



eCommerce Landscape

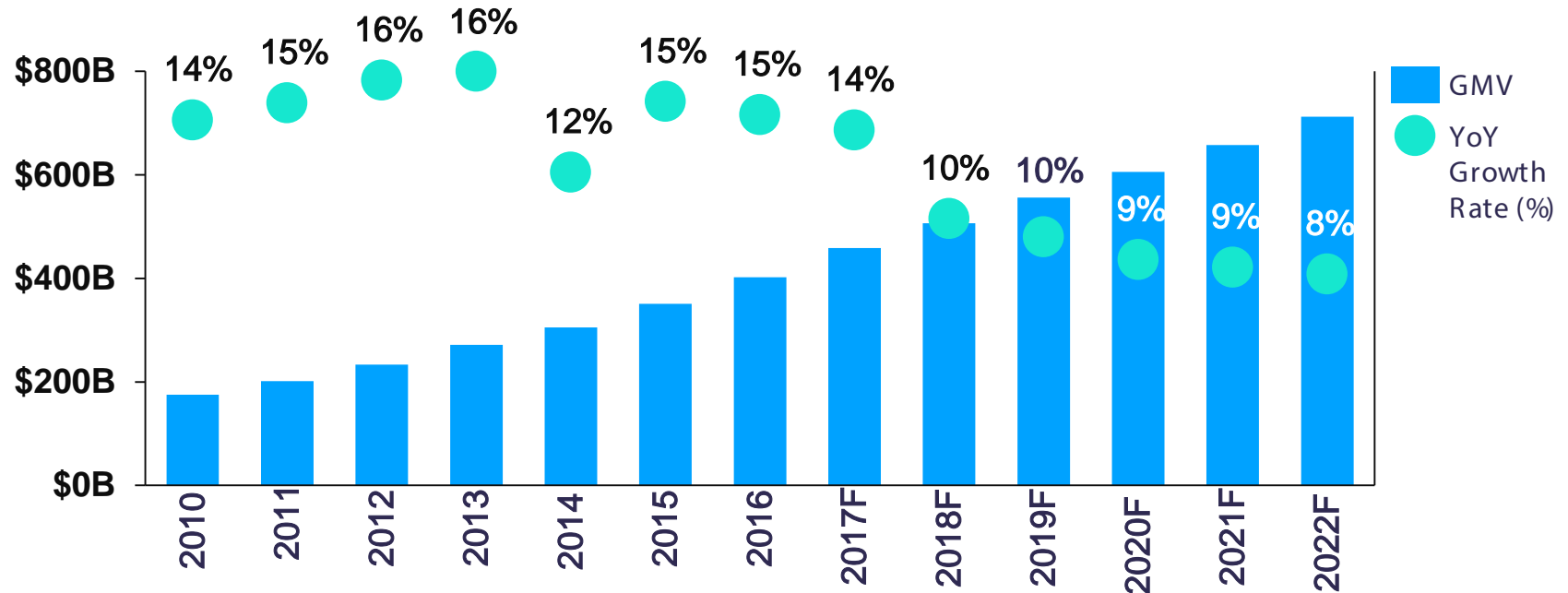
Carmela Cugini
VP of Grocery, US eCommerce

AGNEDA

- eCommerce Trends
- Who Is The Consumer
- How to Participate with Walmart US eCommerce

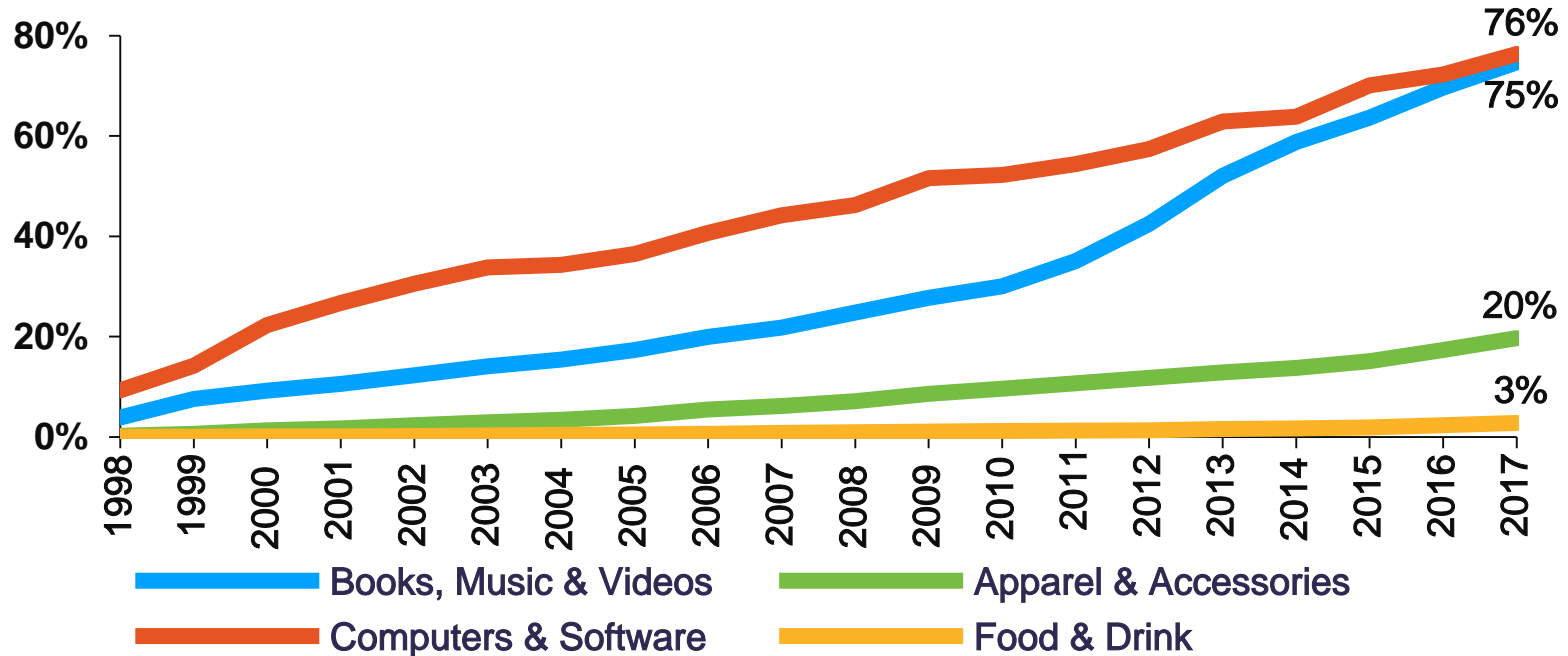
eCommerce Sales Are Projected to Reach \$700B by 2022

U.S. eCommerce GMV, 2010-2022



Categories Are Coming Online at Different Rates

Online Penetration Rates, 1998- 2017



Consumer Food Trends Emerging



Food
Integrity

32%
are heavily involved in
trend

- Minimally Processed
- Artificial Ingredient Free
- Additive Free
- Exclusion Diets
- Organic
- Non GMO
- Humanely Treated Animals
- Eco-Friendly



Purposeful
Eating

46% (NEW Way)
28% (Traditional Way)

- Healthy Snacks (NEW)
- Whole Food Nutrition (NEW)
- Heart Health (NEW)
- Fortified (Trad.)
- Weight Loss (Trad.)
- Enhanced Energy (Trad.)
- Enhanced Sports Performance (Trad.)



Fresh
Food

59%

- Fresh
- Local



Easy
Eats

43%

- Simple & Easy Meals
- Immediate Consumption
- Convenient (Hand Held or Portable)



Foodie
Culture

27%

- Unique Flavors
- Gourmet/ Specialty
- Indulgent
- Ethnic/Ethnic Flavored

Primary Drivers of Online Choice

Drivers of Online Food and Beverage Retail Choice					
EASY EXPERIENCE	48%	ASSORTMENT	33%	PRICE	13%
SAVING TIME	16%	QUALITY ASSORTMENT (ST)(TR)	14%	FAST & FREE SHIPPING (ST)	7%
SITE/APP EXPERIENCE (ST/TR)	13%	DELIVERY EXPERIENCE (ST)	9%	SAVING MONEY (ST)	6%
SHOPPING LISTS/SUBSCRIPTIONS*	12%	BULKY ITEMS	6%		
CONVENIENT STORE PICK-UP (ST)	5%	RECOMMENDATIONS & INFORMATION (TR)	2%		
CUSTOMER SERVICE (TR)	2%	MEAL PLANNING & INSPIRATION (TR)	<2%		
		FRESH & LOCAL (ST)(TR)	<2%		

Drive Retention

Drive Acquisition

ST = Switch Trigger – areas where consumers are more likely to switch from another retailer and will aid in acquisition
 TR = Trend Rider – areas where more trendy consumers are engaging and suggest higher importance in the future



Engaging with Walmart US eCommerce

Three eCommerce Platforms For Food



Walmart 
Pickup • *Grocery*

Bentonville Buyer
Dotcom Content



Dotcom



jet

Dotcom

Our Mass Sites Offer Different Value Propositions

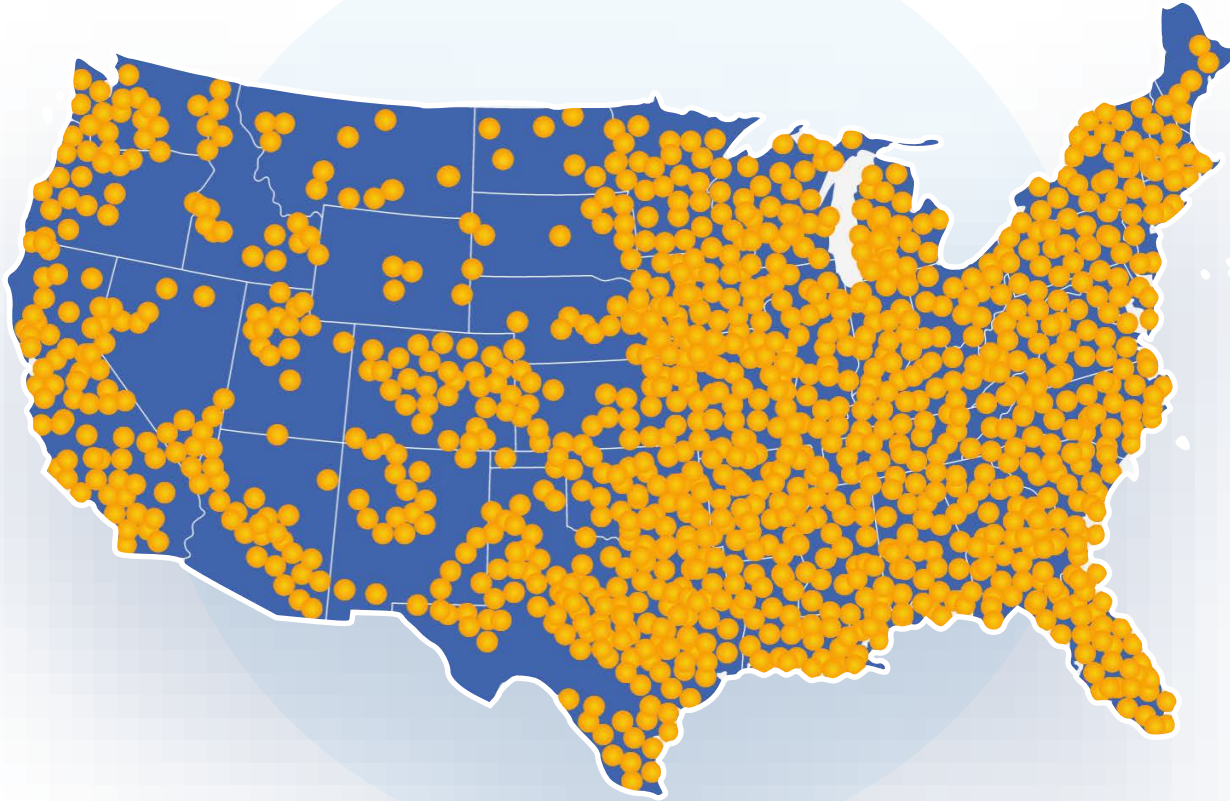


- Everyday Low Price foundation
- One-stop-shop for nearly everything
- Omni-channel shopping



- Targeted to urban shoppers
- More curated assortment
- Designed for living in a metro/urban area

Walmart's Scale Is A Competitive Advantage

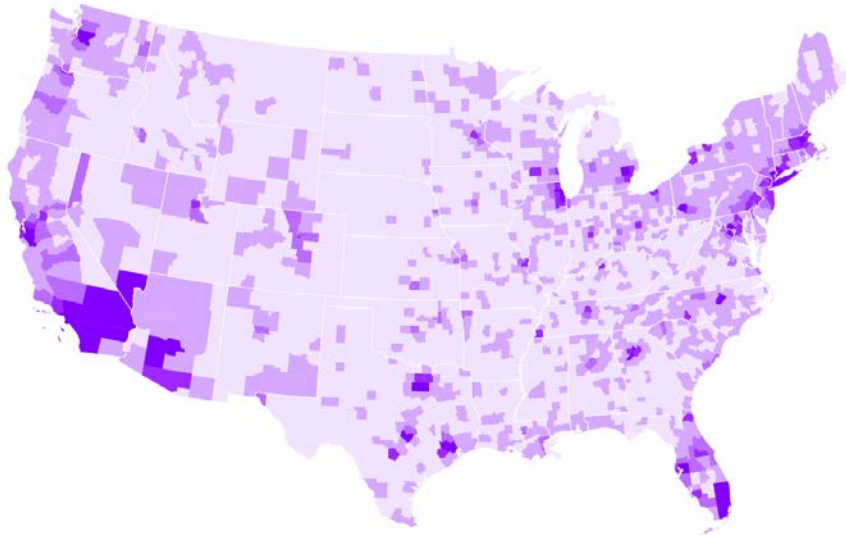


Omni-Channel

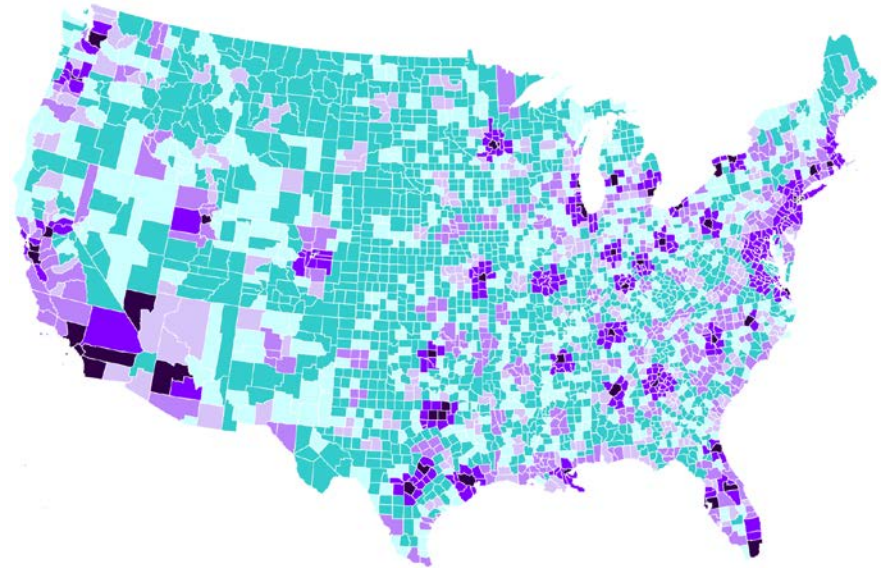
- ✓ Store within 10 miles of 90% of Americans
- ✓ 1.4 million associates
- ✓ Largest grocer in the U.S.

Jet Will Compliment Walmart To Reach Urban Consumers

Jet customers over-index in large central and large fringe metro areas



The Top 30 Metro areas make up ~50% of all U.S. demand



Walmart and Jet are well positioned for success

#1 

largest retail chain

1 in 6 

Americans are visitors

#1 

multi-channel retailer

Over 110MM

Unique web and mweb visitors
on Walmart and Jet / month

#2

largest retail
site online²

Walmart/Jet owns double digit online traffic share with a strong 1st party business and emerging marketplace business

Where We Were

Great paint. Great price.

Performs better than paint costing \$50 and more!



Price per gallon varies by brand. Results based on Golden High End color across all brands.

Shop now >



All

Search



Hello, Sign In My Account



All Departments

Easter essentials

My local store

Pick it up TODAY

Tips & Ideas

Walmart Credit Card savings



Spring it on! Fresh Rollbacks in Home.



Rollback 30⁰¹

Sponsored products you might like



\$6.88

Ziploc Pinch and Seal Sandwich Bags, 240...

★★★★★ 35
2-Day Shipping



\$6.89

Tide Original Scent HE Turbo Clean Liquid...

★★★★★ 590
2-Day Shipping



\$33.88 list price \$39.98

save \$6.10

O-Cedar Microfiber EasyWring Spin...

★★★★★ 1076
2-Day Shipping



\$8.99

All Stainlifters Oxi Laundry Detergent...

2-Day Shipping



\$5.24

Tide Original Scent HE Turbo Clean Liquid...

★★★★★ 565
2-Day Shipping



\$13.59

Finish PowerBall Fresh Scent Automatic...

★★★★★ 7802



\$6.88

Ziploc Double Zipper Storage Bags, Quart...

★★★★★ 15
2-Day Shipping



\$34.99

Tide Lique Clean (88 L)

★★★★★
2-Day Shipping

Where We Are Heading



Hey, Ashley. What do you need today?

62° SAN LEANDRO STORE #5637

All you need to recharge your spirit.



LAKE MARIE TRAIL
NAPA VALLEY
3 miles away

WEDNESDAY IS HERE
QUICKLY RE-ORDER THE THINGS YOU'RE RUNNING LOW ON.



PRICE DROP
87¢

Understanding How We View Our Business Will Help Optimize Yours

Fundamentals



1

Have it



2

Find it



3

Display it



4

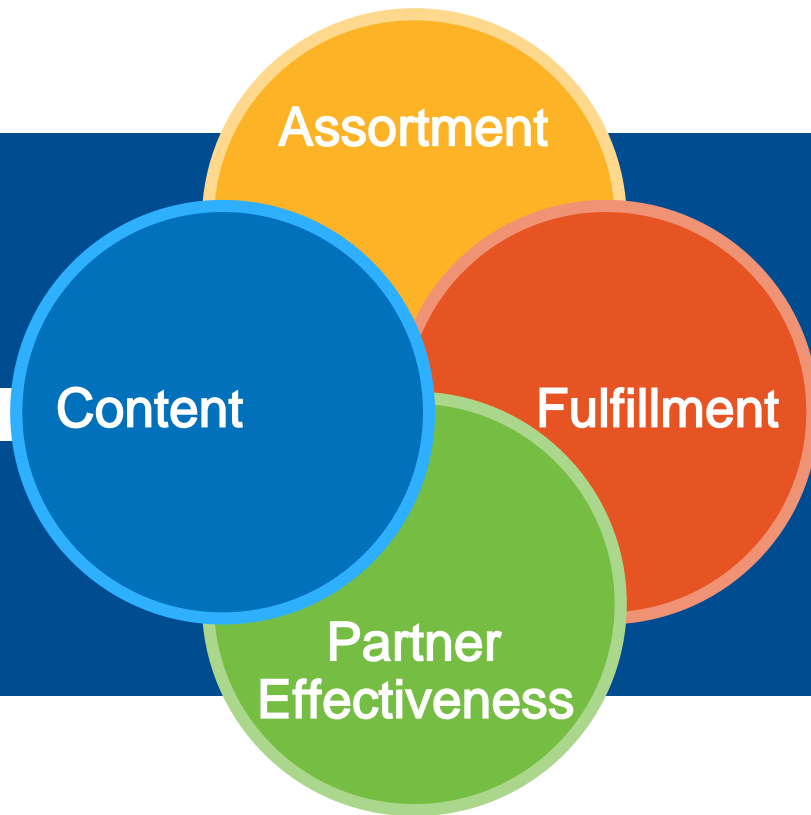
Price it



5

Deliver it

Specialty Category
Shopping Experiences





Thank You