



CLEVELAND  
RESEARCH COMPANY

# Face your moment of truth with conviction.

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



“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.”

*Division Manager Walmart and eCommerce, Bush Brothers & Company*

# Gain a Competitive Edge with Cleveland Research



## 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

We have unique access to the senior management teams across your key retailer customers.

This access gives us a competitive advantage to uncovering opportunities and risks faster and more accurately.

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.

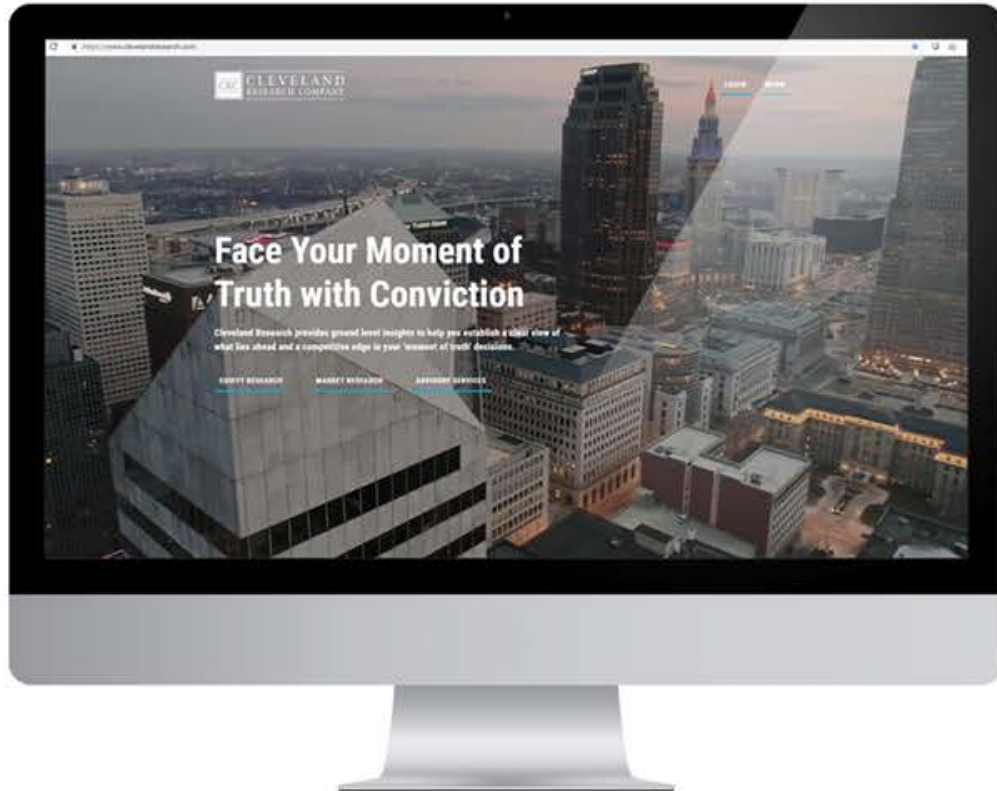
Regional roundtables facilitated by CRC provide an opportunity to discuss challenges and share best practices with peers in non-competing categories.

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



# Retail Insights

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.

CRC's research covers everything from traditional brick & mortar retailers transitioning into omnichannel powerhouses, to pureplay eCommerce companies like Amazon. Our sought-after retail analysts combine a broad range of intelligence and actionable insights across mass, club, grocery, discount, drug, dollar, department store, specialty retail, and eCommerce channels, highlighting business inflections, company-specific strategies, and market share fluctuations across the entire retail landscape. 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.

143 companies



95% renewal rate

# Connect with our Retail team



**Russ Dieringer**  
Executive Director  
eCommerce Council



**Jackie Lewis**  
Executive Director  
Traditional Retail Council



**Scott Bender**  
Senior Analyst



**Jim Braun**  
Director  
eCommerce Council



**Laura Decker**  
Market Research  
Associate



**Chuck Geiss**  
Business Development



**Ben Metzger**  
Market Research  
Associate



**Maggie O'Neill Clapp**  
Business Development



**Oksana Pelts**  
Director  
eCommerce Council



**Jen Perpar**  
Market Research  
Associate



**John Selio**  
Research Associate

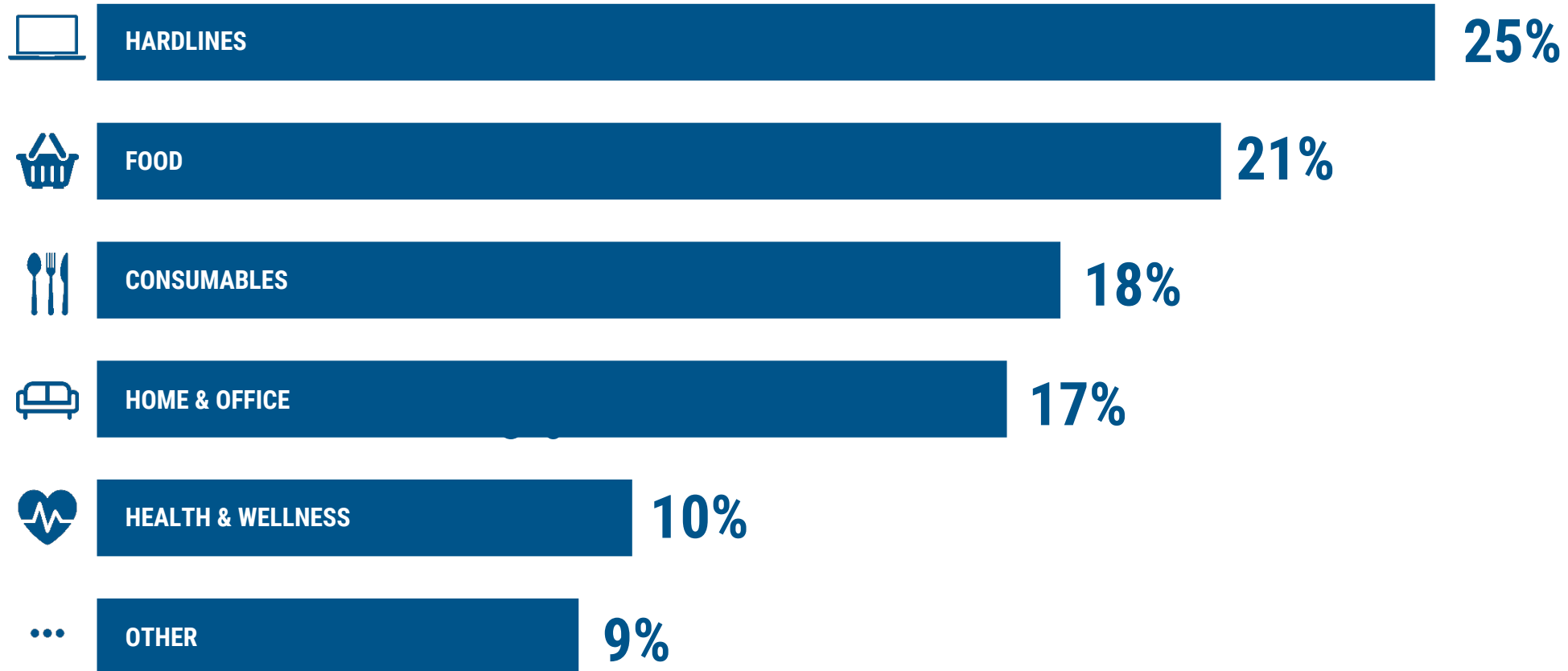


**Lisa Young**  
Business Development

*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.*

# Join the Industry Leaders

Members of our retail councils represent a variety of industry verticals



## Research Breakdown



### Company Updates



### eCommerce Research



### Amazon Research



### Consumer Research

# Retail Insights Reports

CRC's custom reports provide insight into the current omni-channel environment including helpful actionable conclusions that can be used immediately to clarify and strengthen your business across the brick & mortar, eCommerce, mass, club, dollar, drug, grocery, and specialty retail channels. Members will have access to hundreds of reports including industry overviews, customer updates, consumer surveys, and channel outlooks distributed each week. **With a membership, you have unlimited access to all reports delivered directly to your inbox and are available to download in our online partner portal.**

#### CUSTOMER SURVEYS & BENCHMARKS

Profitability & Performance Benchmarks

Digital Advertising Benchmark

What Good Looks like in eCommerce Teams

Supply Chain and SIOC Benchmarks

Determining the Value of AVS

LiveCast Live Polling Results

Amazon Shopper Consumer Study

Social Commerce Shoppers

Private Label Shopper

Adoption of Voice Consumer Study

Quarterly Chartbooks: Grocery, Mass, Club

Walmart & Target Benchmark

Annual Pet Specialty Reports

Annual Forecasts Across Retail

Consumer Surveys: Target, Hard Discount, Club, Walmart

#### COMPANY UPDATES

Mass Retail (Walmart & Target)

Drug (Walgreens & CVS)

Automotive Aftermarket

Department

Club (Costco, Sam's Club, BJ's)

Dollar (Dollar General, Dollar Tree, Family Dollar)

Grocery (Albertsons, Ahold Delhaize US, Supervalu, Kroger)

Natural (Whole Foods, Sprouts, UNFI)

#### AMAZON UPDATES

Monthly real-time Amazon Insights

Special Reports on Prime Day, Cyber 5, and Amazon's Quarterly Earnings

Quarterly recaps of business performance

#### ECOMMERCE UPDATES

eCommerce Forecasts

Pureplay eTailer Recaps

Digital Path to Purchase Studies

Weekly eCommerce Newsletters

Online Home Improvement Updates

Online Food/CPG Category Updates

Regular Omnichannel Updates

Latest research on Advertising and Commerce Marketing





# eCommerce Events

## eCOMMERCE SUMMIT

*September 2020 | San Diego, CA*

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 LIVECASTS

Shorter than most webinars, more engaging than reading a report, CRC LiveCast format aims to give you only the most critical information to improve your business while enabling a direct conversation with us. During our LiveCasts, we distill a month's worth of recent research into a digestible 15 minute session that includes a shared screen, a handful of engaging polling questions to get you more insightful data, and a chance to ask your most pressing questions.

**Members receive unlimited registrations to CRC LiveCasts.**



February | March | April | June | September | October | November

## 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  
Phoenix



May  
Boston



July  
Cleveland



November  
Dallas

# Traditional Retail Events

Members receive five seats to CRC's Traditional Retail events.

## KROGER FORUM

*March 2020 / Cincinnati, OH*

CRC's Kroger Forum provides real-time key insights, trends and action items that organizations can apply to their specific business at Kroger. This event is ideal for Kroger team leads, NAMs, marketing directors, category & insight managers, financial analysts and others calling on or looking to sell into Kroger.

## RETAIL SUMMIT

*June 2020 / Chicago, IL*

This day-long event features the CRC Retail team and a group of guest speakers who provide insights and best practices on how to approach the emerging opportunities within brick & mortar retail landscape. Best positioned for top retail executives and cross-functional team members including Directors and VPs of Retail Sales, CRC's Retail Summit helps paint a clear picture of the retail landscape over the next 3 to 5 years.

## COSTCO FORUM

*September 2020 / Seattle, WA*

In advance of Costco's Supplier Day, CRC's Costco Forum answers your strategic and tactical questions that better equip your Costco team across sales, marketing, insights, finance, and supply chain). CRC brings together the supplier community and categories that are looking to find the right formula to capture growth at Costco and the overall retail channel.

## WALMART FORUM

*October 2020 / Bentonville, AR*

Fresh on the heels of CRC's participation at Walmart's investor meeting, we share the key takeaways from Walmart's management team and our perspective on how to strategically position your business to respond to the company's forward-looking strategies and initiatives for each of Walmart's business units including US, Sam's Club, International, and eCommerce. We help answer your strategic and tactical questions that will better equip your Walmart team across all functions.







# Traditional Retail Events

## TRADITIONAL RETAIL WEBINARS

We host a regular series of webinars that identify key changes and emerging themes in the retail industry with practical implications for strategic planning, forecasting, and budgeting. **Members receive unlimited registrations to CRC webinars.**



**February 2020**

Walmart Year Beginning Webinar



**April 2020**

Aldi / Hard Discount Webinar



**July 2020**

Club Webinar



**December 2020**

Holiday Retail in Real-Time Webinar

## TRADITIONAL RETAIL ROUNDTABLES

Aimed at sharing best practices, the CRC-hosted small group gathering roundtables with non-competing suppliers to gather information that helps team leads navigate current challenges and consider new ideas to grow their business.



Walmart  
Roundtable



Kroger  
Roundtable



Costco  
Roundtable



# Clear answers to your Retail questions

Here is a list of real questions CRC has helped answer 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.

What Amazon programs like Pantry, Subscribe and Save, and Business are brands adopting and which ones are seeing the fastest/slowest growth?

Should brands invest in Amazon's New Amazon Vendor Services (AVS) program?

What are brands experiencing during Amazon's annual negotiation process and what does Amazon seem most focused on?

What is the growth outlook for eCommerce in 2020 and 2021 – which retailers are growing the fastest and why? What does that mean for brands' investment focus in those years?

How much should brands increase their advertising spend in 2020 and what ad units provide the greatest ROI?

How is Amazon evolving, as the eTailer drives brands to either the 1P or 3P platforms and how will this evolve over the next few years. How should brands be thinking about implementing their hybrid (1P/3P) models?

What accounts beyond Amazon offer the longest growth potential?

How should brands be structuring their eCommerce teams and how should they be thinking about their omnichannel investments?

Is Amazon expected to be more or less profitable for brands' businesses in 2020? Should brands expect growth on the account to accelerate or decelerate in 2020?

Should brands be testing the commerce marketing options available on Walmart, Home Depot, and other omnichannel accounts?

How can suppliers best optimize their brick & mortar retail business in the current environment, and find new avenues for growth?

What is a realistic growth rate for brick & mortar retail in 2019 and beyond? Which retailers are set to outpace and which are set to underperform these growth rates?

Which retail accounts/channels should we be prioritizing and investing in? Which emerging channels should suppliers be watching?

Where do the biggest square footage opportunities exist in the current US retail market?

How so we strategically think about resource allocation over the next 2-3 years within our retail team?

How are brands managing Amazon's SIOC requirements?

What is the overlap between the Walmart.com and Amazon.com shoppers and what does this mean for brands' channel strategy?

How are brands thinking about competing with Amazon's private label brands?

What are the updates on the rate of Amazon Go expansion in 2020 since the volume is fulfilled via Amazon Fresh and/or SpartanNash?

Are brands currently fulfilling Fresh/Prime Now orders through SpartanNash and if so, how are brands determining the volume to Amazon vs. other accounts through that platform?

Are manufacturers having success gaining distribution in Amazon Go stores?

Are brands working with brokers to interface with the Amazon Grocery team and do these new partnerships suggest manufacturers should make major investments into AmazonFresh in 2020?

How are brands viewing the potential integration of Whole Foods as it becomes more synonymous with Prime Now in terms of account responsibilities, supply chain, etc.?

Have brands seen incremental sales as a result of participating in marketing programs on AmazonFresh/Prime Now?

Are brands experiencing challenges in aligning contracts with SpartanNash and Amazon?

Have brands found the SPIN reports available from SpartanNash and Amazon accurate?

What are the current initiatives most pertinent to suppliers at each retail customer (Walmart, Target, Costco, Sam's Club, CVS, Walgreens, Kroger, Dollar General, Dollar Tree, etc) and how are other suppliers navigating those?

What are some best practices in successfully navigating requests for increased margin support/trade funding and tighter inventory management?

How are the best retailers approaching omni-channel, and how can suppliers partner to capture growth?

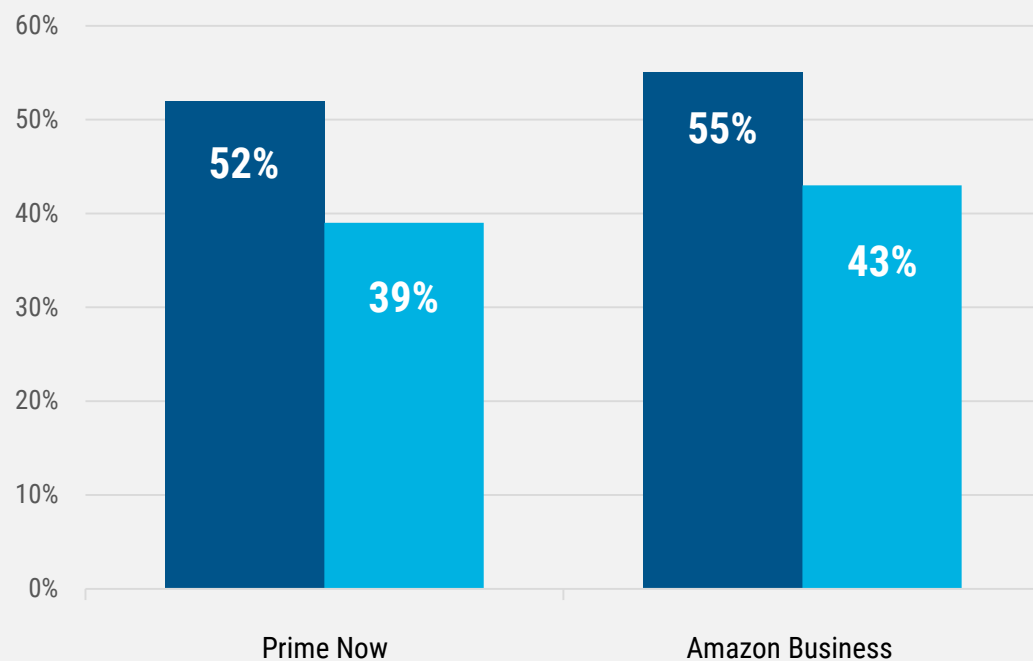
What is the outlook for private label in the US market (maximum penetration) and do consumer insights support the repositioning of existing brands or creating new brands? How do branded players compete and how to private label suppliers capitalize on this growth?

# CRC members outperforming the competition on Amazon

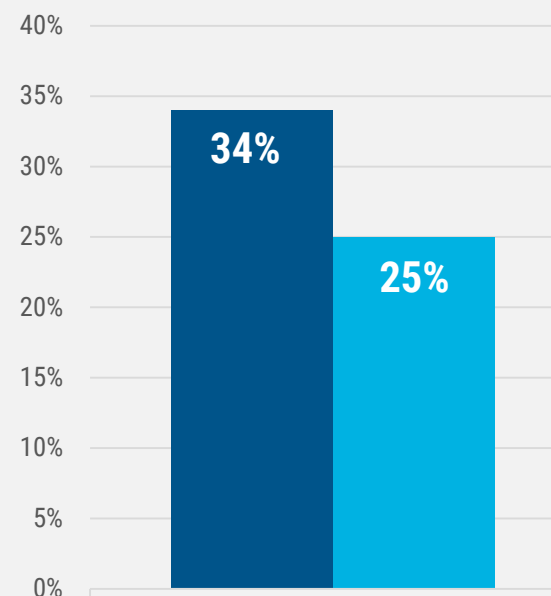
■ members

■ non-members

2018 Growth for Amazon Programs Participated in for 1+ Years  
*All Categories*



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

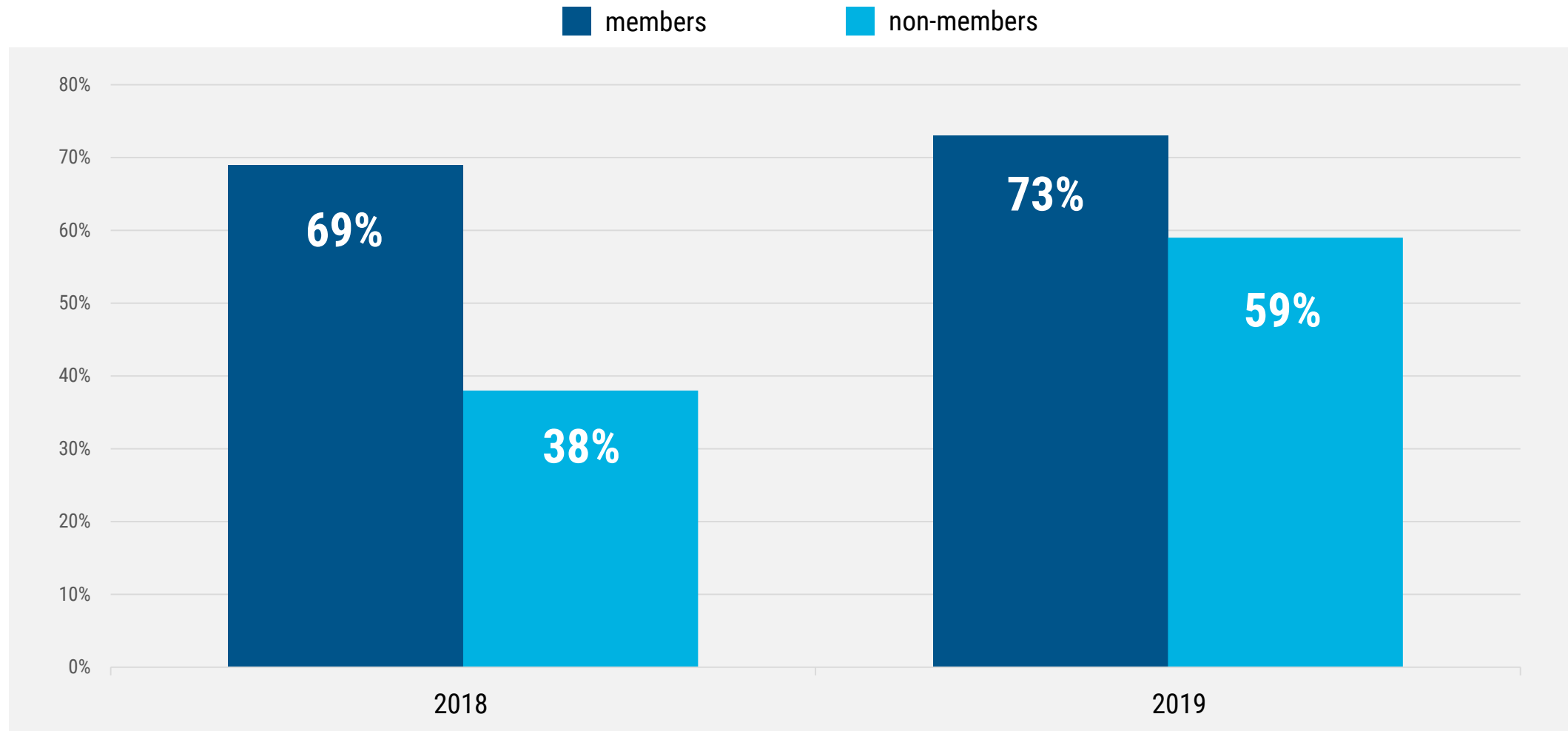


Amazon has become an incredibly dynamic, challenging account to work on. Our council members feel more prepared though, with 34% indicating they feel better on both growth and profitability in 2019 compared to non-council members.



# Estimated growth rate for Walmart.com, 2019 vs. 2018, *CPG companies*

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.

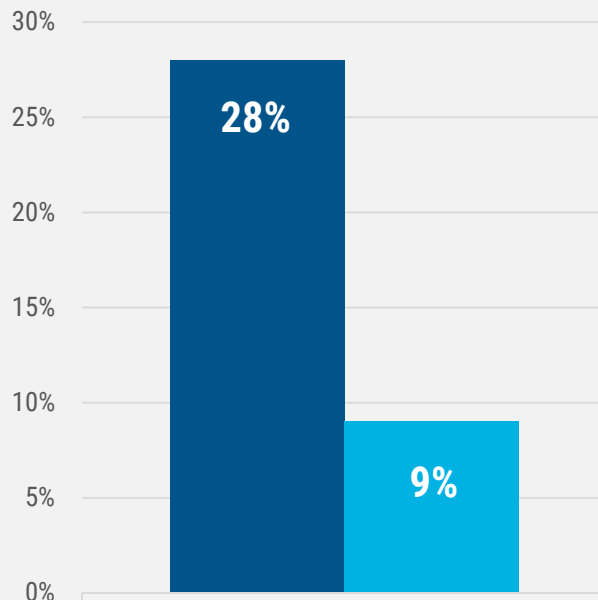


# CRC members outperforming the competition on Walmart.com

■ members

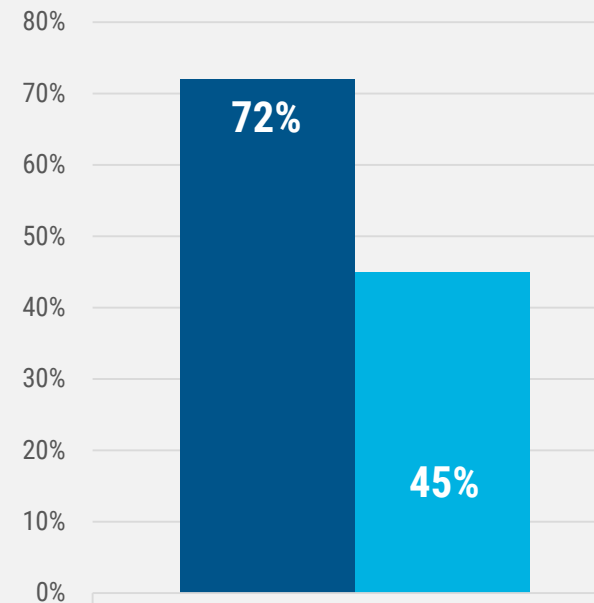
■ non-members

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



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 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



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.



# Market Research 2020 Event Calendar

CRC conferences offer high-level thought leadership and ground-level action items. 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 inspirational solutions. From suppliers to distributors, manufacturers and resellers, large and small brands, companies and colleagues, CRC events help empower intelligent business decisions. *Dates are subject to change.*



## January

**Macroeconomic** Webinar  
January 15  
**Home Improvement** Roundtable  
January 29 & 30 | Atlanta, GA



## February

**eCommerce** LiveCast  
February 5  
**Foodservice** Distribution Webinar  
February 21  
**Retail** Walmart Year Beginning Webinar  
Date TBA



## March

**Foodservice** Sysco Roundtable  
March 12 | Houston, TX  
**eCommerce** LiveCast  
March 18  
**eCommerce** Roundtable  
March 25 & 26 | Phoenix, AZ  
**Retail** Kroger Forum  
Date TBA



## April

**Foodservice** Non-Commercial Roundtable  
April 9 | Cleveland, OH  
**eCommerce** LiveCast  
April 29  
**Home Improvement** Roundtable  
April 29 & 30 | Charlotte, NC  
**Home Improvement** Webinar  
Date TBA  
**Retail** Aldi/Hard Discount Webinar  
Date TBA



## May

**eCommerce** Roundtable  
May 14  
**Foodservice** Non-Commercial Webinar  
May 15  
**eCommerce** Roundtable  
Date TBA | Boston, MA



## June

**eCommerce** LiveCast  
June 10  
**Foodservice** US Foods Roundtable  
June 11 | Chicago, IL  
**Retail** Summit  
Date TBA | Chicago, IL



## July

**Foodservice** 2H20 Forecast Webinar  
July 1  
**eCommerce** LiveCast  
July 22  
**Home Improvement** Roundtable  
July 29 & 30 | Atlanta, GA  
**Retail** Club Webinar  
Date TBA  
**Home Improvement** Webinar  
Date TBA  
**eCommerce** Roundtable  
Date TBA | Cleveland, OH



## August



## September

**eCommerce** LiveCast  
September 2  
**Foodservice** Forum  
September 30 | Chicago, IL  
**Retail** Costco Forum  
Date TBA | Seattle, WA



## October

**Retail** Walmart Forum  
October 8 | Bentonville, AR  
**eCommerce** LiveCast  
October 14  
**eCommerce** Summit  
October 22 | San Diego, CA  
**Home Improvement** Roundtable  
October 28 & 29 | Charlotte, NC  
**Home Improvement** Webinar  
Date TBA



## November

**eCommerce** Roundtable  
November 5 | Dallas, TX  
**eCommerce** LiveCast  
November 18  
**Foodservice** Restaurant Webinar  
November 20



## December

**Foodservice** PFG Roundtable  
December 9 | Richmond, VA  
**Home Improvement** Summit  
December 10 | Atlanta, GA  
Holiday **Retail** in Real-Time Webinar  
Date TBA



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