



CUTSIZE

MILL AND MILL/OEM BRAND BENCHMARKING SURVEY

MAY 2014

(EUROPE)



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Our aim in this report is to provide the basic survey results, and the report contains an Executive Summary and the detailed statistical tables.

In addition to this report, Clients may optionally obtain a SUPPORT SERVICE from EMGE, which can include:

- a) Private Presentations
- b) Tailor-made analysis specific to your company
- c) Database, supplied in Excel file format, covering anonymous individualised responses.

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A) Introduction

Survey of Cutsized Paper Suppliers and Brand Positioning

This report presents the summary results of an interview survey among the Trade (i.e. Merchants, OEMs and Office Stationery Distributors/OSDs, in addition to some End Users/Retailers in 2014) of the image of cutsized paper Suppliers and Brands in Europe.

This is the 15th survey in the series.

The research focused on Suppliers and Brands, Awareness, Factors of Importance and Product/Supplier Performance.

The study involved 306 (206 in W.Europe and 100 in E.Europe) interviews with Merchants, OEMs, Stationery Distributors and End Users/Retailers, which maintains our record in recent years of keeping interview numbers above 200 in W.Europe and 100 in E.Europe.

The interviews were performed during March/April 2014, across the countries listed below. The interviews were performed by telephone.

Countries included in 2014 Cutsized Survey:

Belgium	Estonia
Denmark	Latvia
Finland	Lithuania
France	Poland
Germany	Russia
Italy	
Netherlands	
Norway	
Spain	
Sweden	
UK	

A.1 Range of Questions Asked

BRAND AWARENESS

- Spontaneous awareness of cutsize brands

PRODUCT BENCHMARKING

- IMPORTANCE ratings for factors when choosing a brand of cutsize paper
- PERFORMANCE ratings for specific brands with each factor

Factors:

- *Physical Properties (bulk, smoothness, formation)*
- *Product Performance (runnability, e.g. no jams, low curl)*
- *Brand Reputation*
- *Regularity of Quality (consistent quality)*
- *Optical Appearance (e.g. brightness, whiteness, opacity)*
- *Advertising/Promotional Support*
- *Multifunctionality (all applications/all equipment)*

COMPANY BENCHMARKING

- Factors of IMPORTANCE when selecting a company to supply
- PERFORMANCE ratings for specific suppliers with each factor

Factors:

- *Account Management (responsiveness, professionalism, effectiveness, friendliness, market knowledge, ability to deliver)*
- *Overall Customer Service (sales force, admin, tech. support)*
- *Speed of Reaction to Price Movements*
- *Product Technical Performance*
- *Environmental Policy (relevant info. from suppliers)*
- *Reliability of Delivery (meeting delivery deadlines)*
- *Depth of Product Range*
- *Advertising/Promotional Support*
- *Flexibility of Pricing*
- *Availability of Packaging Alternatives (ordered delivery time)*
- *Lead Times*
- *Supplier Location*
- *Brand Reputation (identification)*
- *Innovative Marketing Approaches*

IMPORTANCE OF BRAND IN PORTFOLIO

- *Importance of this brand being in your portfolio*

A.2 Interview Numbers & Methodology

FIGURE 1. INTERVIEW NUMBERS

Country	Merchants	End Users /			TOTAL
		OEMs	OSDs	Retailers	
GERMANY	23	2	13	4	42
FRANCE	15	3	18	0	36
UK	21	1	13	2	37
SPAIN	11	0	10	0	21
ITALY	11	3	9	2	25
BENELUX	10	4	6	5	25
NORDIC	10	1	7	2	20
W.EUROPE	101	14	76	15	206
RUSSIA	31	2	11	1	45
POLAND	5	0	25	0	30
BALTIC	17	2	5	1	25
E.EUROPE	53	4	41	2	100
EUROPE	154	18	117	17	306

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FIGURE 2. RESPONDENTS' PROFILES

Country	Sales & Mark.	Purchasing	TOTAL
	Managers	Managers	
GERMANY	11	31	42
FRANCE	7	29	36
UK	27	10	37
SPAIN	12	9	21
ITALY	8	17	25
BENELUX	12	13	25
NORDIC	10	10	20
W.EUROPE	87	119	206
RUSSIA	32	13	45
POLAND	13	17	30
BALTIC	17	8	25
E.EUROPE	62	38	100
EUROPE	149	157	306

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For this survey, a highly structured programme of interviews was devised, comprising 306 telephone interviews; including 154 Merchants, 18 OEMs and 117 OSDs and 12 End Users/Retailers.

The respondent sample selection was compiled from our own existing information, complimented by other sources, including sponsors.

1174 mentions were obtained on Spontaneous Brand Awareness, 1044 ratings on Brand Performance and 711 ratings were obtained on Supplier Performance.

It should be noted, of course, that in some cases the sample sizes are small and such results may have little statistical significance.