

NOW ON

Disruptor or Disrupted?



Join the slack network for Q&A:
cutt.ly/commerce_live

Moderator:



Bryan Wiener

Former CEO, 360i
Comscore;
Board of Directors,
Cars.com;
Advisor, Profitero

Panelists:



Amy Calhoun

VP of Marketing, Hello Products



Jeremy Dodge

Head of eCommerce & Digital
Marketing, No Cow



Ken Barraza

Director of Digital Marketing &
eCommerce, JUST Water



Kelly Olin

Head of Global eCommerce
Acceleration, General Mills

**eComm has changed
the game**

No barriers to entry = Endless competition

Keyword:
"cereal bar"

327

Kroger store
1606 Memorial Dr.
Waycross, GA
31501

3,000

Amazon.com

Keyword:
"laundry detergent"

172

Kroger store
1606 Memorial Dr.
Waycross, GA
31501

4,000

Amazon.com

Keyword:
"cat food"

367

Kroger store
1606 Memorial Dr.
Waycross, GA
31501

5,000

Amazon.com

Keyword:
"men's
deodorant"

111

Kroger store
1606 Memorial Dr.
Waycross, GA
31501

9,000

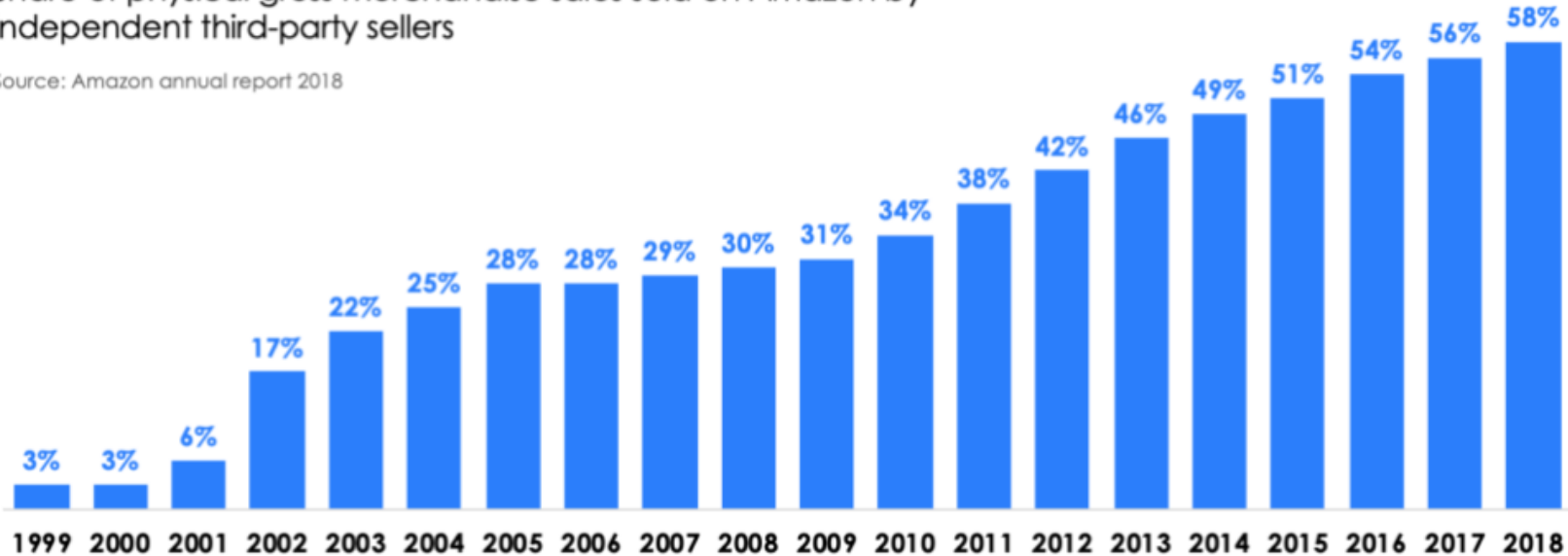
Amazon.com

Marketplaces have democratized distribution and consumer access for independent brands

Amazon's 3P sales trend

Share of physical gross merchandise sales sold on Amazon by independent third-party sellers

Source: Amazon annual report 2018



Algorithmic retail has democratized who wins and who loses in the category

Factors influencing Amazon's algorithms



Source: Tinutii

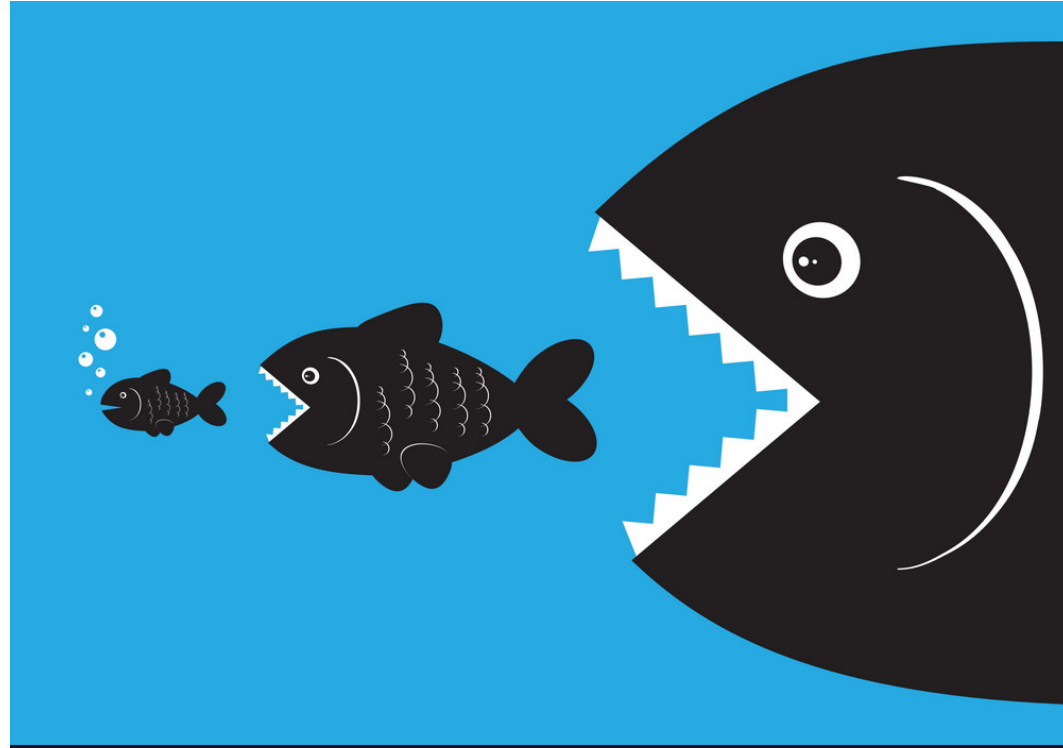
- **Category captaincy don't matter ... it's all about "meritocracy" (i.e. sales velocity)**
- **Self-service marketing tools enables brands to control their own destiny** (Amazon Advertising, A+ content, Amazon Posts, Promotions, Vine Reviews)
- **Amazon has traditionally favored 3P sellers with better analytics**
- **Democracy is spreading** (Walmart, Target are adopting self-service models)

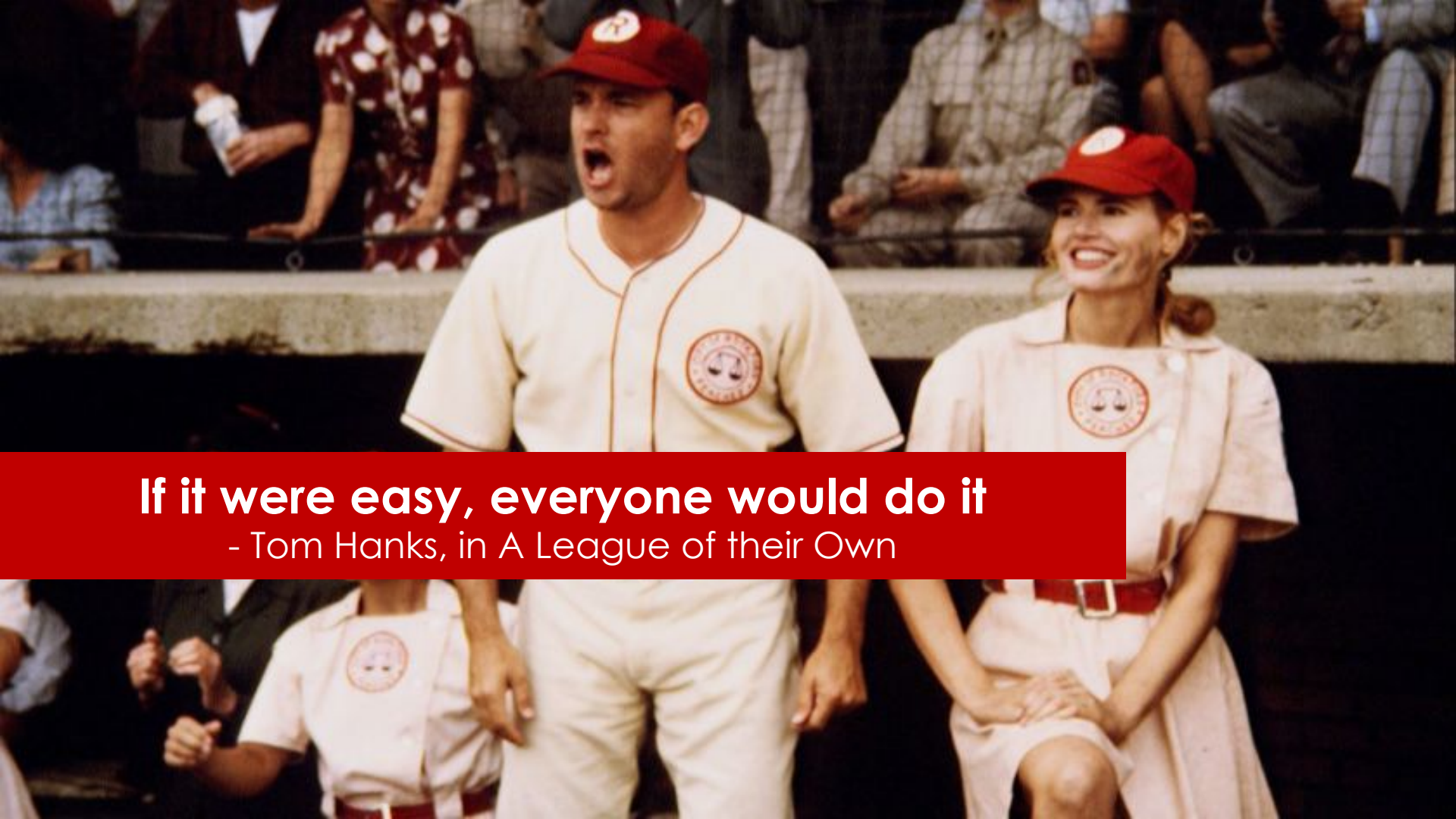
DTC has democratized consumer data, creating fast feedback loops for brands



What this means ...

- 1 Disruption is constant
- 2 Speed kills
- 3 Structure for agility





If it were easy, everyone would do it

- Tom Hanks, in A League of their Own

Panel discussion