Walmart Media Group

Spark growth in your business

PROPRIETARY & CONFIDENTIAL

These materials are provided pursuant to the parties' confidentiality agreement and are considered Walmart confidential and proprietary information and may not be disclosed or further distributed without Walmart's express consent.

© 2020 Walmart Media Group. Proprietary and Confidential.

Agenda

- Customers are in perpetual motion
- Walmart's momentum
- Value proposition
- Advertising solutions

© 2020 Walmart Media Group. Proprietary and Confidential.

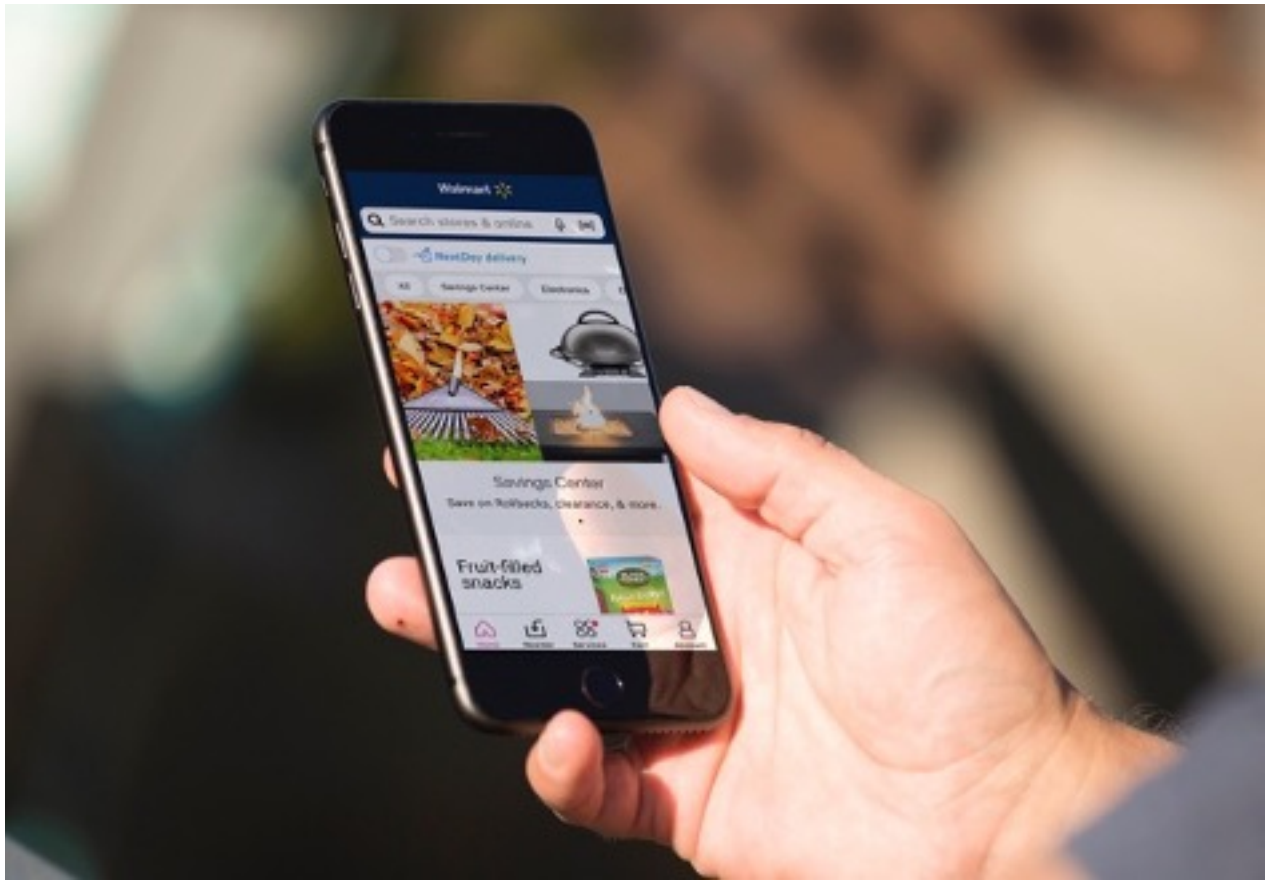
Spark change

Shopper behavior is evolving profoundly and fast

© 2020 Walmart Media Group. Proprietary and Confidential.

Omnichannel is everything

The Walmart shopper journey isn't digital or physical — it's both



35%

of Walmart store customers visit Walmart.com before they purchase

55%

of those customers visit Walmart.com within 24 hours before they buy in-store

15%

of Walmart.com orders are picked up at a physical Walmart store

Source: Walmart first-party data

© 2020 Walmart Media Group. Proprietary and Confidential.

Spark growth

Walmart is America’s powerhouse retailer

© 2020 Walmart Media Group. Proprietary and Confidential.

Our scale is truly massive

#1
U.S. retailer [2]

4,759
U.S. stores[2]

95%
of America has shopped at Walmart or Walmart.com[1]

160MM
weekly visitors to Walmart stores and online properties[2]

Source: [1]NPD Checkout OmniPanel (BE & eCommerce) 12M# September, 2019; figure is per year. [2]Walmart 1st Party Data, 2019.

© 2020 Walmart Media Group. Proprietary and Confidential.

The customer is #1. Always.

The customer is at the center of everything we do. Walmart is evolving with them and for them.

© 2020 Walmart Media Group. Proprietary and Confidential.

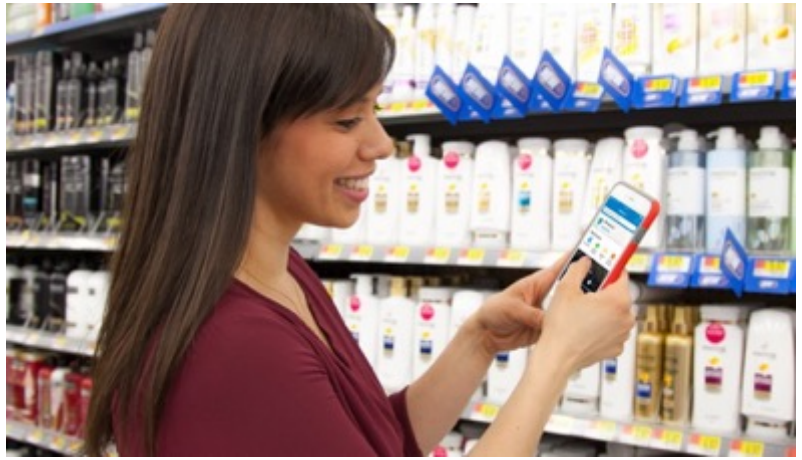
Walmart is leading the omnichannel evolution

We're using our scale and infrastructure to deliver customer experiences no other retailer can match

Free NextDay Delivery to

75% OF THE U.S.

on Walmart.com



Walmart app store maps for

4,759

Walmart stores

Online Grocery pickup at

3,100+

Walmart stores

© 2020 Walmart Media Group. Proprietary and Confidential.

Walmart Online Grocery is the industry leader

We're innovating to make grocery shopping seamless and convenient for millions of Americans

Delivery Unlimited from

1,400

Walmart stores

Same-day delivery from

1,600+

Walmart stores

Online Grocery voice order on

Google & Siri

© 2020 Walmart Media Group. Proprietary and Confidential.

Enabling brands to reach customers at the right time and place delivering highly relevant content and accountable advertising that enhances the Walmart shopping journey

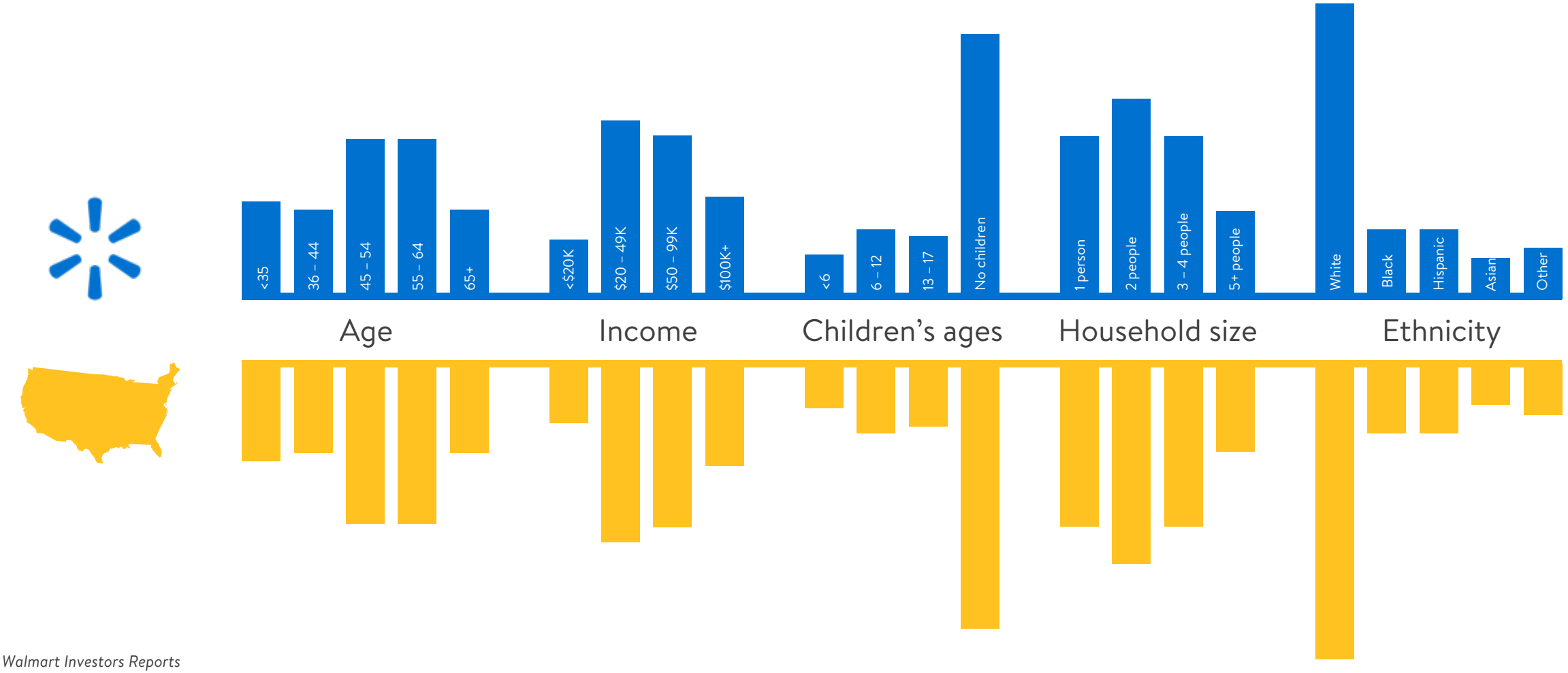
Ads customers love

Partnerships brands trust

© 2020 Walmart Media Group. Proprietary and Confidential.

Our shopper demographic mirrors the U.S. demographic

The Walmart customer base encompasses every income and lifestyle

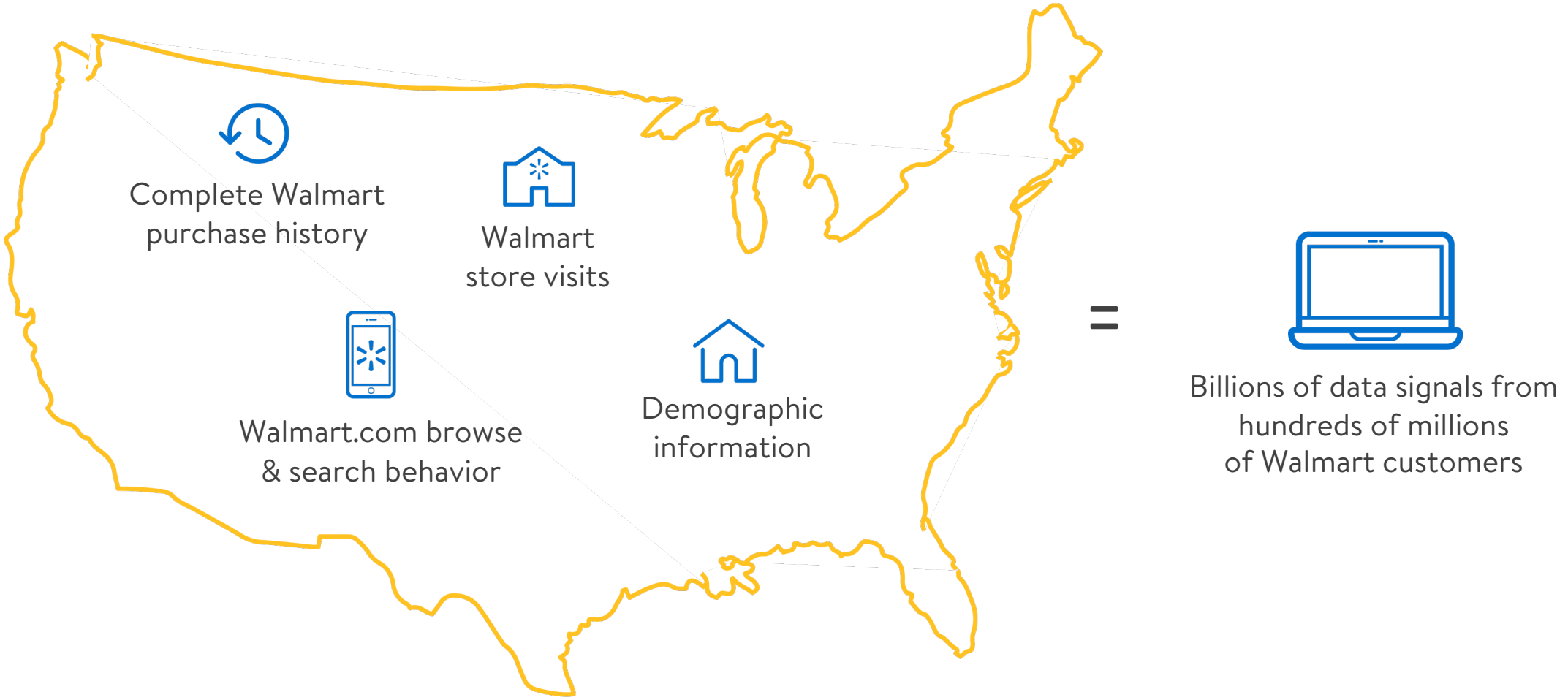


Source: Walmart Investors Reports

© 2020 Walmart Media Group. Proprietary and Confidential.

Our proprietary data encompasses 95% of U.S. households

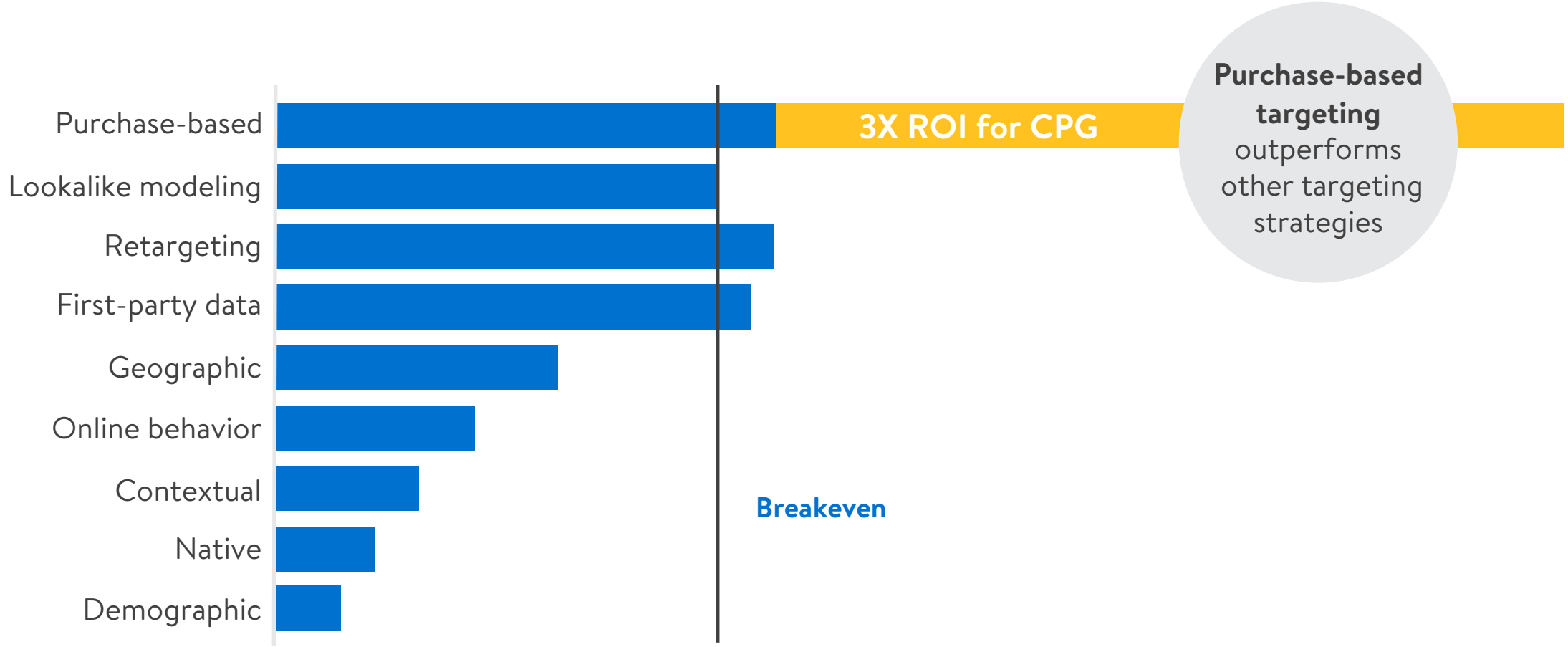
We capture customer behavior and purchase information across Walmart properties



© 2020 Walmart Media Group. Proprietary and Confidential.

The Walmart advantage: purchase-based targeting

Only we know which products our customers don't just consider, but buy — online and in-store



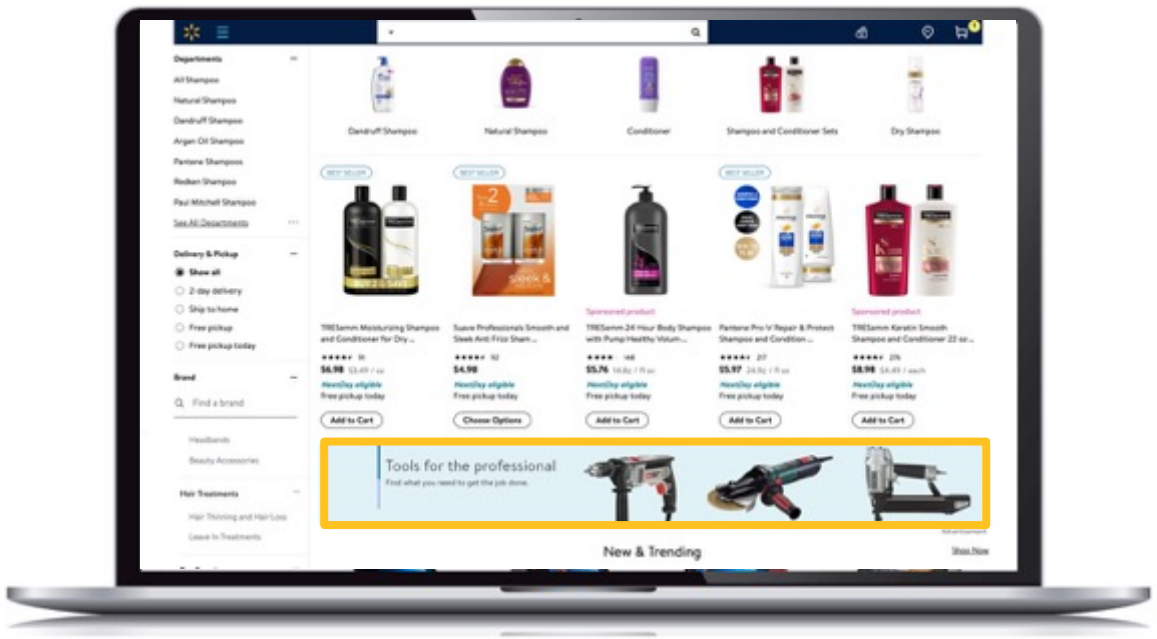
Source: Nielsen, Multi-Touch Attribution, 2019

© 2020 Walmart Media Group. Proprietary and Confidential.

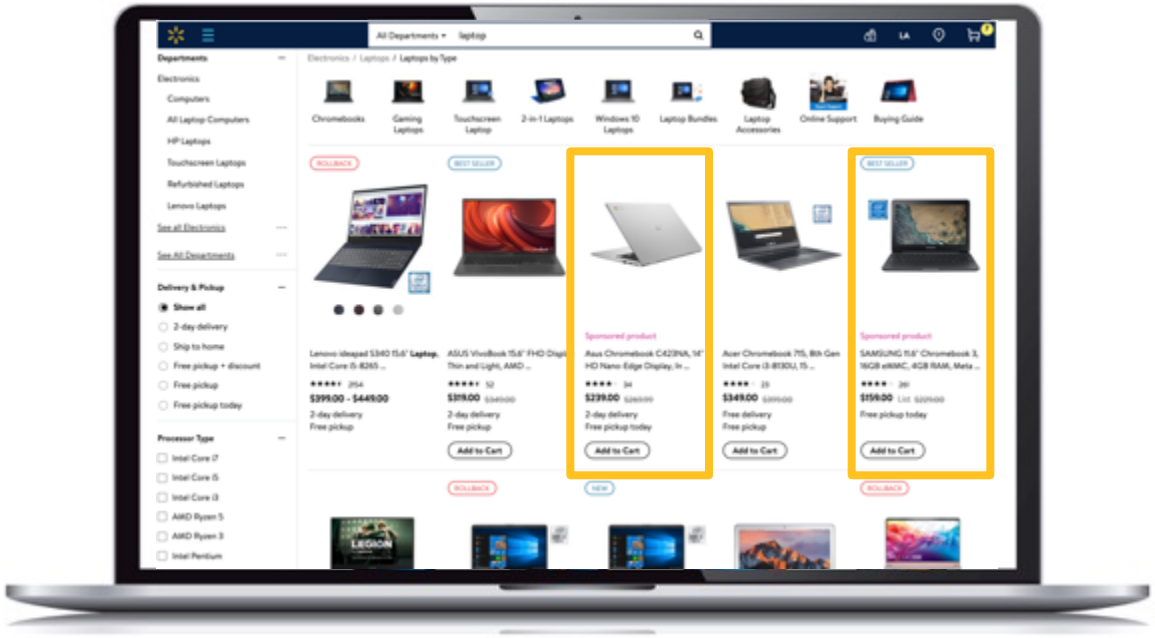
Deliver your ad in context, based on real behavior

Additional targeting options help brands serve the right ad to the right customer at the right time

Behavioral



Contextual



© 2020 Walmart Media Group. Proprietary and Confidential.

Delivering real-time access to campaign metrics

Q1

Sponsored Products

Self-serve in-flight reporting

- Campaign metrics
- Attributed online sales
- Online ROAS

Closed-loop Display

In-flight reporting via email

- Campaign metrics
- Attributed omnichannel sales & ROAS

Q2

Closed-loop Display

Self-serve in-flight reporting

- Campaign metrics
- Attributed omnichannel sales
- Omnichannel ROAS
- Splits by online and in-store

© 2020 Walmart Media Group. Proprietary and Confidential.

Ads customers love, with measurable omnichannel results

A portfolio of solutions for effective messaging at every step of the Walmart shopper journey

Online or in-store purchase

In-store

Capture Walmart customers during transactions and at Online Grocery Pickup.

Social

Extend your reach and influence Walmart customers across Facebook, Instagram and Pinterest

Accountable, closed-loop advertising that only Walmart can deliver at scale

Walmart.com

Reach everyday and seasonal customers on mobile and desktop devices

Online Grocery

Reach habitual, repeat customers with high conversion and basket value

Offsite

Remind and re-engage existing Walmart customers across thousands of sites and apps

© 2020 Walmart Media Group. Proprietary and Confidential.

We build partnerships brands trust

At Walmart, the goal isn't to sell more ads. It's to sell more of your products.

© 2020 Walmart Media Group. Proprietary and Confidential.

Customers come to Walmart to discover new products

Walmart.com is a daily destination for searching and browsing

16MM
searches per day

717
page views per second

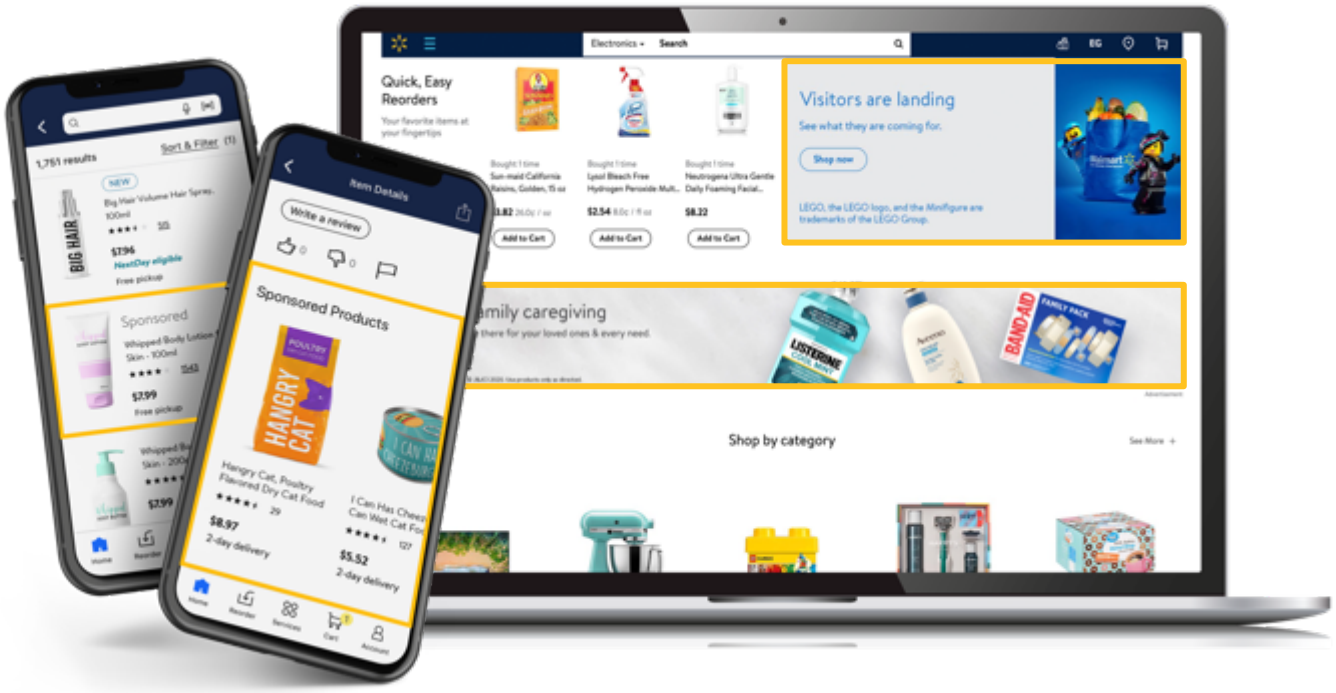
12MM
visits per day

Source: Walmart 1st Party Data, Nov 2018-Oct 2019.

© 2020 Walmart Media Group. Proprietary and Confidential.

Two ad strategies cover all the bases

Combine Sponsored Products and Closed-loop Display campaigns to reach Walmart customers whether they're buying, browsing or "just looking"



Sponsored Products ads

- Appear **onsite** on Walmart.com
- Capture Walmart customers actively searching our digital properties for specific products

KPI: Online ROAS

Closed-loop Display ads

- Appear **onsite** on Walmart.com and **offsite** across the web and social media platforms
- Build awareness and consideration among Walmart customers on and off our digital properties

KPIs: Omnichannel sales lift and ROAS

© 2020 Walmart Media Group. Proprietary and Confidential.

Sponsored Products

Get noticed

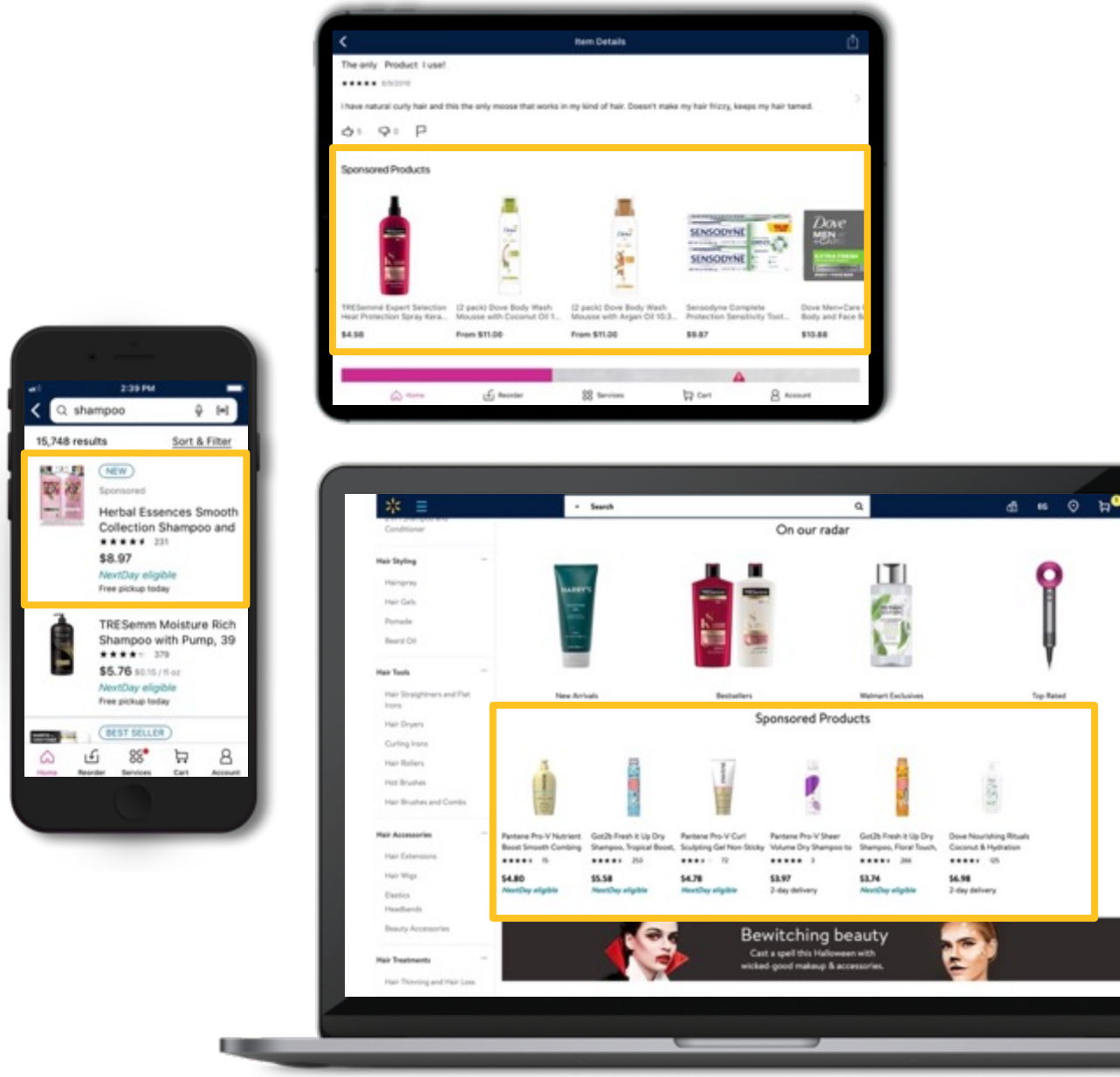
Ads appear on Walmart.com where customers will see them—at the top of search results and on product pages.

Increase sales

Reach motivated customers searching for products like yours and advance them to your product page.

Control costs

You pay only when customers click your ads.



© 2020 Walmart Media Group. Proprietary and Confidential.

Closed-loop Display

Reinforce

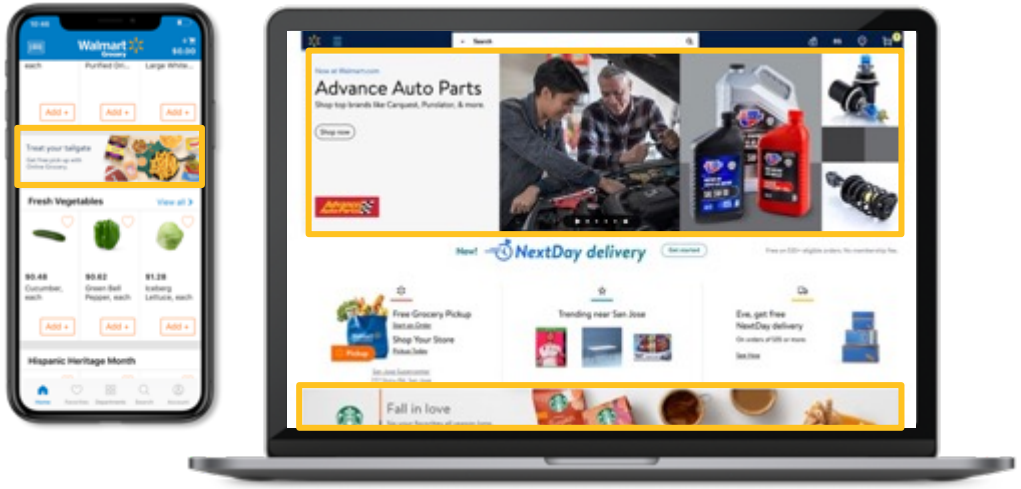
Onsite Display ads keep your brand and product top-of-mind with active Walmart.com customers.

Recapture

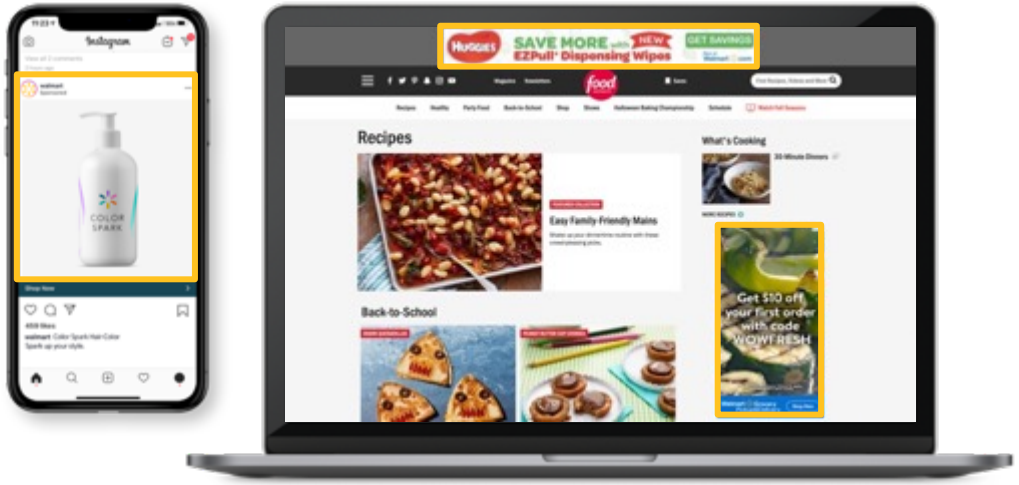
Offsite Display ads lead in-market customers back to Walmart.com to buy.

Omnichannel results

Track ad-exposed sales not just on Walmart.com but in Walmart stores.



Onsite Display on Walmart.com and Online Grocery



Offsite Display across the web and social media

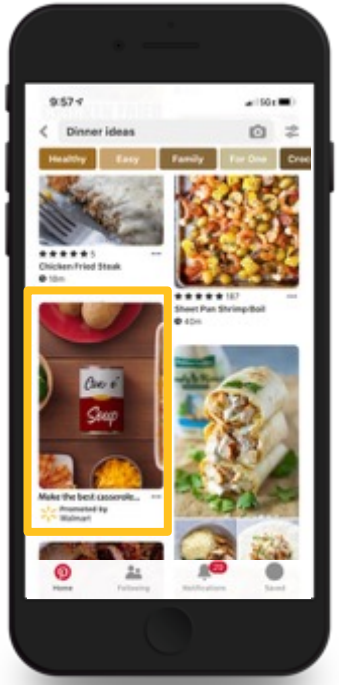
© 2020 Walmart Media Group. Proprietary and Confidential.

Sell strong, all year long

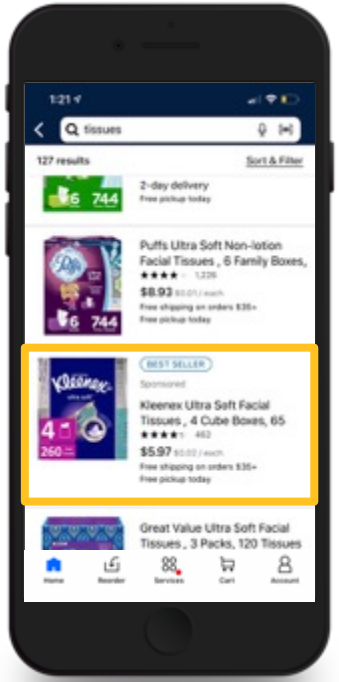
Stay always on for millions of Walmart customers doing everyday research and shopping

Inspiration
Display

Consideration
Offsite and social



Discovery
Sponsored Products



Purchase
Online and in-store

© 2020 Walmart Media Group. Proprietary and Confidential.

Introducing

Walmart Advertising Partners

Brands may now work with select third-party AdTech platforms to automate, optimize and scale their Walmart Sponsored Products campaigns.

© 2020 Walmart Media Group. Proprietary and Confidential.

Work with the Walmart Advertising Partner of your choice

Launch and manage your Sponsored Products campaign through any of these trusted API platforms

flywheel BY ASCENTIAL

PACVUE

kenshoo

teikametrics

© 2020 Walmart Media Group. Proprietary and Confidential.

More control over your Walmart campaigns

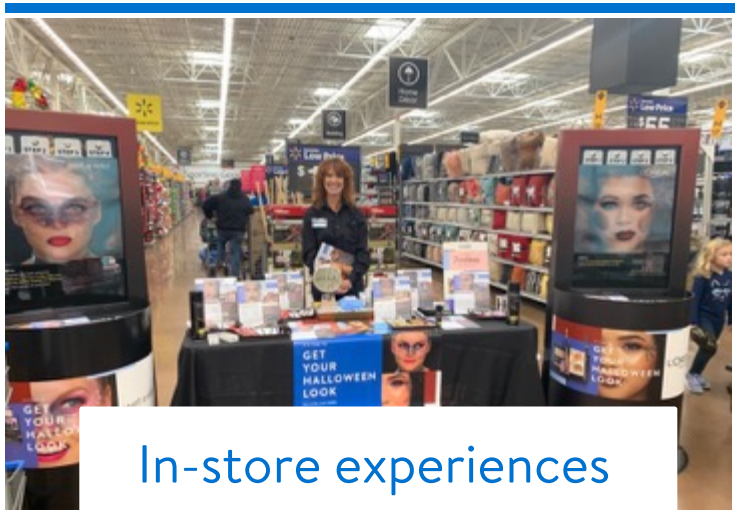
Consolidate Sponsored Products ad purchasing and reporting, and get expert support

- Buy Walmart Sponsored Products ads through the API partner platform of your choice.
- Access more-efficient tools, bulk operations and campaign optimization.
- Retain your direct access to Walmart Media Group's current Sponsored Products features.
- Continue your strategic partnership with Walmart Media Group while working with your Walmart Advertising Partner.

© 2020 Walmart Media Group. Proprietary and Confidential.

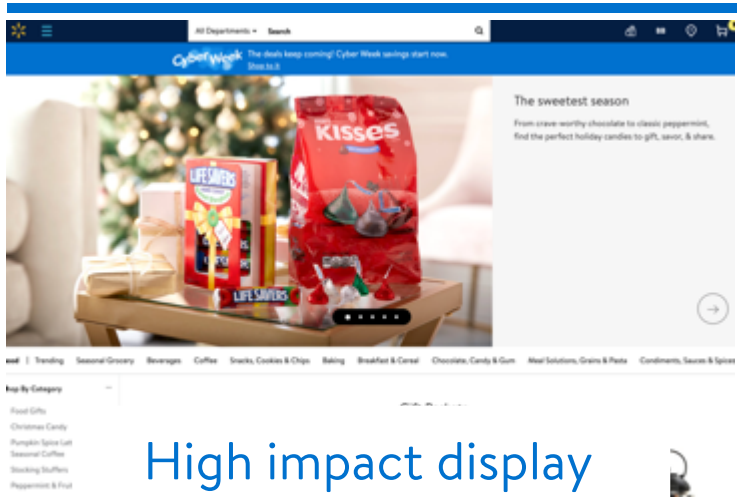
Own seasonal and category moments

Omnichannel solutions that only Walmart can deliver at scale



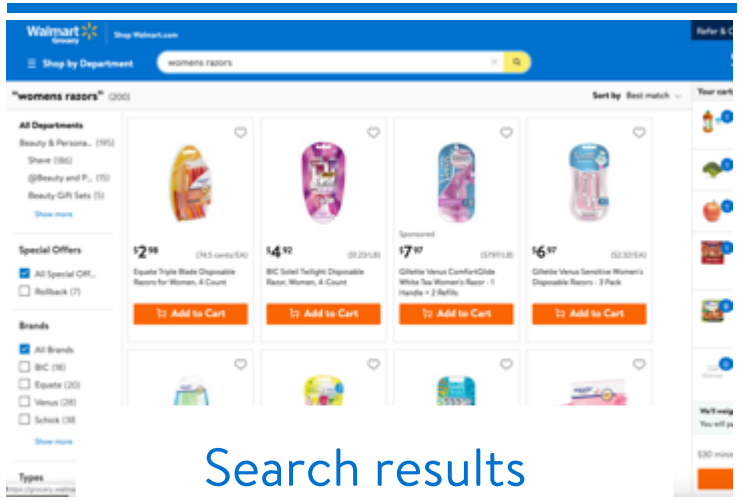
In-store experiences

- Live store activations
- Big events
- Sampling
- Demos
- TV Wall



High impact display

- Premium lockouts + homepage takeovers
- Audience and contextually targeted display



Search results

- Drive discovery across search results
- Own search results with Search Brand Amplifier placement
- Boost visibility within product pages

© 2020 Walmart Media Group. Proprietary and Confidential.

Online Grocery

Spark expansion into a unique Walmart audience

© 2020 Walmart Media Group. Proprietary and Confidential.

Walmart Online Grocery

Making shopping more convenient for customers

Insight

Our always-connected customers demand real choice. They need to be able to shop anytime and anywhere.

Strategy

Walmart is bringing **convenience** to customers with omnichannel shopping and delivery options.

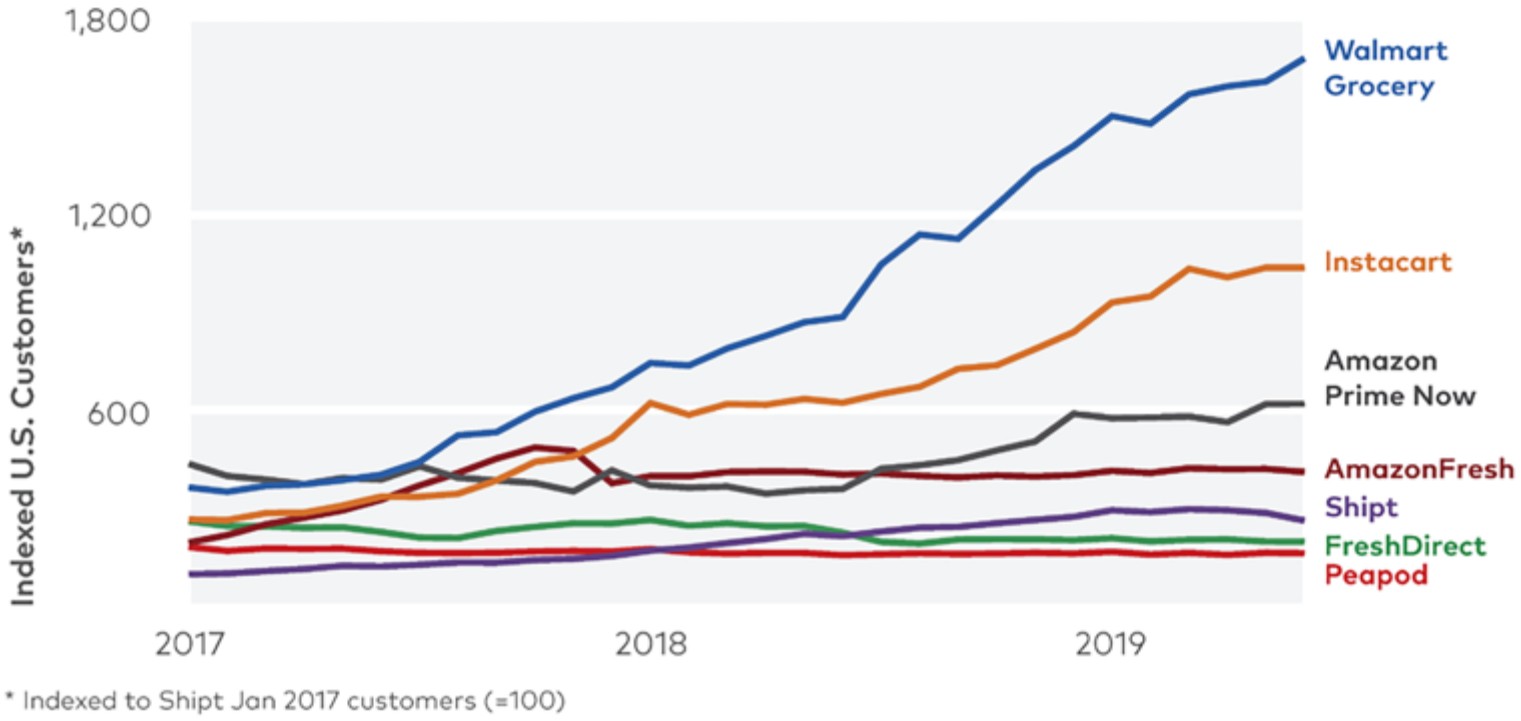
Source: GCIA Customer Profile 2019.

© 2019 Walmart Media Group. Proprietary and Confidential.

Walmart is the nation's online-grocery leader

62% more customers than the next-largest competitor

U.S. monthly online-grocery customers



* Indexed to Shipt Jan 2017 customers (=100)

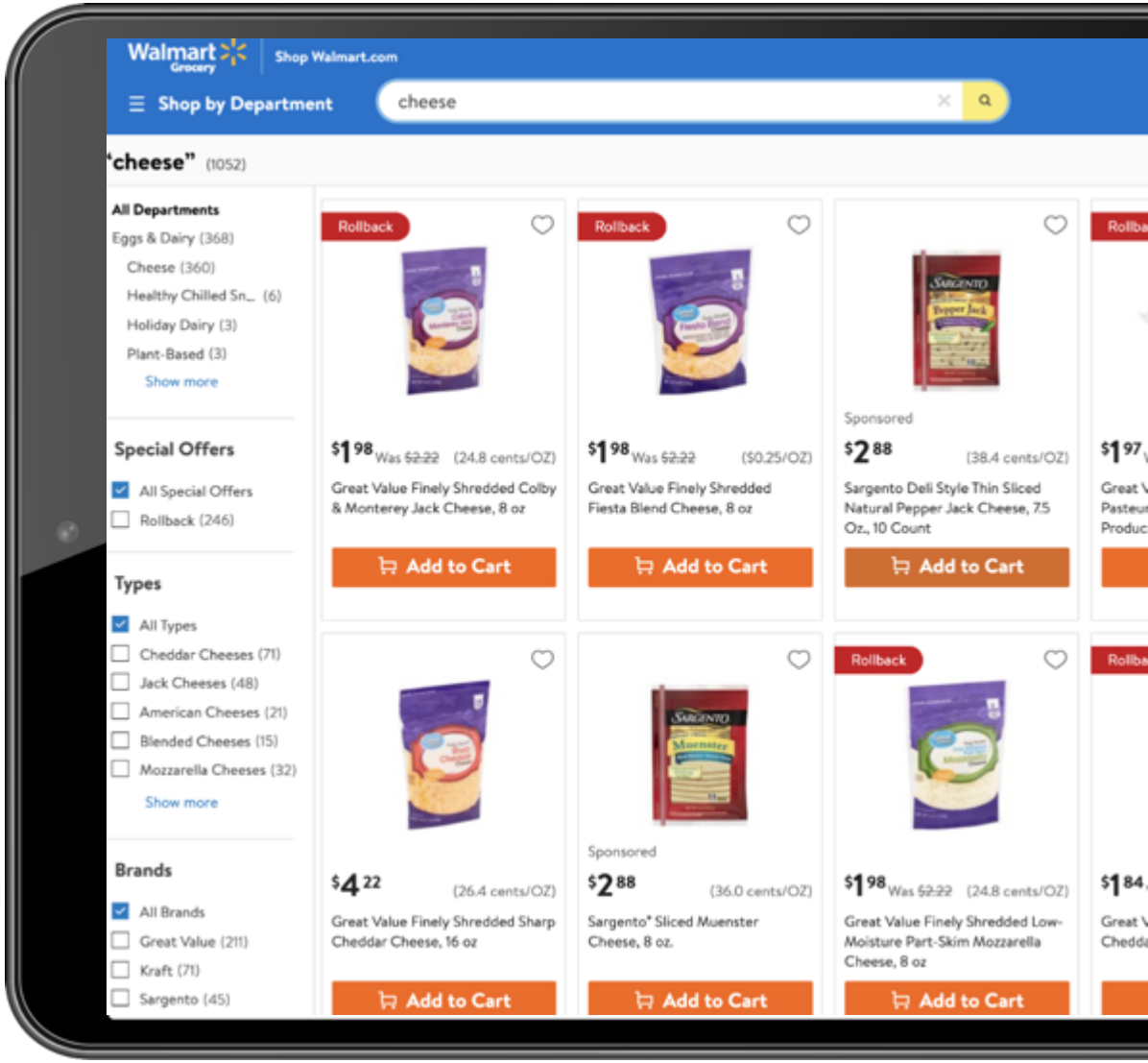
Source: Supermarket News, 8/14/2019 (https://www.supermarketnews.com/online-retail/walmart-takes-online-grocery-crown-research-shows)

© 2019 Walmart Media Group. Proprietary and Confidential.

Walmart Online Grocery

Time-saving convenience that gives customers back 3 hours a week

Once a customer has shopped Online Grocery three times, they become a loyal customer



Source: GCIA Customer Profile 2019.

© 2019 Walmart Media Group. Proprietary and Confidential.

Online Grocery pilot programs

We're rolling out high-tech delivery innovations

InHome Delivery

A Walmart associate places the customer's grocery order directly into their refrigerator.

Refrigerated pickup kiosk

The customer orders online, goes to their nearest Walmart store, and scans a code to pick up their perishable goods.

Autonomous delivery vehicles

A custom-built self-driving cargo van brings the customer's grocery order to their home.

Pilot programs are subject to change

© 2020 Walmart Media Group. Proprietary and Confidential.

Online Grocery customers are high-value and replenish frequently

- 80% female
- 34% age 25-37
- 40% $50K - $99K household income

- 40% smartphone shoppers
- 35% desktop shoppers
- 9% tablet shoppers

- 12K searches per minute

- 43% of customers with two or more past purchases have returned to shop in one week or less

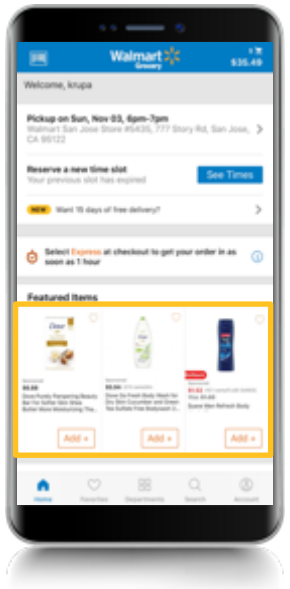
Source: Walmart 1st Party Data, Nov-2018- Oct 2019

© 2020 Walmart Media Group. Proprietary and Confidential.

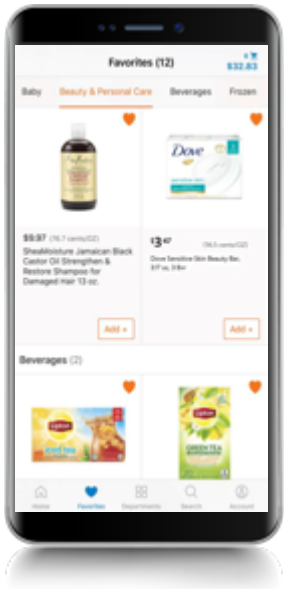
Influence Online Grocery customers across their journey

There's an ad solution for every key step along the way

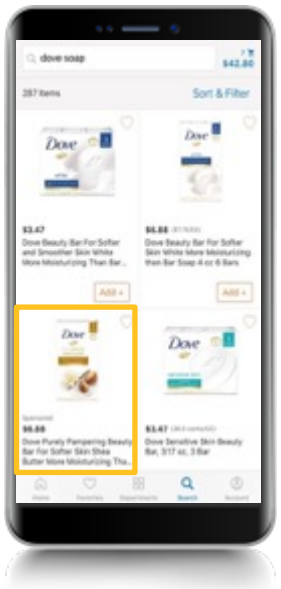
Homepage



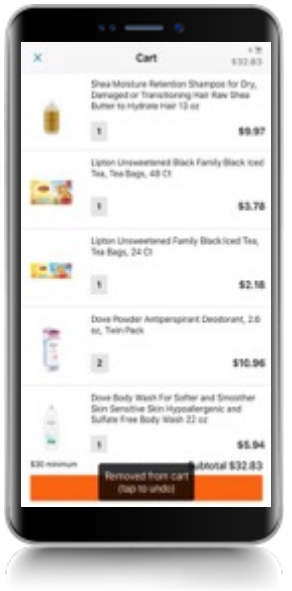
Favorites



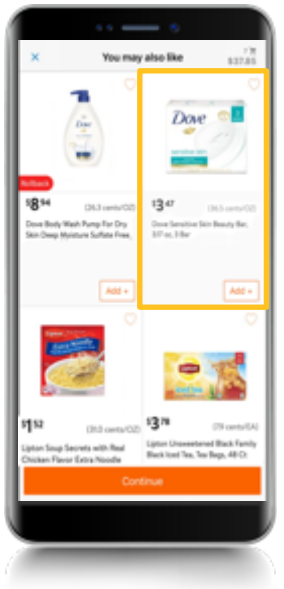
Browse



Cart



Pre-checkout



Display & Sponsored Products

Sponsored Products

© 2020 Walmart Media Group. Proprietary and Confidential.

Let's spark momentum — together

Size, reach and data only Walmart can offer

- Omni scale
- Omni insights and targeting
- Omni results

The right mix of strategic media and marketing

- Always on, always in
- Omni category and seasonal
- Online Grocery

We'll do it together, through our partnership

© 2020 Walmart Media Group. Proprietary and Confidential.

Thank you.

© 2020 Walmart Media Group. Proprietary and Confidential.