L2

DIGITAL IQ INDEX®

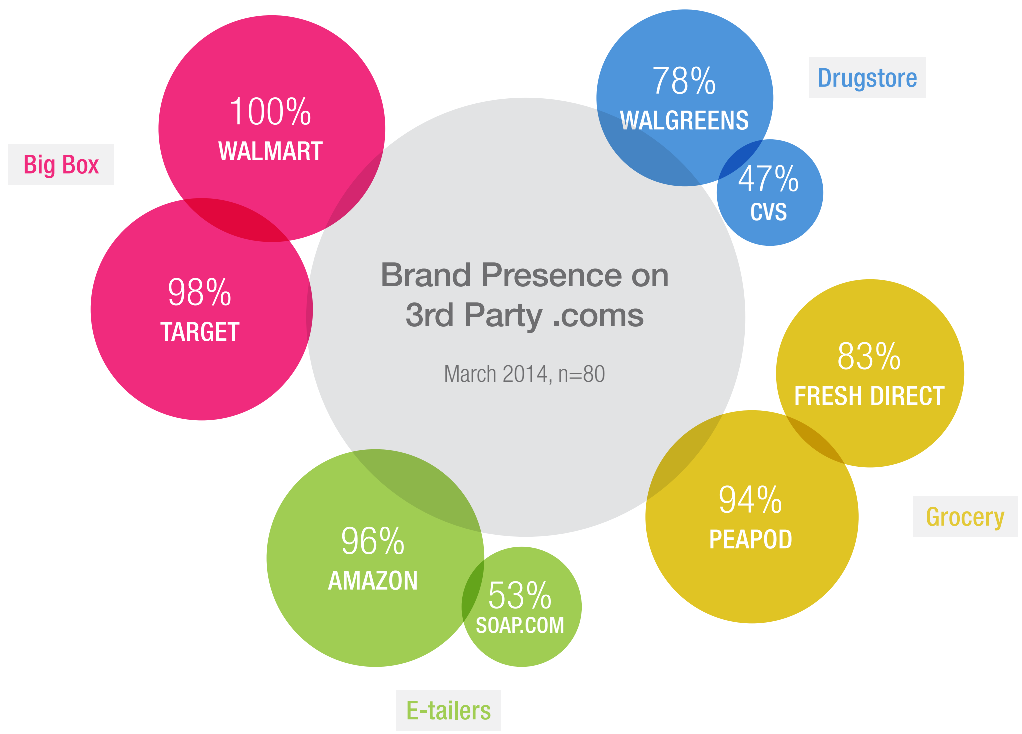
FOOD

May 12, 2014

Watch the Video

Influence

The $321 billion U.S. packaged food market's appetite for digital is increasing. Eighty-six million Americans visited food and recipe sites in November 2013[1] and digital channels are starting to have an impact across the purchase funnel. Thirty-eight percent of grocery shoppers spend at least half of their planning time online and one in three shoppers utilize email when planning a trip to the store.[2] Once in store, digital influence increases: 90 percent of smartphone shoppers use their device in aisle[3], searching for recipes (37 percent), looking for coupons (24 percent), and researching nutritional information (19 percent).[4]



1. "Cooking Websites are Recipe for Success", BakeMag.com, January 9, 2104.
2. "Digital Resistance: Will the U.S. Warm to Online Groceries," MediaPost, Sarah Mahoney, June 5, 2013.
3. "Mobile In-Store Research: How In-Store Shoppers are Using Mobile Devices", Google Shopper Marketing Council, April 2013.
4. "Grocery shoppers research online, but still prefer physical stores," Nicholas Joseph, Researchscape, June 13, 2013.

Online Wars

Although e-commerce represents just 3.3 percent of grocery, analysts expect that share to explode by 6.7 to 16.9 percent in the next decade.[1] Stop and Shop's Peapod currently leads the market with $550 million in revenues in 2013[2] and an estimated 8.7 percent share of the e-grocery market. Rival Fresh Direct trails with 5.8 percent.[3] However, Amazon and Walmart are lurking, and several recent announcements suggest widespread investment in grocery is imminent. Walmart is piloting a store in Denver, CO where users can pick up online orders without leaving their car. In addition, in-store pick-up is available through 11 store locations.[4] Although Walmart is the market leader in U.S. grocery,[5] its in-store shoppers prefer Amazon for online ordering.[6] The Everything Store is rumored to be extending its AmazonFresh program to 20 urban areas by the end of 2014.[7] As households await the launch of AmazonFresh in their area, Amazon Prime Pantry lets Prime members order popular household essentials in everyday sizes (half of Index brands are available).[8]

1. "Grocery 3.0: Boulder County firms riding rising tide of online delivery," Alicia Wallace, Daily Camera, March 10, 2014.
2. Internet Retailer Top 500 Web Retailers.
3. "Online Grocery Sales in the U.S.," Ibis World, December 2013.
4. "Wal-Mart to Build Online Grocery Pick-Up Center in Bentonville," The City Wire, Kim Souza, April 30, 2014.
5. Walmart 2013 Annual Report.
6. "Wal-Mart's In-Store Shoppers Prefer Amazon.com—Not Walmart.com", MarketWatch The Wall Street Journal, Andria Cheng, April 4, 2014.
7. "Amazon Plans Big Expansion of Online Grocery Business," Altair Barr, Reuters, June 4, 2013.
8. "Amazon Wants to Ship You Small-Sized Grocery Items… in Bulk," VentureBeat, Kia Kokalitcheva, April 23, 2014.

Digital Divide

There are isolated success stories, however many brands are just starting to invest online:

- While 90 percent of consumers use their mobile phones when shopping for grocery[1], 43 percent of brands do not have a mobile-optimized site.
- Only half of brands are investing in content on product detail pages on Amazon and Walmart.com. Furthermore, 81 percent fail to redirect the customer from their brand site to an authorized e-tailer.
- More than half of brands (57 percent) are not purchasing branded key words on Google, failing to take advantage of valuable search real estate.
- Despite heavy investment on traditional media, the majority of food brands still fail to feature a digital call to action, even in costly Superbowl ad campaigns.
- Four in five brands fail to feature user reviews on their sites, missing the opportunity to increase search engine optimization and drive purchase decision online and in the grocery aisle.

40 Million First Baskets

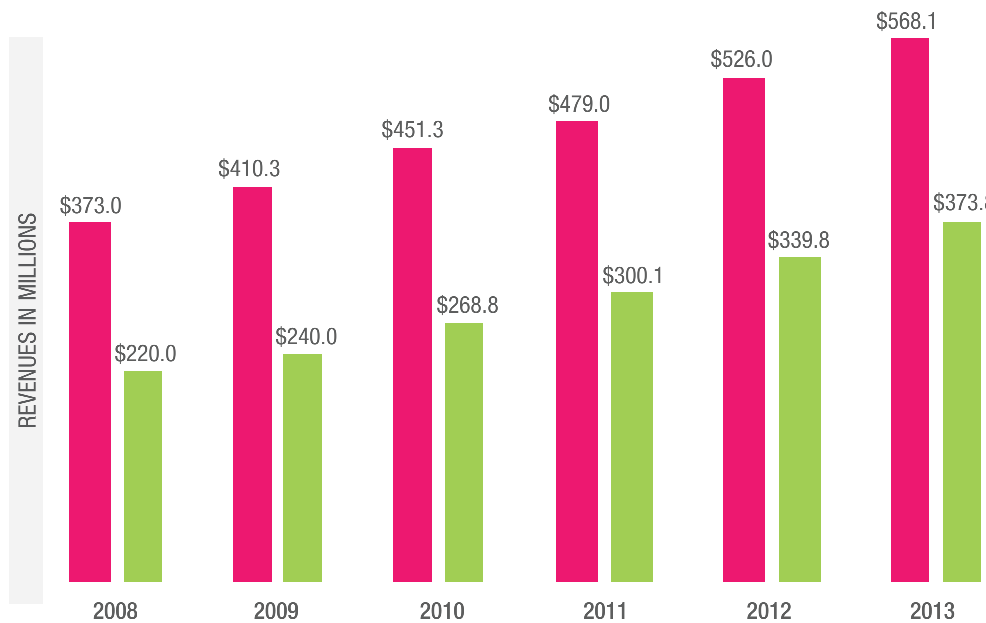
Within the next year, a third of U.S. households will try online grocery shopping for the first time.[2] Once a customer completes an e-grocery order, they are likely to buy 25 percent of future purchases from the Internet.[3] Furthermore, once a product is added to a customer's basket it is more likely to be repurchased, shifting the conversion algorithm from a one-time impulse at shelf/end-cap to a much larger liftetime value proposition. In the UK, a more mature online grocery market, British consumers spend 43 percent more, on average, when purchasing groceries through both channels (£53) vs. single channel shoppers who average just £37.[4]

1. "Mobile In-Store Research: How In-Store Shoppers are Using Mobile Devices", Google Shopper Marketing Council, April 2013.
2. "The Online Grocery Shopper," Hartman Group, 2013.
3. "Ocado Coming of Age," James Tracey and Marc de Speville, Redburn, May 13, 2013.
4. "The omnichannel opportunity, Unlocking the power of the connected consumer," Deloitte, A Report for eBay, February 2014.

Online Grocery U.S. Annual Revenues

2008-2013

Peapod Fresh Direct



Digital IQ = Shareholder Value

This study attempts to quantify the digital competence of 80 packaged food brands in the U.S. market. Our aim is to provide a robust tool to diagnose digital strengths and weaknesses, helping managers achieve greater return on incremental investment. Like the medium we are assessing, our approach is dynamic. Please reach out with comments that improve our methodology and findings. You can reach me at Scott@L2ThinkTank.com.

Scott Galloway
Founder, L2

ABOUT THE RANKING

DIGITAL IQ INDEX® **FOOD**

L2

Methodology

SITE & E-COMMERCE

35%

EFFECTIVENESS OF BRAND SITE & E-COMMERCE INVESTMENTS

Technology:
Load Time, Analytics, Interactivity, Video

Search & Navigation:
SUser Interface, Navigation, Site Search

Customer Service:
Store Locator, FAQ, Contact Us, Live Chat

Product Page & Content Investments:
Product Details, User Reviews, Nutritional Information, Recipe Content

Account & Loyalty Programs: Personalization, Functionality, Technology

E-Tailer & E-Grocery Investments: Discoverability, Product Pages on E-Tailer and Online Grocers

DIGITAL MARKETING

30%

SEARCH, DISPLAY, AND EMAIL MARKETING EFFORTS

Search:
Traffic, Web Authority, SEO/SEM

Advertising and Innovation:
Display, Retargeting, Cross-Platform Initiatives, Sponsorships on Recipe Sites

Blog & Other User-Generated Content:
Mentions, Sentiments

Email:
Ease of Sign-Up, Frequency, Segmentation, Trigger Emails

SOCIAL MEDIA

20%

BRAND PRESENCE, COMMUNITY SIZE, CONTENT, AND ENGAGEMENT

Facebook:
Size, Growth, Programming, Responsiveness, Engagement

YouTube:
Search Visibility, Channel Experience, Video Views

Twitter:
Size, Growth, Tweet Frequency, Online Voice, Engagement

Instagram:
Size, Growth, Programming, Engagement

Emerging Social Media:
Pinterest, Google+

MOBILE

15%

COMPATIBILITY, OPTIMIZATION, AND MARKETING ON SMARTPHONES AND TABLETS

Smartphone Experience:
Compatibility, Functionality, Store Locator

Tablet Experience:
Compatibility, Responsiveness, UI/UX Optimization

Mobile Search:
SEO, SEM, Localization

Mobile Innovation:
Mobile Applications (iPhone, Mobile Applications (iPhone, iPad, Android), Third-Party Couponing Apps, Other Mobile/ Geolocal Initiatives

Classification

GENIUS 140+

Digital competence is a point of competitive differentiation for these brands. Creatively engineered messaging reaches travelers on a variety of devices and in many online environments.

GIFTED 110–139

Brands are experimenting and innovating across site, mobile, and social platforms. Digital presence is consistent with brand image and larger marketing efforts.

AVERAGE 90–109

Digital presence is functional yet predictable. Efforts are often siloed across platforms.

CHALLENGED 70–89

Limited or inconsistent adoption of mobile and social media platforms. Sites lack inspiration and utility.

FEEBLE <70

Investment does not match opportunity.

DIGITAL IQ RANKING

DIGITAL IQ INDEX® **FOOD**

IN THE COMPANY OF GENIUS | **GIFTED** | **AVERAGE**

RANK	BRAND	DIGITAL IQ
1	General Mills Inc	150
1	Kellogg Co	150
3	General Mills	135
4	Kraft Foods Group	129
5	Unilever Group	121
5	MCCORMICK & CO INC	121
7	Chobani	120
7	PepsiCo	120
9	General Mills	115
9	Hershey Co.	115
9	Weight Watchers International	115
12	Barilla Holding	114
12	Kellogg Co.	114
12	Groupe Danone	114
15	Unilever Group	112
16	Mead Johnson Nutrition Co	108
17	Clif Bar & Co.	104
17	Kraft Foods Group	104
19	Land O' Lakes	103
20	Campbell Soup Co.	101
21	Mondeléz International	100

GENIUS
Betty Crocker
Kellogg's
GIFTED
Pillsbury
Kraft
Ben & Jerry's
McCormick
Chobani
Quaker Oats
Cheerios
Hershey's
Weight Watchers
Barilla
Kashi
Stonyfield Farms
Knorr
AVERAGE
Enfamil
Clif Bar
Velveeta
Land O'Lakes
Campbell's
Oreo
Hellmann's
Lay's
Dole
Philadelphia
Coffee-mate
Earth's Best
Hormel
M&M's
Gerber
Snickers
Amy's Kitchen
Earthbound Farm
Johnsonville
Similac
Ragu
Reese's
Tyson
CHALLENGED
Kit Kat
Nature Valley
Pepperidge Farm
Jack Link's
Häagen-Dazs
Horizon Organic
Magnum
Doritos
Green Giant
Little Debbie
Yoplait
Cheez-It
Oscar Mayer
Pringles
Stouffer's
Birds Eye
Jimmy Dean
Del Monte
DiGiorno
Heinz
Post
Breyers
Keebler
Tostitos
Dannon
Sargento
Cheetos
Hot Pockets
Progresso
FEEBLE
Planters
Entenmann's
Fresh Express
Marie Callender's
Hillshire Farm
Wrigley's
Dreyer's/Edy's
Ruffles
Totino's
Thomas
Fritos
Nature's Own
Banquet

DIGITAL IQ RANKING

DIGITAL IQ INDEX® **FOOD**

AVERAGE **CHALLENGED**

RANK	BRAND	DIGITAL IQ
22	Hellmann's Unilever Group	99
22	Lay's PepsiCo	99
24	Dole Dole Food Co.	98
24	Philadelphia Kraft Foods Group	98
26	Coffee-mate Nestlé	97
26	Earth's Best Hain Celestial Group	97
26	Hormel Hormel Foods Corp.	97
29	M&M's Mars	96
30	Gerber Nestlé	95
30	Snickers Mars	95
32	Amy's Amy's Kitchen	94
33	Earthbound Farm Organic Earthbound Farm	93
33	Johnsonville Johnsonville Sausage	93
33	Similac Abbott Laboratories	93
36	Ragú Unilever Group	90
36	Reese's Hershey Co.	90
36	Tyson Tyson Foods	90
39	Kit Kat Hershey Co.	89
39	Nature Valley General Mills	89
39	Pepperidge Farm Campbell Soup Co.	89
42	Jack Link's Beef Jerky Link Snacks	88

GENIUS
Betty Crocker
Kellogg's
GIFTED
Pillsbury
Kraft
Ben & Jerry's
McCormick
Chobani
Quaker Oats
Cheerios
Hershey's
Weight Watchers
Barilla
Kashi
Stonyfield Farms
Knorr
AVERAGE
Enfamil
Clif Bar
Velveeta
Land O'Lakes
Campbell's
Oreo
Hellmann's
Lay's
Dole
Philadelphia
Coffee-mate
Earth's Best
Hormel
M&M's
Gerber
Snickers
Amy's Kitchen
Earthbound Farm
Johnsonville
Similac
Ragu
Reese's
Tyson
CHALLENGED
Kit Kat
Nature Valley
Pepperidge Farm
Jack Link's
Häagen-Dazs
Horizon Organic
Magnum
Doritos
Green Giant
Little Debbie
Yoplait
Cheez-It
Oscar Mayer
Pringles
Stouffer's
Birds Eye
Jimmy Dean
Del Monte
DiGiorno
Heinz
Post
Breyers
Keebler
Tostitos
Dannon
Sargento
Cheetos
Hot Pockets
Progresso
FEEBLE
Planters
Entenmann's
Fresh Express
Marie Callender's
Hillshire Farm
Wrigley's
Dreyer's/Edy's
Ruffles
Totino's
Thomas
Fritos
Nature's Own
Banquet

DIGITAL IQ RANKING

DIGITAL IQ INDEX® **FOOD**

L2

CHALLENGED

RANK	BRAND	DIGITAL IQ
43	Häagen-Dazs Nestlé	87
44	Horizon Organic WhiteWave Foods Co.	86
45	Magnum Unilever Group	85
46	Doritos PepsiCo	84
46	Green Giant General Mills	84
46	Little Debbie McKee Foods Corp.	84
46	Yoplait General Mills	84
50	Cheez-It Kellogg Co.	83
50	Oscar Mayer Kraft Foods Group	83
52	Pringles Kellogg Co.	82
52	Stouffer's Nestlé	82
54	Birds Eye Pinnacle Foods	81
54	Jimmy Dean Hillshire Brands Co.	81
56	Del Monte Del Monte Foods	80
56	DiGiorno Nestlé	80
56	Heinz Heinz Co. H.J.	80
56	Post Post Holdings	80
60	Breyers Unilever Group	79
61	Keebler Kellogg Co.	77
61	Tostitos PepsiCo	77
63	Dannon Groupe Danone	76

GENIUS
Betty Crocker
Kellogg's
GIFTED
Pillsbury
Kraft
Ben & Jerry's
McCormick
Chobani
Quaker Oats
Cheerios
Hershey's
Weight Watchers
Barilla
Kashi
Stonyfield Farms
Knorr
AVERAGE
Enfamil
Clif Bar
Velveeta
Land O'Lakes
Campbell's
Oreo
Hellmann's
Lay's
Dole
Philadelphia
Coffee-mate
Earth's Best
Hormel
M&M's
Gerber
Snickers
Amy's Kitchen
Earthbound Farm
Johnsonville
Similac
Ragu
Reese's
Tyson
CHALLENGED
Kit Kat
Nature Valley
Pepperidge Farm
Jack Link's
Häagen-Dazs
Horizon Organic
Magnum
Doritos
Green Giant
Little Debbie
Yoplait
Cheez-It
Oscar Mayer
Pringles
Stouffer's
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Del Monte
DiGiorno
Heinz
Post
Breyers
Keebler
Tostitos
Dannon
Sargento
Cheetos
Hot Pockets
Progresso
FEEBLE
Planters
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Fresh Express
Marie Callender's
Hillshire Farm
Wrigley's
Dreyer's/Edy's
Ruffles
Totino's
Thomas
Fritos
Nature's Own
Banquet

DIGITAL IQ RANKING

DIGITAL IQ INDEX® **FOOD**

CHALLENGED **FEEBLE**

RANK	BRAND	DIGITAL IQ
63	Sargento Foods	76
65	PepsiCo	75
66	Nestlé	73
67	General Mills	72
68	Kraft Foods Group	69
69	Grupo Bimbo	68
69	Chiquita Brands International	68
71	ConAgra Foods	62
72	Hillshire Brands Co.	60
72	Mars	60
74	Nestlé	59
74	PepsiCo	59
74	General Mills	59
77	Grupo Bimbo	56
78	PepsiCo	51
79	Flowers Foods	44
80	ConAgra Foods	37

GENIUS
Betty Crocker
Kellogg's
GIFTED
Pillsbury
Kraft
Ben & Jerry's
McCormick
Chobani
Quaker Oats
Cheerios
Hershey's
Weight Watchers
Barilla
Kashi
Stonyfield Farms
Knorr
AVERAGE
Enfamil
Clif Bar
Velveeta
Land O'Lakes
Campbell's
Oreo
Hellmann's
Lay's
Dole
Philadelphia
Coffee-mate
Earth's Best
Hormel
M&M's
Gerber
Snickers
Amy's Kitchen
Earthbound Farm
Johnsonville
Similac
Ragu
Reese's
Tyson
CHALLENGED
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Dreyer's/Edy's
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Totino's
Thomas
Fritos
Nature's Own
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KEY FINDINGS MOBILE

DIGITAL IQ INDEX® **FOOD**

Mobile & Tablet

In the past year, U.S. smartphone adoption grew 24 percent and tablet users increased by 57 percent[17]. Ninety percent of smartphone owners use their smartphone in-store for grocery shopping[18]. On smartphones, half of shoppers chose the brand site as the destination for in-store research, looking for retail locations (39 percent), promotional offers (38 percent), or price comparisons (30 percent)[19].

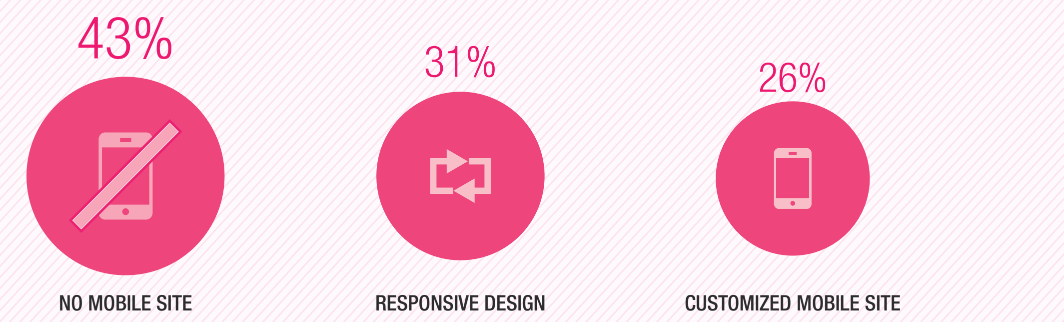
Fifty-seven percent of Index brands have a mobile-optimized brand site. Food brands favor responsive design (31 percent) over a separate mobile domain (26 percent), more than peers in Personal Care and Home Care, at 43 percent and 36 percent, respectively. Brands have yet to invest in basic mobile functionality such as click to call (only 70 percent of sites), touch and swipe technology (43 percent) or geolocation (24 percent). Less than 20 percent of brands have a mobile-specific shopping list tool.

Consumers turn to their tablets when searching for recipes or following instructions while cooking—engaging with the device for a prolonged period of time as they prepare a meal[20]. On tablet, brands largely default to the desktop site, missing the opportunity to bring recipe content to the forefront. Ben & Jerry's, Betty Crocker, DiGiorno, Gerber, Kashi, McCormick, Pillsbury, and Sargento have made tablet-specific customizations, using responsive design. Sixty-eight percent of brands have optimized dropdown menus by employing iOS defaults. A third of brands offer swipe support on the home page or throughout the collection pages. Swipeable product images and fluid grid galleries, functionality common on Specialty Retail sites, are absent from the Food category.

17. "U.S. Digital Future in Focus 2014", ComScore, 2014.
18. "Mobile In-Store Research: How In-Store Shoppers are Using Mobile Devices", Google Shopper Marketing Council, April 2013.
19. Ibid.
20. "Understanding Tablet Use: A Multi-Method Exploration", Google, Hendrick Muller, Jennifer L. Grove and John S. Webb, 2012.

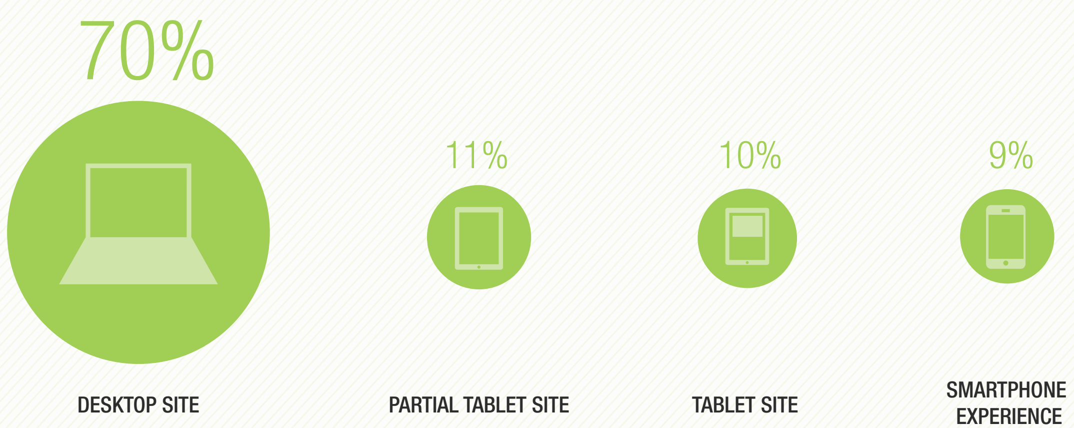
Food: Site Configuration on Smartphone

March 2014, n=80



Food: Site Configuration on Tablet

March 2014, n=80



Digital Coupons

Digital coupons have seen a surge in popularity. In 2013, redemptions topped 66 million, up 141 percent year on year. Approximately 40 percent of all coupons were redeemed on food products[21]. Digital coupons average redemption rates of 14 percent, outpacing print coupons that tally rates of just 1 percent.[22]

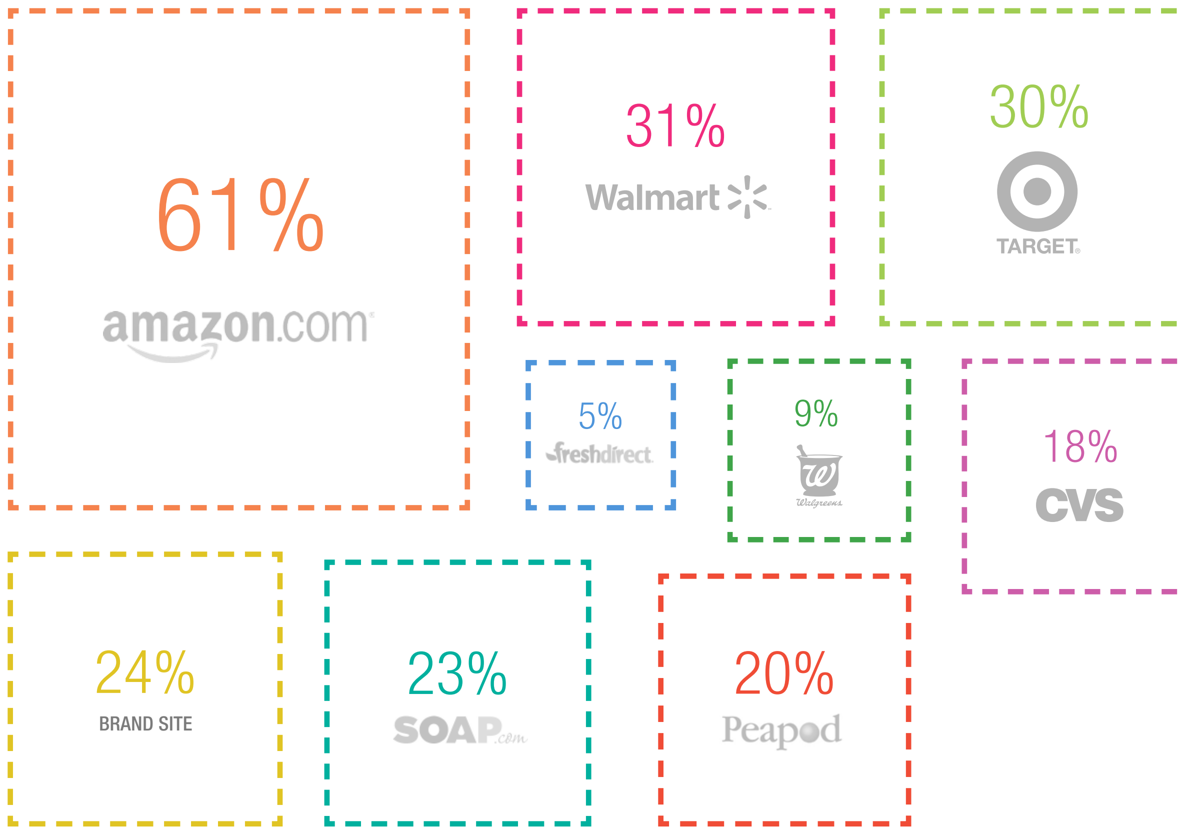
Only 24 percent of Food brands had coupons available on their brand sites during our data collection period, even though 36 percent had a dedicated coupon section in the main site navigation. Even where digital coupons were available, brands failed to capitalize on social or email sharing. Just nine requested customer data in exchange for coupon access. Although 74 percent of female shoppers report obtaining coupons from email promotions, just 5 percent of branded Food emails highlighted coupon.[23]

E-tailer sites have more coupon availability. Sixty-one percent of Food brands offered a “clippable” e-coupon on Amazon.com. Availability through Walmart.com and Target.com is more limited, with less than a third of brands offering coupons during our collection period. These multichannel retailers are missing out on a major opportunity as 64 percent of coupon-savvy consumers have reported searching for digital coupons while in-store on a shopping trip.[24]

Food: Digital Coupon Availability

Percentage of Brands with Active Coupons

March 2014, n=80



21. InMar Releases Coupon Trends for 2013, PRWeb, January 15, 2014.
22. NCH Coupon Facts Report, 2014.
23. “From Clipping to Clicking: How Today’s Consumers are Adapting to New, Emerging Forms of Coupons, ” Google Think Insights, June 2013.
24. 2K14 Shopper Marketing Report, Valassis.

Social Media Landscape

Index Food brands have heavily invested in social media. Forty-eight percent maintain an active presence on each of the four major platforms (Facebook, Twitter, YouTube, and Instagram). Sixty-one percent of Food brands have launched a presence on foodie-haven Pinterest, with 10 percent prioritizing Pinterest over Instagram. Despite reaching parity in community size, engagement rates on Instagram are 27 times those of Pinterest.

Facebook is the platform of choice, with an average community size of 2.1 million, more than ten times the size of the next largest platform, Google+. Food Facebook communities dwarf those of other industries. The average Food Facebook page is 2.5 times larger than the average Personal Care page and receives 47 percent higher engagement. Oreo (35 million likes), Snickers, Reese's, and M&M's boast Facebook communities of more than 10 million followers, and 44 percent of Index brands maintain a Facebook page with more than one million fans.

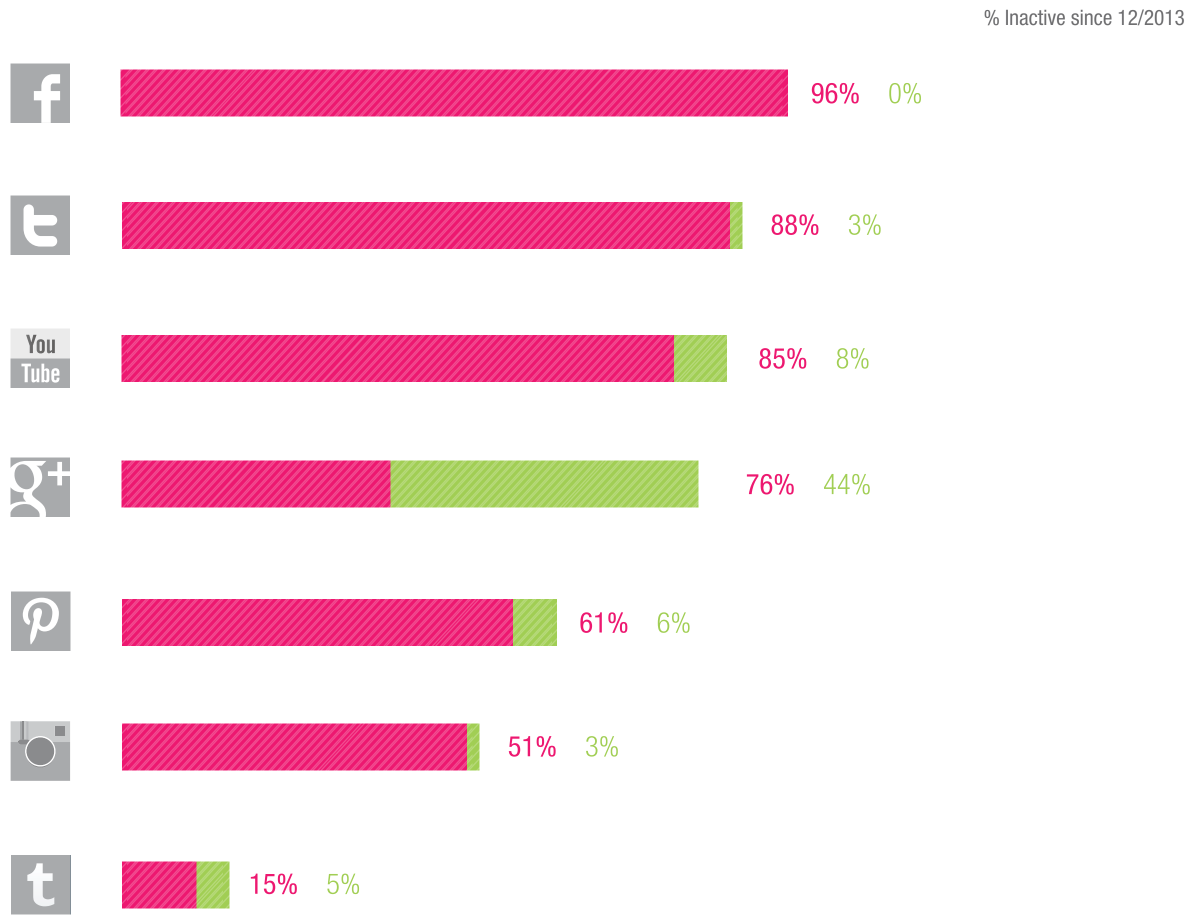
In many cases, social media investments trump site and other owned destinations. For example, Cheetos redirects to its Facebook page from its brand site. Doritos registers more than five million monthly video views on their YouTube channel compared with fewer than 1 million unique visitors on its brand site[25].

Food: Social Media Adoption

Percentage of Brands with Official Presence by Platform

February 2014, n=80

Brand Presence   Accounts Inactive



25. Compete.com

E-Commerce Handoff

Amy's Kitchen, Clif Bar, Earth's Best, Earthbound Farm, Enfamil, Jack Link's, Kashi, Quaker Oats, and Similac offer a direct-to-consumer e-commerce experience from a brand e-store. Forgoing the best practice of merging e-commerce capabilities on the brand site, these e-stores live separately from the brand site with limited content and integration.

Relative to peers in Home Care and Personal Care, Food brands do not see their brand sites as e-commerce funnels. A staggering 81 percent do not direct the customer to an e-tailer from their brand site, compared with just 27 percent and 17 percent of Personal Care and Home Care brands, respectively. Unilever is the strongest in this regard, linking to product pages on retail partners for its Hellmann's and Knorr brands. Coffee-mate, Gerber, Keebler, and Kellogg's direct consumers to a brand-owned page on e-tailer sites.

"A staggering 81 percent do not direct the customer to an e-tailer from their brand site."

Food: E-Commerce Sophistication

Percentage of Brands with the Following

March 2014

Food, n=80 | Personal Care, n=75 | Home Care, n=56

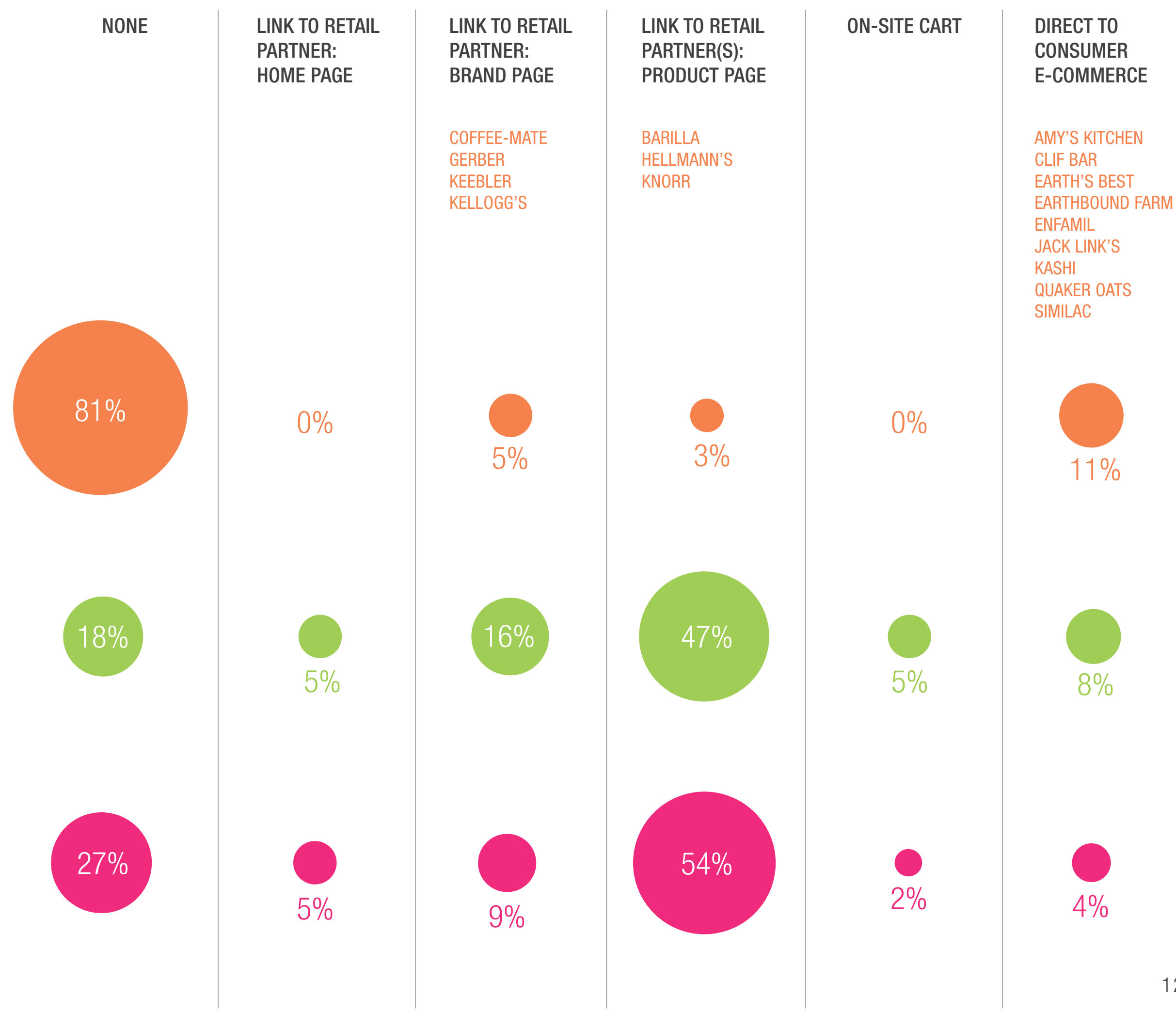


TABLE OF CONTENTS

DIGITAL IQ INDEX® **FOOD**

Click to jump to:

Click logo to return here.

ABOUT L2

DIGITAL IQ INDEX® FOOD

L2 is a think tank for digital innovation.

We are a membership organization that brings together thought leadership from academia and industry to drive digital marketing innovation.

RESEARCH

Digital IQ Index®: The definitive benchmark for online competence, Digital IQ Index® reports score brands against peers on more than 600 quantitative and qualitative data points, diagnosing their digital strengths and weaknesses.

L2 Collective®: Series of benchmarking reports designed to help member brands better understand resources, human capital, budgets, and priorities supporting digital strategies.

EVENTS

Forums: Big-picture thinking and game-changing innovations meet education and entertainment. The largest gatherings of prestige executives in North America.
300+ attendees

Clinics: Executive education in a classroom setting with a balance of theory, tactics, and case studies.
120–180 attendees

Working Lunches: Members-only lunches led by digital thought leaders and academics. Topic immersion in a relaxed environment that encourages open discussion.
40–80 attendees

CONSULTING

Advisory Services: L2 works with brands to garner greater return on investment in digital initiatives. Advisory work includes Digital Roadmaps, Social Media Strategy, and Organizational Strategy engagements.

MEMBERSHIP

For membership info and inquiries: membership@L2ThinkTank.com

Upcoming Events

LUNCH: BEAUTY & FASHION: CHINA
May 20, 2014 · New York

LUNCH: WEARABLES
June 03, 2014 · New York

BREAKFAST: MOBILE & TABLETS
June 03, 2014 · London

LUNCH: MOBILE & TABLETS
June 05, 2014 · Paris

BREAKFAST: MOBILE & TABLETS
June 06, 2014 · Geneva

CLINIC: SOCIAL IS MEDIA
June 12, 2014 · New York

BREAKFAST: OMNICHANNEL
June 25, 2014 · New York

Upcoming Research: Q2 2014

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Hotels
Auto

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Wearables
Amazon
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