# Retail and Wholesale Trade: Practical Experience in the Use of Corporate Data

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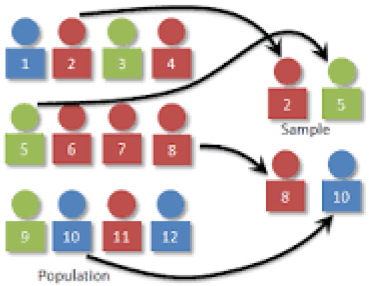
# Let’s start with a little bit of background…

**Respondent Burden**
Manual reporting can impose a burden on firms participating in the voluntary PPI survey




**Periodic Sampling Limitations**
Limited understanding of product changes over time makes it difficult to maintain representative samples in dynamic industries

**Large Transaction Volumes**
Collecting representative prices for industries with large transaction volumes, broad product inventories, and rapidly changing inventories is challenging

## Need for Alternative Data Collection

Cloud-based enterprise resource planning systems

Real-time inventory management platforms


Transaction processing programs

Firms maintain increasingly detailed transactional records

# Corporate Data

## WHAT

- Large set of transaction level data provided by a sampled firm
- A report that the firm already maintains
- Contains prices, costs, quantities, and product identifiers

## WHY

- Reduces respondent burden while increasing available data
- Allows development of more representative transaction groupings
- Improves insight into index movements and drivers of price change

# Corporate Data in Retail and Wholesale Trade

Retail and wholesale trade PPIs measure changes in gross margins

Stable product definitions, recurring transactions, and sufficient detail are needed to evaluate margins over time


## Ideal Candidate

Trade industries are driven by large transaction volumes and broad, constantly changing product inventories

Most firms maintain highly granular records of transactions with dates, quantities, prices, costs, discounts, etc.

# Benefits of Corporate Data in Retail and Wholesale Trade

Access to larger share of firm's activity than traditional collection

Permits development of broad comparable product lines

Calculate margins using broader set of observations


More representative margin measurement without added burden on firm

# Pilot Program

## Test Industry

Grocery and Related Products Merchant Wholesalers (NAICS 424400)

## Objective

Assess both the feasibility of acquiring corporate datasets and ability to process, evaluate, and use the data

## Initiation Process

- Engage with personnel with direct knowledge of firm pricing, inventory, accounting, or information systems
- Offer firms option to provide traditional data or corporate data
- Understand how data is maintained within the firm and what data is available to BLS
- Cooperating firms asked to provide records covering major product categories
- Data availability varies across firms – inventory systems, accounting, product categories, reporting structures

# Successful Corporate Data Collection

## What we asked for…

- Respondents encouraged to provide as much detailed transaction information as possible
- BLS provided mockups to respondents of acceptable formats for corporate data file submission

Basic Example

| Product | Cost | Sale Price | Margin |
|---|---|---|---|
| Product A | $60 | $100 | $40 |
| Product B | $30 | $80 | $50 |

## What we received…

- Broader set of observations than traditional data collection representing a substantially larger share of the firm's activity
- Datasets containing product identifiers, descriptions, quantities sold, sales prices, and acquisition costs
- Underlying data to develop representative product groups and calculate average margins using consistent procedures
- Transaction-level records that provided greater detail and understanding of product composition within broad product lines and the ability to assess data quality

BLS data collection systems have limitations and do not always align with systems used by firms within their business operations

Challenges resulted from differences in firms' data structures and file formats


Constant review of microdata needed to ensure uniformity of product groupings

Firms' product assignments do not always line up with PPI classifications (ex. Eggs)

**Firms can provide corporate datasets that support margin calculations**


- Shifted from feasibility to repeatable production procedures integrated into existing PPI production processes
- Established procedures to support respondent initiation, data acquisition, data preparation, quality review, and ongoing monthly updates
- Balanced statistical quality, respondent burden, and operational needs

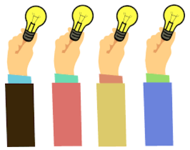
Standardization and Flexibility

Integration into initiation

Transformation into statistical inputs

# The work continues…

Scaling corporate data collection will require continued attention to workloads and resource allocation



Additional experiences with new firms and different industries will help us refine our approaches

Continued investment in technical training, documentation, analytical capabilities, and automation


Success depends not only on data availability but also the operational capabilities to use the data effectively

# Contact Information

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