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## Key Findings

- Walmart provides more on-platform merchandising opportunities than other retailers, such as end cap-style hero images, which appear both on category and search result pages.
- The top-two home care enterprises by average best-seller product rank on Walmart serve 17 times more display ad impressions and sponsor 6 times more product listings on the retailer site than the average analyzed enterprise.
- Index brands appear against 43 percent of analyzed home care keyword searches on Google in organic Walmart results, while Jet almost exclusively affords brands visibility in Shopping ads.

## What Brands Should Be Thinking About

- Plan and Conquer:** Take advantage of Walmart and Jet basket-building and replenishment features, and invest in sponsored listings to capture incremental sales.
- Making Sure Bets:** Ensure quality display ad placements by shifting away from programmatic ad buys toward advertising on retailer sites, guaranteeing safe content and quality placement in front of consumers with high purchase intent.
- Hitch a Ride:** Monitor Jet Shopping ads and Walmart organic Google search results to determine whether they are providing second-order visibility. Brands seeking to improve second-order visibility must optimize product page titles and descriptions and allocate additional trade ad spend to appear in retailer Shopping ads.

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**L2 research** is based on data-driven analysis. Our findings, rankings, and recommendations are objective, unbiased, and independent of membership.

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## Rising Tide

Walmart's double-digit e-commerce growth in 2017,<sup>1</sup> fueled by its acquisition of Jet, makes the retailer a must-win digital partner for home care brands. As Walmart's e-commerce business has accelerated, the retailer has introduced basket-building features, and on-platform marketing opportunities that rival Amazon.

However, with opportunities come threats. Private label visibility on both Walmart and Jet is greater than on Amazon, with 14 percent of unbranded home care product searches on Jet featuring Uniquely J in the top position, while only half a percent of top listings on Amazon feature its private label Presto! Jet further threatens brands by suggesting bundles that add Uniquely J to selections of Index brand products, leveraging established brand awareness to steal market share.

This report assesses the performance of 74 Home Care US Index brands on Walmart and Jet, highlighting unique and missed opportunities on each platform.

1. "Walmart has big year of e-commerce investments planned to bring growth back to 40 percent," Lauren Thomas, CNBC, February 2018.

## Home Care US: Ownership of Top Results by Platform

February–March 2018, n=255 Unbranded Keywords

■ Private Label ■ Index Brands

	TOP POSITION	TOP POSITION	TOP-THREE POSITIONS	TOP-THREE POSITIONS
Walmart ✱	6%	54%	5%	54%
Jet	14%	54%	10%	56%
amazon	0.5%	52%	0.7%	50%

Source: L2 Insight Report, "Home Care US: Capitalizing on Walmart and Jet," March 2018.

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## HOME CARE US 2018 RESOURCES

### EXECUTIVE SUMMARY

E-commerce is expected to account for 78 percent of all sales growth in the US CPG industry between now and 2020, and strong performance across multiple e-tailer platforms is increasingly critical to a brand's bottom line. While Amazon remains the top platform, Walmart's online sales grew twice as fast as Amazon's in 2017, and Target doubled down on compelling fulfillment initiatives. As brands come to rely even more on their distribution partners, many are paring down their roster of display ad publishers and increasing the number of ads they serve on e-tailer platforms. By deploying smart e-tailer strategies and strengthening their sites with SEO-optimized tutorial content, a few standout home care brands are dominating the landscape.

The fifth annual [L2 Digital IQ Index: Home Care US 2018](#) benchmarks the performance of 74 home care brands in the US.

### Key Questions

1. Which home care product categories benefit the most from fulfillment innovations such as subscription?
2. How can brands coordinate their search engine optimization and marketing tactics with retailers and consumer search behavior to maximize visibility on Google?
3. Where do emerging and independent brands gain a foothold in digital?

### Other Recommended Reading:

#### Reports:

[L2 Digital IQ Index: Home Care US 2018.](#)

[L2 Digital IQ Index: Big Box US 2017.](#)

[L2 Insight Report, "Personal Care US: E-Tailer Landscape".](#)

#### From Our Site:

[\[VIDEO\] A Sweep Through Home Care](#)

[\[BLOG\] What CPG Should Know About E-Commerce](#)

[\[BLOG\] Top 10 Home Care Brands in Digital](#)

# EXCERPT

HOME CARE US: CAPITALIZING ON WALMART AND JET

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## L2 Membership Benefits

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### BENCHMARKING

L2 Digital IQ, Amazon IQ, and Category IQ Indexes provide analysis and rankings for brand performance, profiling best practices and key innovators.



### MEMBER SUPPORT

L2 advisors provide members with the support they need to make key decisions and prescriptively assess digital initiatives, offering dynamic guidance as improvements are implemented.



### RESEARCH REPORTS

L2 publishes 100+ reports annually, including L2 Digital IQ Indexes, cross-sector Intelligence Reports, and topical Insight Reports. Members have access to L2's entire archive of research.



### EXECUTIVE EDUCATION

L2 hosts 65+ events around the world each year, bringing together top scholars, thought leaders, and L2 analysts to share insights and speak on important developments in the digital sphere.

## L2 Products



### L2 DIGITAL BENCHMARKING INDEXES

Rigorous analysis and benchmarking of brand performance within a specific industry, merchandise category or on Amazon.

- L2 Digital IQ Index
- L2 Amazon IQ Index
- L2 Category IQ Index



### STRATEGY MODULES

Customized benchmarking and insights on digital topics that are strategic priorities for brands, including:

- Omnichannel Retail
- Video
- Content & Commerce
- Data & Targeting and Loyalty
- Localization
- Social Content & Strategy