



ECR Europe Category Management & Shopper Marketing Benchmark Survey

Online Survey of ECR Members in 14 countries
September 2014



Survey Objective

**To benchmark the rate of adoption, use of
and trends in Category Management and
Shopper Marketing across Europe annually.**

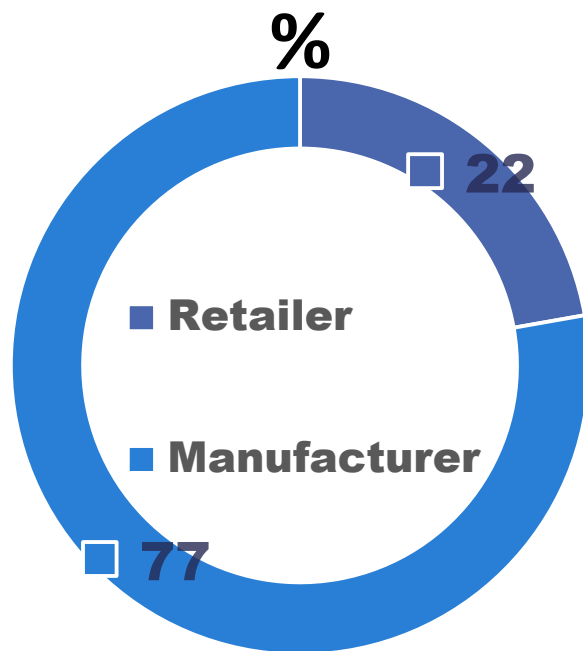
14 countries participated.

- Austria 4%
- Baltics 3%
- Belgium 2%
- Cyprus 4%
- Czech/Slovak 1%
- France 15%
- Greece 11%
- Ireland 15%
- Italy 6%
- Poland 4%
- Romania 12%
- Russia 16%
- Switzerland 5%
- UK 1%

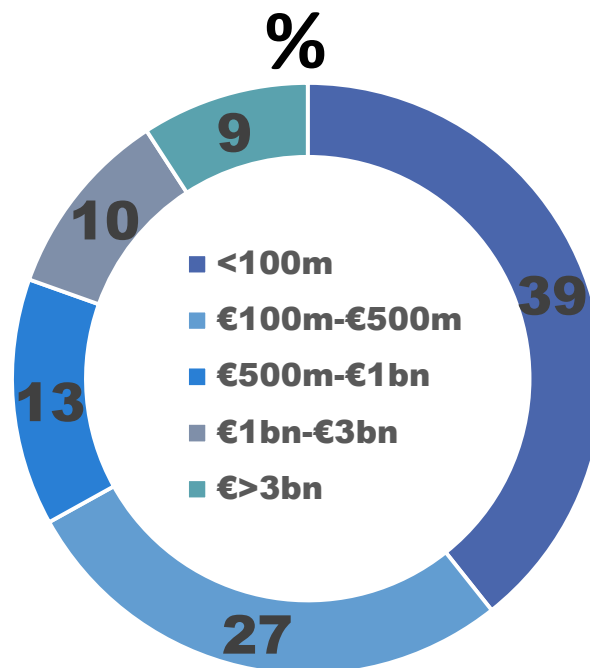


Good mix of Company Types, Turnover and Management Level participated.

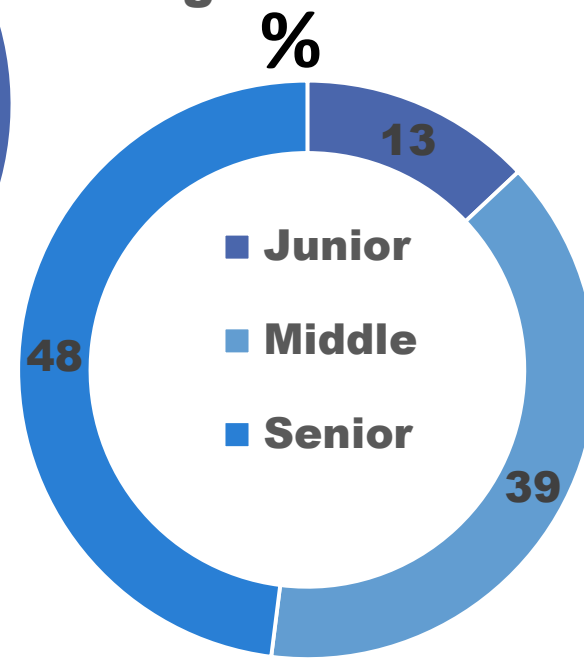
Type of Company



Turnover



Management Level

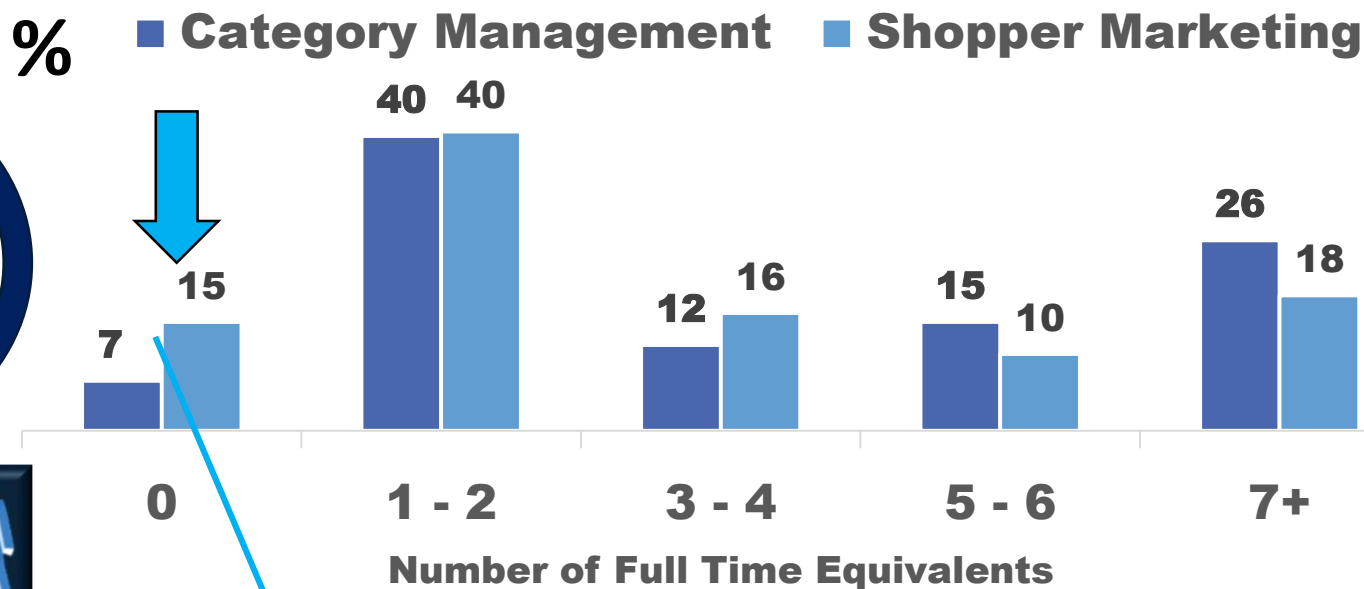


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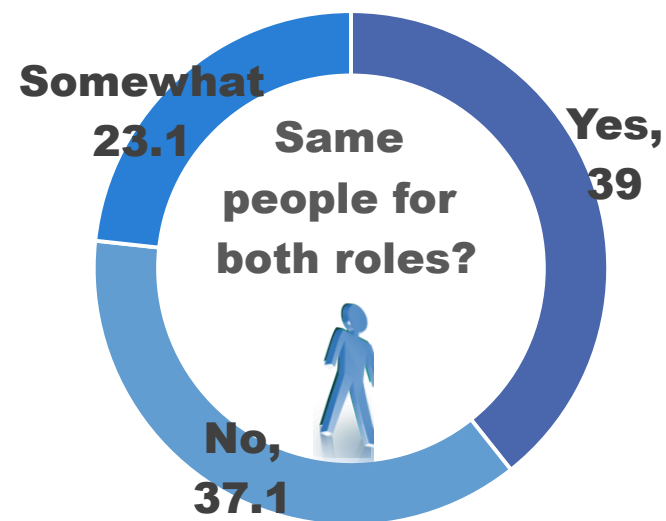
The Results

Shopper Marketing is less resourced than Category Management

How many Full Time Equivalents?



7% of FMCG companies don't have a Category Management FTE and 15% don't have a Shopper Marketing FTE.



Category Management role still mostly traditional functions of space planning, planograms and research.

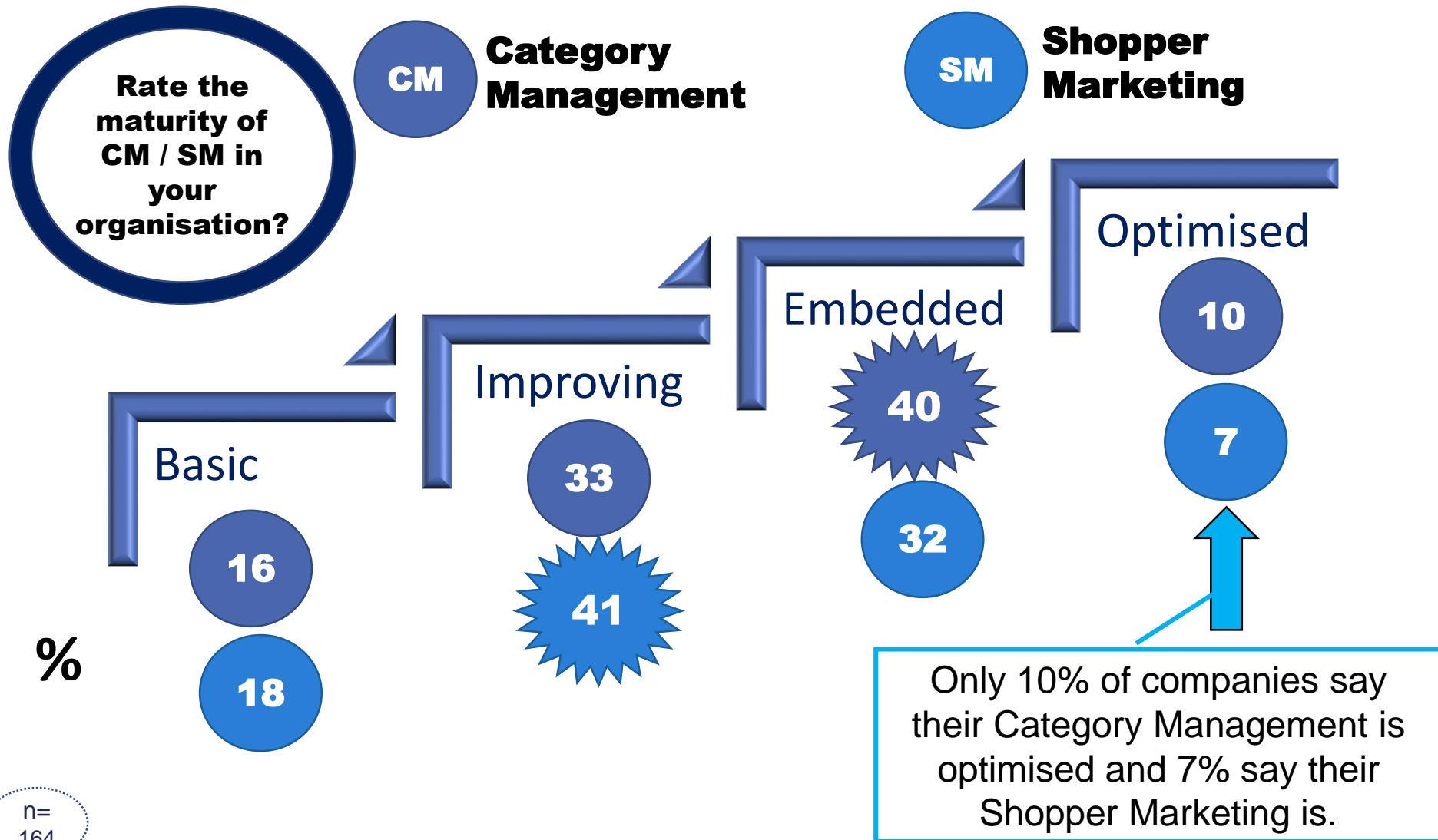
What functions does Category Management conduct?

21% of Manufacturers,
31% of Retailers
not doing Space &
Range planning.

Space & Range planning
Market & Category Intelligence
Implementation of Planograms
Consumer Insights / Research
Maintenance of Planograms
Promotion Planning
Communication to Stores
Channel Strategy
Sales forecasting
Joint Business Planning
Macro Space Planning
Category P&L
Online Shelf Management
Other



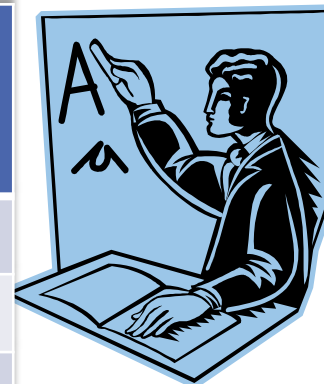
Category Management is rated to be more mature in organisations than Shopper Marketing



Analysis & Evaluation is the biggest training gap

Does your company have need for training?

Category Management	% requiring training
Analysis / Evaluation	47
Process	42
Theory (Basic or Advanced)	32
Software	28
Planogram Implementation	25



Shopper Marketing	% requiring training
Process and/or Analysis	55
Implementation	51
Theory (Basic or Advanced)	40

No Big Problems! But Problems in Shopper Marketing are biggest.

Rate your
Company
on
Scale 1-7



Implementation at Retailer level

Big investment required

Cross functional integration

Availability of Data

Availability of Shopper Insights

Number of Staff

Skills and Training

Understanding of SM / CM

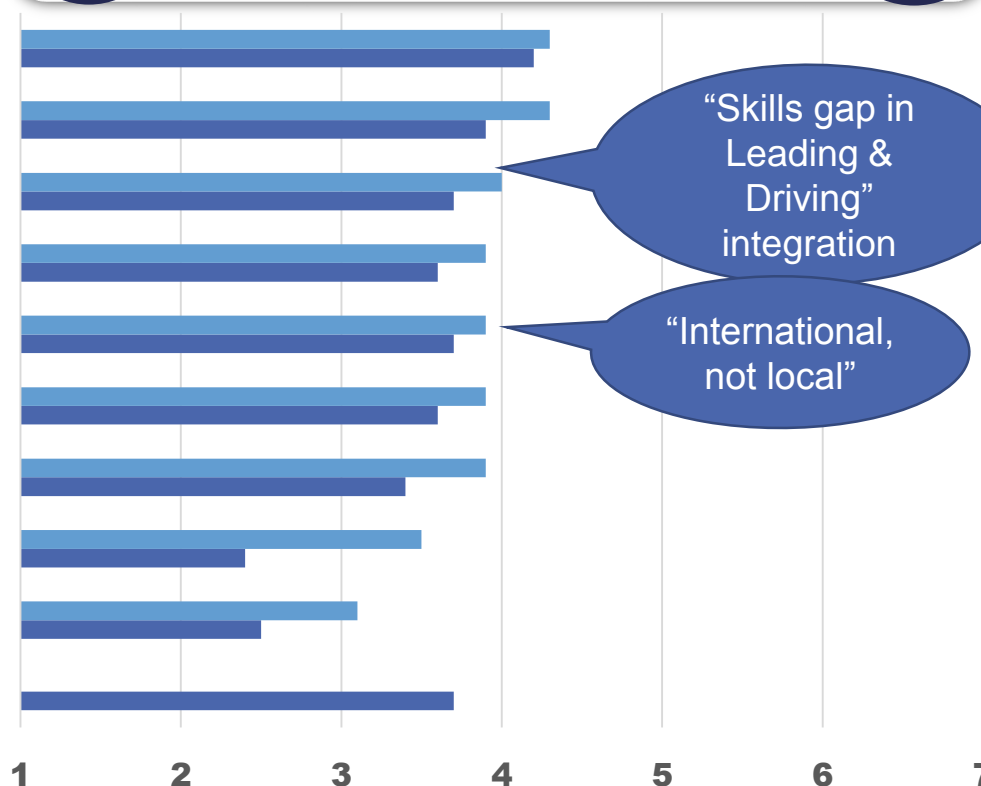
Top Management Commitment

Responsiveness to Demand fluctuation

Not a Problem



Big Problem

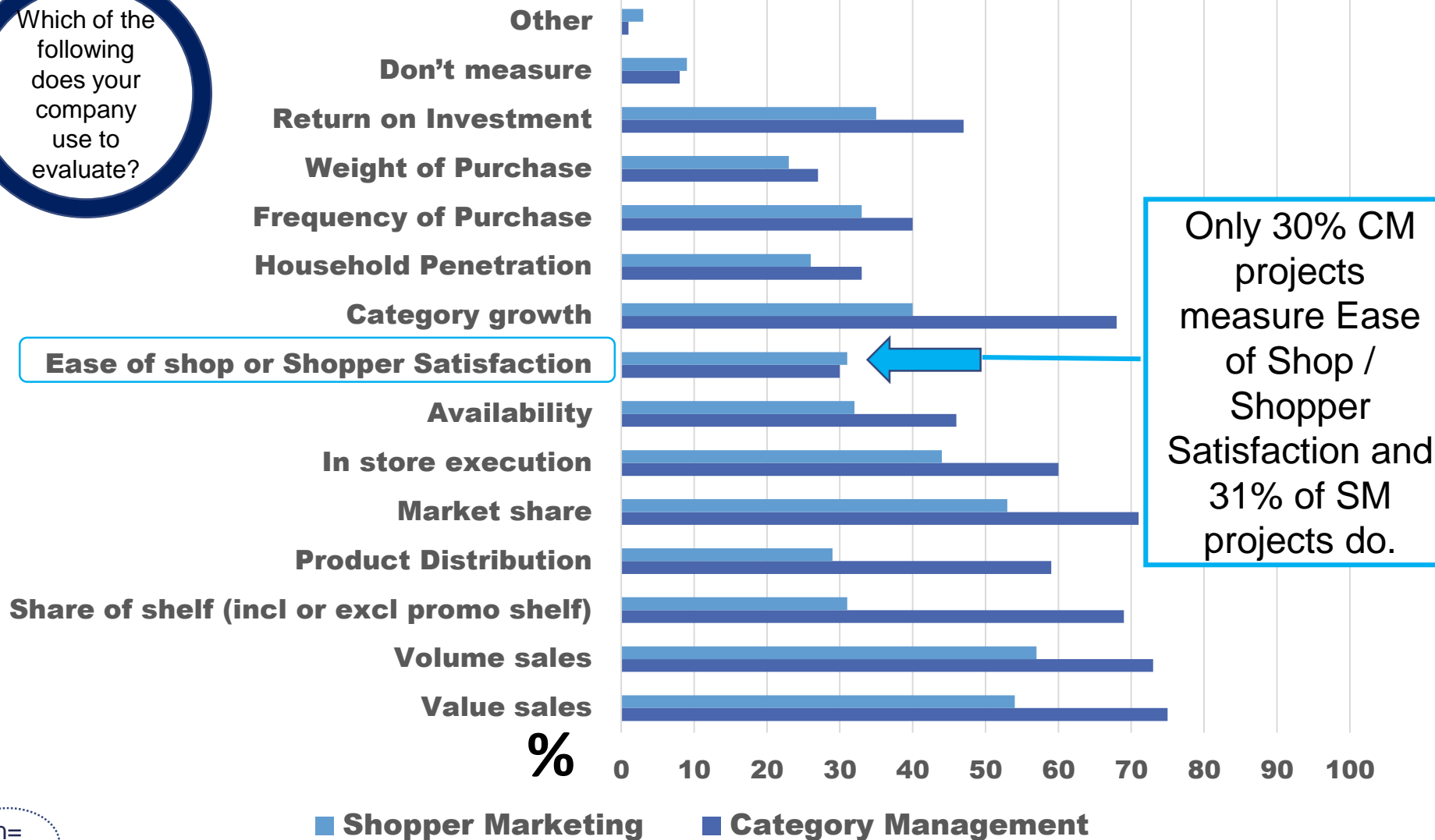


■ Shopper Marketing

■ Category Management

Category Management gets measured more.

Which of the following does your company use to evaluate?



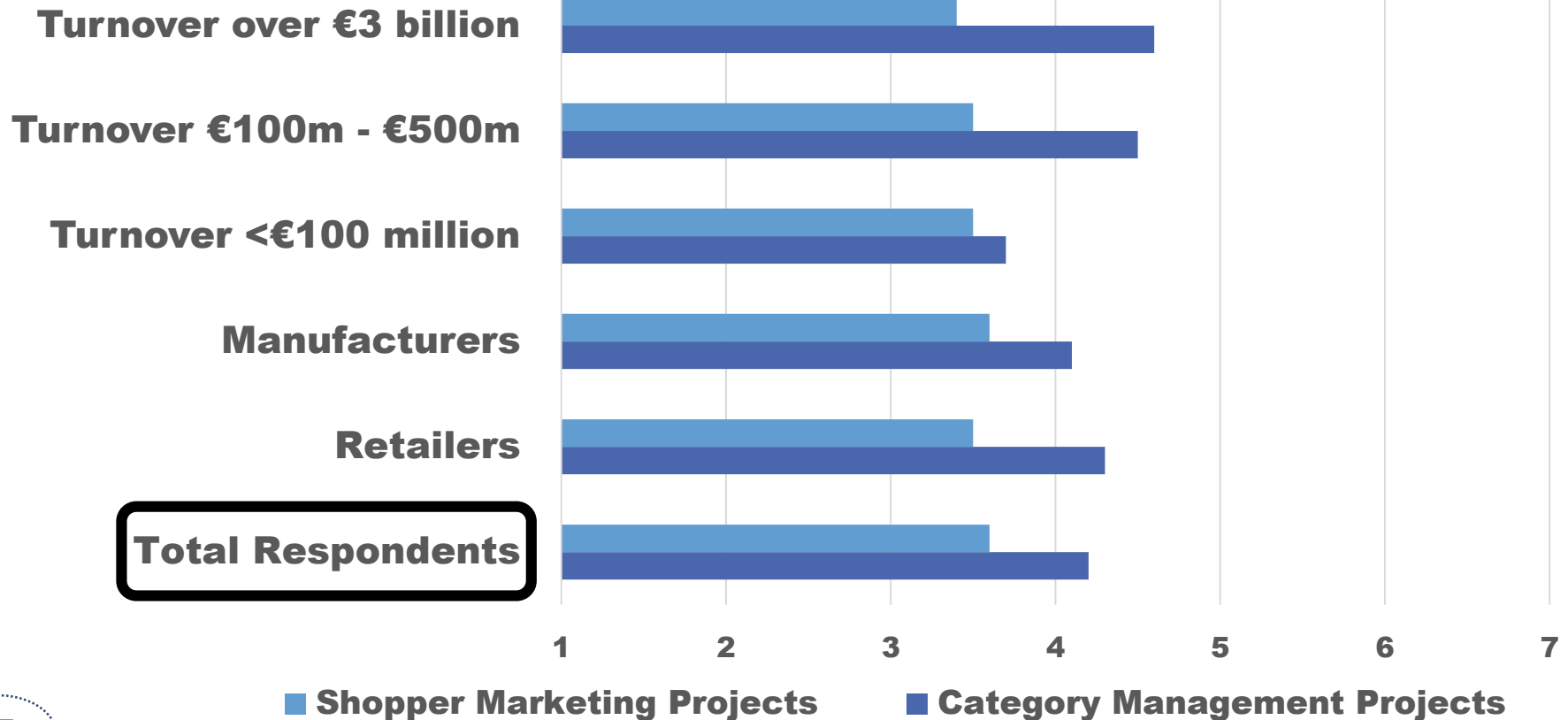
Success of Projects is rated average - regardless of size or type of company.

Overall,
how would
you rate
your
success?

Below Expectations



Above Expectations



We're not yet geared up for the growth in Online...



- **1 in 5 Category Managers conduct Online Shelf Management.**

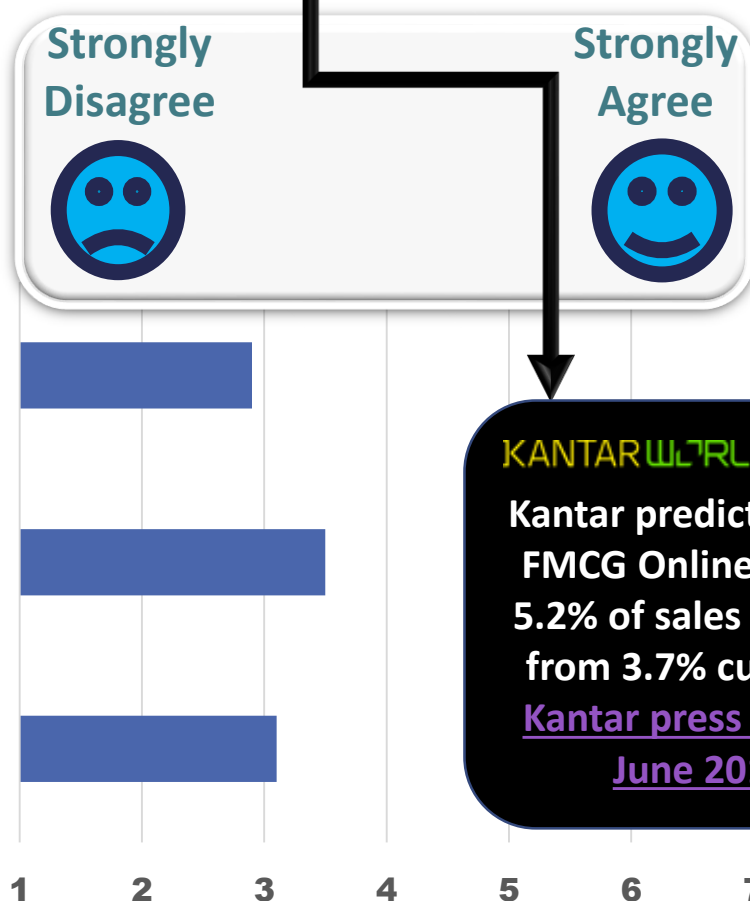
- 19.3% of Manufacturers
- 22.2% of Retailers

- Below average scores :

We have category Management plans for the online shelf.

We are using digital marketing for our Shopper Marketing projects.

We include the Online Shelf in our Marketing Strategy

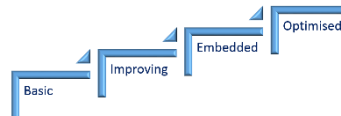


A degree of optimism that things are improving... and both Manufacturers and Retailers agree.





70% of CM and SM Projects don't measure Customer Satisfaction/ Ease of Shop.



Only 10% say CM is optimised in their Company and 7% say SM is.



Only 1 in 5 Category Managers conduct Online Shelf Management.



Category Management & Shopper Marketing Benchmark Survey 2014



7% of FMCG companies don't have a Full Time Equivalent in CM and 15% don't have a SM FTE.

✓ Success!

Success of CM/SM projects rated average – regardless of size of company or if retailer/ manufacturer.

And Finally...

Aitäh
Спасибо
Danke
Děkuji
Dziękujemy
Ευχαριστούμε
Go raibh máith agat
Grazie
Merci
Multumesc
Paldies
Teşekkür ederim
Thank You

A big Thank You to all those who completed this survey for ECR Europe.

We hope you'll agree it provides useful insights on Category Management and Shopper Marketing in Europe and it is of benefit to you and your Company.

We plan to do this survey annually to monitor trends.