



GutCheck Online Walmart Shoppers

Sample Report



03

Background &
Objectives

08

Methodology

12

Executive Summary

24

How does online shopping
differ from in-store

28

Who shops Walmart
online?

39

Why shop Walmart?

43

The new merged
Walmart app

47

How to reach Walmart
online shoppers

53

Supplemental: Walmart
App vs. Walmart.com

59

Appendix

Background & Objectives

The Situation

In the first quarter of 2020, Walmart's pick-up and delivery sales grew **300%**, during the peak of COVID-19. Historically, Walmart offered two separate apps for online shoppers – a grocery app and a general merchandise app. From March to May 2020, Walmart merged the two apps and now allows shoppers to order groceries and all other products (including items available only online) in one place.

The Walmart Grocery app was rated the best shopping app in April and since merging its grocery and retail apps, Walmart is seeing more diverse baskets and higher tickets from customers using the all-encompassing, single app. This may be due to customers having access to a wider selection of items. **“We've seen an uptick in the amount of general merchandise they're buying alongside their groceries, like toys and gardening tools as they shop for bananas and apples and cereal,”** Walmart chief customer officer, Janey Whiteside said.

In addition to merging the apps, Walmart has also added **“hundreds of thousands”** of new slots for online grocery pick-up and added new capabilities allowing customers to reserve no-contact pick-up or delivery or to order Express Delivery to have items delivered to their doors in less than two hours. Customers can also use the app to refill prescriptions and select **“curbside pick-up”** or delivery for those prescriptions. Contactless Walmart Pay is also available through the Walmart App.

Objectives

Key Question

Who is the Walmart online or app shopper and how can Walmart better target and activate against this audience to further increase growth and adoption of online avenues during this changing time?

Research Objectives

1. Identify and profile users of Walmart's online shopping interface (Walmart.com) or app interface by deep diving on implicit and explicit factors such as demographics, lifestyle and personality
2. Determine what motivates the user to purchase groceries and merchandise via the Walmart.com website or app (instead of in-store) and how their behaviors are differentiated from the general population
3. Evaluate how, when, and where to effectively reach app or website users and activate against them with relevant messaging and creative

Sample Groups and Analysis Approach

Walmart.com or Walmart App Shoppers	<i>Primary or shared HH shopper, Purchased groceries or general merchandise through Walmart online or Walmart app in P1M, age 18-65</i>	Online Target n=500
Walmart In-store Shoppers	<i>Primary or shared HH shopper, Purchased groceries or general merchandise at Walmart in-store in P1M, age 18-65</i>	In-store Target n=500
General Population	<i>Primary or shared HH shopper, Age 18-65, Sample balanced by age, gender, region and income</i>	Category n=500

Online Walmart shoppers are compared versus Walmart in-store shoppers and the general population to profile Walmart Online shoppers. Additional analysis looks at differences between Walmart app and Walmart.com shoppers.

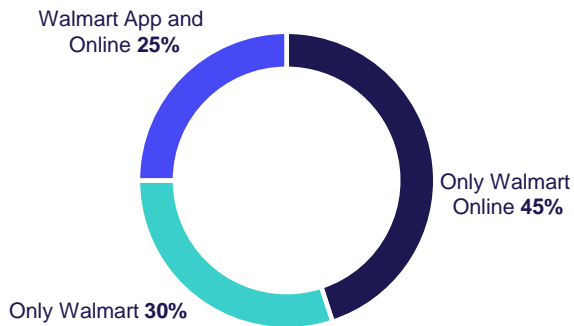
A more granular view of the following user groups adds detail:	<ul style="list-style-type: none"> <i>Exclusive Walmart app Users (not Walmart.com, may use in-store)</i> <i>Exclusive Walmart.com Users (not Walmart app, may use in-store)</i> <i>Walmart Online shoppers using app and .com</i> 	n=150 n=223 n=127
---	---	--

Walmart Shopping Across Analysis Groups

Despite changes during the pandemic, the majority of Walmart shoppers are still going to the store.

Importantly, 1 in 8 general population consumers shop Walmart only online and do not visit Walmart in-person.

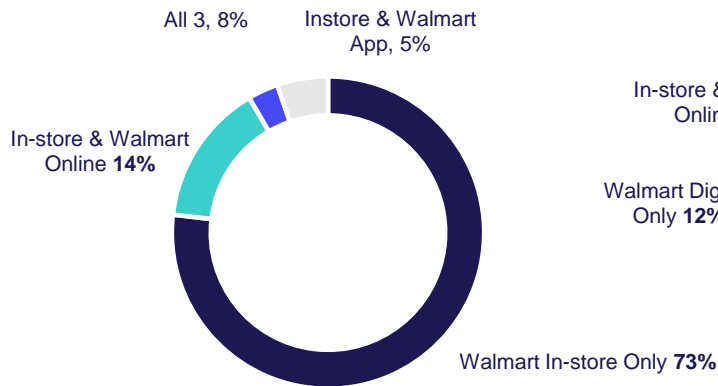
Walmart Online/App Shopper



100% Digital Walmart Shoppers*

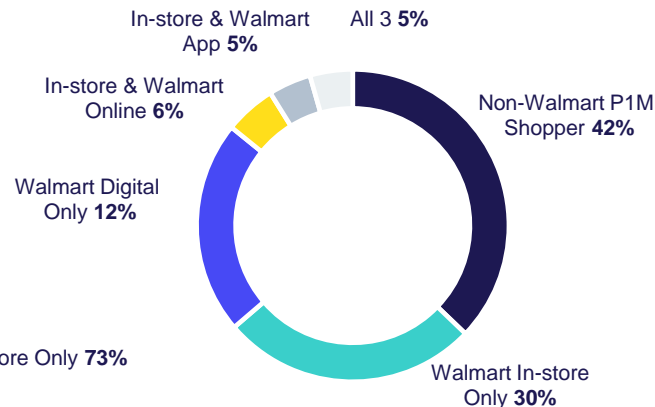
**51% of Digital Walmart Shoppers also shop in-store*

Walmart In-Store Shopper



27% Digital Walmart Shoppers

General Population



27% Digital Walmart Shoppers

Methodology

GutCheck Persona Connector

By combining implicit and explicit measurements, **we provide a deep foundational understanding** of your key personas by focusing on psychology and needs and **recommending how you can take action**.

MULTI-SOURCE ANALYSIS

Explicit Measurements

Survey based data

Usage Frequency

Usage Occasions

Triggers & Barriers

Shopping Behaviors

Purchase Locations

Brand Diagnostics

Implicit Measurements

Advanced AI Algorithms for assessing:

OCEAN Personality Profiles

Universal Needs

Additional Insight

Media Consumption

Lifestyle Hobbies & Interests



RESULTS

Foundational Audience Understanding

About the Audience

Demographics

Attitudes

Universal Needs & Motivations

OCEAN Personality Type

Activation Recommendations

GutCheck Actionability Framework

- » What to Say
- » What to Avoid
- » Visual Inspiration
- » Colors to Consider
- » Product Design Elements

GutCheck Actionability Framework

GutCheck's Framework leverages differentiating details of your key persona to guide downstream marketing, media and creative efforts. These recommendations are grounded in the relationship between personality, needs and validated connections to language, color, and imagery.

What to Say & What to Avoid

Recommendations are based on a publication exploring a validated Needs Framework for understanding how people interact with brands – what they want from them, how they judge them and what drives them to action.

Visual & Color Inspiration

Visual recommendations are based on GutCheck's own proprietary research, connecting needs to highly resonant imagery.

Color recommendations are based on results from a series of academic journals linking color associations to user or consumer needs.



Media Targeting Recommendations

Recommendations are based on the combination of survey and behavioral data and validated findings from academic journals linking OCEAN personality type to movie, tv, book, and music genre preferences.

Product & Service Design Elements

Recommendations on features and product or service design appeal are based on the combination of output from implicit and explicit measurements.

Persona Frameworks

Via Advanced AI Algorithms, we derive Personality and Needs leveraging the below frameworks.

OCEAN Personality profiling

The Big 5 Personality model is the most widely used framework for understanding how a person interacts with the world. There are 5 primary personality types leveraged in the OCEAN model.



Openness
Open to experiencing a variety of activities

Conscientiousness
Act in an organized or thoughtful way













Extraversion
Seek stimulation in the company of others

Agreeableness
Compassionate and co-operative towards others

Neuroticism
Emotions are sensitive to their environment

Needs Framework

The 12-segment framework groups people by the needs that drive their consumer choices. These insights rely on the work of Kotler and Ford.

- | | | | |
|---|-----------------|---|-----------|
|  | Self-Expression |  | Challenge |
|  | Excitement |  | Closeness |
|  | Curiosity |  | Love |
|  | Practicality |  | Harmony |
|  | Structure |  | Liberty |
|  | Stability |  | Ideals |

Executive Summary

Major Themes

Consumers' reasons for shopping on Walmart.com or the Walmart app center on convenience and speed, while offering the additional benefit of being safer. *These arguments extend to online shopping in general, not Walmart specifically.*



» Convenience

Convenience and ease of online shopping are the core reasons for shopping online (prior to COVID-19). Consumers can shop 24/7 from wherever they are, use almost any device and pace the shopping trip to their schedule. Variety of choices and comparisons facilitate and informed decision.

» Speed

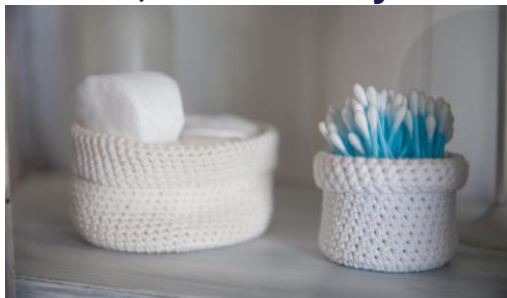
Online shopping is faster than going to a store. There is no need to drive to store, pick a product, wait at check-out, or load up and drive back home.

Even with curbside pick-up the online process takes less time out of busy schedules.

» Safety

With COVID-19, online shopping received another boost: Online shopping is safer and contactless, with no need to get close to other people and physically pay at check-out. The need for contactless shopping accelerated online shopping of multiple categories, especially groceries.

With the advancement of eCommerce across categories like food and household essentials, Walmart is facing online savvy shoppers who are not loyal to one retailer, even if they have a preference.



Categories Shopped
Food, Household Essentials
and Beauty

Foods and household essentials, followed by beauty products represent the strongest online categories for Walmart, although the first two are still shopped more in-store than online.

Other categories, especially non-CPG do not show a gap between online and in-store purchasing; electronics and home improvement products are shopped even more often online.



Digital Shopping Savviness
57% shop more than half the
time online

Walmart Online/App shoppers rely more heavily on buying digital across most retailers.

They are generally more online savvy, have more retail apps installed, use social media and stream TV and radio more than typical shoppers and prefer to hear about promotions and products through online channels.



Little Loyalty
Average of 4 retailers shopped in
past 3 months

Walmart Online/App shoppers are less loyal than Walmart In-store shoppers; they are more likely to shop across several retailers.

With price and product comparisons only one click away, it is easy to change from one retailer's offer to another.

The pandemic has advanced the move towards eCommerce by about five years.

IBM's 2020 U.S. Retail Index Shows Rapid Acceleration of Retail Trends

WWD Alexandra Pastore, WWD • August 25, 2020

According to IBM's annual U.S. retail Index, COVID-19 has accelerated retail trends by nearly five years.

As previously reported, the pandemic has caused a major shift in consumer behavior as it relates to online spending. And at the same time, IBM's report states digital consumer engagement is the new normal. In the first quarter, the company's data found a 13 percent growth increasing to a 26 percent growth the second quarter. The company further projected e-commerce will grow by nearly 20 percent.



GutCheck Persona Summary



“It is close to my house, has low prices, and I enjoy the convenience of the app so that I can pick up my groceries.”



“Walmart’s online grocery pick-up is convenient and there is no additional fee. I receive the same discount as those who shop in the store.”

Bio

Nate and Emily are educated and married with children. While they enjoy their careers their primary need is closeness, so they value connecting with family and friends.

They live busy lives with DIY projects, packed daily routines, and extended kid activities brought on by the pandemic. They are tech enthusiasts with a strong need for structure, so they turn to digital channels to help stay on top of it all. Using online services helps Nate and Emily be efficient. In their free time they like to stay in touch with family and friends through social media, watch movies, stream TV shows, read, and play video games.

Needs

Closeness

Relish Connection to family or friends and place emphasis on setting up a home

Ideals

Experience personal fulfillment through products, such as status brands and those that are based on higher principles like social responsibility.

Structure

Exhibit groundedness and the desire to hold things together. They need to be well organized and under control.

The 12-segment framework groups people by the needs that drive their consumer choices.

Media Usage

PREFERRED CONTENT:

- Comedy
- Drama
- Crime
- Adventure
- Romance
- Independent
- Foreign

PAST 30-DAY SOCIAL MEDIA:



Personality

The big 5 personality model is most widely used framework for understanding how a person interacts with the world.



OPENNESS + AGREEABLENESS

Compassionate and cooperative towards others. Open to experiencing a variety of activities.

Interests

- DIY Home Improvement
- Tech Enthusiasts
- Movie Goers

Demographics

AGE:
Millennials & Gen X

INCOME:
\$96,600

CHILDREN:
1+

EMPLOYMENT:
Full-time

EDUCATION:
Bachelor/Degree

MARITAL STATUS:
Married/Partner

ADDITIONAL INFORMATION:
Primary shopper in household

Cross-Audience Comparison

Online Walmart shoppers have different motivations and triggers than in-store shoppers due to differences in emphasis from their personas and their top personality needs.

Persona-Based Recommendations

Walmart.com and Walmart App Shoppers

Family and kids are at the center for this Audience. They want to take care and do the best for them. This includes buying products that are good for them. Their need to fulfill their ideals suggests that they are likely to look for products that may be healthier, environmentally friendly or offer some added value, since they do care and have more means than in-store shoppers to purchase something that's "good for others".

Walmart In-Store Shoppers

While relationships and family are important to this audience, they are more pragmatic and have to watch their budget. They are more likely to take care of basic needs for themselves and others and less inclined to indulge and purchase items that offer added benefits at additional cost. Their strong need for structure suggests that they go shopping with a shopping list.

Personality



OPENNESS + AGREEABLENESS

Idealistic, Diplomatic, Deep, Tactful, and Genial



OPENNESS + CONSCIENTIOUSNESS

Analytical, Perceptive, Informative and Articulate

Top Needs



Closeness



Ideals



Structure



Structure



Closeness



Harmony

Walmart Online Shoppers – Personality Profile

Needs Assessment

Activate Walmart Online shoppers' need for Closeness and Love by emphasizing relationships and Structure by building a trustworthy brand.

1. Closeness

Because they need to feel physical and emotionally closeness. Emily and Nate work hard to make their homes comforting and nurturing and enjoy celebrating major milestones with their loved ones.

2. Ideals

Highlighting aspects of your corporate social responsibility and using messaging that helps them understand how shopping at Walmart.com may help them achieve their ideals will resonate with Emily and Nate.

3. Structure

Emily and Nate seek a sense of organization in their lives to help them to feel grounded. Clear, simple messaging will resonate more deeply than anything flashy.

4. Harmony

The need for harmony leads Emily and Nate to purchase gracious and friendly brands. They understand and appreciate many points of view and expect companies to do the same.

5. Liberty

Emily's and Nate's need for liberty means that they want to break out of routine and embrace cutting edge innovation or technology. Position new technology or enhancements as ground-breaking.

6. Love

Emily's and Nate's need for love means they place great importance on physical and social connections (whether in groups or 1:1) with family and friends. Showing that your brand facilitates those connections will resonate.

Very Strong

Strong

GutCheck Actionability Framework

What to Say & Do to Tap into Emily and Nate's Needs & Personality



“I can get mainly everything I want at one place and either do curbside pick-up or have it delivered at the day and time that I want to have it. Also, they have great low prices, I get what I need faster than some of the other places. I know what I'm going to get and not get with e-mail alerts on my products. Plus, it's cheaper with their delivery and curbside pick-up is free.”

» What to Say

Position Walmart.com and the Walmart app as a way for Emily and Nate to connect with their loved ones. Their open, agreeable personalities and being tech enthusiastic position them to use these if it makes their lives simpler. Their needs for closeness and love keep them looking for ways to connect with others; however, they try to do this in low stress ways because they also desire structure and harmony. As part of their Ideals need, they also get fulfillment from knowing they use brands that represent their beliefs well. That can be brands that show social responsibility as well as those that represent status, so be sure to message how well Walmart.com and the app deliver brand names and on trend looks.

» What to Avoid

Avoid messaging that is too focused on the product; Emily and Nate will be more drawn to messaging that connects with their relational needs.

» Visual Inspiration

Focus on imagery of Emily and Nate using the Walmart app in ways that demonstrate how it makes their lives easier and/or frees up time to spend with friends and family.



» Colors to Consider

Leverage blue to build trust and connect with Emily and Nate's needs for closeness and structure.



GutCheck Recommendations.

Online Walmart shopper' expectations are distinct form in-store shoppers' and should be addressed to gain stronger consideration for Walmart.



Convenience is key for online Shoppers

Make consumers' busy days easier and help them manage their needs. The app and Walmart.com must be supportive by working seamlessly and fast, making the shopping experience easy and being reliable in product availability and delivery time.



In-store shoppers like to see and touch products

Make it easy for them to get an experience online that comes close to having the product in-hand. Videos, several detailed pictures with zoom, consumer reviews explaining the experience, etc. can substitute the hands-on experience and provide even more depth.



Digital ad spend is critical

Programmatic, search, social, and audio is critical in reaching the Online Walmart audience since they are more likely than other shoppers to discover new products and promotions via social media, searches, retailer websites, in-app or email



Increase Awareness

Raise awareness of the advantages of the merged Walmart grocery & retail app since only a portion of consumers have noticed the change. Those who noticed it liked the merger and some say it is easier to navigate.



Address Pain points


Pain points in the user experience with the new Walmart app should be addressed (e.g., app crashing, loading time, in-stock information).

The Walmart Plus Launch is Very Timely

WALMART · Published September 1

Walmart to launch long-awaited subscription service Sept. 15

Walmart + costs \$98 a year or \$12.95 a month



A new **membership** program that combines **in-store + online benefits.**

Source: <https://corporate.walmart.com/newsroom/2020/09/01/walmart-introduces-walmart>
<https://www.foxbusiness.com/lifestyle/walmart-launches-subscription-service>
<https://www.techradar.com/news/walmart-plus>
<https://www.nytimes.com/2020/09/01/business/walmart-plus-membership.html>

Walmart Plus: release date, price and how its membership compares to Amazon Prime

By Matt Swider 20 hours ago

The Walmart Plus subscription service is almost here, and it rivals Amazon Prime on price

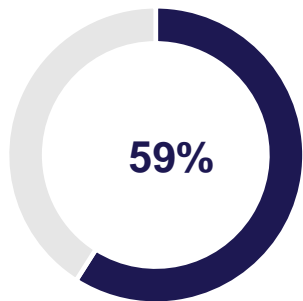
Retailer launches a membership program that helps put more time back in customers' day while continuing to save them money.

BENTONVILLE, Ark., Sept. 1, 2020 — Walmart is launching a new membership program that brings together in-store and online benefits to save customers money and time like no other retailer can: Walmart+.

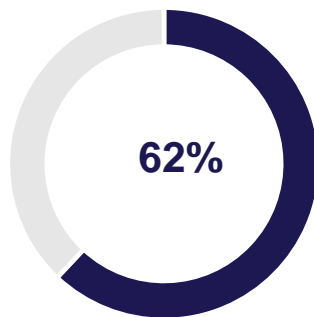
Walmart+ uses the company's unique assets to make life easier for busy families. Along with the power of its online presence, Walmart+ has the reach of more than 4,700 stores, including 2,700 stores that offer delivery as fast as same day. Members will receive unlimited free delivery from stores, fuel discounts and access to tools that make shopping faster for families. Membership will be available to all customers on Sept. 15. It will cost \$98 a year or \$12.95 a month and includes a 15-day free trial period. In the future, the company will leverage its wide-ranging strengths to add additional benefits for members in a variety of services and offerings.

Three Themes

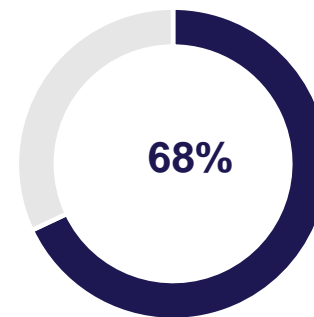
Walmart's biggest threat online is Amazon as evidenced by surprisingly strong dual usage of Walmart and Amazon in purchasing, subscription and app usage.



59% of Online Walmart shoppers have also purchased at Amazon in past 3 months.



62% of Online Walmart shoppers are Amazon Prime Members and 57% of those who say they prefer to shop at Walmart also have Amazon Prime.



68% of Online Walmart shoppers have the Amazon app installed

Delivering an excellent online experience is paramount to compete with Amazon.



» Targeting

Approach messaging and marketing initiatives to the Online/App and In-store audiences separately, as their personas and needs are quite different, largely due to their life stages and income levels.

Online/App users are more likely to be Millennial parents with higher incomes motivated by strengthening their family experiences and using technology to get the best brands, prices, and convenient shopping experience.

In-store shoppers are older, less digitally-savvy, and have budget concerns due to lower incomes or retirement.

» Experience

Directly address competition with Amazon. Walmart must close any gaps in Walmart.com and app performance to fuel trust. Over time site problems risk an erosion in Walmart trust and pushing shoppers to Amazon where consumers will likely have a consistently positive experience.

Enhance the site and app with excellent customer reviews, hassle-free returns, reliable, plus fast and affordable/free shipping.

Leverage Walmart's advantage over Amazon, its 3,500+ Supercenters and additional smaller stores*, all conveniently located where shoppers can see/touch a product or return easily if they wish.

» Brand Personality

Use digital prowess to reinvigorate the Walmart brand personality, which must provide a uniform and consistent experience across all Walmart users.

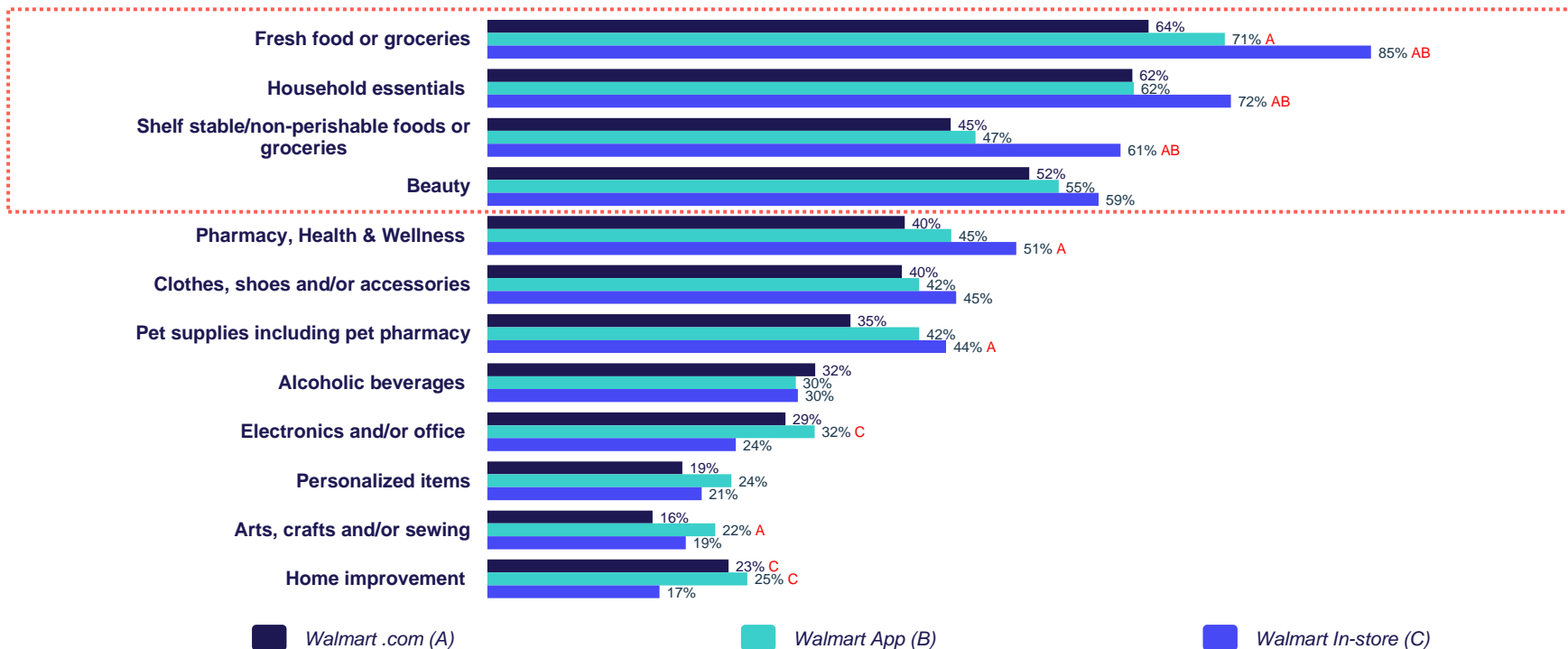
Use the new online/app and its messaging to help make the brand feel younger and more current.

Ensure it is associated not only with affordability but offering a breadth of brand name groceries and household goods to attract higher income Millennials. Walmart offers 160,000 items** with its subscription service, Walmart Plus, while Amazon stocks 10 million items via Prime where 1 million are available with same day delivery***.

How Does Online Shopping Differ From In-Store?

Although foods, household essentials, and beauty are still shopped more in-store, they also represent the strongest online shopping categories for Walmart.

Electronics and home improvement products are shopped more online and non-CPG are close to in-store.



Top Purchase Triggers By Shopper Type

Online and app shopping offer several acknowledged advantages over in-store centring around ease of shopping, safety, convenience and speed.

However, in-store shopping offers some unique advantages like being able to touch the product, immediate availability and the perception that in-store is cheaper.



Walmart.com

- Easy
- Safer, due to COVID-19
- Shop 24/7
- Fast Shipping
- Can track my order
- Faster than in-store shopping



Walmart App Shopper

- Easy
- Safer, due to COVID-19
- Shop 24/7
- **Walmart App is most convenient to shop**
- Can track my order
- Faster than in-store shopping



Walmart In-Store Shopper

- Convenient location
- Going to store is convenient
- **In-store shopping is cheaper**
- **Prefer to use/touch items to purchase**
- **Have products immediately/no wait**
- Generally good in-store experience

Top Purchase Barriers By Shopper Type

Barriers for not shopping through Walmart.com and the Walmart app reflect general reasons for not liking online shopping*.

Reasons for avoiding in-store shopping center around safety during the pandemic and social distancing.

Top reasons for not purchasing from



Walmart.com

- Delivery **wait times**
- **Shipping Costs**
- Can't see/touch/try on products
- Complicated **returns**
- In-store **prices** are sometimes better
- Couldn't **find product** I wanted



Walmart App Shopper

- Delivery **wait times**
- **Shipping Costs**
- Can't see/touch/try on products
- Did not want to **download App**
- Complicated **returns**
- Couldn't **find product** I wanted



Walmart In-Store Shopper

- Safety In-store due to COVID-19 concerns
- Too many people in store
- Long check-out or wait lines

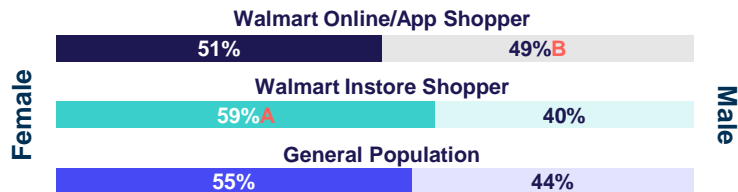
Who Shops Walmart Online?

Consumer Profile Walmart Online Shoppers

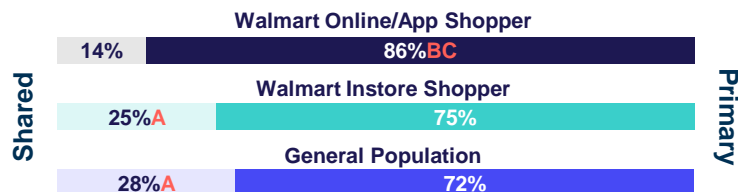
Walmart Online/App shoppers are more likely than In-store shoppers to be married with kids at home and to handle shopping by either gender equally.

In-store shoppers tend to be female with no children at home.

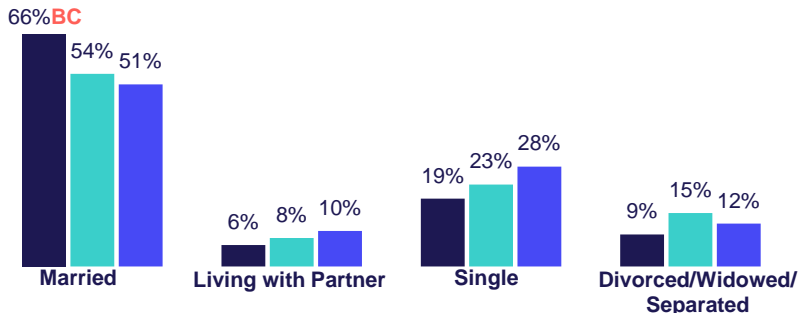
Gender



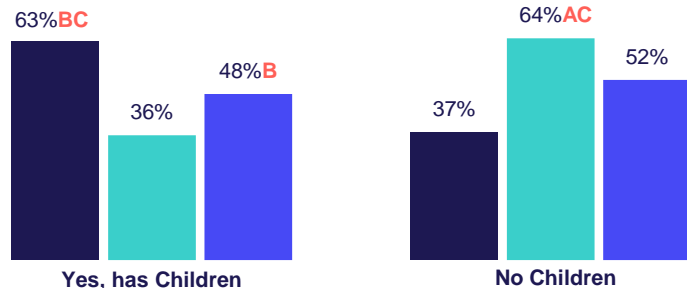
Shared/Primary HH Shopper



Marital Status



Children in Household



Walmart Online/App Shoppers (A) (n=500)

Walmart In-Store Shoppers (B) (n=500)

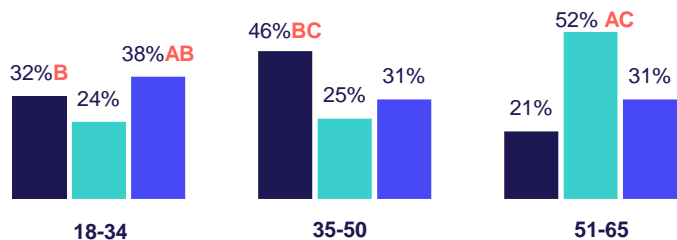
General Population (C) (n=500)

A/B/C Statistically different at 95% confidence level

Consumer Profile Walmart Online Shoppers

Walmart Online/App shoppers are younger with higher educations and incomes than Walmart In-store shoppers.

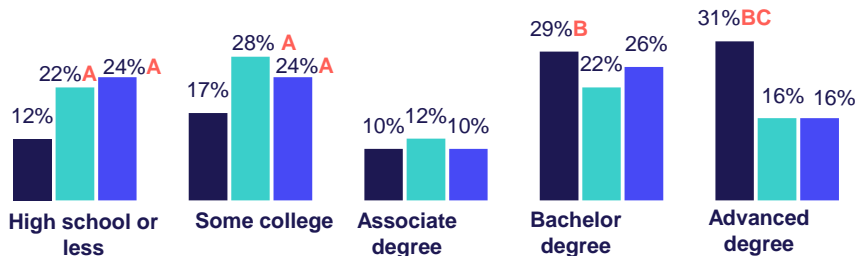
Age



Median Age

Walmart Online/App	39
Walmart In-Store	51
General Population	39

Education



Walmart Online/App Shoppers (A) (n=500)

Walmart In-Store Shoppers (B) (n=500)

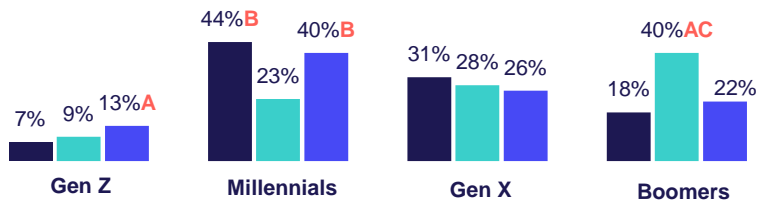
General Population (C) (n=500)

A/B/C Statistically different at 95% confidence level

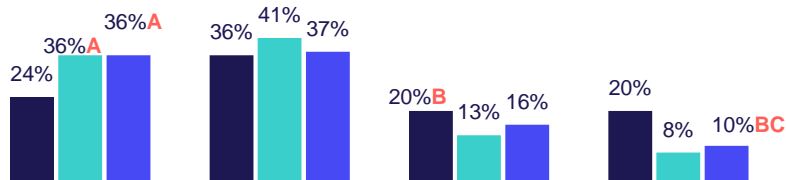
Consumer Profile Walmart Online Shoppers

Walmart Online/App shoppers are younger with higher educations and incomes than Walmart In-store shoppers.

Generations



Household Income



Average Income

Walmart Online/App	\$96,600
Walmart In-Store	\$71,000
General Population	\$75,400

Walmart Online/App Shoppers (A) (n=500)

Walmart In-Store Shoppers (B) (n=500)

General Population (C) (n=500)

A/B/C Statistically different at 95% confidence level

Channel Preferences: Digital

Walmart Online/App shoppers rely more heavily on buying with digital tools compared to Walmart In-store shoppers or the general

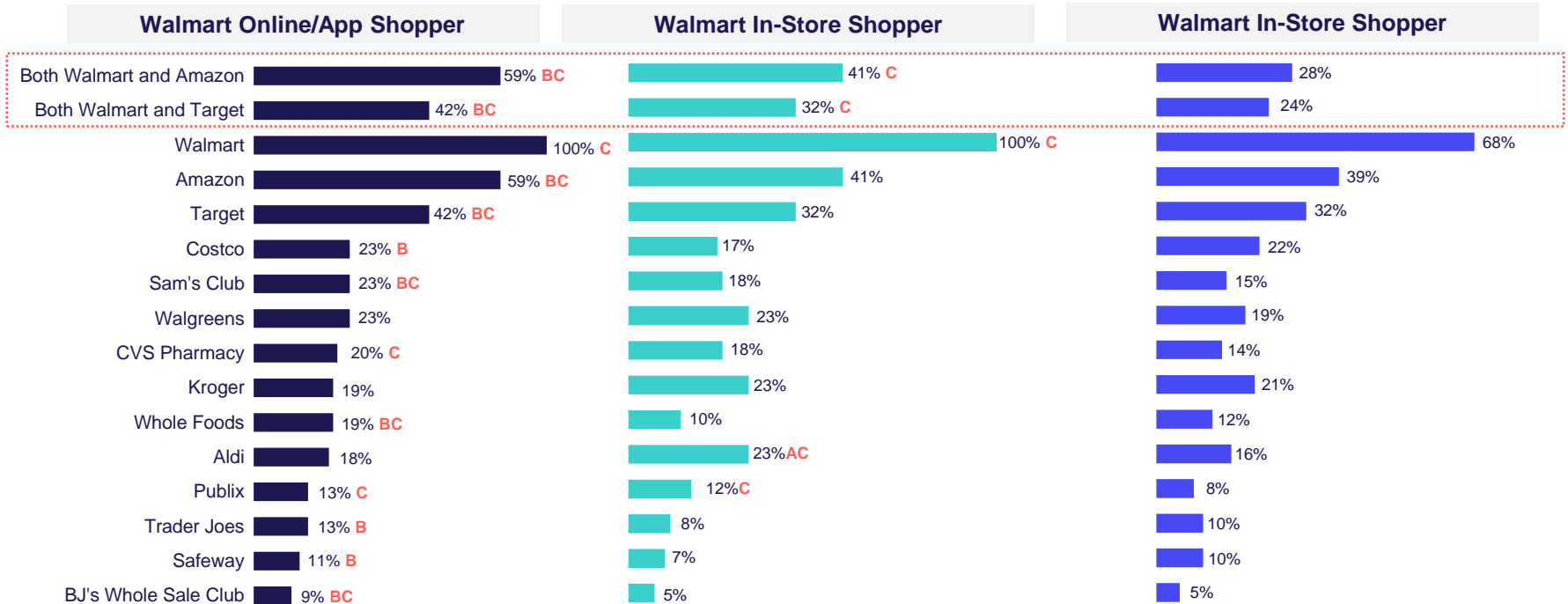
Infact, more than half of Walmart Online/App shoppers buy over 50% of goods digitally.



Retailers Purchased from Past 3 Months

Walmart Online/App shoppers are less loyal than In-store shoppers; they are shopping across several retailers, likely comparing across them.

The majority of Online/App shoppers purchase at BOTH Amazon and Walmart.



Retailers Purchased from the Most

While Walmart is the preferred retailer for both Walmart shopper segments, Online/App shoppers are more likely than In-store shoppers to prefer Amazon.



Retail or Shopping App Involvement

The competition with Amazon is obvious, given that the majority of Online Walmart shoppers have both the Walmart and Amazon apps installed.

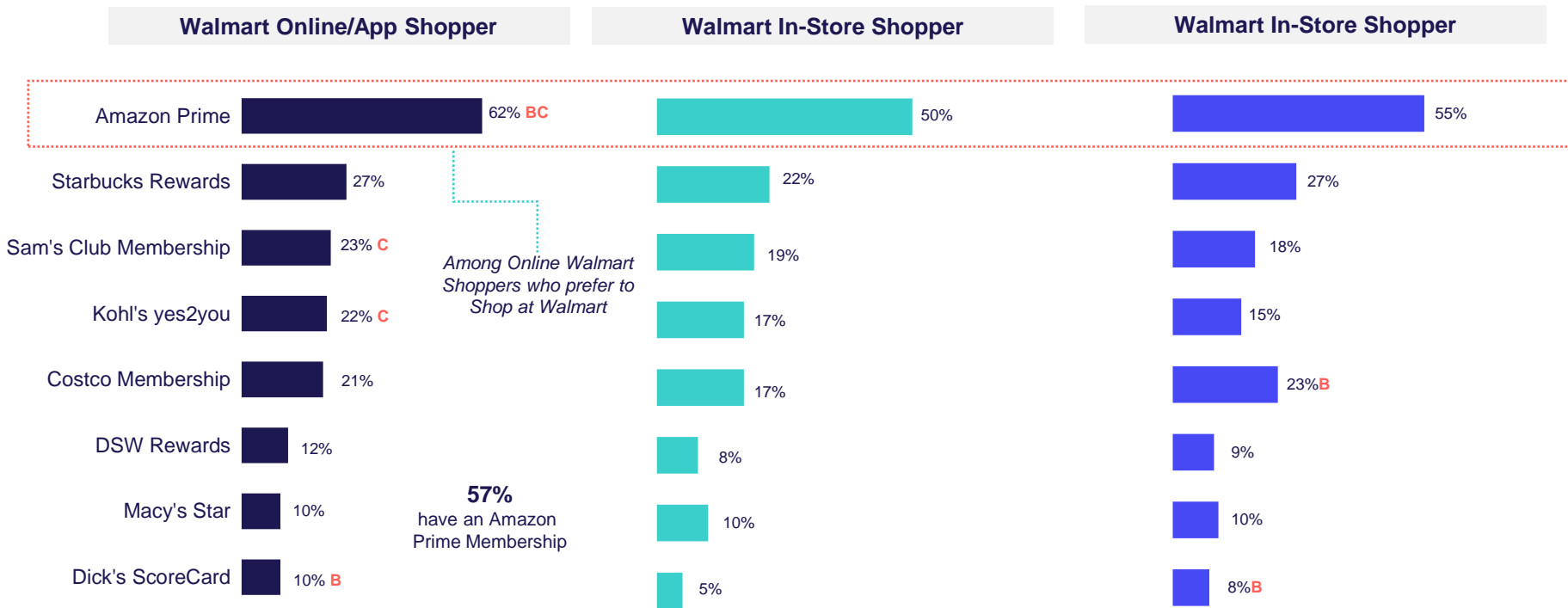
Amazon is even more of a threat among In-store shoppers, who are more likely to have the Amazon app than Walmart's.



Member in Loyalty Programs

Amazon is Walmart's core rival among online shoppers since almost 2 in 3 Walmart Online shoppers have a Prime membership.

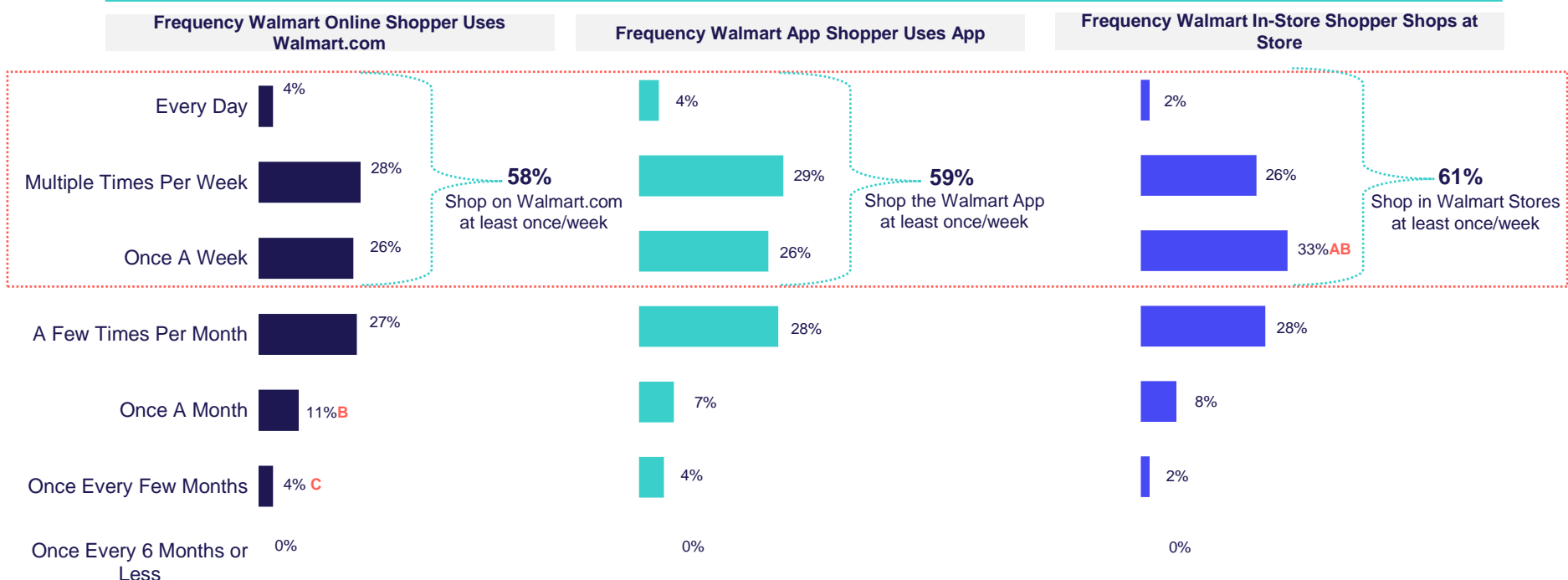
The launch of Walmart Plus is very timely to bind digital shoppers to Walmart and to compete with Prime.



Frequency of Walmart Shopping: Digital, In-Store

Walmart Online and App shoppers shop just as often using those tools as Walmart In-store shoppers shop at the store.

Clearly for digital Shoppers, these tools have become their 'normal' way to shop.



Q: How frequently would you say you shop on Walmart.com?

Q: How frequently would you say you shop on Walmart's App?

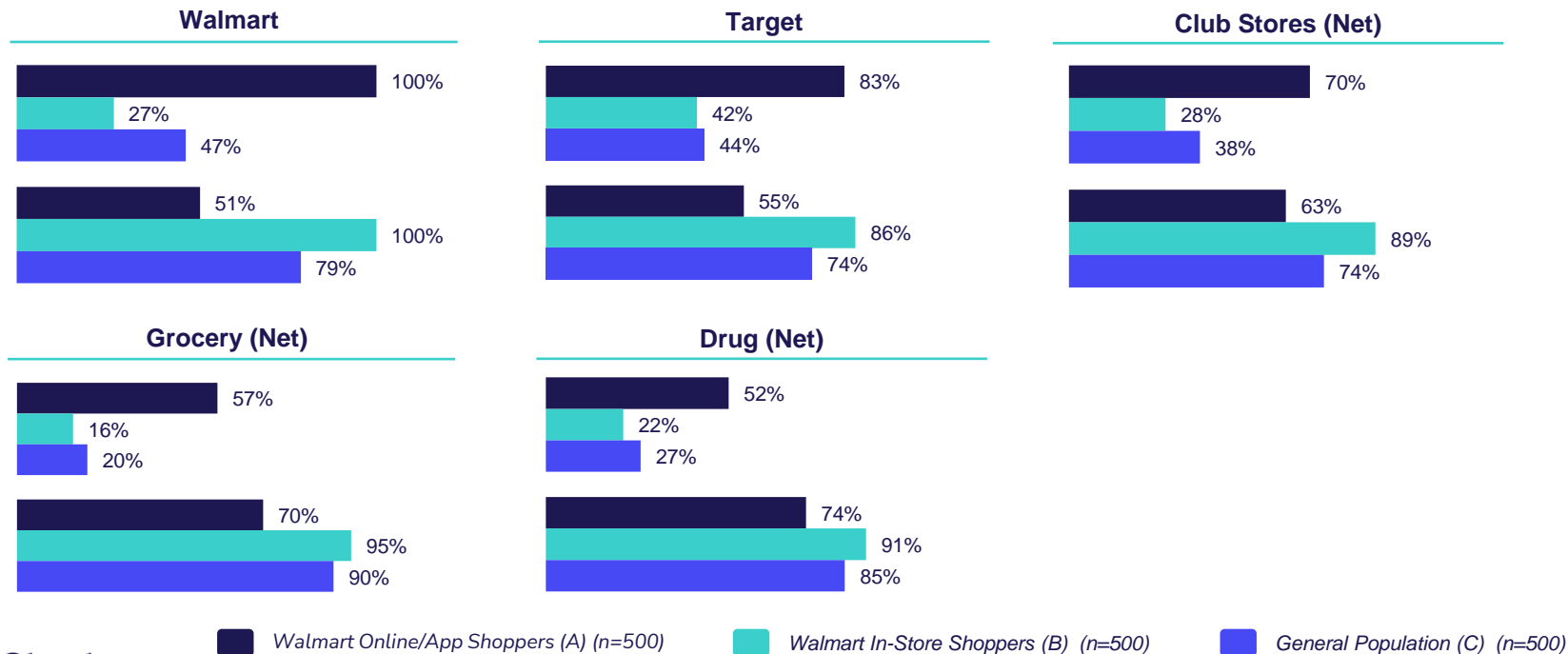
Q: How frequently would you say you shop at any Walmart store (i.e., Supercenter, Discount Store and/or Neighborhood Market)? Your best estimate is fine.

(Walmart Online/App Shoppers (A) n=548; Walmart In-Store Shoppers (B) n=428; General Population (C) n=985) ^{A/B/C} Statistically different at 95% confidence level

Channel Preference by retailer

Not surprisingly, consumers who shop digitally prefer to do so across retailers; only grocery and drugs stores draw them into brick and mortar locations.

Walmart is not the only retailer having to keep digital shoppers engaged given their ability to easily compare.



Why Shop Walmart?

Why Prefer Walmart – In-Store Walmart Shoppers

Walmart’s strong price positioning is a big motivator to shop at Walmart. The store is seen as a one-stop shop, offering close-by locations and wide variety.

Summary of coded open-ended responses



“ **One stop shopping. Convenient location. Good prices.**”
-Male, Age 51

“ **Extremely close to my house and has a huge variety of products I can get for my large family.**”
-Female, Age 33

“ **Reasonable, open-carry is allowed, acceptable variety, has a super center so I can get food and household supplies in one stop, free online order and curbside pick-up.**”
-Female, Age 51

Why Prefer Walmart – Online/App Walmart Shoppers

Walmart’s positioning around low prices extends to its online offering. Consumers also like the convenience of online and the variety offered.

Walmart’s advantage over Amazon is its number of in-store locations to offer the best of both: online and in-store.

Summary of coded open-ended responses



“ As Walmart provides **cheaper, better, more accessible** services than others.”
-Male, Age 38

“ **Easy** to place an order online for **curbside delivery**. Good **service** when I go to pick it up.”
-Female, Age 58

“ Their app is **easy to use** and keeps my **purchase history** and debit **card info**.”
-Female, Age 39

Why Prefer Amazon – Walmart Online/App Shoppers

However, Amazon stands apart to its shoppers for easy shopping, fast delivery, convenience and offering great prices.

Amazon shoppers trust Amazon with accurate delivery times and the benefits of Prime membership.

Summary of coded open-ended responses



“ Because I **always love Amazon**, the **fast deliveries**, the **quality** and the **good prices**.”

-Male, Age 21

“ Their **payment system** and **shipping system** is best for me.”

-Female, Age 34

“ Amazon is the **largest shop** in the world and **trusted shop**. Amazon gives real product in **value, price**, so I shop with Amazon.”

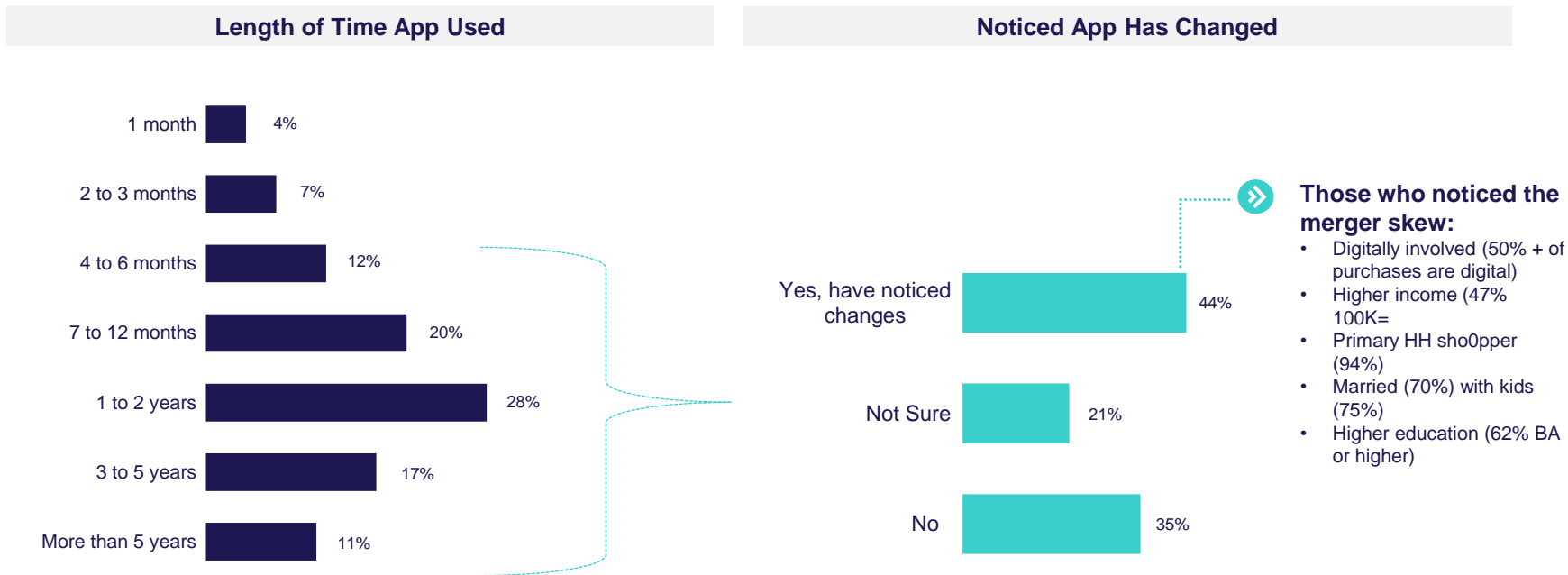
-Female, Age 39

The New Merged Walmart App

Walmart App Usage

Most Walmart App shoppers have been using the app for a while and should be exposed to the merging of grocery and general merchandise on the app.

However, awareness of app changes is modest; just under half of its shoppers noticed a change.



What Walmart App Changes did Consumers Notice and Like

Continue to educate consumers about the benefits of the merged Walmart app since awareness is not widespread; those who noticed the merger like it.

Only 17% of app users who noticed a change mention the merging of grocery and general merchandise shopping into one app.

Summary of coded open-ended responses



“ Walmart Grocery **merged** with Walmart’s main app for a **more seamless experience**. There used to be two apps and it was hard and clunky to use.”
-Female, Age 64

“ I like that the front page **shows me recommended or featured products** along with products I have frequently ordered.”
-Female, Age 38

“ Being able to **pay for your groceries with debit on the app** instead of waiting till you get the store.”
-Female, Age 35

What Walmart App Changes did Consumers Notice and Not Like?

Address commonly mentioned pain points that center around the new app crashing, loading time, product search, correct inventory updates and more.

“ My app has been **taking longer** to load and/or **find the items** that I search for.”

- Female, Age 46

“ **Inventory is NEVER accurate**, the **curbside check-in** is ridiculous and only works half the time, it doesn't text you with substitutions...Only emails them. That's very **inconvenient**.”

- Female, Age 51

“ I never had the app continuously **crash** like it does now.”

- Female, Age 39

“ Some **screens are very busy**. I prefer to see less even if I am required to go to more screens.”

- Male, Age 61

“ **Searches** could be better – also **merchandise that is out of stock** sometimes does not say out of stock.”

- Male, Age 51

“ It took a little while to get it to work with my debit card because the **screen just wouldn't load**. But it's good now.”

- Female, Age 33

“ Harder to **find check in** and order being **split into parts**.”

- Female, Age 43

How to Reach Walmart Online Shoppers

Media Strategy Recommendations

Where to Find Nate & Emily



“ I love to listen to true crime and murder podcasts.”



“ I love all sports content that is current and up to date.”

» Online

Social Media 2-11pm

- Facebook
- YouTube
- Instagram
- Twitter

Shopping Online 11am-11pm

- eCommerce
- Auction sites

» Media

Music and streaming services, as well as social media are all part of Emily's and Nate's lives. Leverage this when trying to reach them.

» Audio

Music Streaming Services 5am-8pm

Spotify music pandora

Podcast Genres

- Comedy
- News
- Sports
- Music
- TV

Podcast They're Loving

- The Joe Rogan Experience

» Video

Streaming Services 2-11pm

NETFLIX prime amazon Disney+ hulu

Movie Genres

- Comedy
- Drama
- Crime
- Adventure
- Romance
- Independent
- Foreign

» Books

Book Genres

- Drama
- Educational
- Poetry
- Science Fiction

Channels for Product Delivery

Reach digital Walmart shoppers through social media, Walmart.com and other digital channels to alert them about promotions and products.

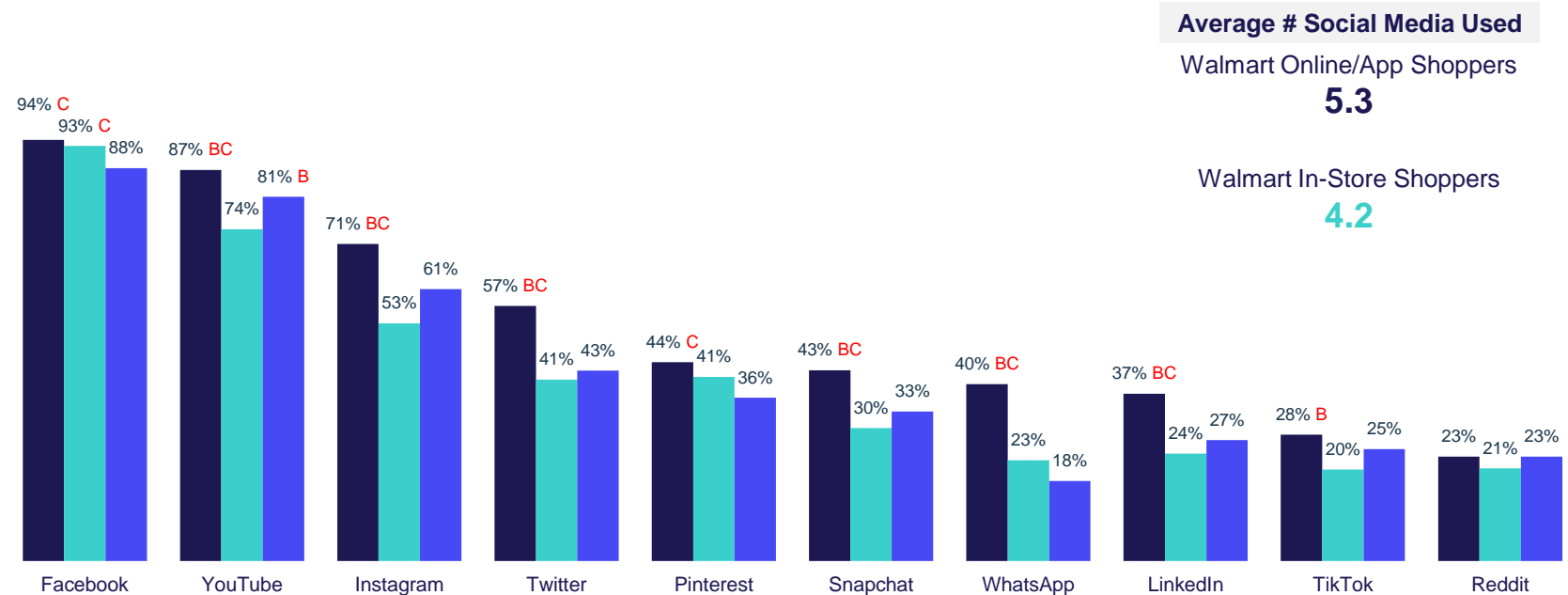
Use in-app messages to reinforce strategic communication points.



Q: Which of the following best describes where you prefer to learn about new products and promotions? (Walmart Online/App Shoppers (A) n=500; Walmart In-Store Shoppers (B) n=500; General Population (C) n=500)

Social Media Usage

Engage Walmart Online shoppers via social media as they are active across more social media platforms than other shopper types.

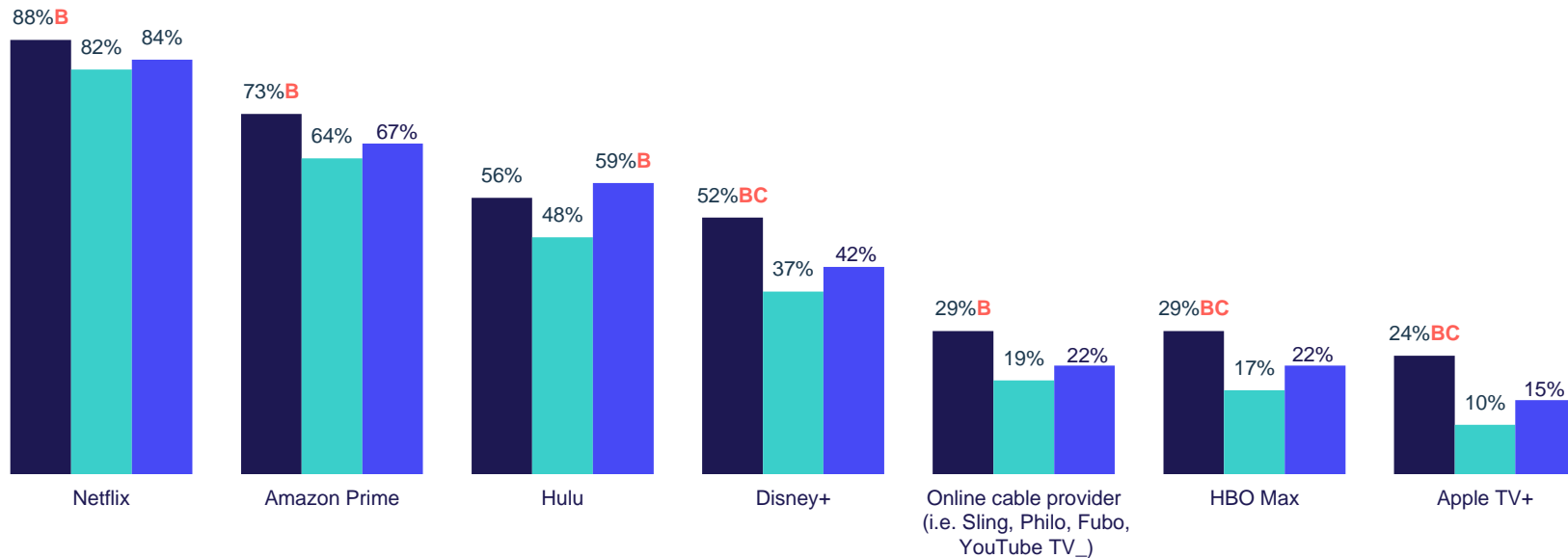


Q: Which of the following social media sites, if any, have you used in the past 30 days? (Walmart Online/App Shoppers (A) n=326; Walmart In-Store Shoppers (B) n=333; General Population (C) n=296)

Streaming TV Usage

Walmart Online shoppers are more likely to stream TV.

Given that they are more likely to have families, Disney+ is a popular channel, in addition to the usual steaming offers from Netflix, Amazon Prime, and Hulu.

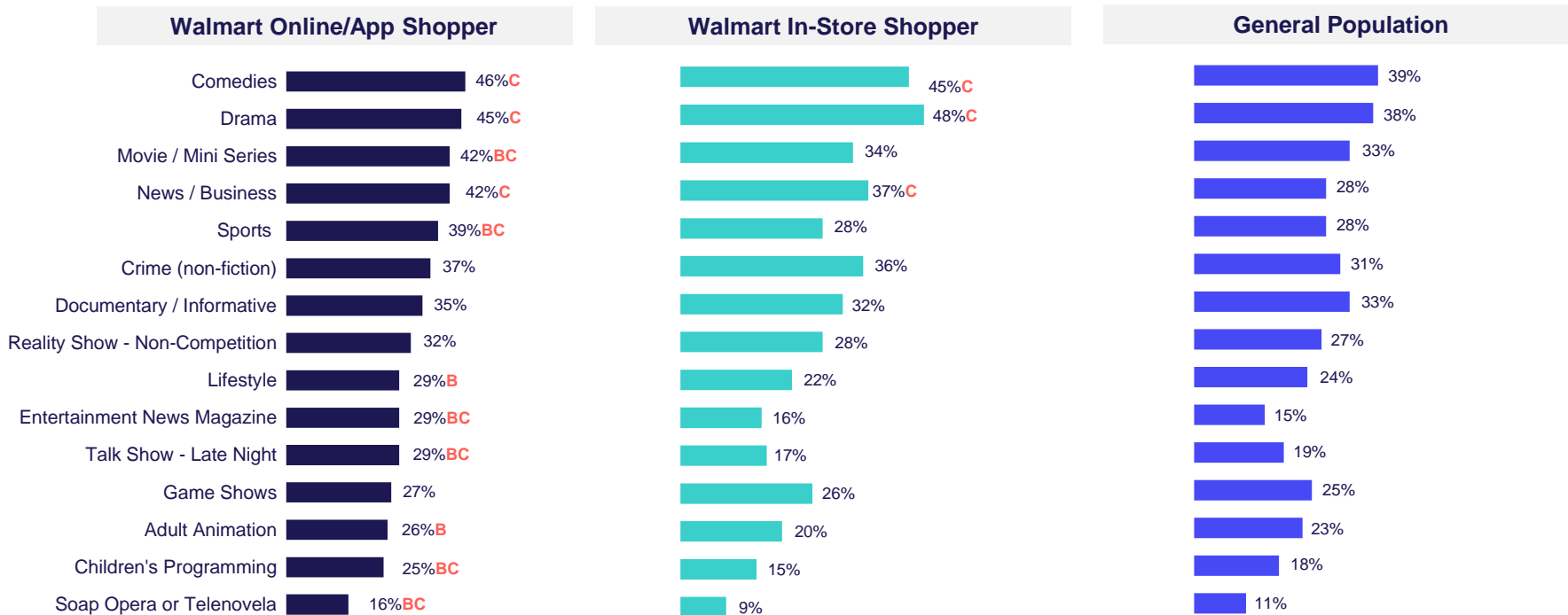


Q: Which of the following video streaming services, if any, have you used in the past 30 days? (Walmart Online/App Shoppers (A) n=280; Walmart In-Store Shoppers (B) n=265; General Population (C) n=258)

Movie and TV Genre

Compared to in-store, Walmart Online shoppers are more interested in watching movies and sports, as well as entertainment news and talk shows.

Given that they have families with kids, they are also more likely to have children's show on.



Supplemental: How do Walmart App Shoppers Differ from Walmart.com Shoppers

Consumer Profile of Exclusive Walmart.com vs. Walmart App Shoppers

Walmart App shoppers who do not shop on Walmart.com skew more female, tend to have a lower income and are less likely to be college educated.

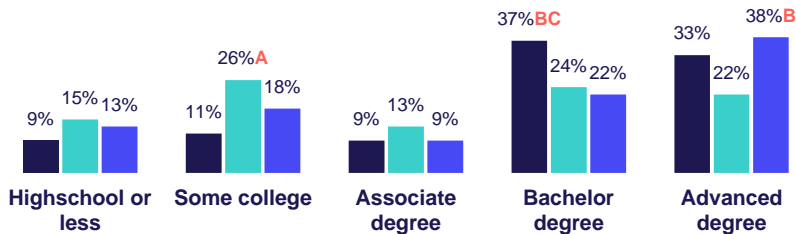
Gender



Household Income



Education



Average Income

Exclusive Walmart.com	\$101,300
Exclusive Walmart App	\$83,900
Both Walmart & App	\$103,300

■ Exclusive Walmart.com Shoppers (A) (n=223)

■ Exclusive Walmart App Shoppers (B) (n=150)

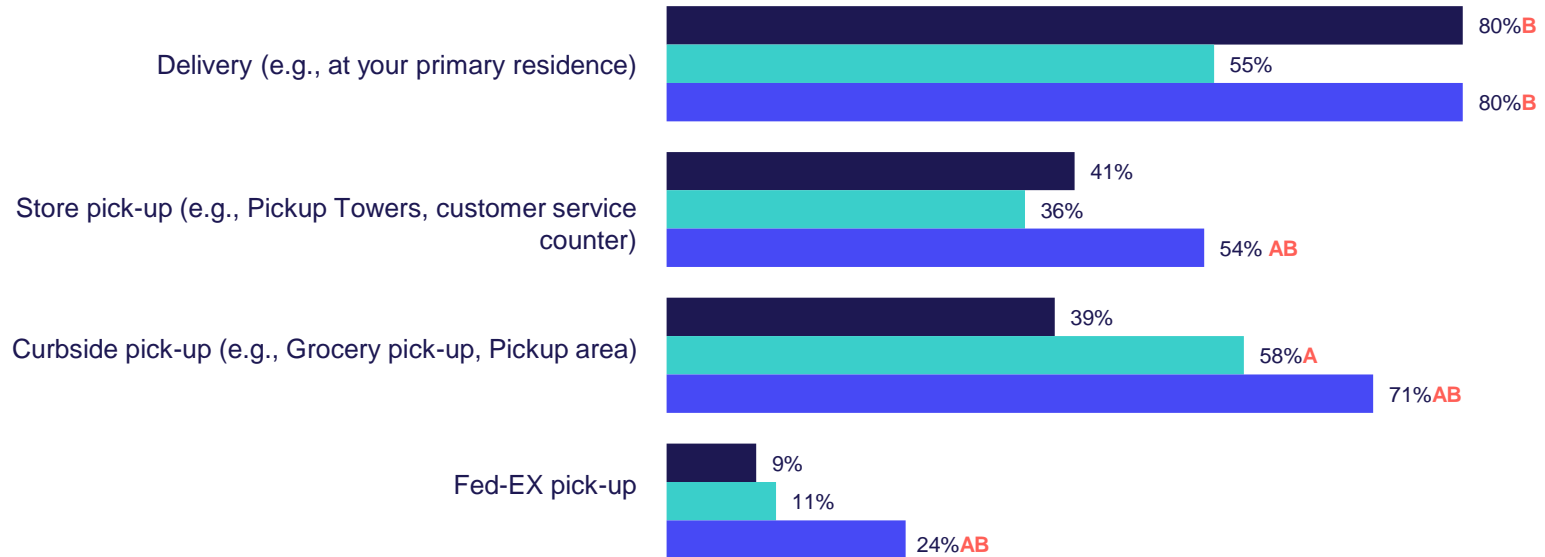
■ Shop Walmart.com and App (C) (n=127)

A/B/C Statistically different at 95% confidence level

How They Receive Orders

Focus curbside pickup-on Walmart App shoppers, who are more likely to use curbside; Walmart.com shoppers tend to prefer delivery.

Walmart App shoppers may be more likely to purchase groceries and thus use curbside pick-up more.



Exclusive Walmart.com (A) Shopper



Exclusive Walmart App Shopper (B)

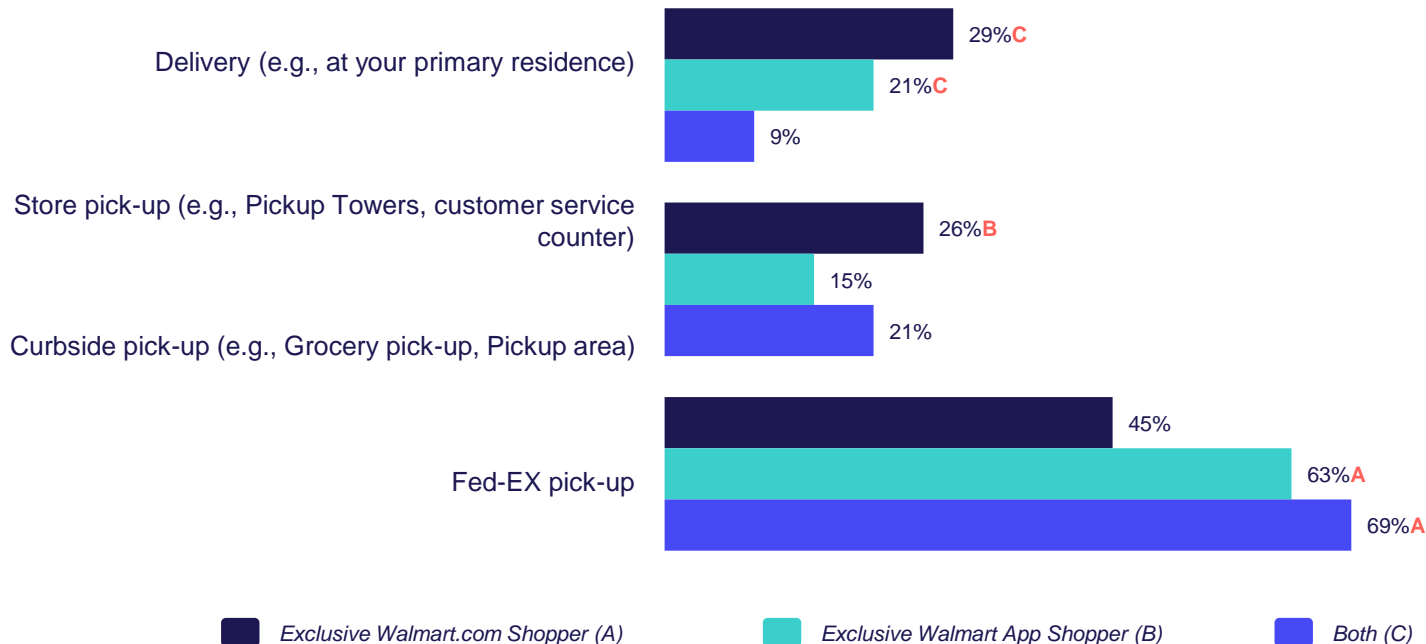


Both (C)

Frequency of Online Shopping

Walmart.com shoppers who do not use the Walmart app are shopping more in-store than those using the Walmart app.

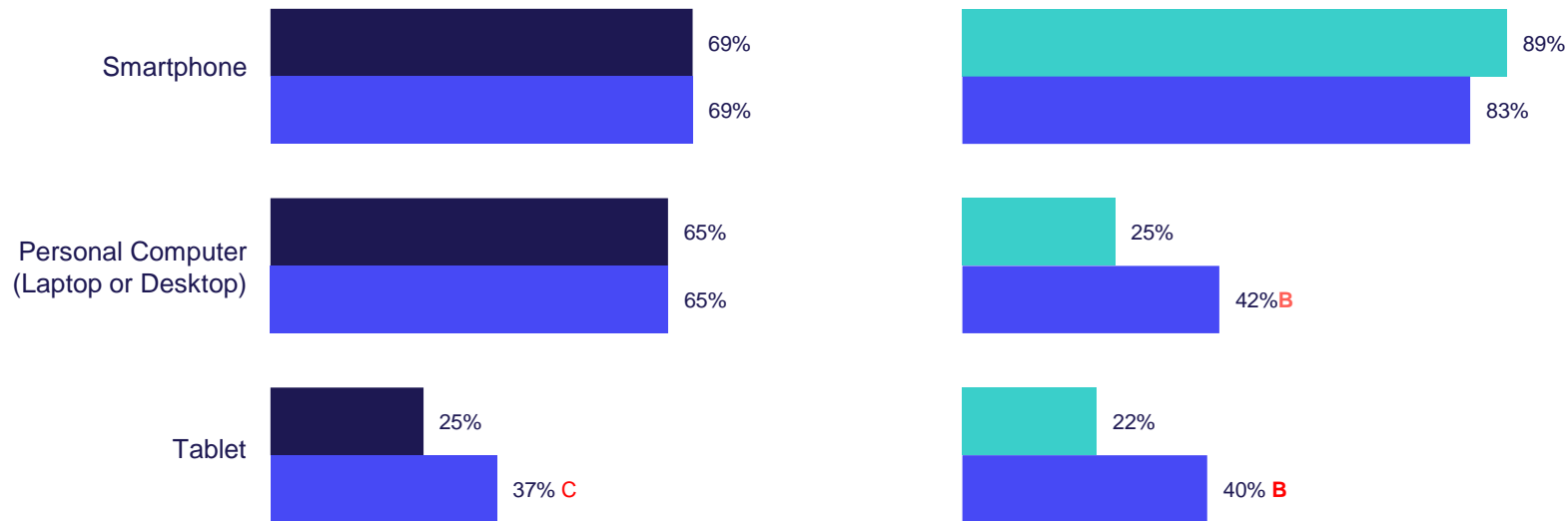
Walmart App shoppers may be more likely to purchase groceries and thus use curb side pick-up more.



How They Order

Ensure the app runs smoothly on smartphones, while the Walmart.com site should be equally convenient to use from smartphone and bigger screens.

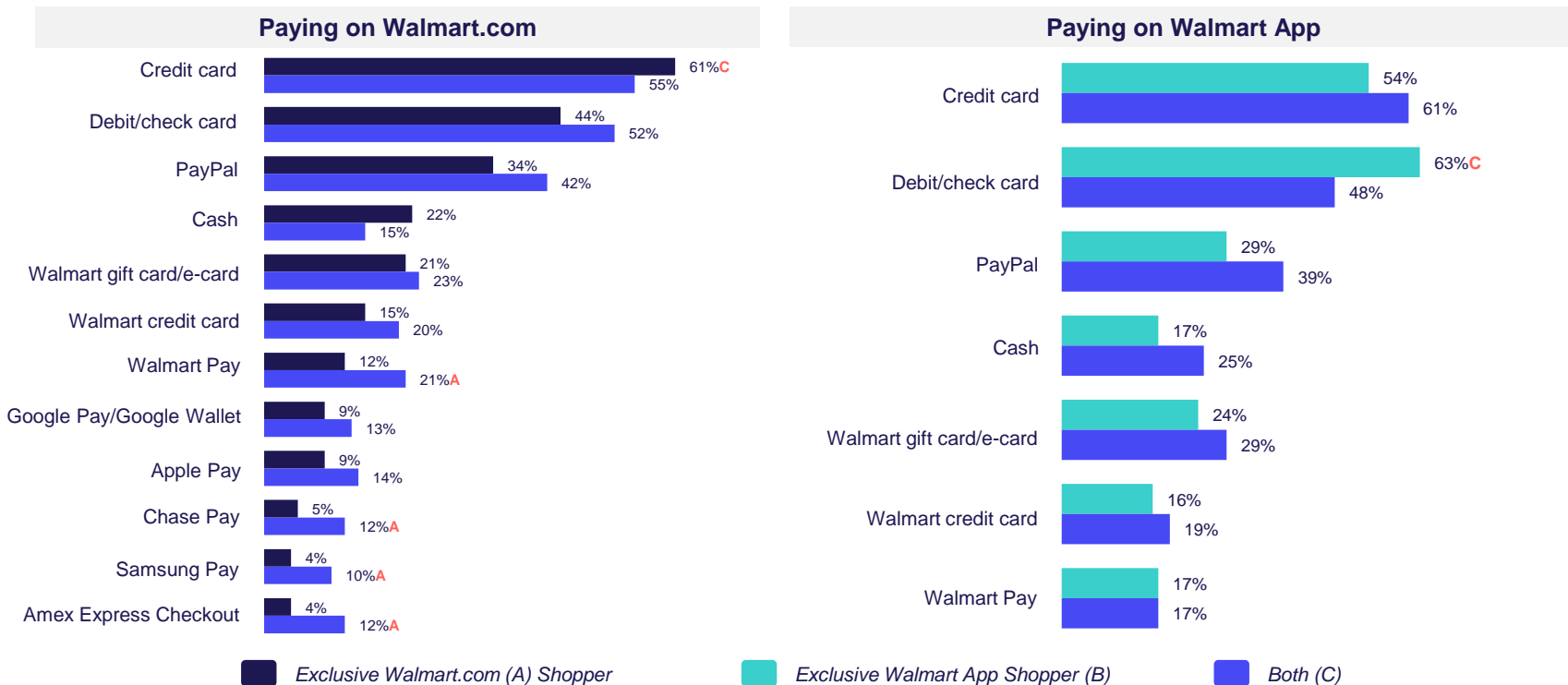
Offer a convenient shopping experience to Walmart shoppers who use tablets; they are shoppers who use both the site and app.



Exclusive Walmart.com Shopper (A)
 Exclusive Walmart App Shopper (B)
 Both (C)

Payment Method

Credit, debit card and PayPal are most commonly used to pay; while site users skew more towards paying with credit card, app users use debit slightly more.



Exclusive Walmart.com (A) Shopper



Exclusive Walmart App Shopper (B)



Both (C)

Appendix

Demographics (Walmart Online n=500; Walmart In-Store n=500; General Population n=500)

Gender	Walmart Online	Walmart In-Store	Gen Pop	Household Income	Walmart Online	Walmart In-Store	Gen Pop	Ethnicity	Walmart Online	Walmart In-Store	Gen Pop
Male	49%	40%	44%	less than \$20,000	8%	10%	13%	African American	8%	11%	11%
Female	51%	59%	55%	\$20,000 to \$24,999	3%	6%	7%	Asian	4%	4%	6%
Non-binary	0%	0%	1%	\$25,000 to \$29,999	3%	6%	5%	Caucasian	80%	76%	68%
Prefer not to say	0%	0%	0%	\$30,000 to \$39,999	6%	7%	6%	Hispanic/Latino	5%	6%	9%
				\$40,000 to \$49,999	5%	7%	5%	Other	3%	3%	5%
				\$50,000 to \$59,999	9%	13%	10%				
				\$60,000 to \$69,999	7%	8%	8%				
				\$70,000 to \$74,999	6%	5%	4%				
				\$75,000 to \$79,999	6%	5%	6%				
				\$80,000 to \$89,999	4%	4%	2%				
				\$90,000 to \$99,999	4%	6%	6%				
				\$100,000 to \$109,999	4%	6%	4%				
				\$110,000 to \$119,999	3%	2%	2%				
				\$120,000 to \$124,999	3%	0%	2%				
				\$125,000 to \$129,999	3%	1%	1%				
				\$130,000 to \$139,999	1%	0%	2%				
				\$140,000 to \$149,999	6%	4%	5%				
				\$150,000+	20%	8%	10%				
				I prefer not to say	0%	1%	1%				
Age	Walmart Online	Walmart In-Store	Gen Pop					Education	Walmart Online	Walmart In-Store	Gen Pop
Generation Z	7%	9%	13%					Less than high school	1%	2%	4%
Millennials	44%	23%	40%					High school graduate	11%	20%	20%
Generation X	31%	18%	26%					Some college	17%	28%	24%
Baby Boomers	18%	40%	22%					Associate degree	10%	12%	10%
								Bachelor's degree	29%	22%	26%
								Advanced degree	31%	16%	16%

Demographics (Walmart Online n=500; Walmart In-Store n=500; General Population n=500)

Employment	Walmart Online	Walmart In-Store	Gen Pop
FT employee	62%	42%	49%
PT employee	8%	10%	10%
Homemaker	8%	10%	11%
Retired	7%	17%	9%
Self-employed	4%	5%	6%
Student	2%	3%	2%
Unemployed	9%	13%	13%

# of Children in HH	Walmart Online	Walmart In-Store	Gen Pop
No children	37%	64%	52%
1	22%	15%	22%
2	31%	14%	16%
3	6%	6%	7%
4	2%	1%	2%
5 or more	1%	0%	2%
No children	37%	64%	52%

Age of Female Children	Walmart Online	Walmart In-Store	Gen Pop
less than 2 years old	7%	7%	9%
2 to 6 years old	36%	33%	44%
7 to 10 years old	33%	33%	28%
11 to 13 years old	21%	21%	18%
14 to 17 years old	22%	37%	28%

Marital Status	Walmart Online	Walmart In-Store	Gen Pop
Single	19%	23%	28%
Married	66%	54%	51%
Divorced	6%	9%	8%
Widowed	2%	3%	2%
Separated	2%	4%	2%
Living with Partner	6%	8%	10%

HH Shopper	Walmart Online	Walmart In-Store	Gen Pop
Primary	86%	75%	72%
Shared	14%	25%	28%
Someone else is primary	--	--	--

Age of Male Children	Walmart Online	Walmart In-Store	Gen Pop
less than 2 years old	7%	5%	15%
2 to 6 years old	33%	30%	41%
7 to 10 years old	33%	27%	29%
11 to 13 years old	24%	27%	21%
14 to 17 years old	30%	34%	31%
less than 2 years old	7%	5%	15%

Demographics (Walmart Online n=500; Walmart In-Store n=500; General Population n=500)

Purchased Retailer	Walmart Online	Walmart In-Store	Gen Pop	Purchased PM1	Walmart Online	Walmart In-Store	Gen Pop	Preferred Retailer	Walmart Online	Walmart In-Store	Gen Pop
Walmart	100%	100%	78%	Walmart	100%	100%	59%	Walmart	57%	62%	40%
Amazon	71%	53%	52%	Amazon	48%	34%	33%	Amazon	15%	5%	12%
Target	59%	52%	49%	Target	30%	24%	24%	Kroger	4%	8%	10%
Walgreens	41%	41%	36%	Kroger	15%	20%	18%	Target	5%	4%	4%
CVS Pharmacy	37%	33%	28%	Costco	17%	13%	17%	Aldi	3%	5%	3%
Aldi	32%	35%	30%	Walgreens	16%	16%	13%	Costco	3%	2%	5%
Sam's Club	39%	30%	25%	Aldi	14%	18%	11%	Publix	1%	3%	3%
Kroger	29%	35%	30%	Sam's Club	16%	14%	11%	Sam's Club	2%	2%	2%
Costco	35%	26%	30%	CVS Pharmacy	14%	12%	9%	Safeway	1%	1%	4%
Whole Foods	31%	22%	26%	Whole Foods	14%	7%	8%	Meijer	1%	2%	2%
Trader Joes	24%	21%	20%	Publix	10%	10%	7%	Whole Foods	2%	1%	1%
Publix	20%	19%	13%	Safeway	9%	5%	8%	Albertsons	0%	1%	2%
Safeway	19%	15%	16%	Trader Joes	9%	4%	7%	BJ's Wholesale Club	1%	1%	2%
Albertsons	13%	12%	13%	BJ's Wholesale Club	7%	4%	5%	Trader Joes	1%	0%	1%
Meijer	12%	11%	10%	Meijer	4%	6%	5%	CVS Pharmacy	1%	0%	1%
BJ's Wholesale Club	15%	9%	9%	Albertsons	5%	4%	4%	Walgreens	1%	0%	1%
Other	11%	18%	14%	Other	6%	11%	9%	Other	2%	3%	6%
None of the above	0%	0%	1%	None of the above	0%	0%	2%				

Demographics (Walmart Online n=500; Walmart In-Store n=500; General Population n=500)

P1M Purchase	Walmart Online	Walmart In-Store	Gen Pop	P1M Purchase Channel Walmart	Walmart Online	Walmart In-Store	Gen Pop
Purchased online	86%	45%	50%	Mobile app	55%	13%	30%
Purchased on an app	73%	31%	46%	Online	70%	22%	31%
Purchased in Physical Store	81%	100%	83%	In-Store	51%	100%	79%
None of the above	0%	0%	2%	I don't know	0%	0%	1%

Personality Profile

Online Walmart shoppers have different motivations and triggers than in-store shoppers due to differences in emphasis from their personas and their top personality needs.

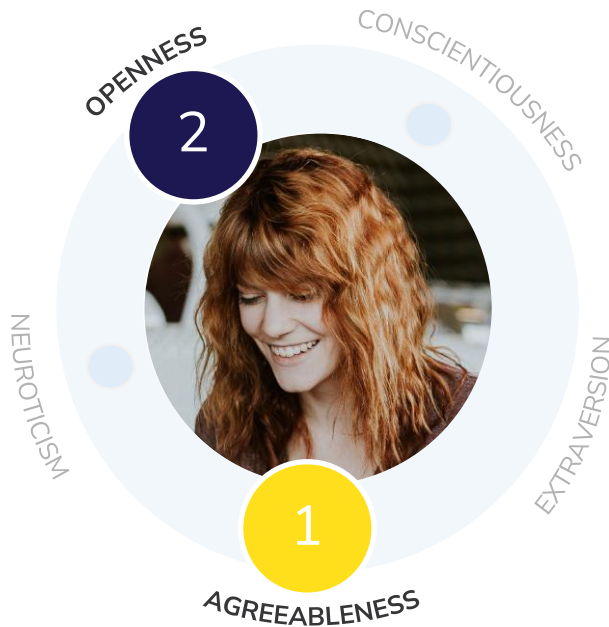
AGREEABLENESS + OPENNESS

OPENNESS

Open to experiencing a variety of activities

AGREEABLENESS

Compassionate and cooperative towards others



Audiences with an Agreeableness / Openness 1-2 pairing tend to be:

- Idealistic
- Diplomatic
- Deep
- Tactful
- Genial

Audiences with Openness as a primary characteristic tend to be:

- Adventurous
- Appreciative of Art
- Emotionally Aware
- Philosophical
- Imaginative

Audiences with Agreeableness as a primary characteristic tend to be:

- Altruistic
- Accommodating
- Emphatic
- Modest
- Uncompromising
- Trusting of Others

Big 5 Definitions

Extraversion	Agreeableness	Openness	Neuroticism	Conscientiousness
Seek Stimulation in the company of others	Compassionate and cooperative towards others	Open to experiencing a variety to activities	Emotions are sensitive to their environment	Act in an organized or thoughtful way
Audiences who are primarily extraverted tend to be like:	Audiences who are primarily agreeable tend to be like:	Audiences who are primarily open tend to be like:	Audiences for whom neuroticism is primary tend to be like:	Audiences who are primarily conscientious tend to be like:
Energetic	Altruistic	Adventurous	Fiery	Driving
Assertive	Accommodating	Appreciative of Art	Prone to Worry	Deliberate
Cheerful	Modest	Emotionally Aware	Melancholy	Dutiful
Excitement-seeking	Uncompromising	Philosophical	Hedonistic	Persistent
Outgoing	Empathetic	Imaginative	Self-Conscious	Self-Assured
Sociable	Trusting of Others	Authority-challenging	Susceptible to Stress	Organized

GutCheck Persona Connector – Summary of Needs

Category	Need	Interpreting this need
The Feelings Need	Love	This need is about physical connections and social with family and friends whether in groups or 1:1.
	Closeness	Consumers with a need for closeness want to feel the emotions brought about by relationships with friends, family or non-human parts of their family. These consumers may engage in "nesting" -- making their home or other relational spaces comforting and nurturing right after major life milestones like buying a new home both because it helps set up situations for emotional closeness and because it helps them feel secure and in control of change, which can be scary.
	Harmony	Consumers with a need for harmony prefer gracious, friendly, and polite companies, goods, and services. These consumers are not only tolerant of the viewpoints and feelings of others but appreciate those views and feelings and want their views and feelings similarly appreciated. They enjoy things that are good for the sake of goodness (an end) and not as a cure for a problem (means).
The Energy Needs	Excitement	Audiences with this need are all about having fun, living life to the fullest, and thrill-seeking.
	Self-Expression	Audience with this need are looking to choose their own adventure.
	Challenge	The need for achievement and success drives those with a challenge need. These consumers enjoy taking on and overcoming challenges just for the sake of a good challenge.
The Ideas Needs	Liberty	Consumers with this need prefer contemporary / modern design and/or fashion over anything traditional, so they gravitate to the latest fashion and gadgets. They want to break out of the routine or status quo and often times, the rules.
	Curiosity	Audiences with this need are always looking to learn something new -- they took those messages about never stop learning seriously and they bring that with them regardless of what they are doing.
	Ideals	Consumers with an ideals need experience public and personal fulfillment through products that provide high profile outcomes such as glamour, sophistication, or elite status or products or causes based on higher principles on which responsible progress can be made.
The Grounded-ness Needs	Practicality	Consumers with a practicality need value efficiency and getting the job done, especially as it pertains to the physical world or their own bodies.
	Stability	Consumers with a stability need desire the physical world and physical objects to be reliable and to provide them with a consistent experience over time.
	Structure	People with this need are seeking a broader sense of structure and organization in their daily lives.

GutCheck Persona Connector – Summary of Needs

Theory	Source Information
The Big 5	Costa, Paul T., Jr., and Robert R. McCrae. Revised nEO Personality Inventory (nEO-PI-R) and nEO Five-Factor Inventory (nEO-FFI) Manual. Odessa, FL: Psychological Assessment Resources (1992).
The Big 5	Hirsh, Jacob B., Sonia K. Kang, and Galen V. Bodenhausen. Personalized Persuasion: Tailoring Persuasive Appeals to Recipients' Personality Traits. External link icon Psychological Science, Vol. 23(6) (June 2012): pp. 578-581.
Needs	Ford, J. Kevin. Brands Laid Bare: Using Market Research for Evidence-Based Brand Management. John Wiley and Sons (2005).

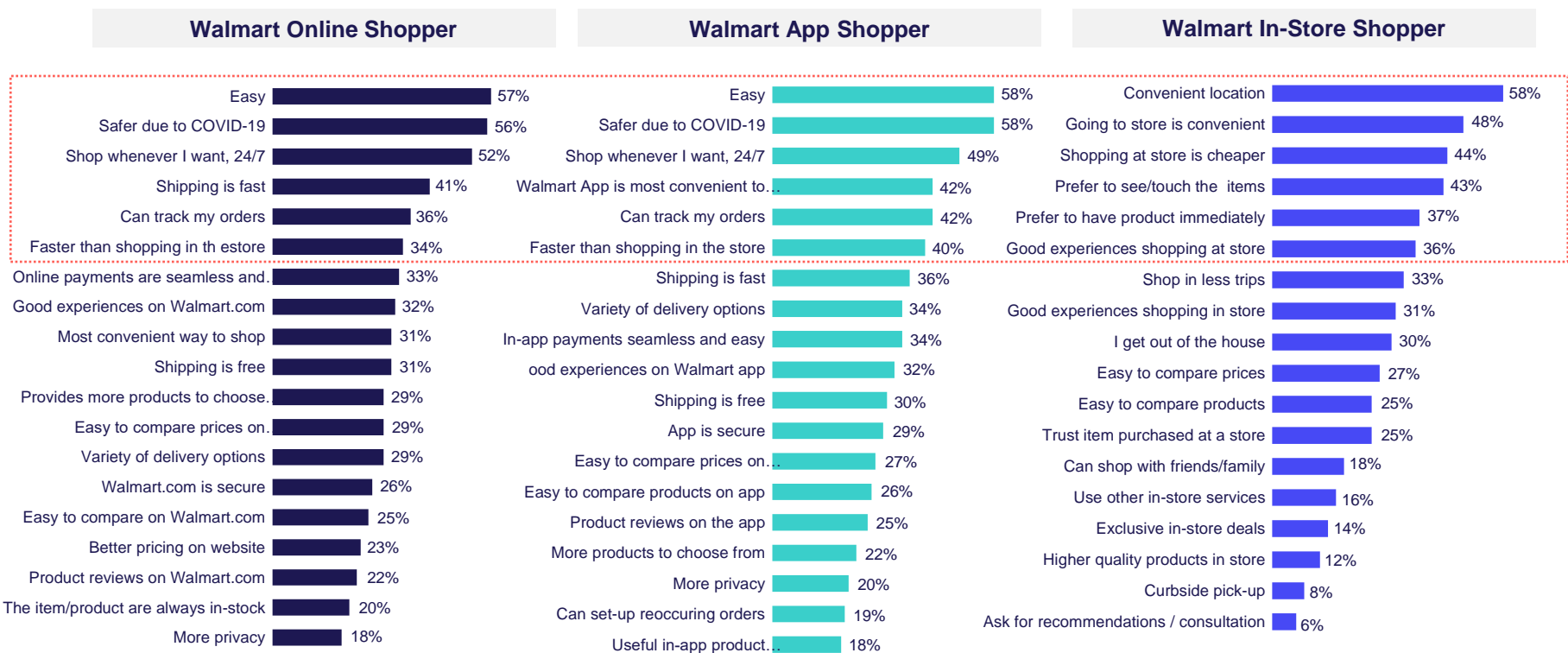
Personality Insights are provided through a partnership between Stat Social and IBM Watson; these insights rely on the work of those above (as well as others). IBM Watson codes a person on the three primary theories based on the content they produce online. StatSocial links this profile to PII so that it can be onboarded and activated through advertising technology channels. GutCheck leverages this data on your specific audience to provide a detailed profile of your audience on the three theories of human behavior.

Appendix

Supplemental Charts

Purchase Triggers by Shopper Type

Purchase triggers for online shopping are similar across Walmart.com shoppers and Walmart App shoppers, and distinctly different from in-store.

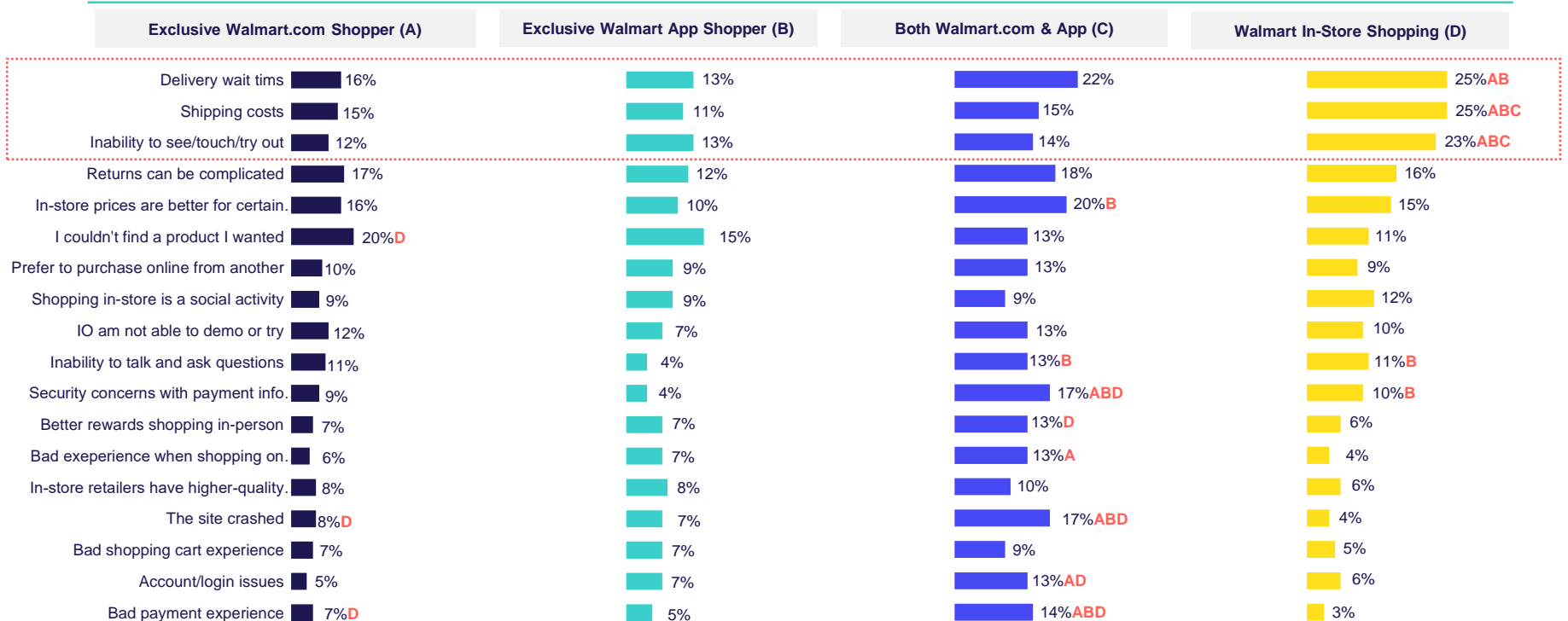


Q. Which of the following, if any, have led you to place orders online from Walmart.com? (Walmart Online Shopper N=383)
 Q. Which of the following, if any, have led you to place orders online from the Walmart App? (Walmart App Shopper N=387)
 Q. Which of the following, if any, have led you to shop at a Walmart store (i.e., Supercenter, Discount Store and/or Neighborhood Market)? (Walmart In-Store Shopper N=518)

Purchase Barriers For Walmart.com Shopping

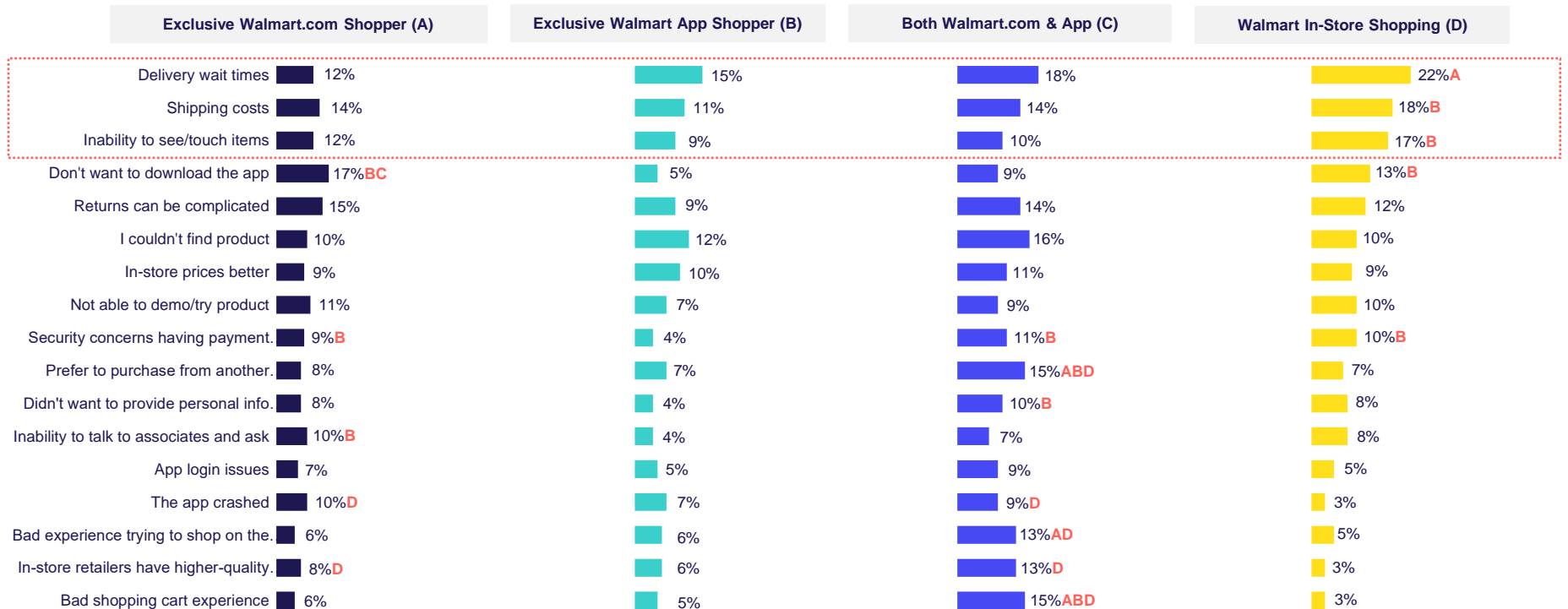
Main deterrents to shop online for In-store shoppers are delivery wait times, shipping costs and their need to touch and see the product.

Online shoppers using the site and app seem to have had more security concerns and account or site issues.



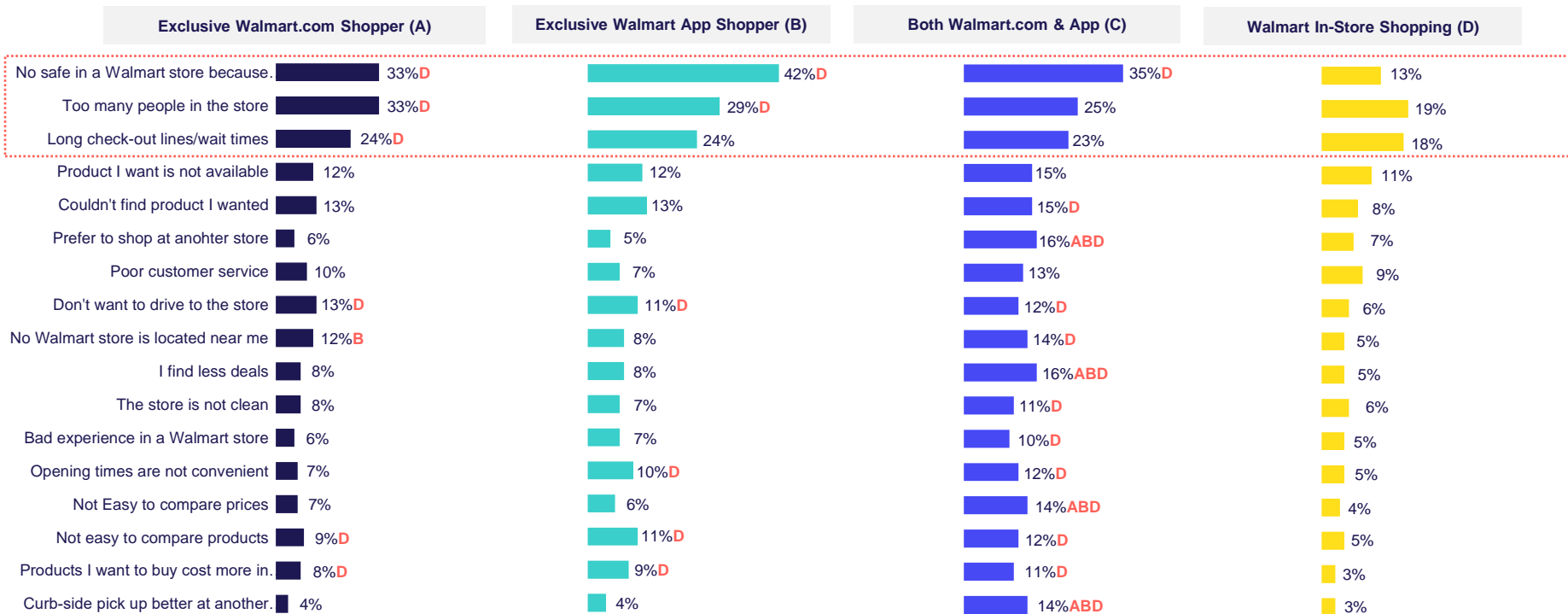
Purchase Barriers For Walmart App Shopping

Albeit not as pronounced as seen with Walmart.com, the same issues also prevent In-store shoppers from using the Walmart app.



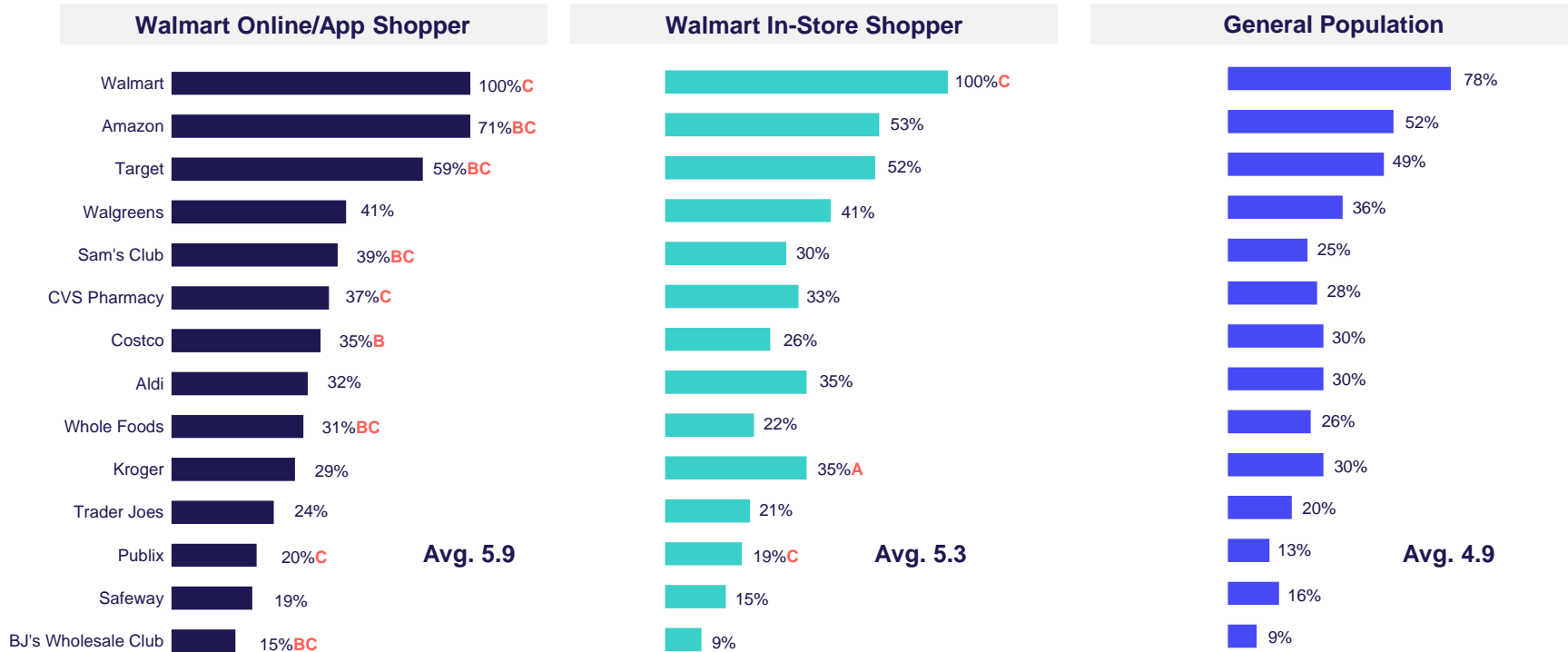
Purchase Barriers For Walmart In-Store

Safety due to COVID-19, long checkout lines and too many people are the main deterrents for shopping in-store. Online shoppers using the site and app are more prone to mention barriers to shopping in a Walmart store.



Retailers Purchased from Ever

The Walmart online/app shopper is more involved in shopping and thus is likely less loyal to any one retailer.



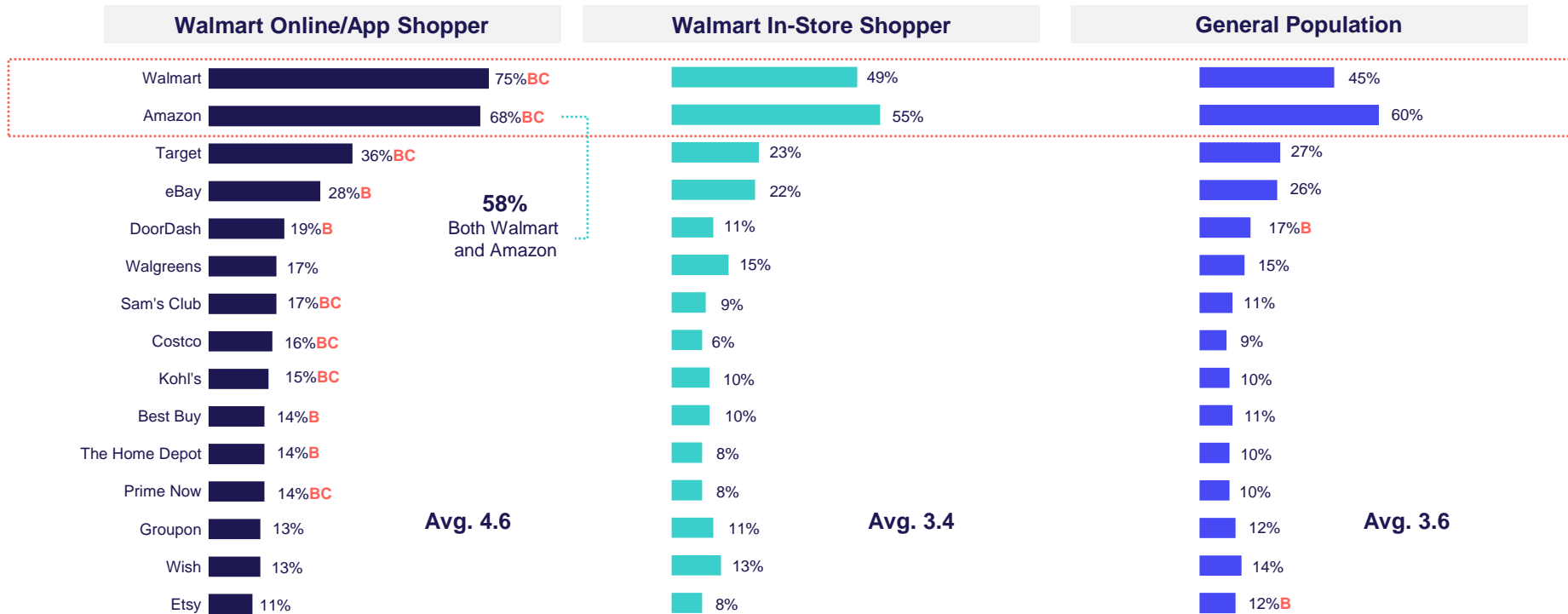
Channel Preference: Digital, In-Store, Both

Walmart online/app shoppers prefer to buy things online; they rarely prefer in-store shopping.



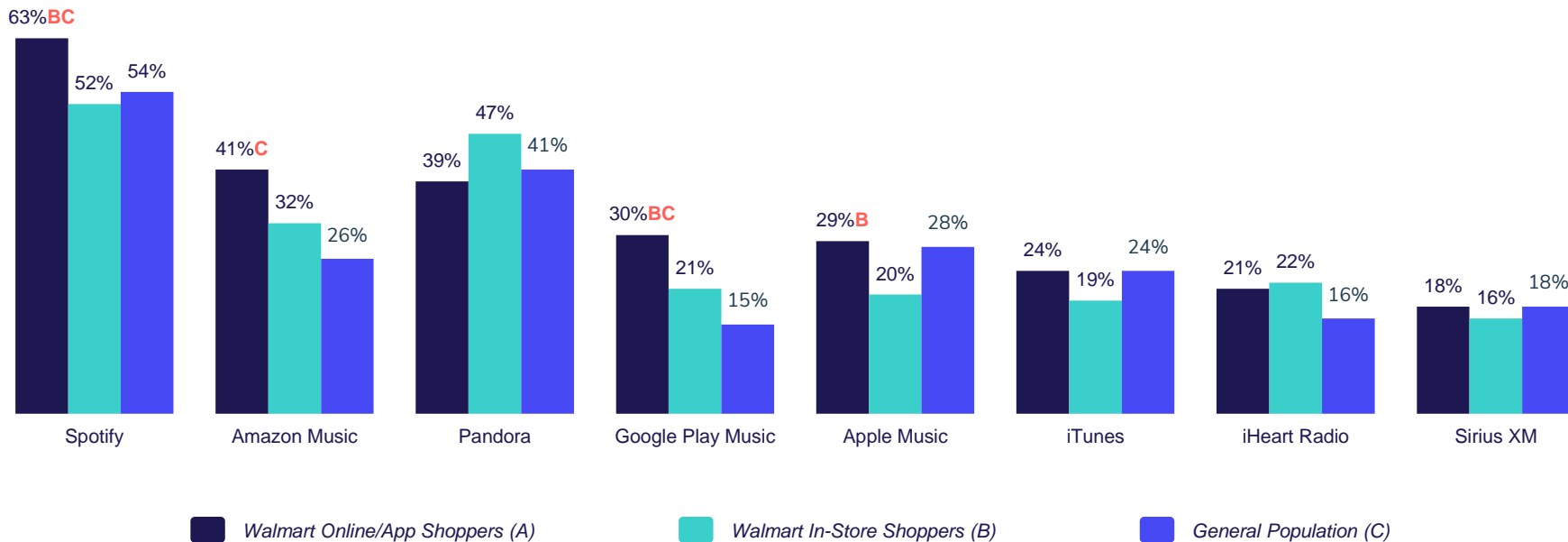
Retail or Shopping App Involvement

Even in comparison to the general population, Walmart in-store shoppers are using fewer apps.



Streaming Music

Advertising on Spotify is likely to reach Walmart Online shoppers more than other streaming music channels.



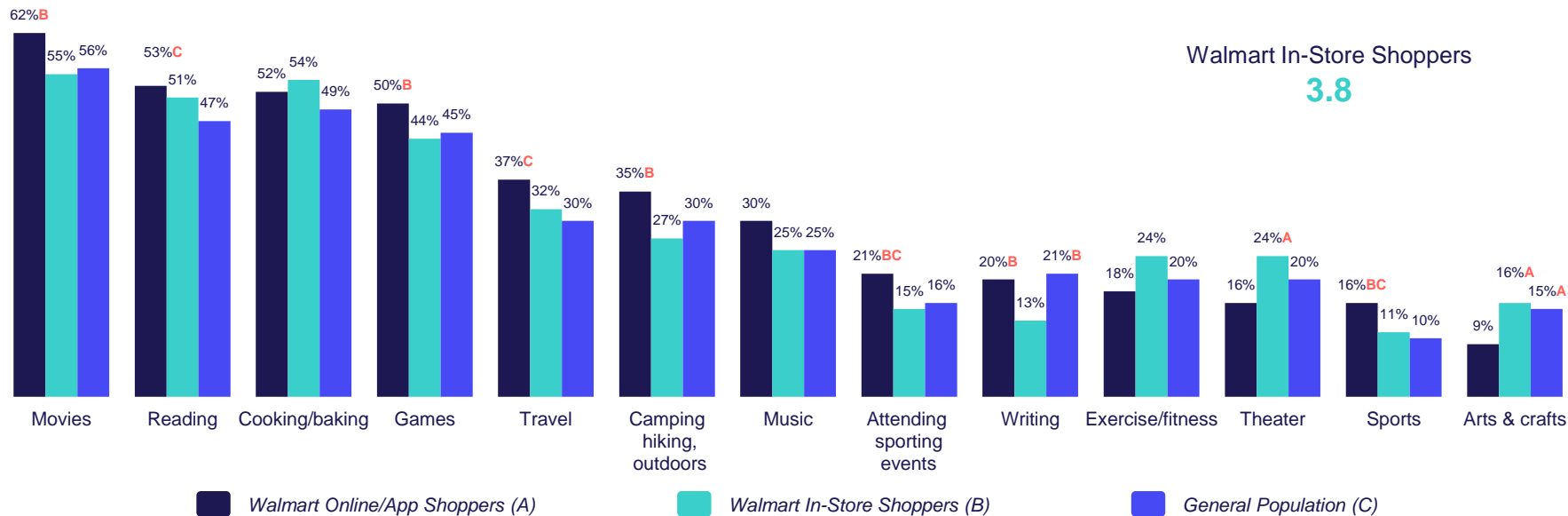
Hobbies

Although the online target audience is a little more likely to watch movies and play games, there are few differences in their hobbies.

Average # Hobbies

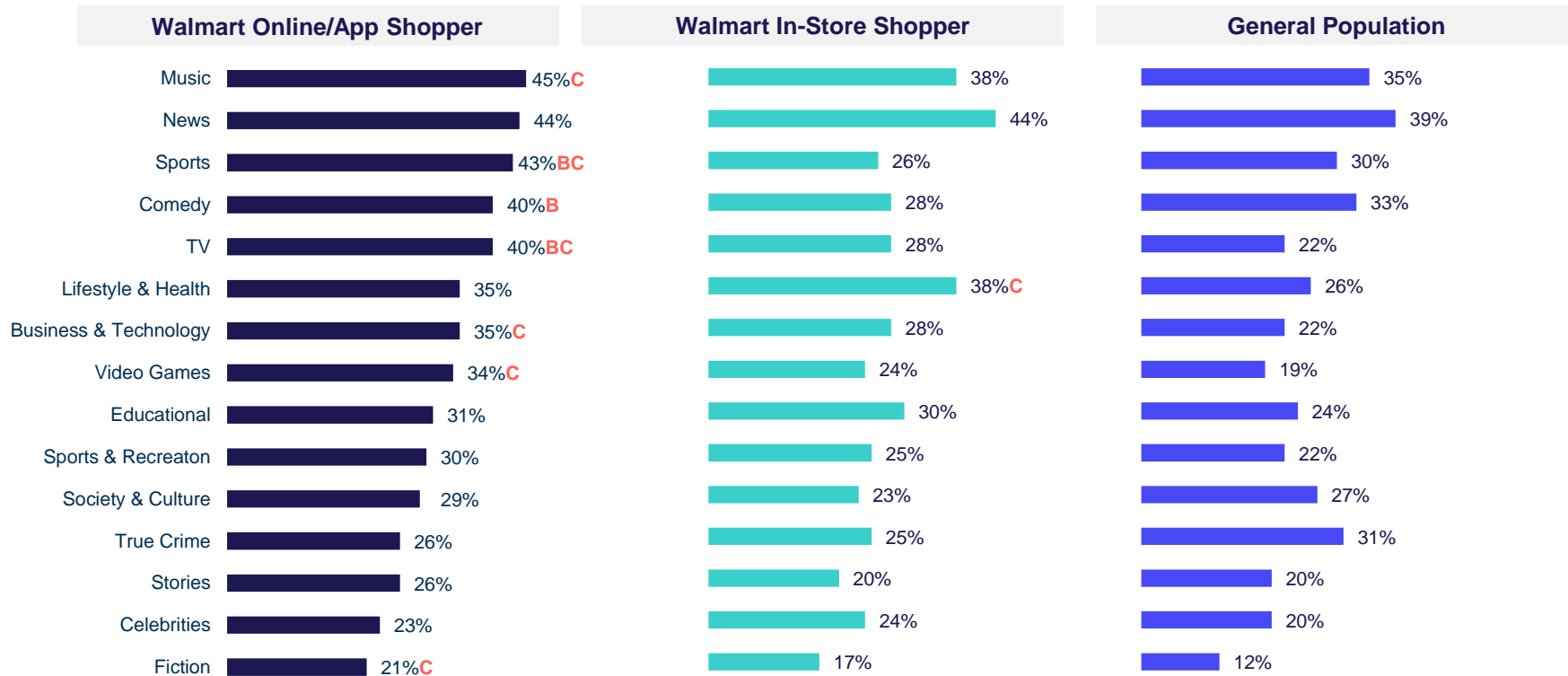
Walmart Online/App Shoppers
4.2

Walmart In-Store Shoppers
3.8



Podcast Usage

Similar to the genres they like, Walmart Online shoppers also show more interest in TV and Sports Podcasts.

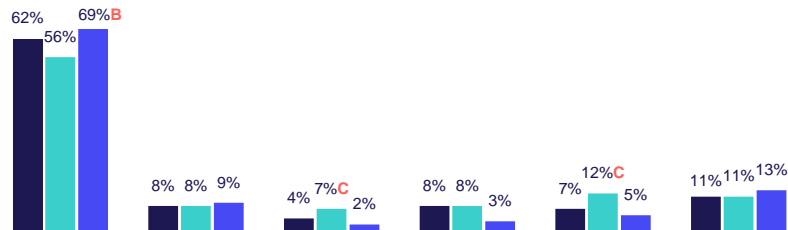


Q: Which of the following podcast genres, if any, have you listened to in the past 30 days? e.g. online using the retailer's website, at a physical store and/or using the retailer's mobile app). (Walmart Online/App Shoppers (A) n=500; Walmart In-Store Shoppers (B) n=500; General Population (C) n=500) ^{A/B/C} Statistically different at 95% confidence level

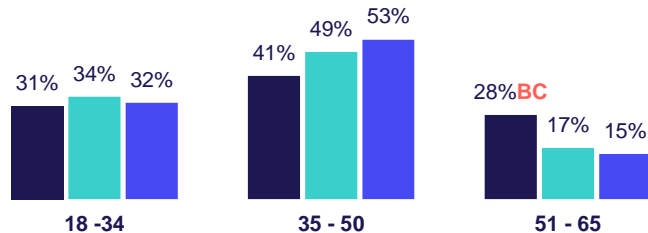
Consumer Profile of Exclusive Walmart.com vs. Walmart App Shoppers

There are few differences across other demographics between Walmart.com and Walmart App shoppers,

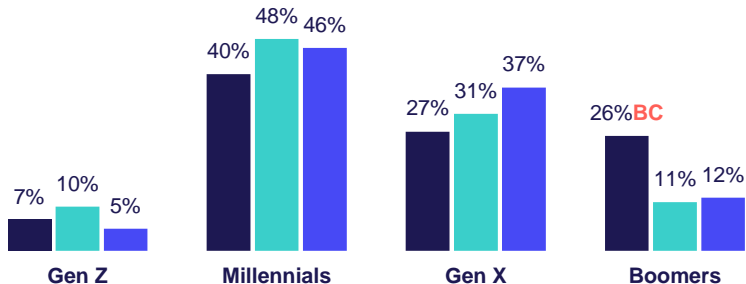
Employment



Age



Generations



Median Age

Exclusive Walmart.com	40
Exclusive Walmart App	37
Both Walmart.com & App	38

Exclusive Walmart.com Shoppers (A) (n=223)

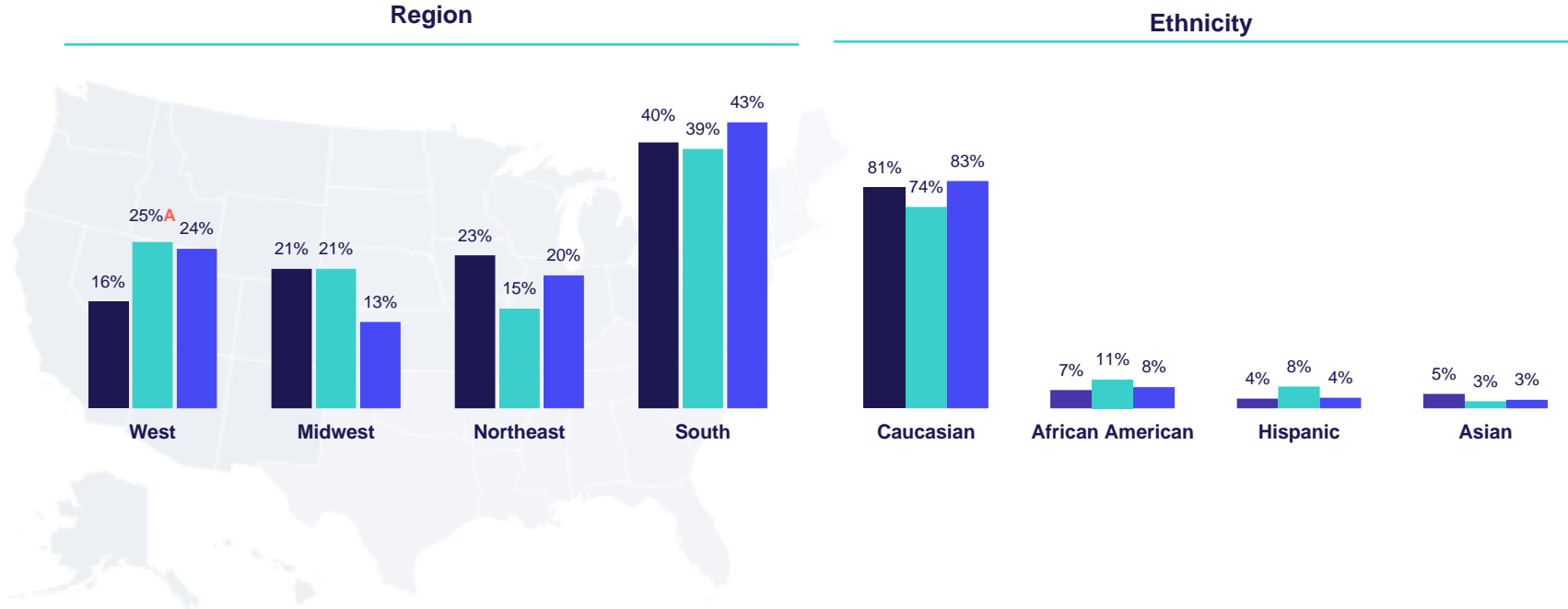
Exclusive Walmart App Shoppers (B) (n=150)

Shop Walmart.com and App (C) (n=127)

A/B/C Statistically different at 95% confidence level

Consumer Profile of Exclusive Walmart.com vs. Walmart App Shoppers

There are few differences across other demographics between Walmart.com and Walmart App shoppers,



■ Exclusive Walmart.com Shoppers (A) (n=223)

■ Exclusive Walmart App Shoppers (B) (n=150)

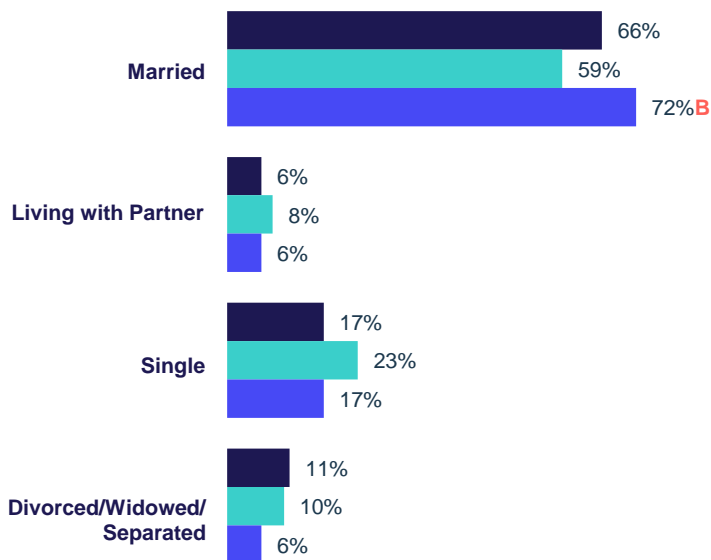
■ Shop Walmart.com and App (C) (n=127)

A/B/C Statistically different at 95% confidence level

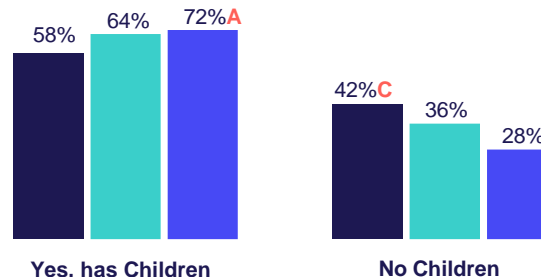
Consumer Profile of Exclusive Walmart.com vs. Walmart App Shoppers

There are few differences across other demographics between Walmart.com and Walmart App shoppers.

Marital Status



Children in Household



Gender

