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(Note: page numbers do not match Sample Report as Verbatim Comments and responses to questions 2-5 were removed)

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# Client Survey

## Executive Summary

In 2005 Client determined there was an internal need for additional quantitative data regarding the perceptions of retailers within the convenience retail / petroleum marketing industry. A study was undertaken by b2b Solutions. During the fourth quarter of 2006, Client elected to undertake the same study to bench mark what, if any, changes had occurred. Both the original and the 2006 surveys utilized CSP Information Group's *Daily News* database.

The following were attributes selected for both studies:

- 1) collaborative business planning and implementation of programs
- 2) tailoring/customizing programs to differentiate from competitor's
- 3) having category business plans that help grow your top and bottom line
- 4) deliver product and merchandising tools effortlessly
- 5) support new products with funding, merchandising, and product supply

Client (Company "G") selected six additional companies to be included. They included Company "A", Company "B", Company "C", Company "D", Company "E", and Company "F". Retailers rated each company for each attribute using a scale of one (1) to five (5) points with one (1) being the worst and five (5) being the best. The retailers were also invited to explain their ratings. Their verbatim comments are included in this report.

Approval Ratings were developed using the average points each company received and dividing that number by the maximum possible (5). The results are summarized in the following table\*.

Ranking*	Attribute				
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
1	"F"	"E"	"F"	"F"	"F"
2	"E"	"F"	"E"	"C"	"E"
3	"C"	"C"	"G"	"E"	"A"
4	"G"	"G"	"A"	"A"	"C"
5	"A"	"A"	"C"	"B"	"G"
6	"B"	"B"	"B"	"G"	"B"
7	"D"	"D"	"D"	"D"	"D"

\* Based on total group Approval Ratings.

“F” and “E” dominated the top two positions for the survey as they did last year. “C” improved its position significantly and replaced “A” as number three for four (4) of the attributes studied. “G”, “B”, “A”, and “D” ratings consistently placed them in the last four positions with few exceptions. “G” cracked the top three for “Having Business Plans that help grow your top and bottom line.”

We assigned “points” for each position based on Total Group grouping (seven for number 1, six for number two, etc.) and then ranked the companies based on their total points.

<b>Ranking*</b>	<b>Company</b>	<b>Points</b>
<b>1</b>	“F”	34
<b>2</b>	“E”	30
<b>3</b>	“C”	23
<b>4</b>	“A”	19
<b>5</b>	“G”	18
<b>6</b>	“B”	11
<b>7</b>	“D”	5

b2b Solutions performed the same type of analysis but used average Approval Rate as the metric. Using this metric shows that none of the companies reached a 70% average approval rating and were actually ranked closer than it may otherwise appear. The results are in the table below.

<b>Ranking*</b>	<b>Company</b>	<b>Average Approval Rate</b>
<b>1</b>	“F”	69.97%
<b>2</b>	“E”	69.18%
<b>3</b>	“C”	64.09%
<b>4</b>	“A”	62.35%
<b>5</b>	“G”	60.15%
<b>6</b>	“B”	53.90%
<b>7</b>	“D”	48.59%

A Rating Distribution was developed to determine what patterns, if any, could be discerned. The ratings were divided into three categories – Above Standard (for a five (5) or four (4) rating); Standard (for a three (3) rating) and Below Standard for a two (2) or one (1) rating,

Of the 60 instances [five attributes X four groupings (total, 200+, 51-200, 1-50) X top three positions] the top three (3) companies "F", "E" and "A" occupied 47 – the same as last year's survey. "C" (8), "G" (3) and "B" (2) were the only other companies to reach the top three (3) positions.

Only one company ("A") received a point average above 4 / approval rating of 80%+ in the 60 rating instances. This occurred for attributes 1, 4, and 5 and always in the 51-200 grouping.

"D" was consistently rated the worst. For three (3) of the five (5) attributes it was ranked in seventh position overall and by all groups. In the other instances it reached fourth once and sixth twice. Again this year "D" consistently received the lowest Above Standard percentage for each attribute.

The highest Above Standard ratings for the five (5) attributes was spread among three (3) companies – "F" (2), "E" (2) and "C" (1).

The Above Standard ratings were also reviewed for patterns. While their respective ranking may vary, it is not surprising that the same three companies ("F" - 15), "E" - 13 and "A" - 13) dominated the top three positions in the Above Standard Ratings as they did in the overall ratings.

## Study Methodology

The same instrument was used for both the 2005 and 2006 surveys. It was developed to assess retailers' perceptions of five (5) attributes of seven (7) selected candy/snack companies. The companies included "C", "A", "E", "G", "B", "D", and "F".

An online version of the survey was developed where the retailers were asked to assign a ranking of one (1) through five (5) for each company for each attribute with one (1) being the worst and five (5) being the best. The questionnaire was emailed to retailers in the *CSP Daily News* database during January, 2007.

The completed surveys were reviewed and the data scrubbed to eliminate duplicate responses from companies where category manager(s) and others within the company responded, from those that failed to complete the entire survey, and those with oblivious errors. Those qualified responses were then analyzed and the information summarized in this report.

For each attribute a ranking by company was developed based on weighting the responses by the number of stores the respondent operated or influenced. In the following example this total number of stores was 30,000.

### **Table 1: Study Methodology**

The underlying methodology for the research was based on "one store / one vote" rather than "one company one vote". This weighted the results on the number of stores each vote represented.

For each attribute the seven (7) companies were then ranked on the basis of points earned. In addition, an Approval Rating was developed for each company by dividing their total number of points by the maximum possible (five). See Table 2 for an example.

<b><u>Rating</u></b>	<b><u>Number of Stores</u></b>	<b><u>% of Total</u></b>	<b><u>Points Earned</u></b>
<b>1</b>	1,125	3.75%	.0375
<b>2</b>	2,625	8.75%	.175
<b>3</b>	7,500	25.00%	.75
<b>4</b>	5,625	18.75%	.75
<b>5</b>	<u>13,125</u>	<u>43.75%</u>	<u>2.18</u>
<b>Total</b>	<b>30,000</b>	<b>100.00%</b>	<b>3.89</b>

This Approval Rating is reported for all respondents and by the following three (3) groupings – 1-50 stores; 51 to 200 and 200+ stores. These summary results are presented in both numerical and graphical form.

**Table 2: Study Methodology**

**Total Group (25,188=100%)**

<u>Position</u>	<u>Point Average</u>	<u>Manufacturer</u>	<u>Approval Rate</u>
<b>1</b>	3.56	“F”	71.2%
<b>2</b>	3.39	“A”	67.8%
<b>3</b>	3.38	“E”	67.6%
<b>4</b>	3.02	“G”	60.4%
<b>5</b>	2.95	“D”	59.0%
<b>6</b>	2.85	“B”	57.0%
<b>7</b>	2.70	“C”	54.0%

A distribution analysis was also undertaken by manufacturer in which the responses were grouped in three categories – Above Standard (those with a 5/4 rating), Standard (those with a 3 rating) and Below Standard (those with a 2/1 rating). This provides additional insight as to how the average scores are balanced across the rating scale. An overall ranking based solely on Above Standard rating is included.

The retailers were also invited to share qualitative comments on why they rated the companies as they did. Their verbatim comments (other the spelling, capitalization and other common errors which were corrected) are reported in the same three groupings.

# Survey Instrument (Does Not Include Qualifier Questions)

Name \_\_\_\_\_  
 Company \_\_\_\_\_  
 Phone Number \_\_\_\_\_  
 Email \_\_\_\_\_  
 Name \_\_\_\_\_

**Please rate the performance of each of the suppliers listed  
 by check marks in the appropriate columns.**

Attribute 1	Supplier	Poor		Average		Excellent	
		1	2	3	4	5	
	"A"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"B"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"C"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"D"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"E"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"F"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"G"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please briefly explain why you rated the companies the way you did.

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Attribute 2	Supplier	Poor		Average		Excellent	
		1	2	3	4	5	
	"A"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"B"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"C"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"D"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"E"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"F"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"G"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Please briefly explain why you rated the companies the way you did.

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Attribute 3	Supplier	Poor		Average		Excellent	
		1	2	3	4	5	
	"A"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"B"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"C"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"D"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"E"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"F"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	"G"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Please briefly explain why you rated the companies the way you did.

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Attribute 4	Supplier	Poor		Average		Excellent
	"G"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"A"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"B"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"C"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"D"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"E"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"F"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"G"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please briefly explain why you rated the companies the way you did.

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Attribute 5	Supplier	Poor		Average		Excellent
	"A"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"B"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"C"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"D"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"E"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"F"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	"G"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please briefly explain why you rated the companies the way you did.

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## Study Sample

The following table provides statistical breakdowns of the qualified retailers in the study sample. Although the number of companies responding was the same the total number of stores declined. As with the 2006 the survey (based on the number of stores operated/influenced) skewed very heavily towards the larger operators.

**Table 3: Study Sample**

<b>Retailers</b>			
Number of Retailers		88	
<b>Stores</b>			
Number of stores operated		12,299	
Number of stores influenced (franchises, branded dealers/marketers)		<u>12,889</u>	
Total stores operated/influenced		25,188	
<b>Job Title</b>			
		<u>Number</u>	<u>Percent</u>
Senior Management		30	35
Store Operations		18	20
Merchandising/Marketing		<u>40</u>	<u>45%</u>
Total		88	100%
<b>Company Size</b>			
<u>Stores Operated and Influenced</u>		<u>Number of Stores</u>	<u>Percent</u>
1 – 50 Stores		759	3.0
51 – 200		2703	10.7
200+		<u>21,726</u>	<u>86.3</u>
		25,188	100%
<u>Company Size Distribution</u>		<u>Number of Companies</u>	<u>Percent</u>
1 – 50 Stores		48	54.5
51 – 200		21	23.9
200+		<u>19</u>	<u>21.6</u>
		88	100%

## Attribute One

**Table 1-1: Ranking By Point Average / Approval Rate**

The spread between the highest and lowest point average was the lowest for this attribute of any measured. There was a great deal of movement in the rating for this attribute from the 2005 survey. “F”, “G”, “B” held the same relative positions; “C” and “E” moved up while the other companies moved down.

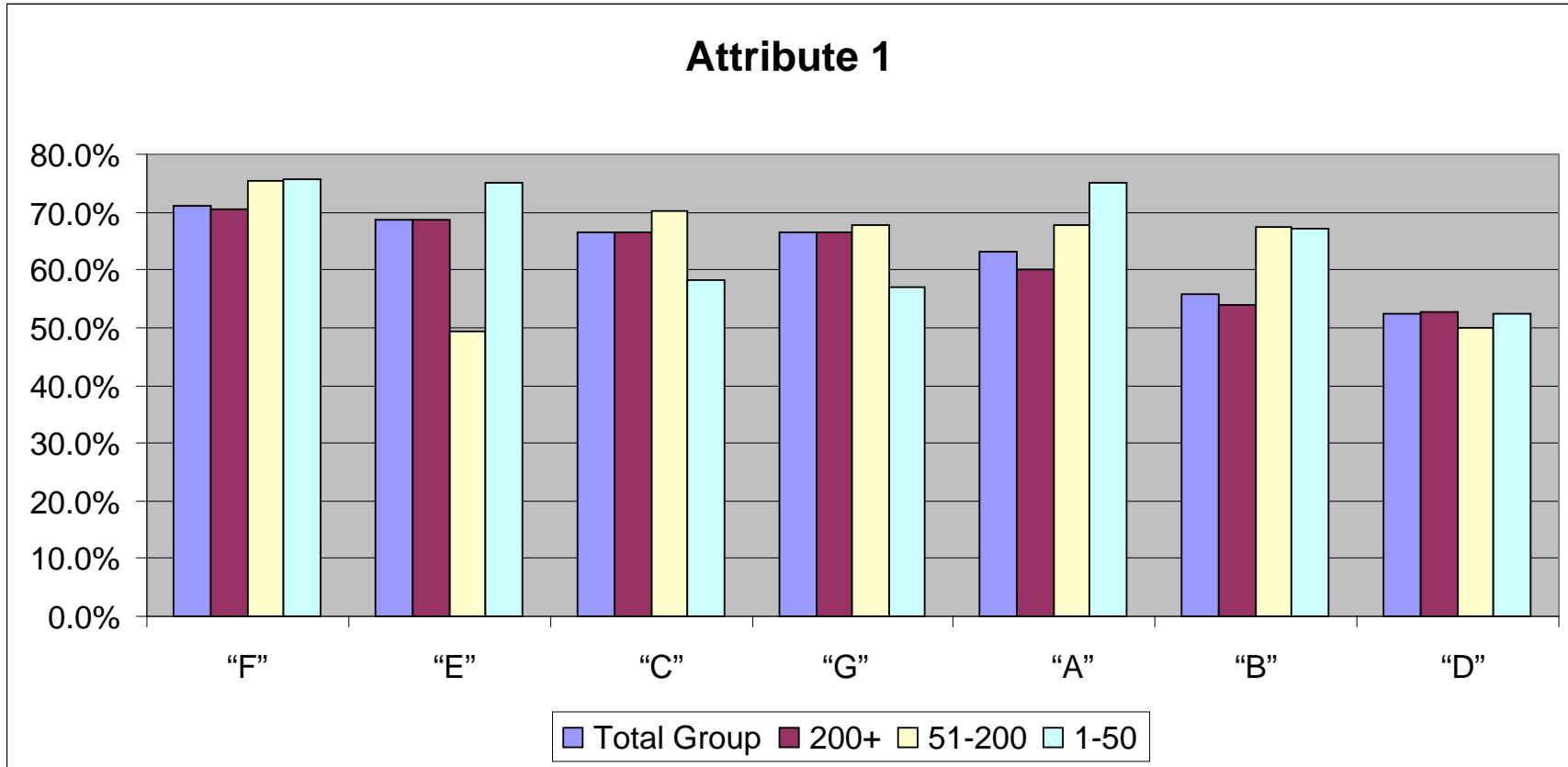
<b>Total Group (25,188=100%)</b>			
<b><u>Position</u></b>	<b><u>Point Average</u></b>	<b><u>Manufacturer</u></b>	<b><u>Approval Rate</u></b>
1	3.55	“F”	71.1%
2	3.43	“E”	68.5%
3	3.33	“C”	66.6%
4	3.32	“G”	66.4%
5	3.15	“A”	63.1%
6	2.78	“B”	55.7%
7	2.62	“D”	52.4%

**Table 1-2: Ranking by Approval Rate by Store Grouping** (listed by total group rating)

“F” rated the best across all grouping except the 51-200 with “E” second in three (3) of the four (4) groupings. This was only one (1) of three (3) instances when any company (“A”) received an average rating above four (4) by any group. The top three (3) companies (based on total group rating) held one of the top four (4) positions across the groupings with the exception of “E” which dropped to last in the 51-200 category.

	<b><u>Total Group</u></b>	<b><u>200+</u></b>	<b><u>51-200</u></b>	<b><u>1-50</u></b>
“F”	71.1%	70.4%	75.5%	75.8%
“E”	68.5%	68.6%	49.5%	75.0%
“C”	66.6%	66.4%	70.3%	58.2%
“G”	66.4%	66.5%	67.8%	57.0%
“A”	63.1%	60.1%	83.3%	75.0%
“B”	55.7%	53.8%	67.5%	67.0%
“D”	52.4%	52.7%	49.9%	52.4%

**Figure 1-1: Ranking By Point Approval Rate by Store Grouping**



**Table 1-3: Rating Distribution**

As Table 1-3 illustrates, there was a significantly larger variability among the companies when the distribution of the rating is analyzed than what might appear when viewing the average ratings. For many of the companies the ratings were either Above Standard or Below Standard. “B” and “F” the ratings were the most evenly spread across the spectrum.

	<u>Rating</u>	<u>“G”</u>	<u>“A”</u>	<u>“B”</u>	<u>“C”</u>	<u>“D”</u>	<u>“E”</u>	<u>“F”</u>
<b>Above Standard</b>	5-4	56.64%	44.02%	21.69%	58.44%	17.53%	52.97%	45.39%
<b>Standard</b>	3	13.34%	10.28%	36.06%	8.05%	38.36%	17.14%	34.13%
<b>Below Standard</b>	2-1	30.03%	45.70%	42.25%	33.51%	44.11%	29.89%	20.48%

**Table 1-4: Above Standard (5/4) Ranking**

The following table indicates the ranking by company based on only using the responses of those companies that rated them Above Standard in total and by retailer groupings. There were several changes in ranking form last year – “G” and “C” moved up in the Total and 200+ ratings. “C” continues to rate highly with the smaller retailer due to DSD system. “A” dropped from holding three (3) number one positions to holding only one.

<u>Position</u>	<u>Total Group</u>	<u>200+</u>	<u>51-200</u>	<u>1-50</u>
1	“C”	“G”	“A”	“A”
2	“G”	“C”	“F”	“F”
3	“E”	“E”	“C”	“E”
4	“F”	“F”	“G”	“C”
5	“B”	“A”	“B”	“B”
6	“A”	“B”	“D”	“D”
7	“D”	“D”	“E”	“G”

**Figure 1-2: Comments by Store Grouping – Attribute 1**

All comments are verbatim except for corrections in spelling and some grammar.

**1 – 50 TOTAL LOCATIONS**

**51 – 200 TOTAL LOCATIONS**

**200+ LOCATIONS**