives over the past 5 years

### Key Success Factors To Implementing OSA Initiatives



**All Respondents**

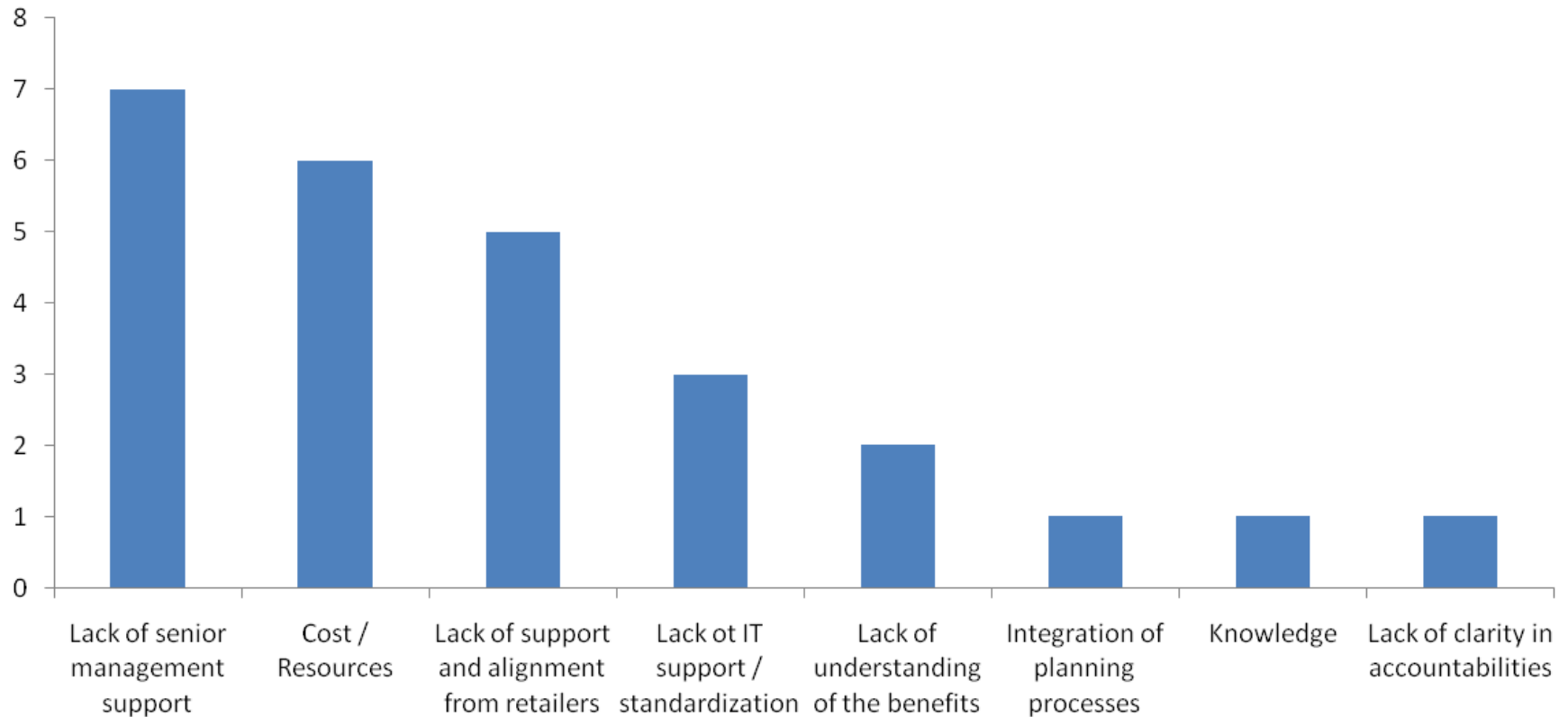
**No. Respondents = 23**

\*Respondents provided free text answers, which have been grouped into the above categories

# Section F

## Question 5 – Key barriers to success to implementing these initiatives over the past 5 years

### Key Barriers to Success To Implementing OSA Initiatives



**All Respondents**

**No. Respondents = 26**

\*Respondents provided free text answers, which have been grouped into the above categories

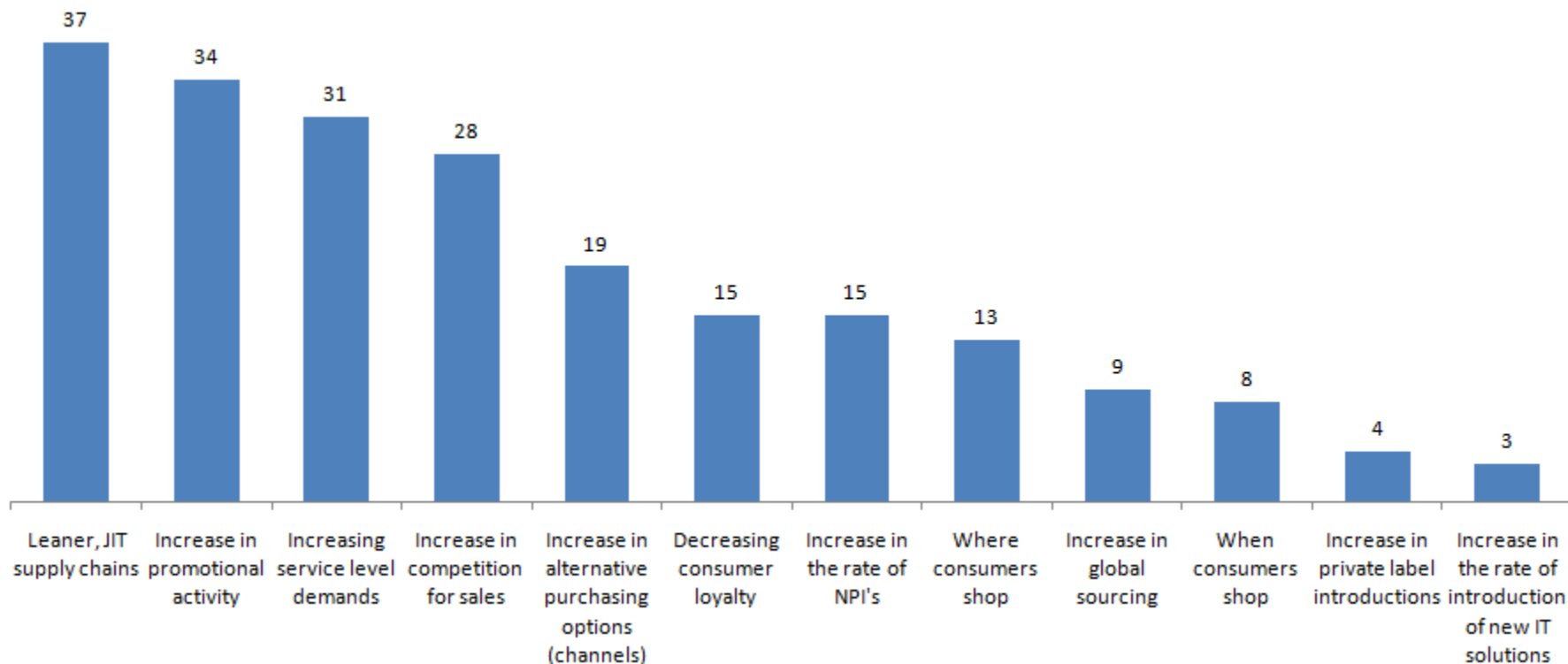
## **SECTION G**

# ***How OSA Can Be Addressed In the Next 5 Years***

# Section G

## Question 1 – Top 3 challenges in the next 3-5 years for improving OSA

### Top Challenges in the Next 3-5 Years for Improving OSA



### All Respondents

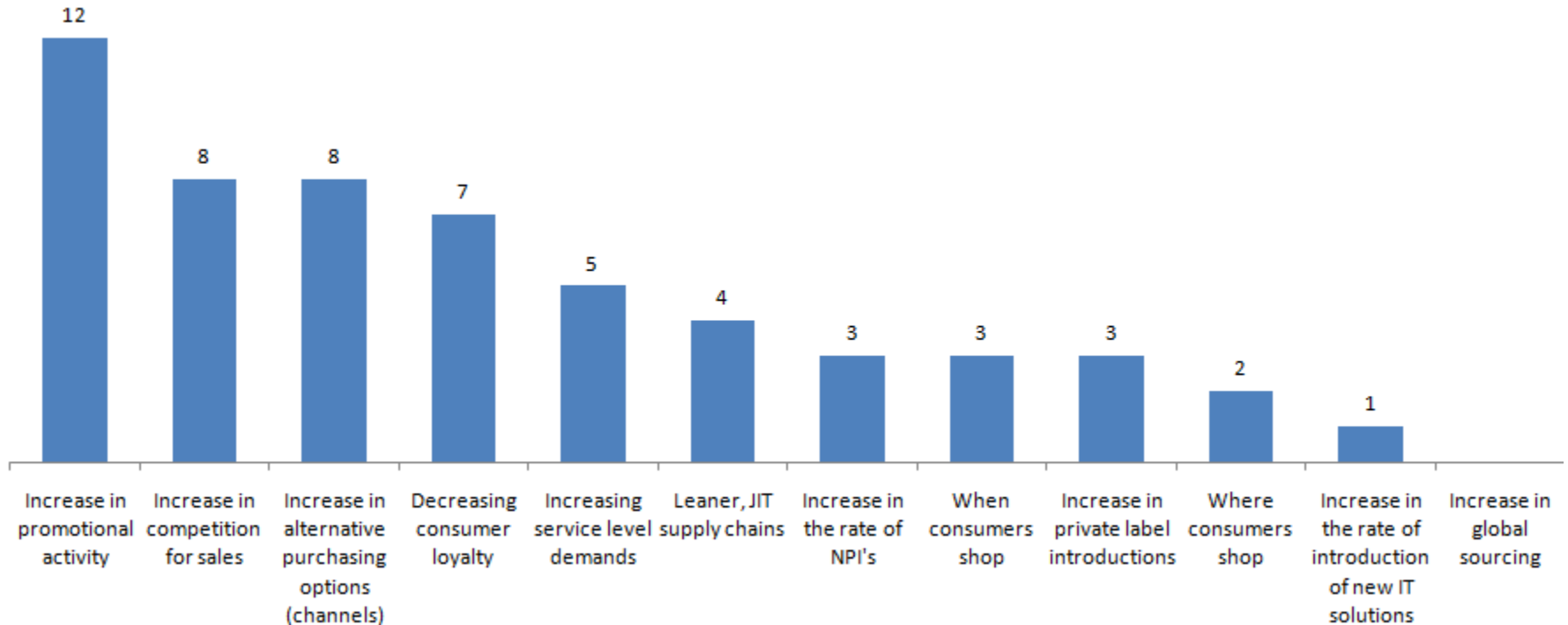
**No. Respondents = 36**

\*Respondents were allowed to choose 3 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section G

## Question 1 – Top 3 challenges in the next 3-5 years for improving OSA

### Top Challenges in the Next 3-5 Years for Improving OSA



### Retailer Respondents Only

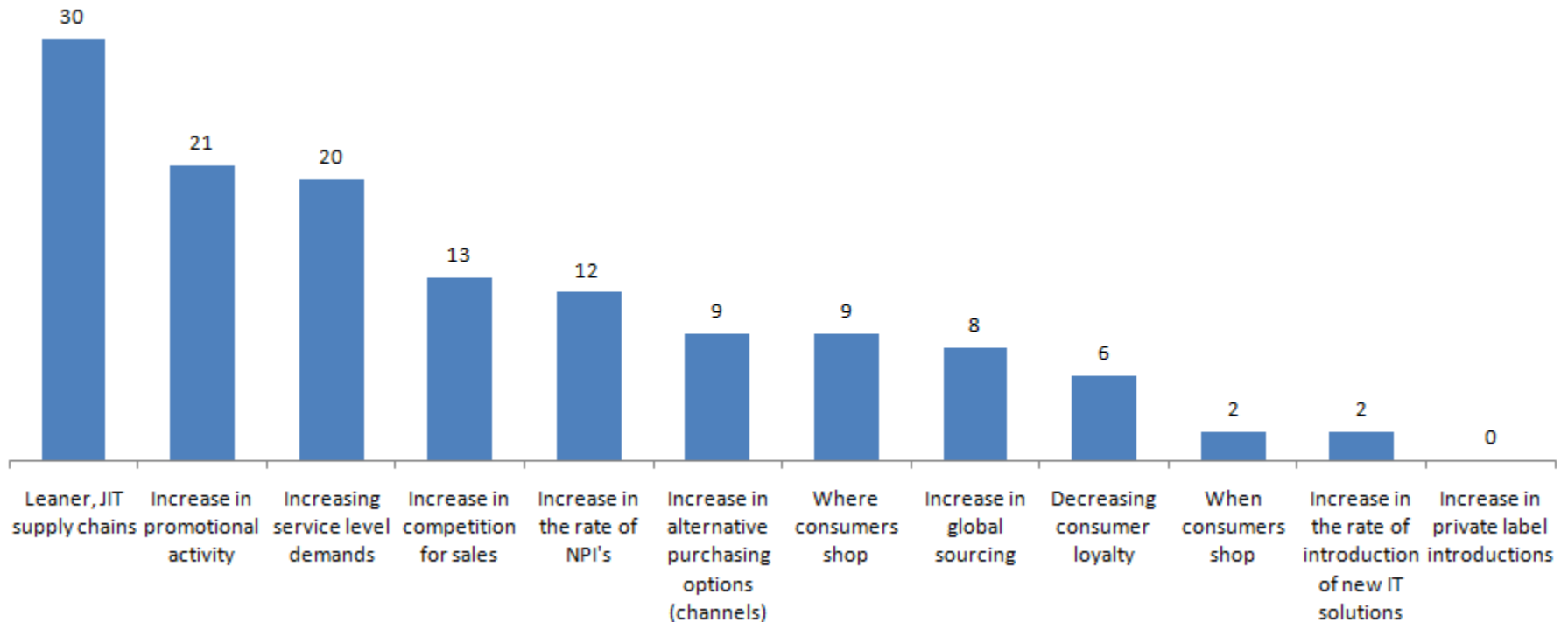
**No. Respondents = 10**

\*Respondents were allowed to choose 3 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section G

## Question 1 – Top 3 challenges in the next 3-5 years for improving OSA

### Top Challenges in the Next 3-5 Years for Improving OSA



### Manufacturer Respondents Only

**No. Respondents = 22**

\*Respondents were allowed to choose 3 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section G

## Question 1 – Top 3 challenges in the next 3-5 years for improving OSA

### Top Challenges in the Next 3-5 Years for Improving OSA



**Under 1000 SKUs Respondents only**

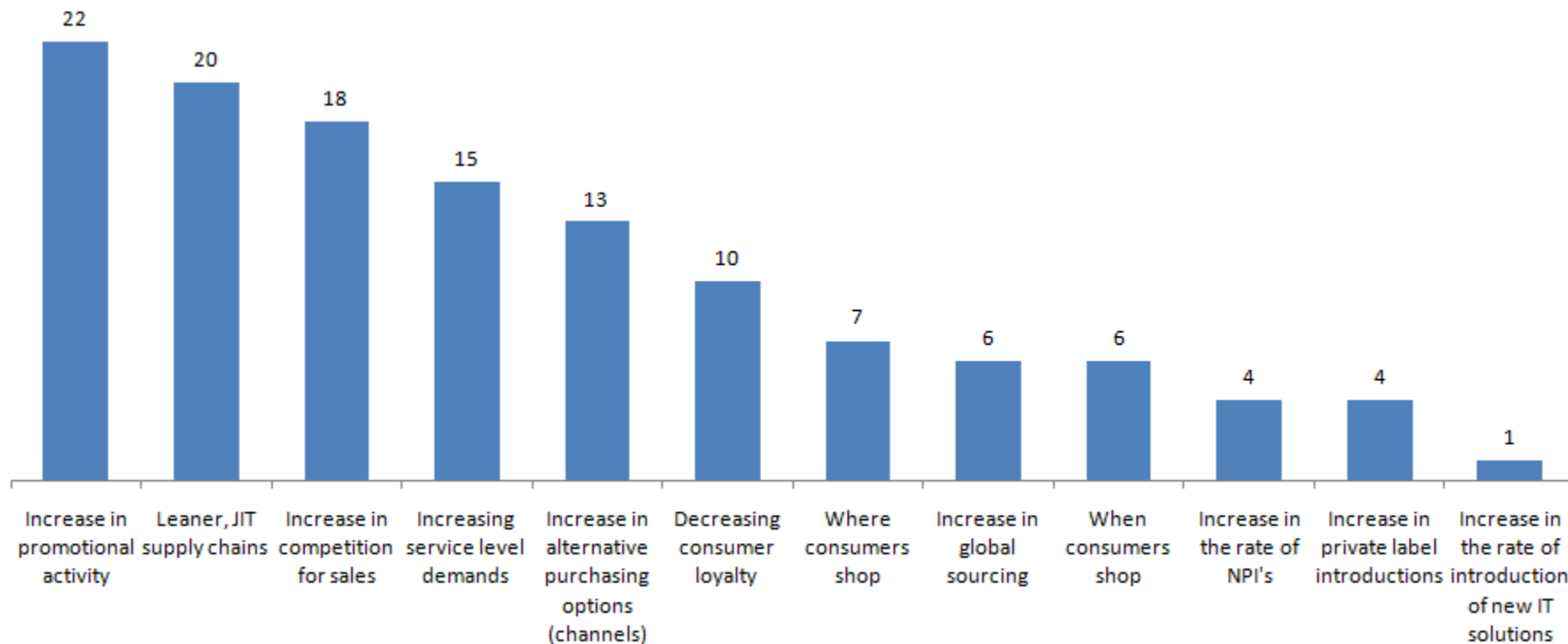
**No. Respondents = 15**

\*Respondents were allowed to choose 3 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section G

## Question 1 – Top 3 challenges in the next 3-5 years for improving OSA

### Top Challenges in the Next 3-5 Years for Improving OSA



**Over 1000 SKUs Respondents Only**

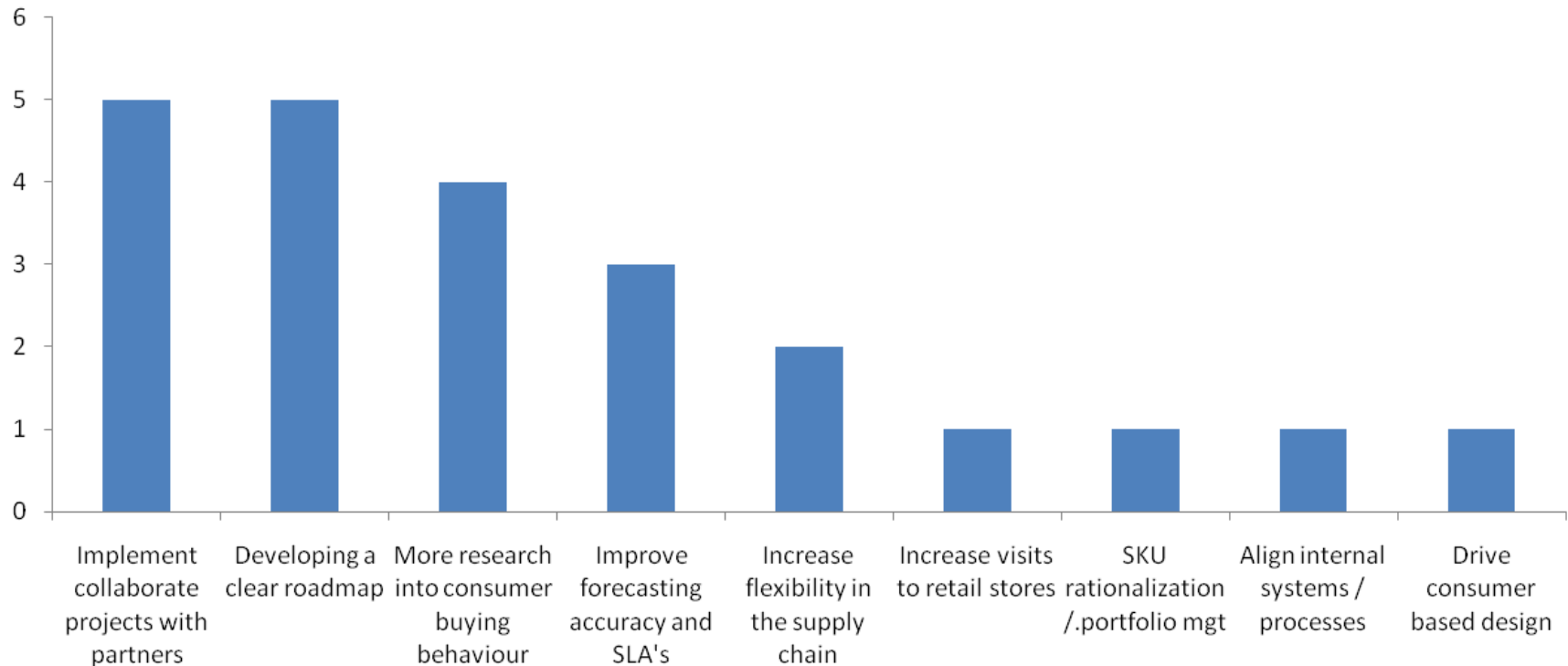
**No. Respondents = 21**

\*Respondents were allowed to choose 3 ranked answers. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section G

## Question 2 – What strategies have you put in place to address these top challenges

### What Strategies Have you Put in Place to Address These Top Challenges?



All Respondents

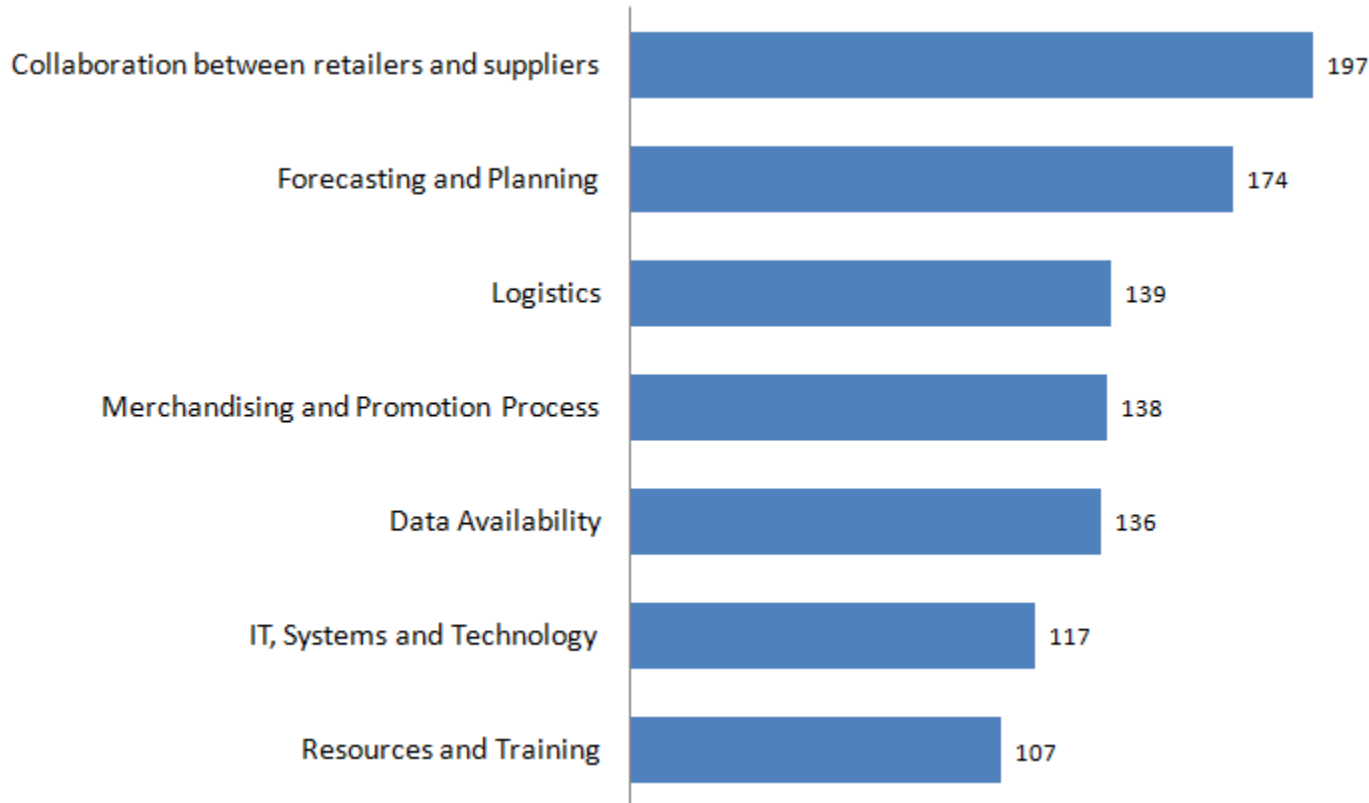
No. Respondents = 24

\*Respondents provided free text answers, which have been grouped into the above categories

# Section G

## Question 3 – Importance of the following critical success areas for improving OSA in the future

### Critical Success Areas for Improving OSA in the Future



**All Respondents**

**No. Respondents = 36**

\*Respondents ranked answers between 1-7. Scale is based on points assigned to each answer (reflecting degree of importance)

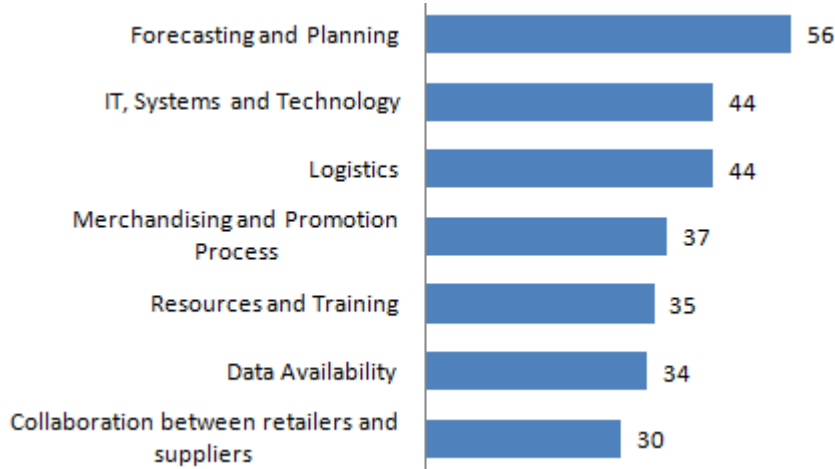
# Section G

## Question 3 – Importance of the following critical success areas for improving OSA in the future



### Retailers

(10 Responses)



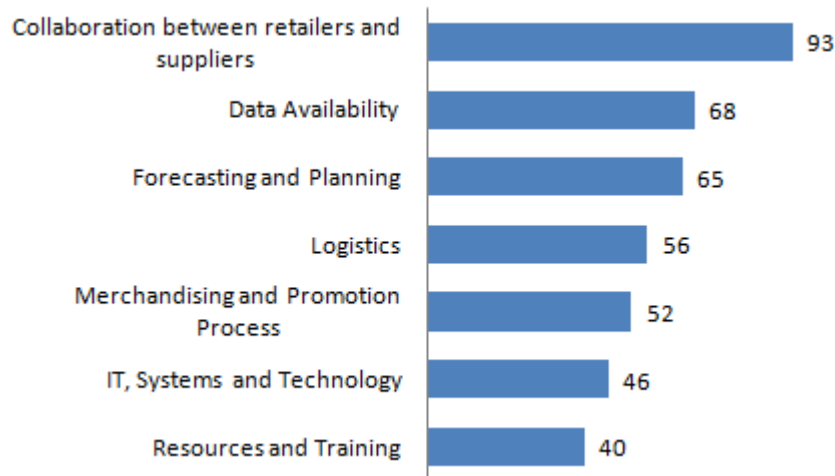
### Manufacturers

(26 Responses)



### Under 1000 SKUs

(15 Responses)



### Over 1000 SKUs

(21 Responses)

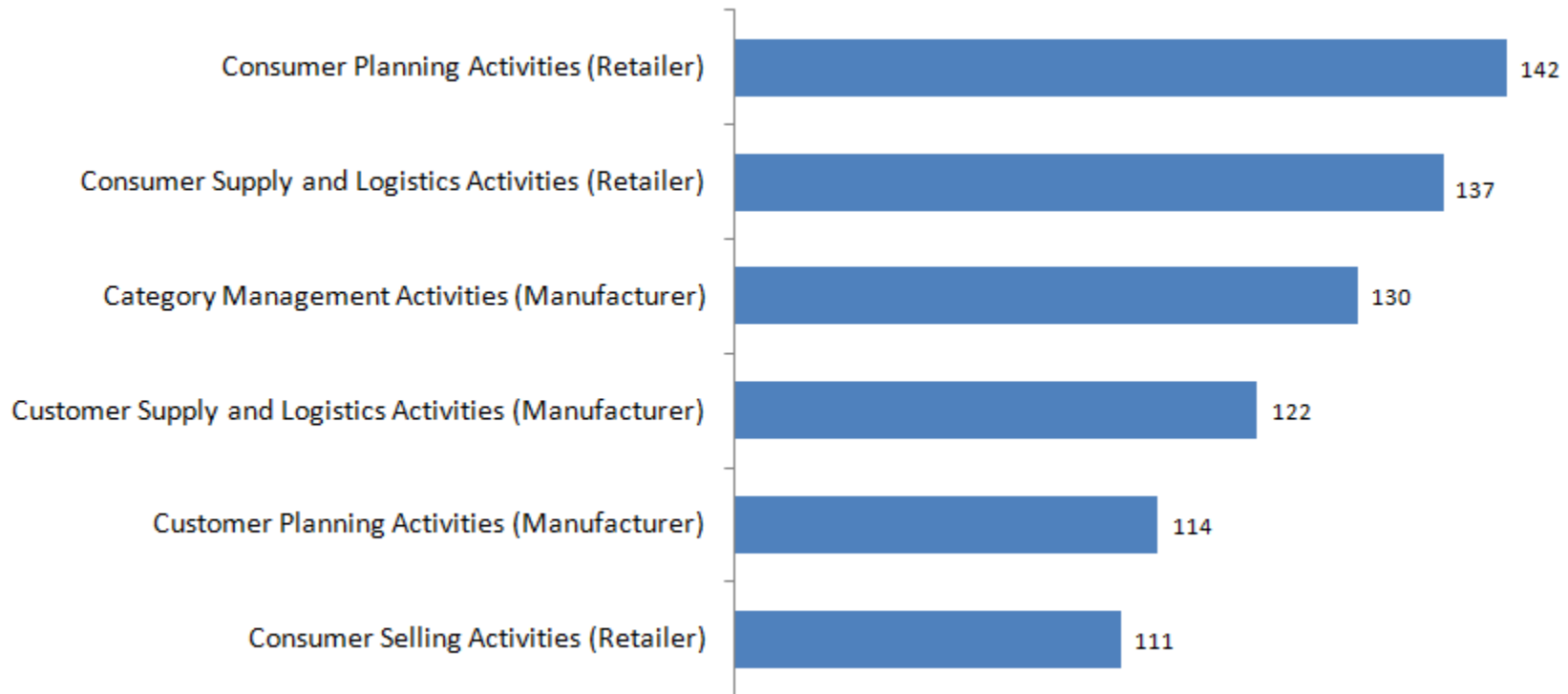


# Section G

## Question 4 – Importance of the following value chain areas for maximizing OSA



### Most Important Value Chain Areas for Maximizing OSA



### All Respondents

**No. Respondents = 36**

\*Respondents ranked answers between 1-6. Scale is based on points assigned to each answer (reflecting degree of importance)

# Section G

## Question 4 – Importance of the following value chain areas for maximizing OSA

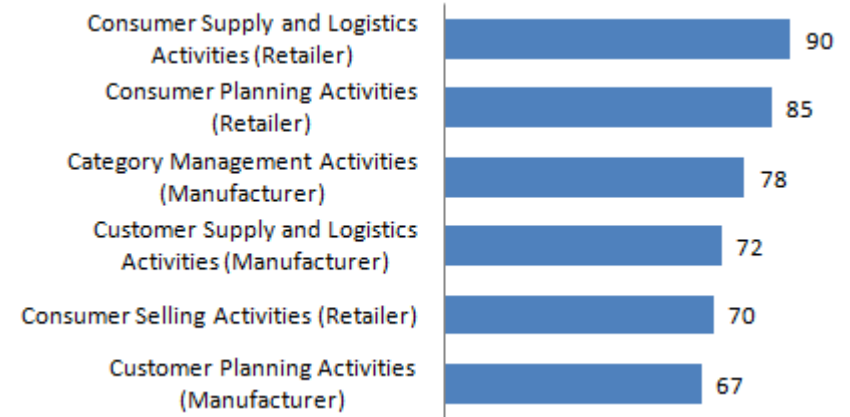
### Retailers

(10 Responses)



### Manufacturers

(26 Responses)



### Under 1000 SKUs

(15 Responses)



### Over 1000 SKUs

(21 Responses)

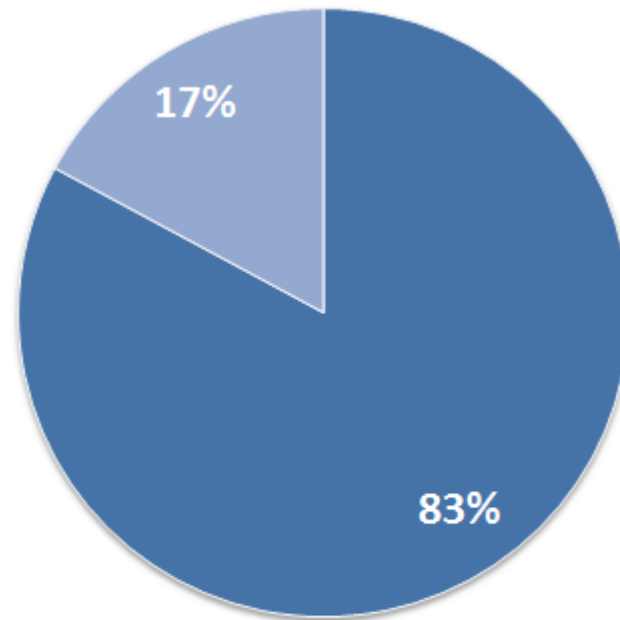


## **SECTION H**

### ***Future Direction and OSA Priorities***

# Section H

*Question 1 – Do you see the need for industry wide initiatives aimed at improving OSA*



■ Yes ■ No

All Respondents

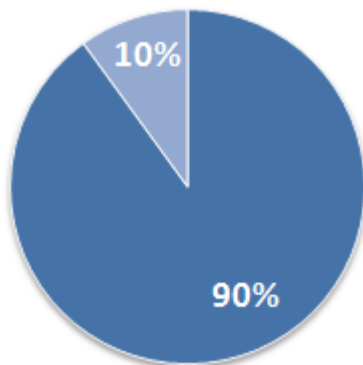
*No. Respondents = 35*

# Section H

## Question 1 – Do you see the need for industry wide initiatives aimed at improving OSA

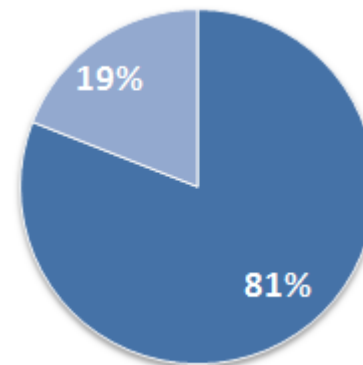
### Retailers

(10 Responses)



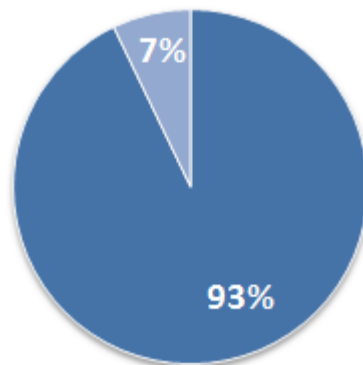
### Manufacturers

(21 Responses)



### Under 1000 SKUs

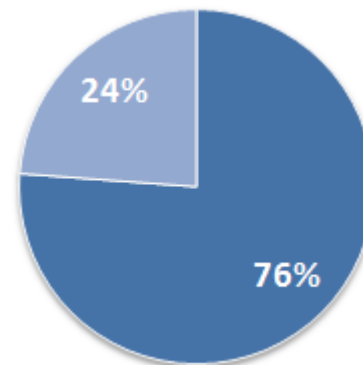
(14 Responses)



■ Yes ■ No

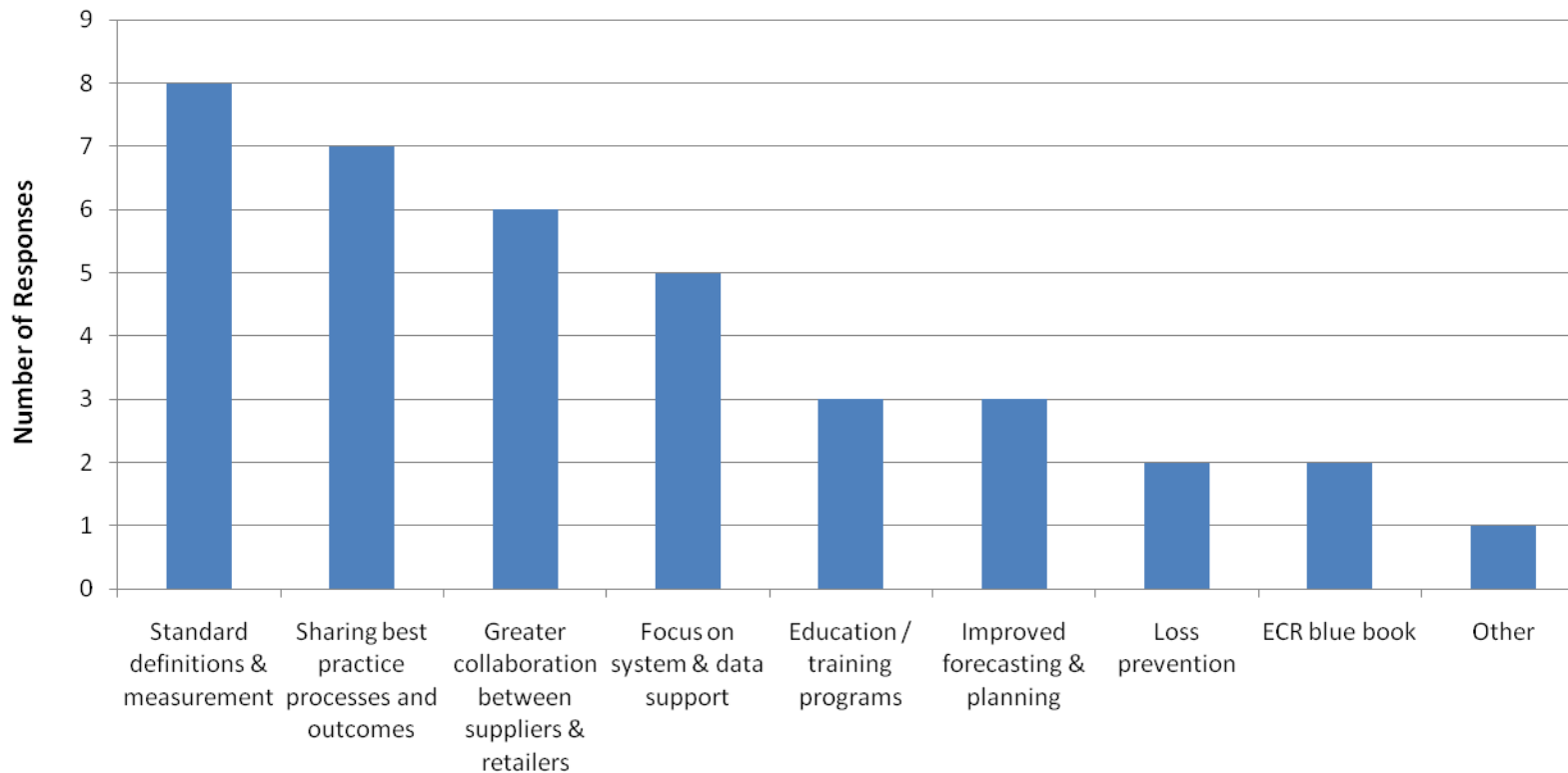
### Over 1000 SKUs

(21 Responses)



# Section H

## Question 2 – What would you like to see as industry wide initiatives?



**Other recommendations (with a score of 1) include:**

- ***Focus on improving supply chain integration***
- ***Industry specific solutions for audit teams***
- ***Objective category and planogram management***
- ***Master data management / alignment***
- ***Increased awareness of benefits Shelf ready packaging***

**No. Respondents = 26**

**End of Document**