



Win with key customers. **Align** resources with areas of greatest upside. **Outpace** the industry.

Face your moment of truth with conviction.

Gain a Competitive Edge with Cleveland Research

CRC is an independent research firm headquartered in Cleveland, Ohio. Our firm is comprised of intellectually curious, highly motivated individuals who strive to build the best research firm in the business. We believe high-quality research directly leads to high-impact conclusions that can give you a competitive edge.

Broad Channel Network

Our team interacts regularly with a broad network of experts across end-markets & categories.

We identify and share best practices highlighting what's working across channels.

We equip you with important industry inflections to help you stay ahead of the curve.

Relationship with Retail Executives

Our financial analysis experience offers us unique relationships with Senior Management teams that give us a clear understanding of key strategic initiatives.

With that access, our work uncovers opportunities and risks within your key retailer strategies.

We help you prioritize key customer strategies to maximize your investments.

Shopper Insights & Surveys

Shopper surveys complement our research with data points to round out the full story on a particular theme, retailer, or channel.

Understand how shopper preferences are changing and how these changes impact your product category.

We add to your perspective on how shoppers are engaging with your customers.

Cross-Sharing & Benchmarking

Our quarterly surveys give our partners unique data points that help benchmark your performance against other council members who are also your peers.

Regional roundtables facilitated by CRC provide an opportunity to discuss challenges and share best practices with peers in non-competing categories.

Join our network & begin building more informed strategies for your team.

Why Cleveland Research



CRC provides a clear picture of where the market is today and where it will be in the future.

Our timely and relevant market research helps our partners grow sales, save money, optimize investments, and strategically plan their business. CRC's real-time reports and forecasts identify short-term inflections, long-term trends, and emerging opportunities.

CRC's research can also be used to support:

- Internal & external strategic discussions
- Budgeting, forecasting, and benchmarking
- Faster response to changing market conditions
- Alignment across leadership, cross functional teams, and customers

We Help Answer Questions & Solve Problems to Make You Smarter & More Profitable

Here is a list of real questions CRC has helped answer in the last 30 days from our virtual roundtables, industry benchmarks, consumer studies, and channel research. Most members say it's both the big picture analysis AND the clear answers to the little questions that consistently gives them an edge, justifying the ROI, year after year.

- 1 What Amazon programs like Pantry, S&S and Business are other brands adopting and which ones are seeing the fastest/slowest growth?
- 2 Should we invest in Amazon's new AVS program?
- 3 What are other brands experiencing during Amazon's annual negotiation process and what does Amazon seem most focused on?
- 4 What is the growth outlook for eCommerce in 2019 and 2020 – which retailers are growing the fastest, why, and what does that mean for our investment focus in those years?
- 5 How much should we increase our advertising spend on Amazon in '19 and into what ad tools?
- 6 Hybrid Model: It's been mentioned before that brands should employ a hybrid model of selling (1P and 3P accounts). However, with the recent report that Amazon is driving customers to one or the other, how do you see this evolving over the course of the next few years and what account(s) offer the longest growth potential?
- 7 How are other brands structuring their eCommerce team, particularly their omnichannel investments?
- 8 Should we expect Amazon to be more or less profitable for our business in '19?
- 9 Should we be testing the commerce marketing options available on Walmart, Home Depot and other omnichannel accounts?
- 10 How are other brands managing Amazon's SIOC requirements hitting in August 2019?
- 11 What is the overlap between the Walmart.com and Amazon.com shoppers and what does this mean for our channel strategy?
- 12 How are other brands thinking about competing with Amazon private label?
- 13 Should we anticipate growth on Amazon to accelerate or decelerate in '19?
- 14 Has anyone heard news on the rate of Amazon Go expansion in 2019 since the volume is fulfilled via Amazon Fresh and/or Spartan Nash?
- 15 Are other brands currently fulfilling Fresh/Prime Now through SpartanNash and if so how are they determining volume to Amazon vs. other accounts through that platform?
- 16 Has any manufacturer been successful in gaining distribution in Amazon Go stores?
- 17 Are other brands working with brokers to interface with the Amazon Grocery team and do these new partnerships suggest we should make major investments in Fresh in '19?
- 18 How are others viewing the potential integration of Whole Foods as it becomes more synonymous with Prime Now (account responsibilities, supply chain, etc.)?
- 19 What degree (if any) of incremental sales have you experienced from participating in the marketing programs on Fresh/Prime Now?
- 20 For Spartan Nash, has anyone had challenges getting contracts aligned with Spartan Nash and Amazon? We have discussed using spin reports from both Amazon and SN – Is this something others have used and has it been accurate?

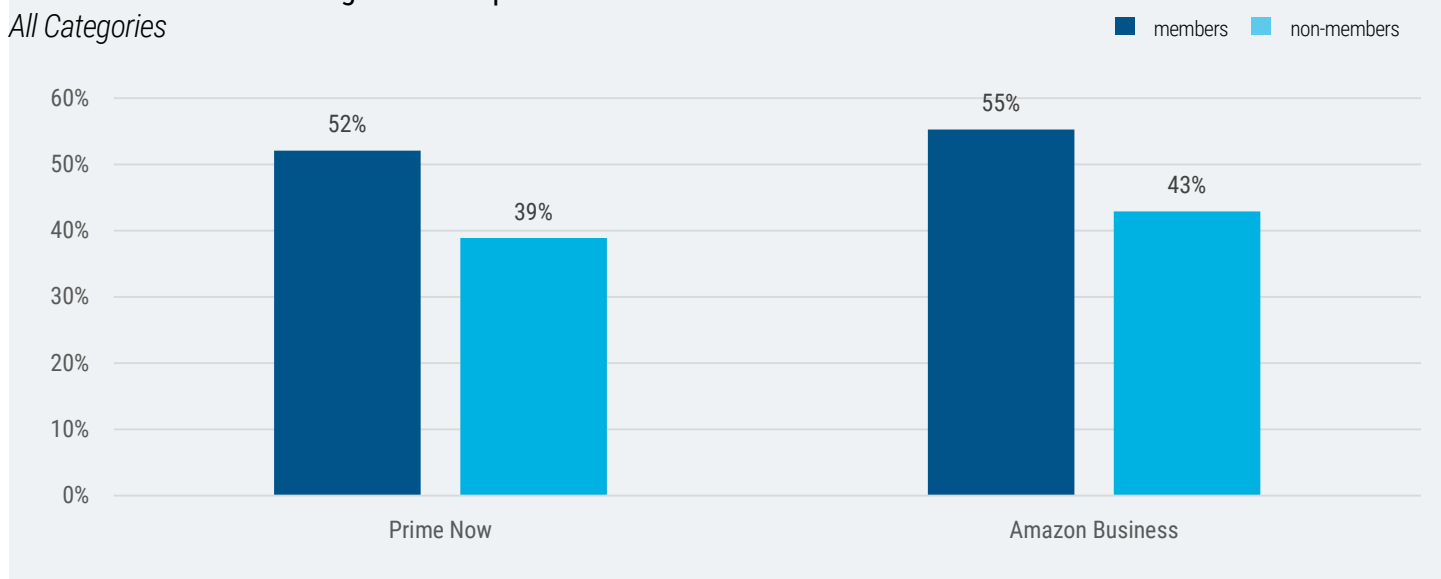


How CRC Members are Outperforming Their Competitors

One of the ways we help our members is identifying which programs are worth participating in on the Amazon account. This helps our members grow faster and the benchmark highlights council members outperforming non-council member peers in both Prime Now and Amazon Business.

2018 Growth for Amazon Programs Participated in for 1+ Years

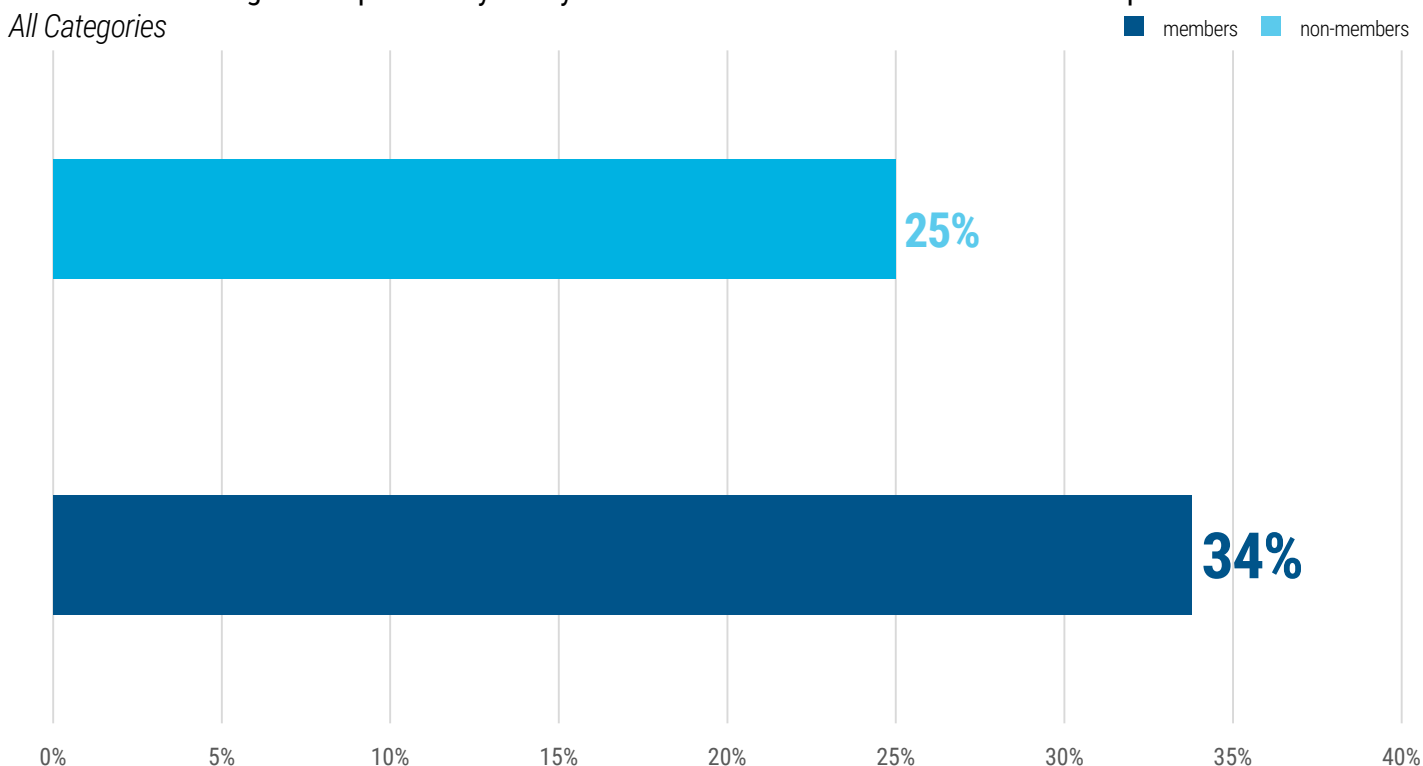
All Categories



Amazon has become an incredibly dynamic, challenging account to work on. Our council members feel more prepared though, with 34% indicating they feel better on both growth and profitability in 2019 compared to non-council members.

I feel better on both growth & profitability for my business on the Amazon account in 2019 compared to 2018

All Categories



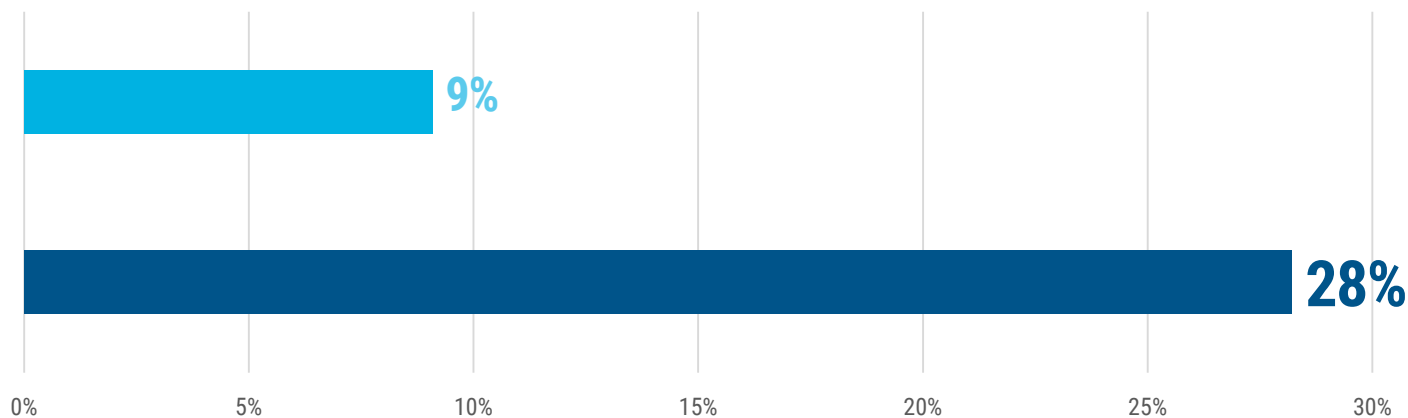
* Survey sample size 134, 50% CRC council members & 50% non-CRC council members.

The other half of our eCommerce Council is comprised of hardline companies and we are helping them grow faster and more profitably as well.

I feel better about my growth & profitability on Amazon in 2019 compared to last year

Hardline Companies

■ members ■ non-members

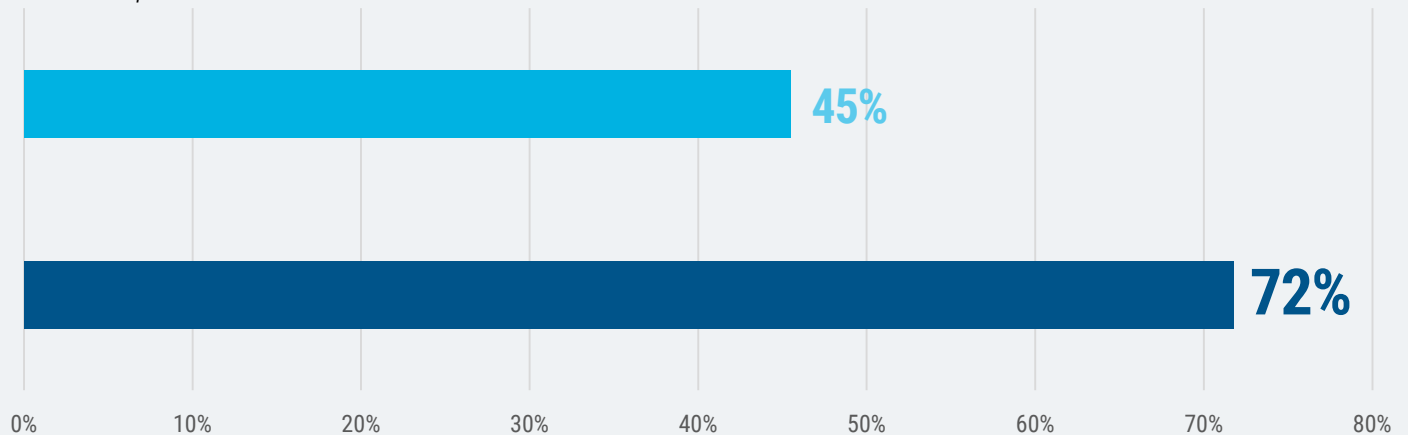


While many companies have seen their profit margins erode on Amazon over the last few years, our hardline category eCommerce Council members are expecting better results than non-council members.

I expect my profit margins on Amazon to be equally to significantly more profitable than my profit margins at other retail customers during 2019

Hardline Companies

■ members ■ non-members

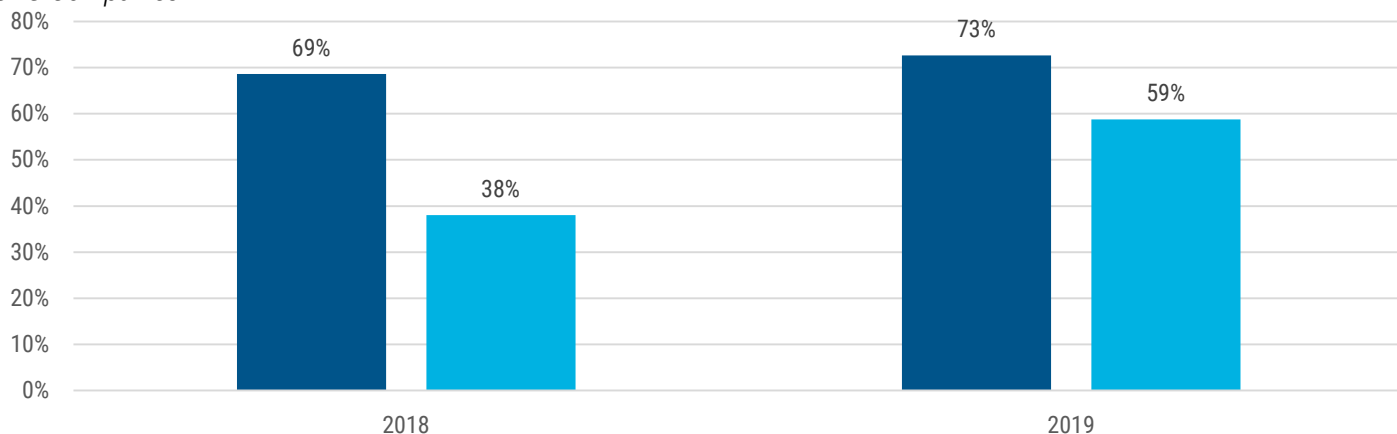


Approximately 50% of our eCommerce Council is comprised of CPG companies. Our benchmark highlights faster growth rates for them on programs like Subscribe & Save and Amazon Business, and we are also helping them on dot.com accounts outside of Amazon, such as Walmart.com.

Estimated Growth Rate For Walmart.com in 2019 & 2018

CPG Companies

■ members ■ non-members





“Cleveland Research Company makes us better business people. Period.

The unbiased perspective and analysis is delivered regularly and timely in a very easy to digest format that is compelling for all levels in our organization. CRC is a partner that provides unlimited ROI.”

- Teena Carter
Division Manager Walmart and eCommerce
Bush Brothers & Company



PRODUCT

Ein Produkt als eine erzeugte Ware oder Dienstleistung ist ein Begriff in der Betriebswirtschaft. Insbesondere im Marketing wird allerdings explizit von Produkten gesprochen, womit alle Objekte gemeint sind, die das Unternehmen verkaufen möchte.



MacBook Pro

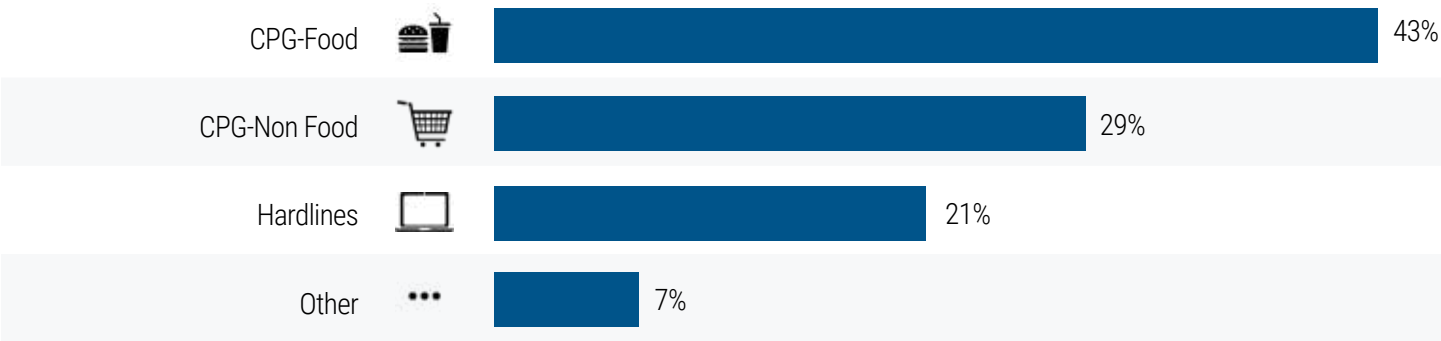
eCommerce Council

eCommerce has disrupted consumer shopping behavior and in turn retail over the past 10 years, moving from 3% of retail sales to 10% today, and influencing more than 75% of all sales that take place. Unlike pre-digital days when the path to purchase was linear, today's shopper journey is dynamic and fluid with no clear delineation between retail channels. In addition to a special focus on how to win with Amazon and the leading omnichannel retailers, our research identifies best practices and emerging trends across retail so our partners can identify opportunities faster than their competitors in what is an increasingly dynamic environment.

146
Companies

98%
Renew Each Yr

eCommerce Council Partners



eCommerce Experts

Phone an eCommerce expert with a Cleveland Research partnership. You gain access to our team to help you answer questions and solve problems on a day-to-day basis. Our expert analysts have 20 years experience combined analyzing eCommerce trends. They specialize in identifying inflections to help vendors grow more profitably and better navigating the constantly evolving customer purchase decision process.

Russ Dieringer
Executive Director, eCommerce Council

Oksana Pelts
Director, eCommerce Council

Jim Braun
Director, eCommerce Council

Laura Decker
Market Research Associate, eCommerce Council

eCommerce Council Reports

CRC's eCommerce reports provide insight into the current business environment including helpful actionable conclusions that can be used immediately to clarify and strengthen your business. Partners will have access to over 250 reports including industry and consumer reports, customer updates, and channel outlooks distributed to your inbox each week. **With an eCommerce Council membership, you have unlimited access to all reports delivered directly to your inbox and are available to download in our online partner portal.**

eCommerce Updates

- eCommerce Forecasts
- Pureplay eTailer Recap
- Home Improvement Online Recap
- eCommerce Path to Purchase Consumer Study
- eCommerce in Home Improvement Path to Purchase Study
- Digital Quarterly - What's Interesting; Driving to Purchase Online
- Quarterly Updates - Mass Retail, Online Food, Home Improvement, Alibaba

Customer Surveys & Benchmarks

- Path to Purchase Report
- Grocery Path to Purchase Report
- Meal Kit Path to Purchase Report
- Online Grocery Report
- Omnichannel Quarterly Reports
- eCommerce Teams Benchmark
- Amazon Strategy Benchmark
- Supply Chain Benchmark
- Annual eCommerce Performance Survey

Amazon Updates

- Monthly real-time Amazon insights
- Special reports on Prime Day, Cyber 5 and Bezos' Annual Letter
- Quarterly recaps of business performance
- Amazon-centric consumer-surveys

eCommerce Research Breakdown



Amazon Research



Consumer research



eCommerce research

"Cleveland Research's reports are incredibly timely, relevant, and informative. I have yet to find a report where I haven't underlined key notes and wanted to pass them along to others on the team."

- Steve Hungsberg
Associate Director of Omnichannel Sales, Red Gold

eCommerce Summit

September 12, 2019 | Seattle, WA

Each year, the Cleveland Research eCommerce Council holds an industry-leading event that provides partners with our latest insights to help plan for and capture the upside opportunities in eCommerce and Amazon over the next 12-18 months. We provide new perspectives, front-line insights, and clear strategic and tactical recommendations from leading thinkers and experts across the industry to help attendees capture the rising wave of eCommerce growth. **Members receive five seats to CRC's eCommerce Summit.**



eCommerce Webinars

We host webinars to share key changes and emerging themes in the industry with practical implications to help partners with tactical and strategic planning. **Members receive unlimited registrations to CRC webinars.**



March
2019



June
2019



August
2019



November
2019



eCommerce Roundtables

Aimed at sharing best practices across the industry, we facilitate small group roundtable discussions with industry experts to navigate challenges and identify best practices.



March 21, 2019
Phoenix, AZ



May 16, 2019
Cleveland, OH



November 6-7, 2019
Seattle, WA



Virtual Roundtables
scheduled
throughout the year

"Cleveland Research has been a valued partner of PepsiCo's for many years. Many of our senior executives look to CRC's reports and summits to provide an informed, independent point-of-view on the evolving omni-channel landscape."

- H. Evan Shaver, Vice President of Shopper Strategy & Insights, PepsiCo North America



CRC eCommerce Team



Russ Dieringer, CFA
*Executive Director,
eCommerce Council*



Oksana Pelts
*Director,
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Jim Braun
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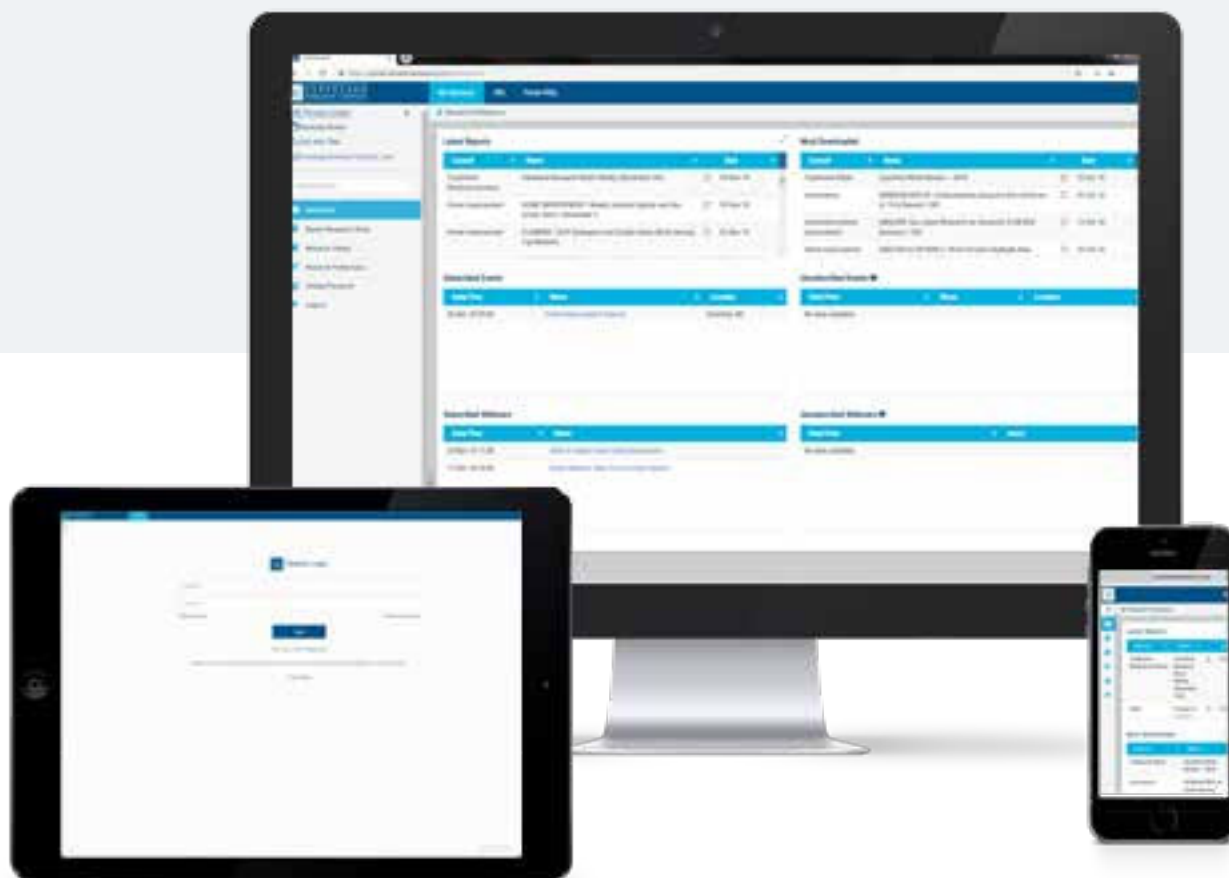


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Market Research Partner Portal

CRC's Partner Portal is an online research tool that allows partners to search and download industry reports, customer updates, shopper reports, and channel outlooks. Our custom reports provide insight into the current business environment including helpful actionable conclusions that can be used immediately to clarify and strengthen your business. Current and historical reports, dated back three years, are available to download.



Engage with Cleveland Research in a variety of convenient ways.



Reports & Benchmarks

CRC's custom reports provide insight into the current business environment including helpful actionable conclusions that can be used immediately to clarify and strengthen your business.



Expert Engagement

With a Cleveland Research partnership, you gain access to our analyst team to help you answer questions and solve problems on a day to day basis.



Roundtables

Aimed at sharing best practices on a particular topic, channel or retailer with non-competitive peers, we host small group roundtable gatherings with industry experts and identify new action items to implement in your business.



Webinars

We host a variety of webinars that identify key changes and emerging themes in the industry with practical implications to help partners with strategic planning, forecasting, and benchmarking their businesses.



Market Research 2019 Event Calendar

Whether you want to accelerate your strategic thinking or need key deliverables for your team to execute immediately, our events and webinars provide forward-looking forecasts and actionable recommendations. CRC events help empower intelligent business decisions.



January

1|15 Macroeconomic Webinar



February

2|6-7 Home Improvement Roundtable
Atlanta

2|21 TRC Walmart Year Beginning Webinar

2|22 FSC Foodservice Distribution Webinar



March

3|7 eCommerce Webinar

3|12 TRC Target Forum
Minneapolis

3|14 FSC Sysco Roundtable
Houston

3|21 eCommerce Roundtable
Phoenix



April

4|4 eCom Live Cast

4|24-25 Home Improvement Roundtable
Charlotte



May

5|7 TRC Natural Webinar

5|9 eCom Live Cast

5|16 eCommerce Roundtable
Cleveland

5|29 eCom Amazon Webinar

5|31 FSC Non-Commercial GPO Webinar



June

6|2019 Home Improvement Webinar

6|6 TRC Walmart Roundtable
Bentonville

6|14 FSC 2H19 2020 Forecasting Webinar

6|19 eCom Live Cast

6|26 FSC US Foods Roundtable
Chicago



July

7|16 TRC Club Webinar

7|24-25 Home Improvement Roundtable
Atlanta

7|31 eCom Live Cast



August

8|2019 Traditional Retail Roundtable
Chicago

8|15 FSC Contract Management Roundtable
Cleveland

8|23 FSC Restaurant Industry Webinar



September

9|2019 Home Improvement Webinar

9|2019 TRC Dollar Webinar

9|10 TRC Costco Roundtable
Seattle

9|12 eCommerce Summit
Seattle

9|20 FSC Performance Food Group Webinar

9|25 Foodservice Forum
Dallas



October

10|17 TRC Walmart Forum
Bentonville

10|23-24 Home Improvement Roundtable
Charlotte



November

11|2019 TRC Kroger Roundtable
Cincinnati

11|6-7 eCommerce Roundtable
Seattle

11|22 FSC eCommerce in Foodservice Webinar



December

12|2019 TRC Holiday Real-Time Update Webinar

12|5 Home Improvement Summit
Charlotte

