



# U.S. Retail: A Media Analysis Report

January/February 2016

## Objective

- This media analysis offers an overview of Walmart in the U.S. media, compared with that of its competitors. Coverage is compared in terms of volume, share of voice, tone, and regions.
- The report also highlights Walmart's Twitter coverage, including coverage of its top mentioned content in comparison to its competitors (Target was not included in the Twitter analysis).

## Coverage

- The study period for the report is January 19 to February 19, 2016.
- The report is based on print, online, broadcast, and Twitter content.

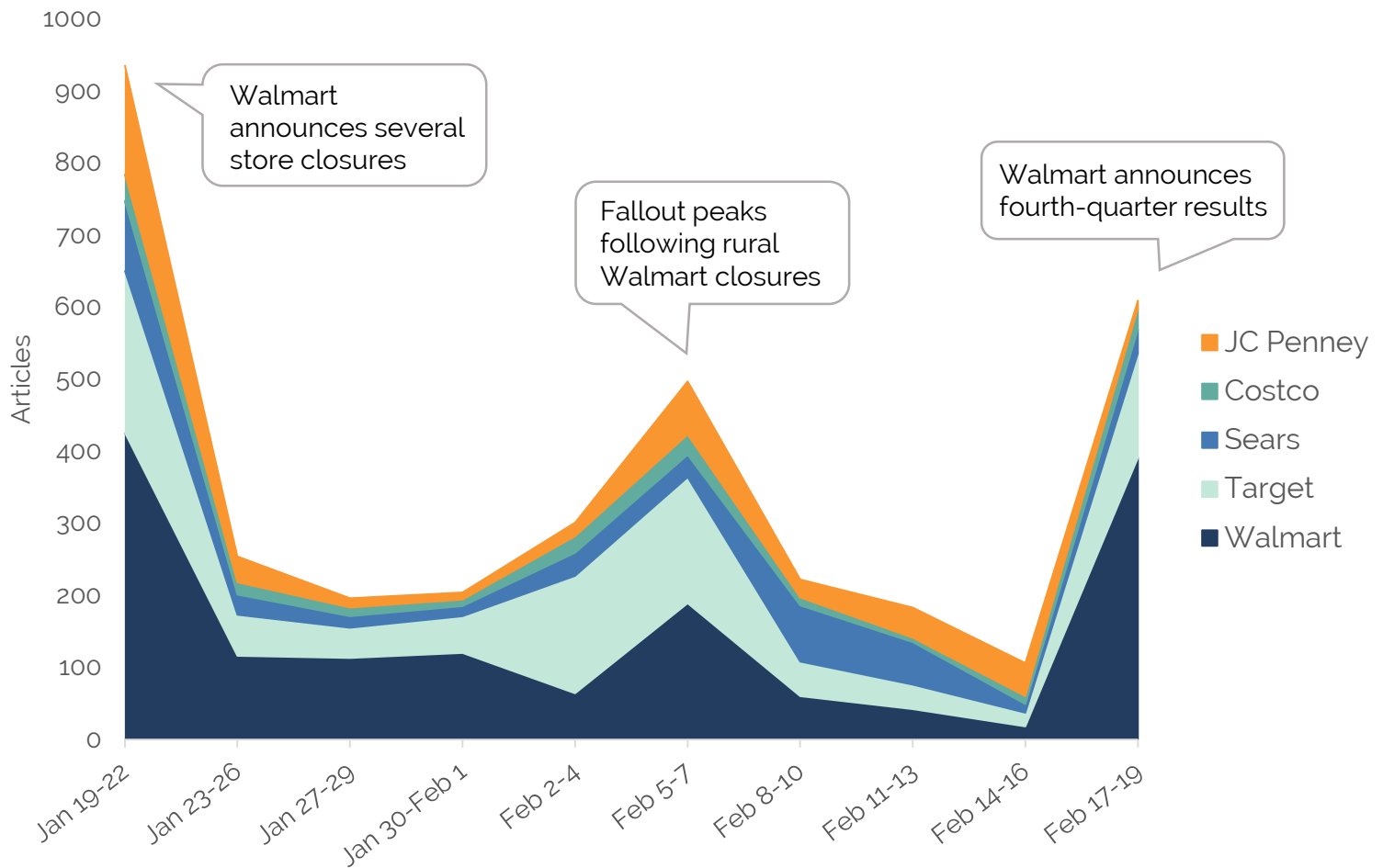
## Toning

- Articles were toned separately for each competitor on a 3-point scale of positive, neutral, or negative.
- When the company in question was presented in a favourable manner, a point was added; a point was removed whenever the competitor was presented unfavourably.
- For the purpose of toning, favourable is defined as encouraging, supportive, or approving of the company; unfavourable is defined as discouraging, disapproving, or critical of the company.

# EXECUTIVE SUMMARY

- Walmart received the highest amount of coverage both in terms of number of articles, at 1,539, and potential reach, at nearly 370M.
- The majority of Walmart's coverage during the period came from two main news events: the decision to hike the minimum wage for 1.2 million of its U.S. store workers, and the announcement it would close 154 of its U.S. stores (and 219 worldwide).
- With the exception of Costco, all competitors, including Walmart, Target, Sears, and JCPenney, had a high percentage of coverage come from either the announcement that locations would be closing or that locations had already been closed, indicating a certain level of turmoil in the wider U.S. retail industry.
- Several competitors, including Walmart, Sears, and JCPenney, garnered significant negative coverage for the announcement of several store closures.
- The majority of content for Walmart and its competitors came from news sources with a national focus, with the second-most amount of coverage coming from the southern U.S.
- The majority of Walmart's Twitter content involved people either entering or trying to qualify for contests related to a particular store.
- Walmart had a high amount of Twitter coverage at the beginning of the study period, related to its decision to close several of its stores (with backlash coming particularly from rural communities).

# COVERAGE OVER TIME



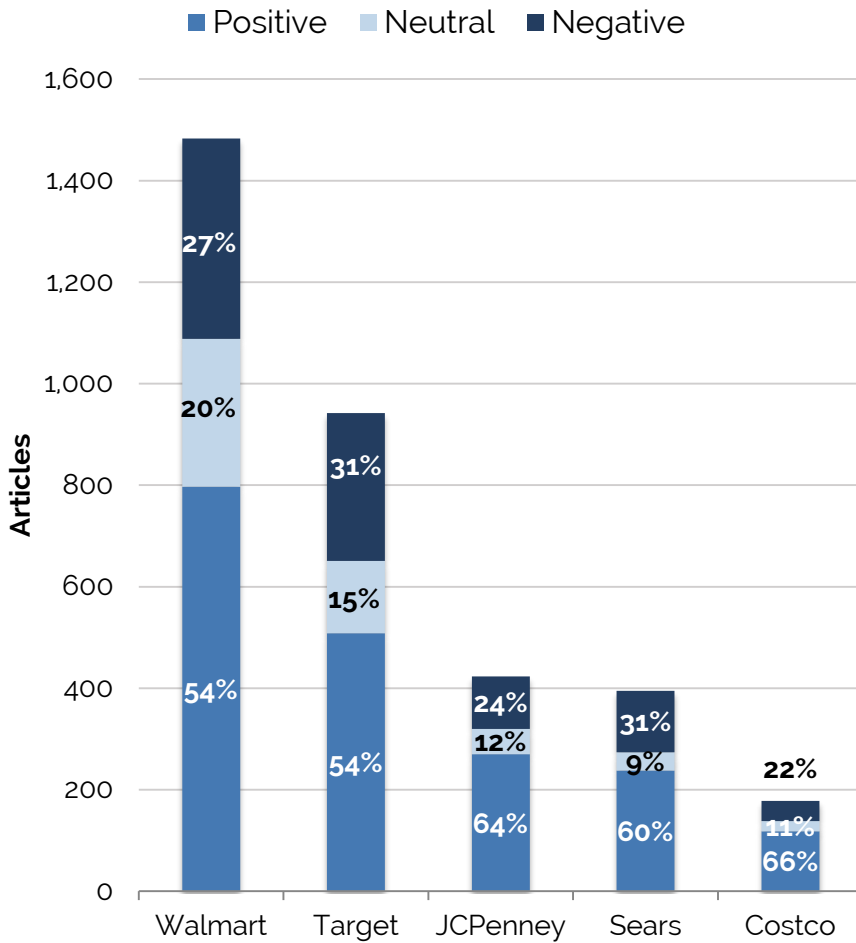
- Walmart mentions dominated retail coverage among the five competitors, with more mentions than the bottom three companies (Sears, JCPenney and Costco) combined.
- Walmart, Target, Sears, and JCPenney had a high percentage of their coverage come from announcements related to store closures.
- All retail outlets analyzed also had a significant portion of their coverage come from yearly earnings, quarterly reports, and post-holiday sales comparisons. Walmart, Sears, and JCPenney logged disappointing quarterly results, which, when combined with the above-mentioned store closure announcements, indicates a certain amount of turmoil in the U.S. big box retail vertical.

## Coverage totals

Company	# of Articles	Circulation
Walmart	1,539	369,236,846
Target	959	244,006,424
JCPenney	427	55,449,691
Sears	400	112,549,408
Costco	183	55,829,999

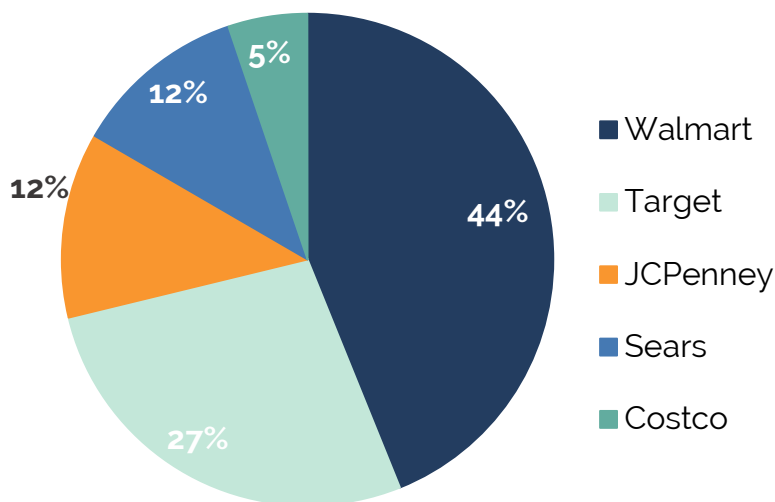
# COMPETITOR SHARE OF VOICE & TONE

## Tone by competitor

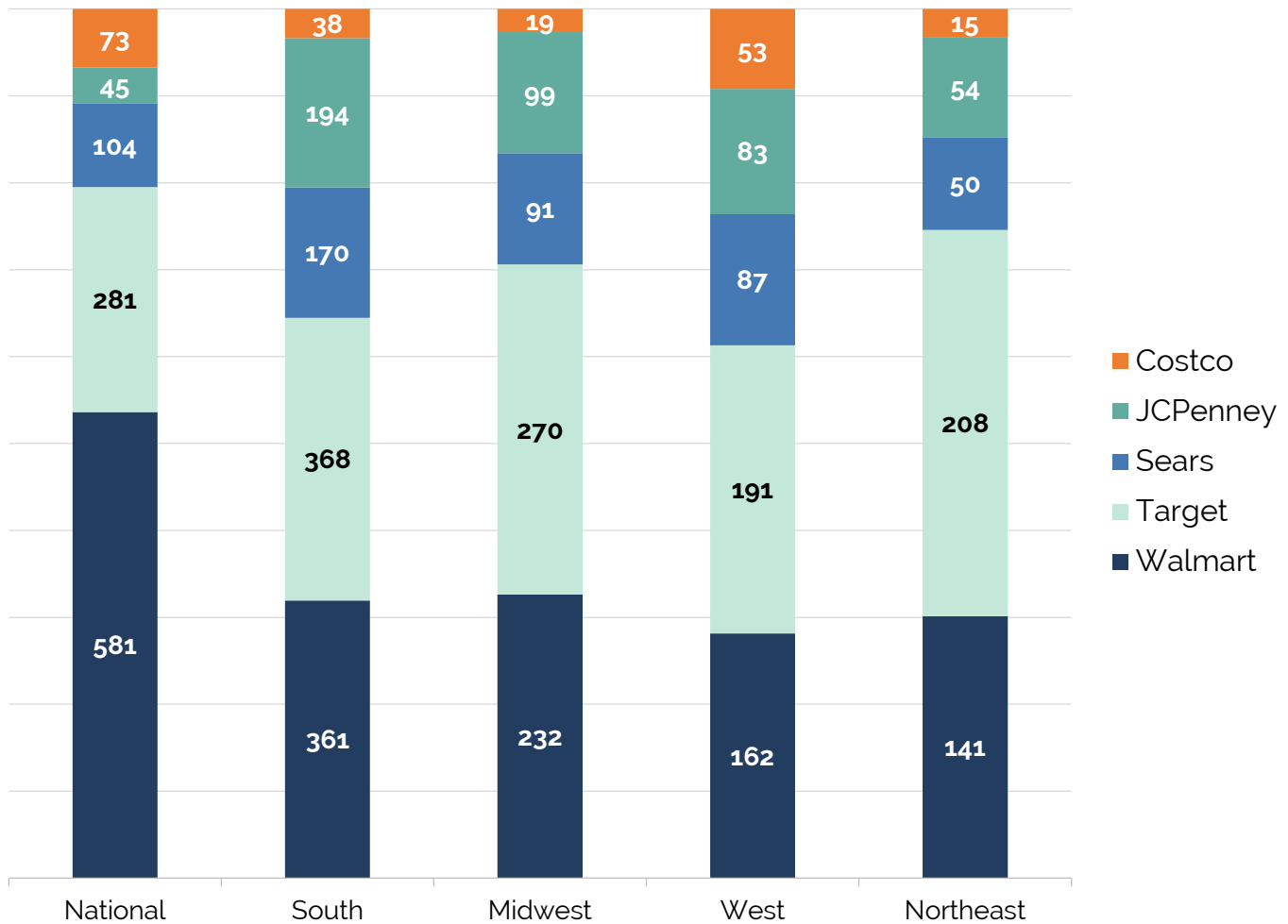


- Walmart received positive coverage as it, along with Coca-Cola, Nestle, and Pepsi, announced it will donate up to 6.5 million bottles of water to schoolkids in Flint, Michigan ("Wal-Mart, Coca-Cola, Nestle and Pepsi Will Donate up to 6.5 Million Bottles of Water to Flint's Schoolkids" in *USA Today*, Jan. 26).
- Several competitors, including Walmart, Sears, and JCPenney, garnered significant negative coverage for the announcement of several store closures ("JCPenney, Sears, Macy's shutting stores" in *Ventura County Star*, Jan. 19).
- With 44%, Walmart received the top share of voice among its competitors, both in number of articles and potential reach.
- Walmart, Sears, and JCPenney received additional negative coverage after sales from Amazon resulted in less-than-satisfactory shares of holiday sales ("Wal-Mart's online sales growth decelerates, trailing growth of Amazon" in *Reuters*, Feb. 18).

## Competitive share of voice (by % articles)

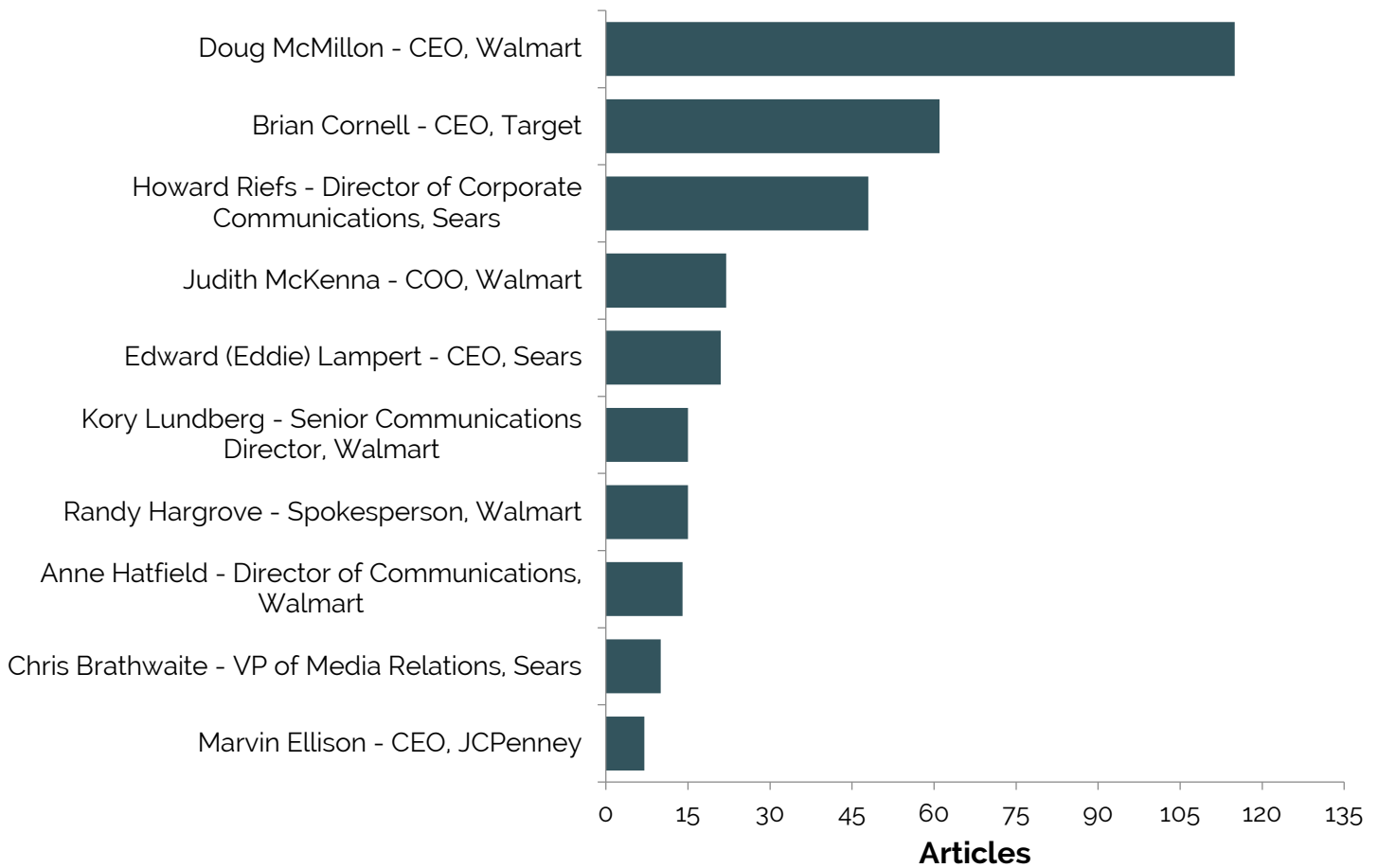


# TOP REGIONS



- The majority of content for Walmart and its competitors came from national news sources, with the second-most coverage coming from the Southern U.S., and the third-most coming from the Midwest.
- The reason for the focus on national coverage for Walmart was its two major stories for the year (wage increase for employees & extensive store closures), which were well covered by the national media (*CNN*, *USA Today*, *The Associated Press*, etc.).
- Walmart also received coverage in the South and Midwest regions due to the above-mentioned story regarding store closures. As the majority of these were rural Walmart Express locations (smaller than the typical Walmart outlet), several stories ran in local papers about the impact on the communities ("Towns lament closing of 6 Walmart stores" in *Oklahoman*, Jan. 28).
- Target received the most southern coverage for its announcement that it would open its first CVS Pharmacy in southern U.S. locations (Charlotte and Raleigh, North Carolina). This was also well covered by southern U.S. broadcast stations (particularly Fox affiliates).

# TOP SPOKESPEOPLE

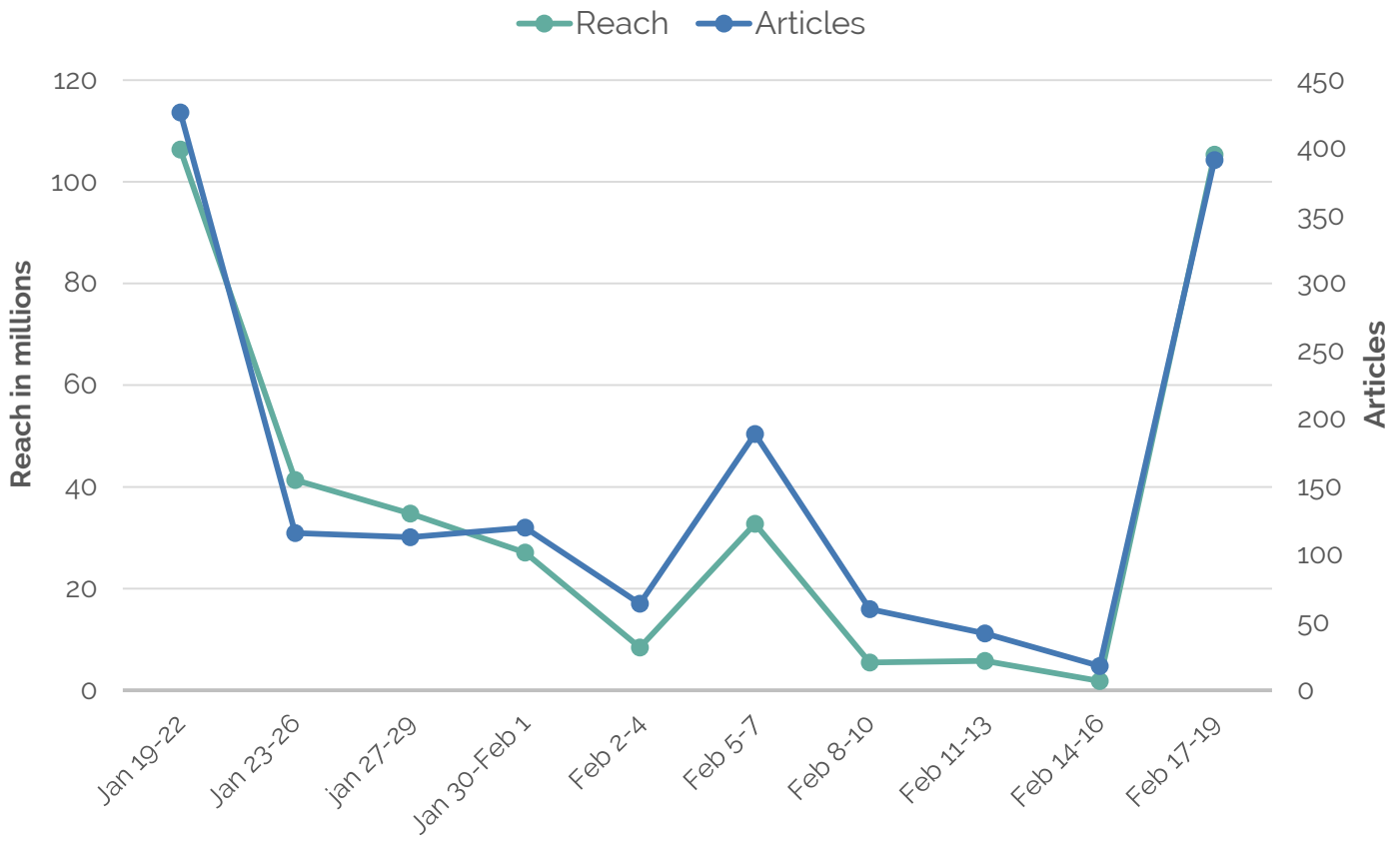


- The top spokesperson by mentions was Walmart CEO Doug McMillon (115 mentions), who spoke about the nationwide employee wage hike (23 outlets), and also commented on Walmart's decision to close 154 of its U.S. stores (269 worldwide) (21 outlets), noting that Walmart is "committed to growing, but we are being disciplined about it" ("Walmart to close 269 stores" in *Des Moines Register*, Feb. 15).
- Target CEO Brian Cornell spoke on the rebranding of Target's in-house pharmacies as CVS, noting that Target customers will benefit from access to CVS drugs and services, while "at the same time it allows us to free up our resources" to focus on "signature categories" such as groceries, baby items, and home goods (10 outlets) ("CVS launches rebranding of Target pharmacy" in *Dayton Daily News*, Feb. 3).
- Howard Riefs, director of corporate communications for Sears, spoke about his company's decision to close several of its locations, citing examples over the past five years where Sears has rented its spaces to retailers and restaurants, including Whole Foods, Aldi, and Forever 21 (20 outlets) ("Department store anchors at malls face a new demographic of shoppers" in *St. Paul Pioneer Press*, Jan. 23).

# WALMART GENERAL COVERAGE

Total articles: 1,539

Total circulation: 369,236,846



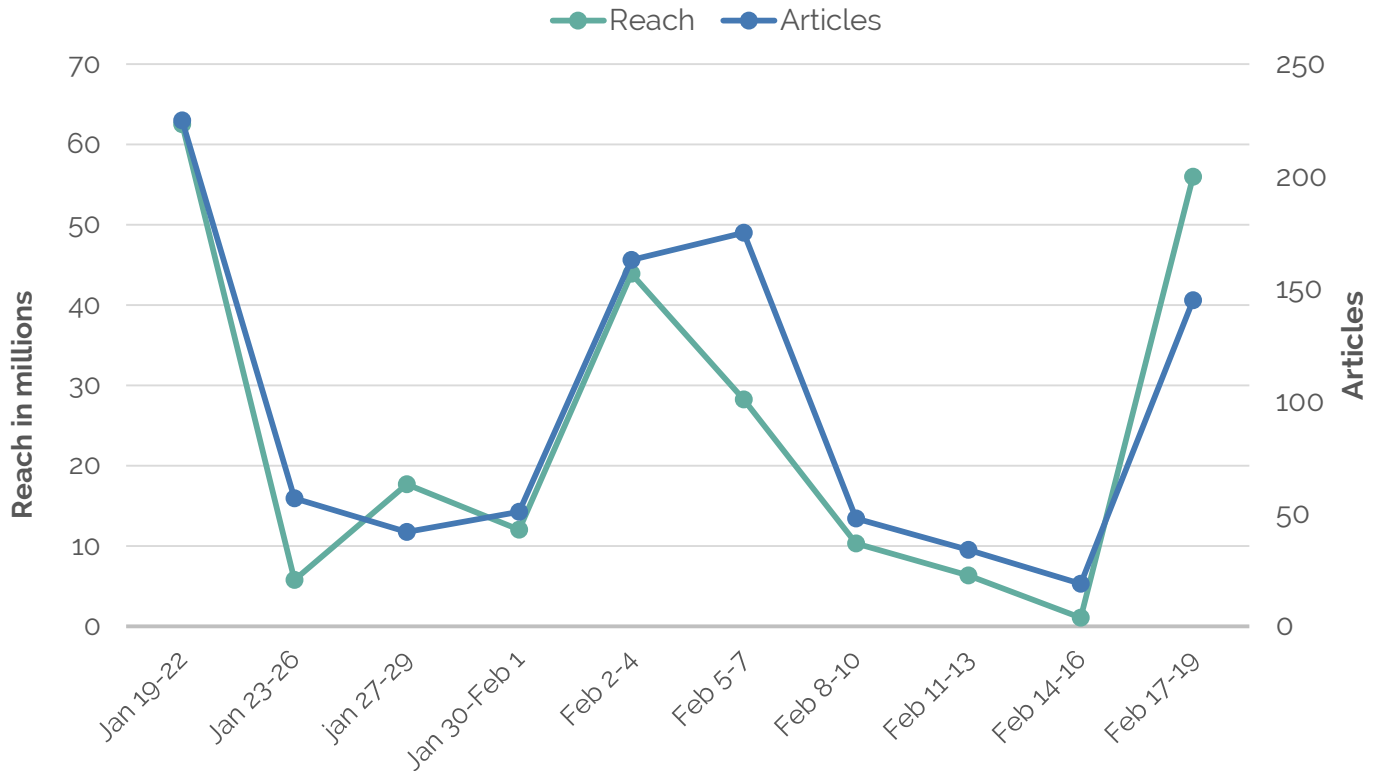
- Walmart's top story for the time period analyzed was the announcement that its Q4 results were down eight per cent ("Wal-Mart profit fell nearly 8% in 4<sup>th</sup> quarter" in *Boston Globe*, Feb. 19). This was covered in 300 unique outlets.
- Walmart received significant coverage (190 outlets) regarding its announcement that it would raise the pay rate for most of its U.S. store workers. This amounted to a raise for 1.2 million of the company's workforce ("Wal-Mart to Boost Wages for Most U.S. Store Workers" in *The Wall Street Journal*, Jan. 20).
- There was also a high amount of coverage surrounding Walmart's ongoing online shopping battle against Amazon (178 outlets). The latest news in February noted that Amazon has been able to outgrow Walmart in the online shopping market ("Wal-Mart's online sales growth decelerates, trailing growth of Amazon" in Reuters, Feb. 19).



# TARGET GENERAL COVERAGE

Total articles: 959

Total circulation: 244,006,424

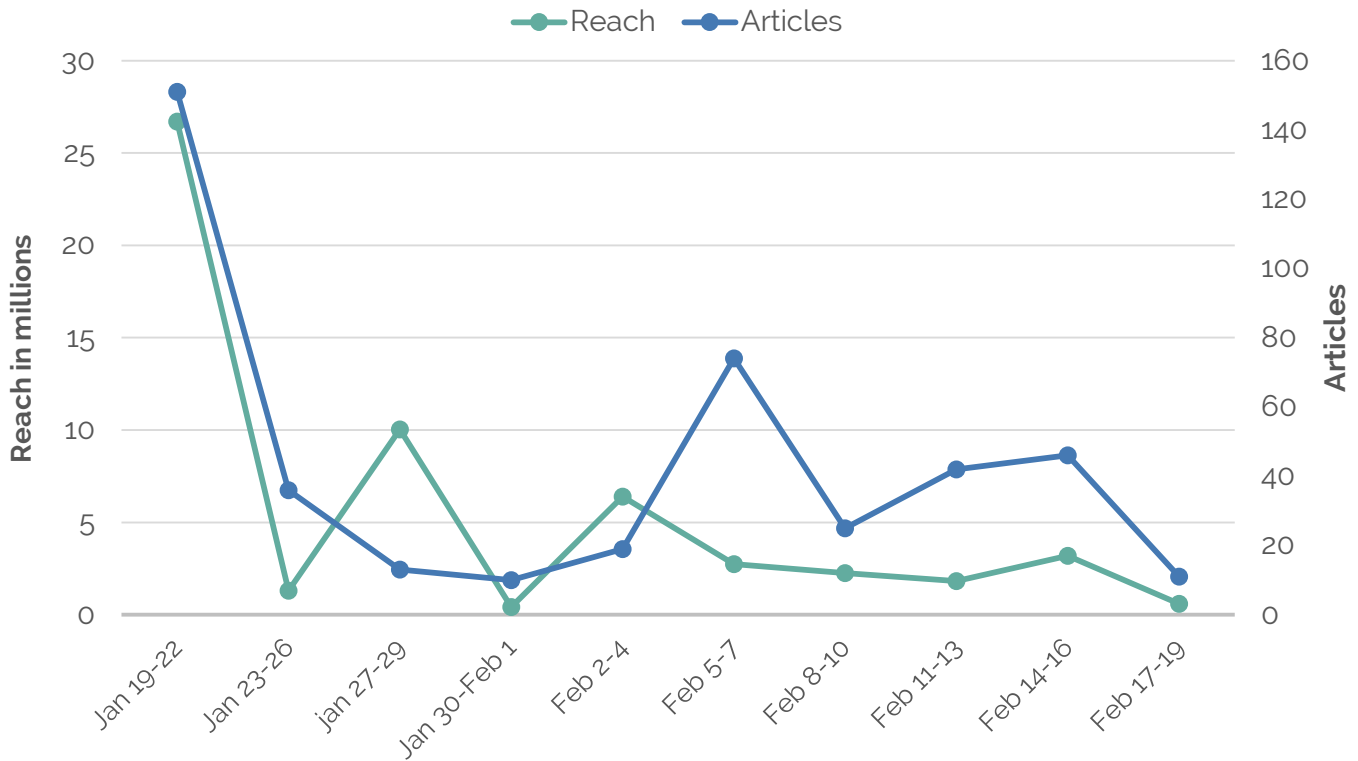


- Target received the second-most coverage among all companies analyzed, with 959 unique hits in print, online, and broadcast media.
- Target's top story for the time period analyzed was the announcement that its 1,672 pharmacies in 47 states would be rebranded as CVS pharmacies (86 outlets). The coverage noted that the first locations would open in Charlotte and Raleigh, North Carolina ("First CVS pharmacies open inside Target stores" in *Memphis Business Journal*, Feb. 3).
- Target's second-most covered story came from the announcement that it would be introducing new shopping carts to help parents and caregivers shop with kids or adults with special needs (75 outlets). The uniquely named 'Caroline's Cart' would be introduced at several Target locations in the coming weeks ("Target adds cart that seats disabled children" in *Chicago Tribune*, Feb. 11).
- Target also received some positive broadcast coverage (34) from local CBS and Fox News outlets, which followed the photo of a Target cashier's kindness to a customer, which went viral on Facebook ("Photo of Target cashier goes viral on Facebook" in CBS News, Jan. 19).

# JCPENNEY GENERAL COVERAGE

Total articles: 427

Total circulation: 55,449,691

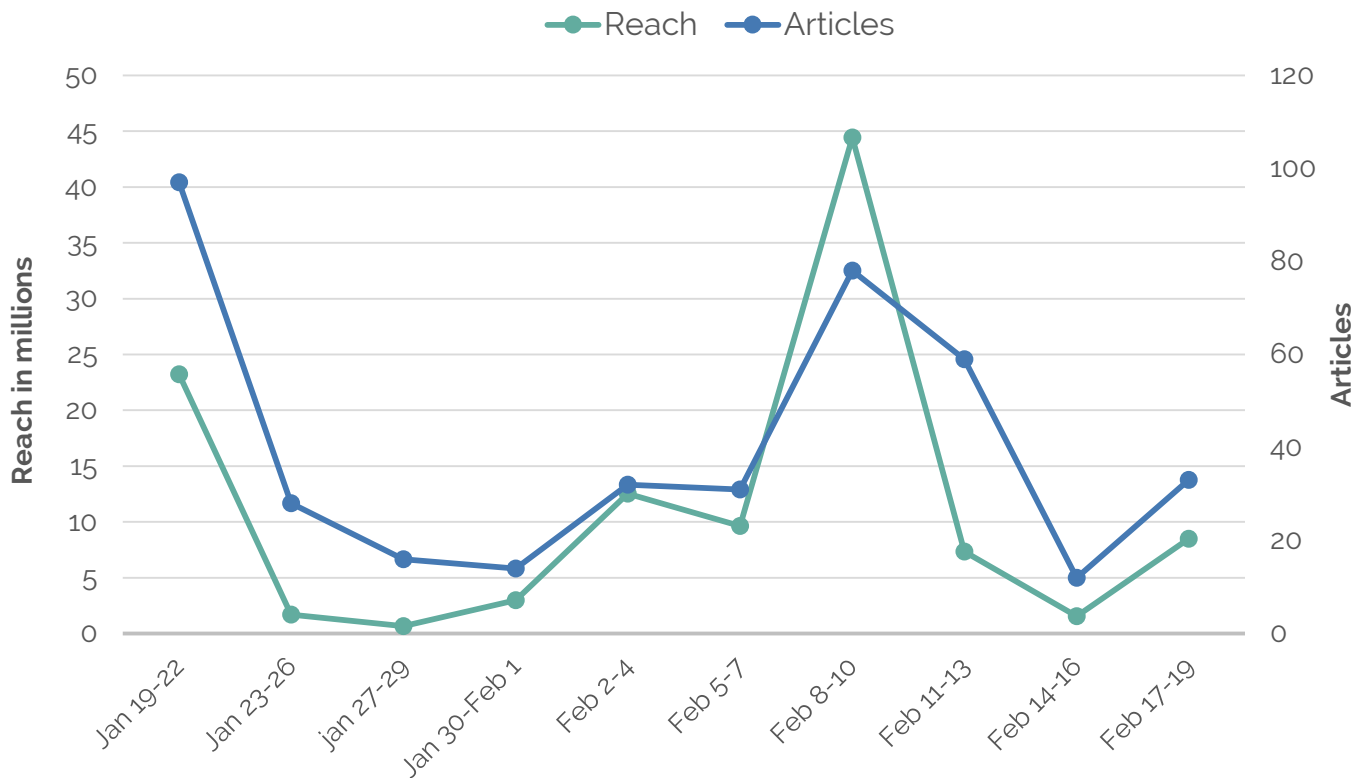


- JCPenney received the third-most coverage among all companies analyzed, with 427 unique hits in print, online, and broadcast media.
- JCPenney's top story for the time period analyzed was its decision to reintroduce home appliances, such as washing machines and refrigerators, to its lineup of offered products (124 outlets). This was well covered in both online and broadcast media ("Appliances returning to Penney" in *Dallas Morning News*, Jan. 20).
- JCPenney's top spokesperson was CEO Marvin Ellison, who was quoted regarding the introduction of new appliance departments in store, noting that they "see the pilot being very accretive."
- JCPenney received a high portion of its coverage from an announcement that several of its stores would be closing following lower-than-expected holiday sales ("JCPenney, Sears, Macy's shutting stores" in *Ventura County Star*, Jan. 19).

# SEARS GENERAL COVERAGE

Total articles: 400

Total circulation: 112,549,408

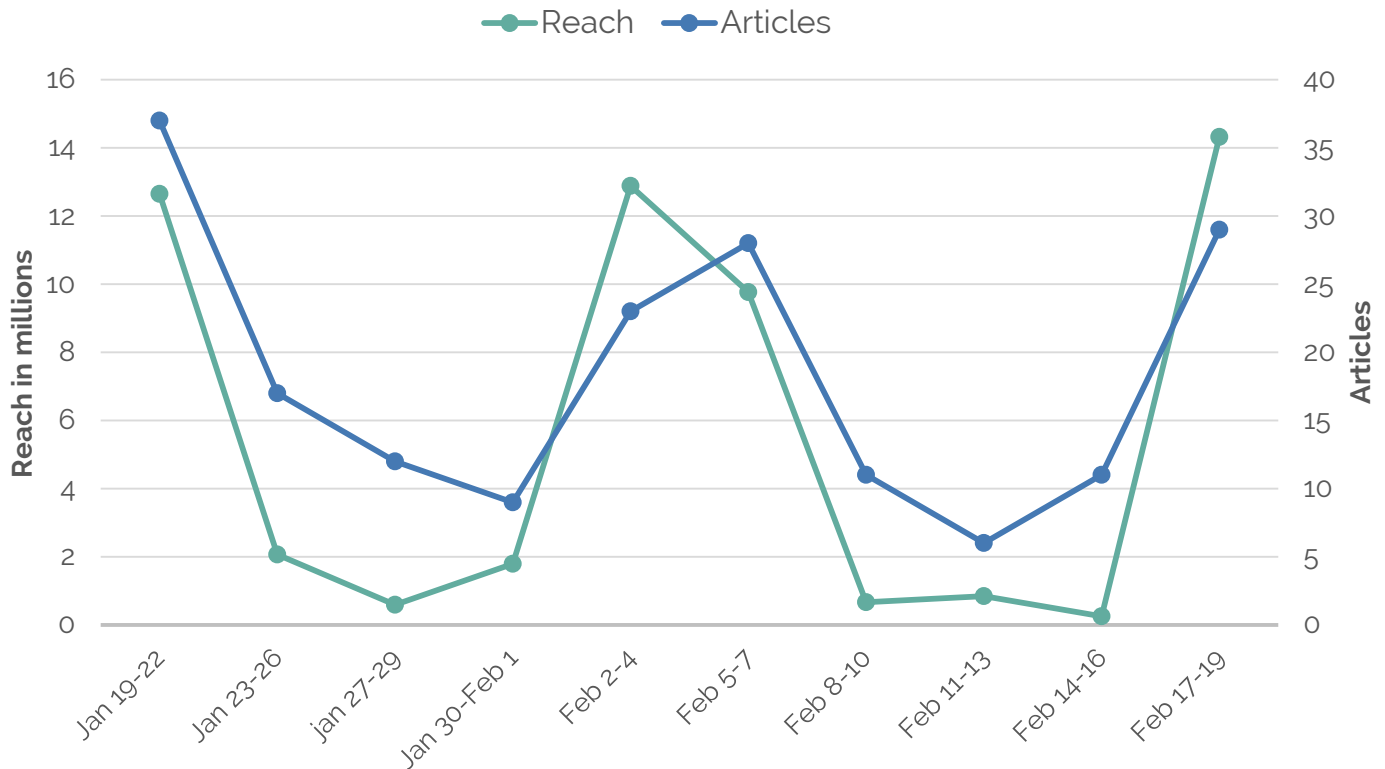


- Sears received the fourth-most coverage among all companies analyzed, with 400 unique hits in print, online, and broadcast media.
- Sears received significant coverage over the course of the time period analyzed surrounding its decision to close at least 50 more stores. The decision was made to close its most “unprofitable” stores (“Traditional mall anchors are fading away” in *San Angelo Standard-Times*, Jan. 19).
- Connected to the above, and further accelerating Sears’s plan to close several of its stores, was the announcement that holiday sales for the company fell by 11.1% when compared to last year (“Sears to speed up store closings” in *The Associated Press*, Feb. 9).
- Sears also received a bump in coverage after its quarterly results were released (70 outlets) (“Sears estimates quarterly sales below analysts’ expectations” in *Reuters*, Feb. 8).

# COSTCO GENERAL COVERAGE

Total articles: 183

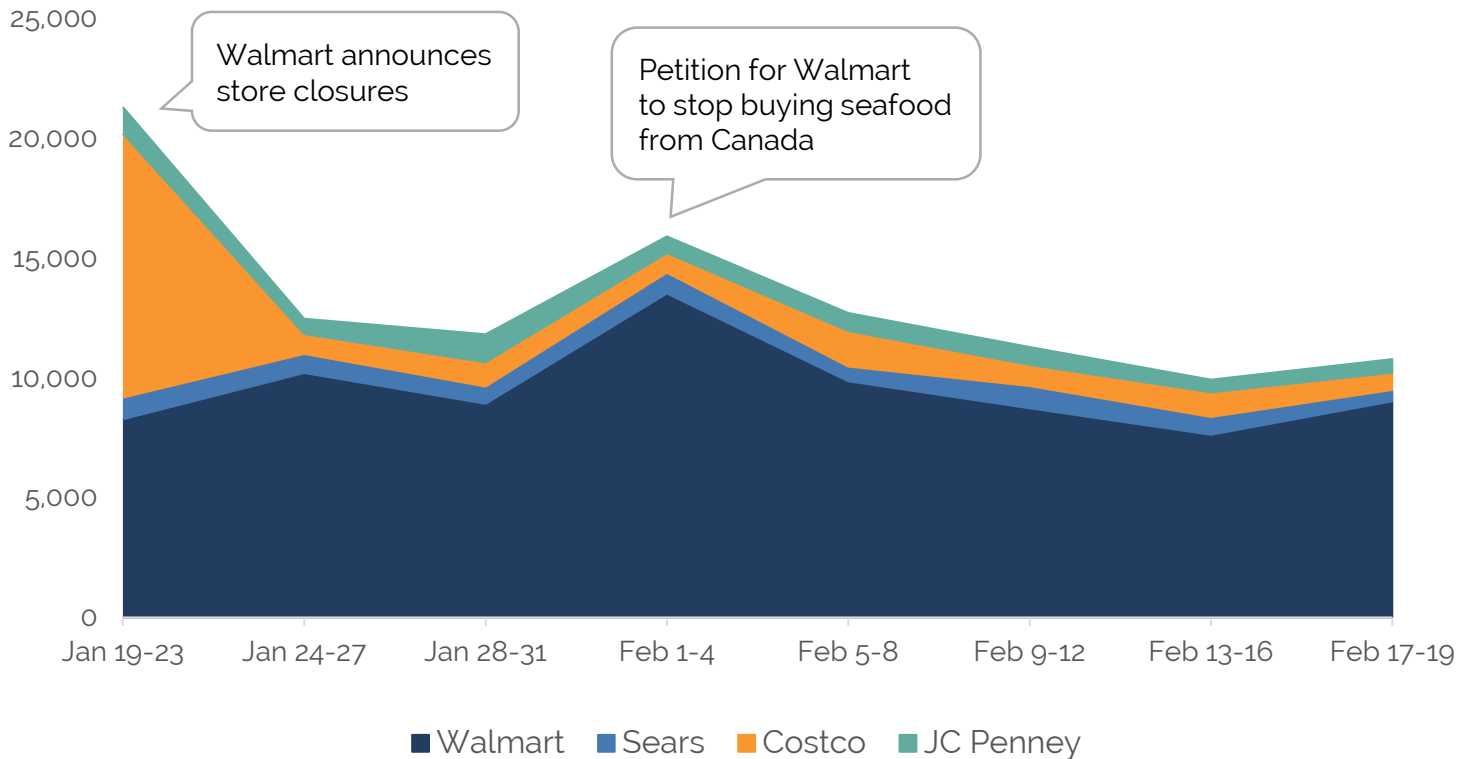
Total circulation: 55,829,999



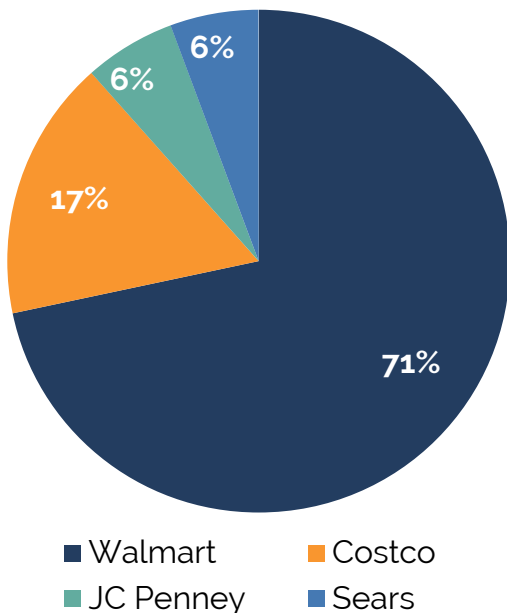
- Costco received the least coverage among all companies analyzed, with 183 unique hits in print, online, and broadcast media.
- Costco received significant coverage over the course of the time period analyzed (35 outlets) as its gas prices were consistently the lowest offered when compared to alternatives in several major U.S. regions ("Costco leads nation in cheap gasoline" in *Modesto Bee*, Jan. 23).
- Costco announced at the beginning of February that it was delaying its decision to switch from American Express to Visa as its credit card provider until the summer season (22 outlets) ("Costco delays credit card switch" in *The Seattle Times*, Feb. 6).
- Costco's top spokesperson, CFO Richard Galanti, was quoted regarding the above delay, noting that the company's "plan is to extend" the contract with Amex by a few months until the new agreement takes effect.

# TWITTER TREND/SHARE OF VOICE

## Twitter trend



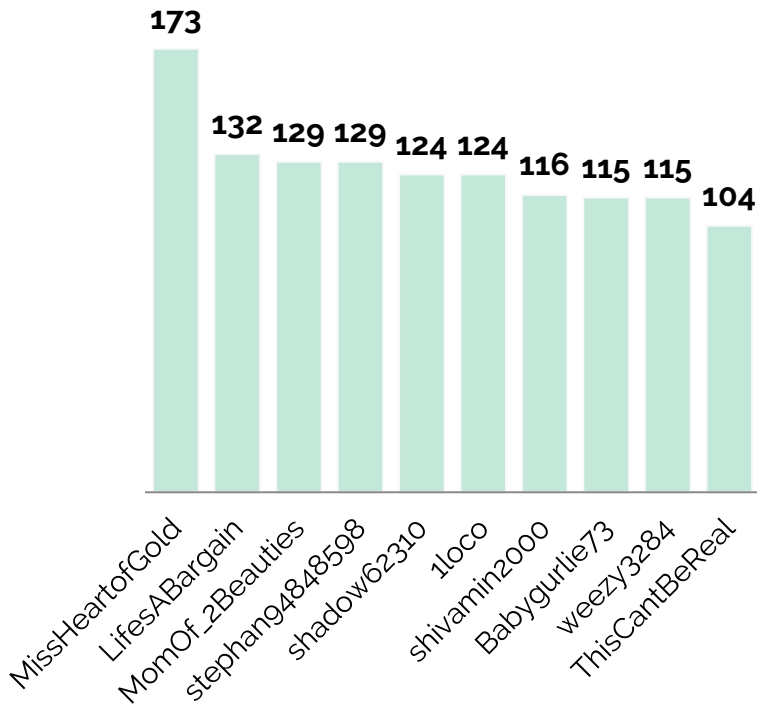
## Twitter share of voice



- Walmart dominated Twitter content in terms of its proportion of mentions compared to other competitors. The majority of content involved people either entering or trying to qualify for contests related to a particular store.
- Walmart had a high amount of coverage at the beginning of the study period, with its decision to close several of its stores (with backlash coming particularly from rural communities).
- Walmart received a spike between February 4 and 7, when a petition calling for the company to stop buying seafood from Canada because of the harp seal hunt became heavily circulated.
- The above timeframe also included a heavily retweeted comment from Democratic nominee candidate Bernie Sanders, which noted that the Walton family "has more wealth than the bottom 130 million Americans."
- Target was not included in this Twitter analysis.

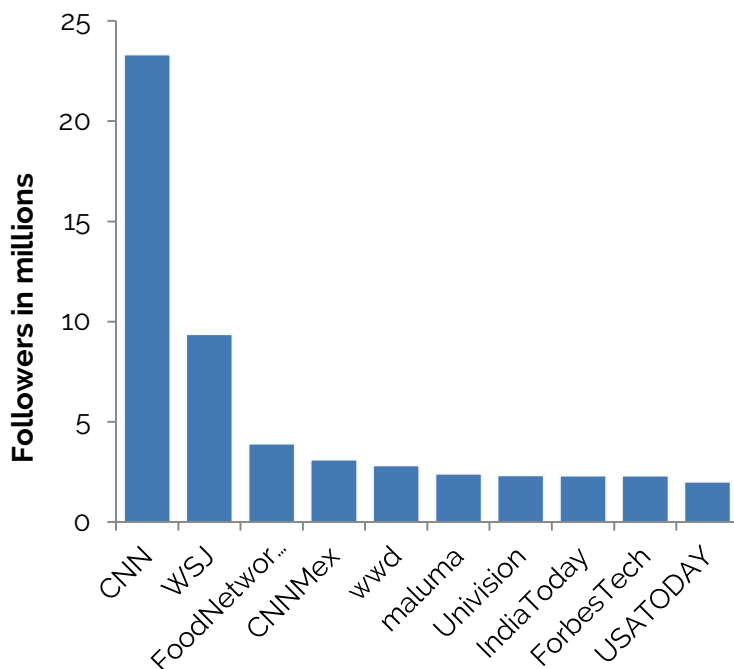
# TWITTER: WALMART INFLUENCERS

## Top influencers by posts



- The top three Twitter users for the time period covered were @MissHeartofGold, @LifesABargain, and @MomOf\_2Beauties.
- The majority of top tweeters were personal handles, and involved people either entering or trying to qualify for contests related to Walmart.
- Some business handles (@LifesABargain) held contests for Walmart gift cards or other related merchandise.

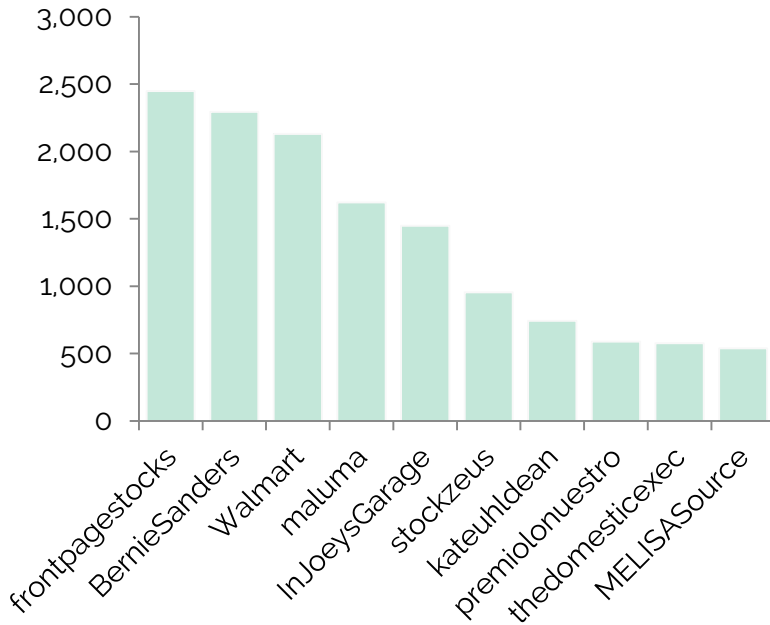
## Top influencers by followers



- Some of Walmart's top Twitter users by followers were @CNN (CNN News handle), @WSJ (The Wall Street Journal handle), and @FoodNetwork (TV channel The Food Network handle)
- Overall, 41,504 Twitter users tweeted or retweeted messages for a total reach of 6,366,417.

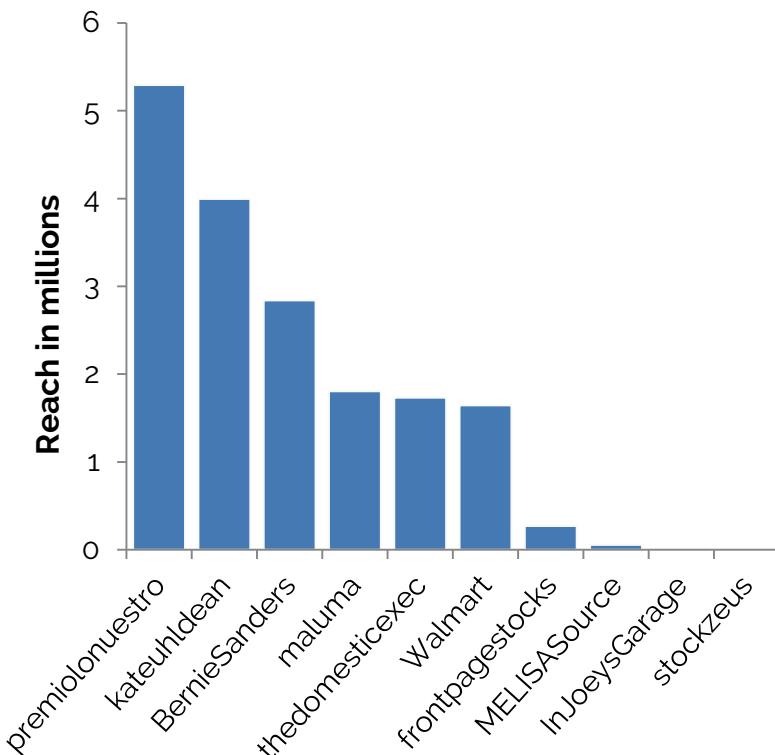
# TWITTER: WALMART INFLUENCERS

## Top influencers by retweets



- The top three Twitter users by retweets for the study period were @frontpagestocks, @BernieSanders, and @Walmart.
- U.S. stock news website @frontpagestocks regularly posted about the ongoing fiscal performance of Walmart's stock.
- @BernieSanders, current U.S. Presidential Democratic nominee candidate, tweeted commentary that the corporate heirs of Walmart collectively have more wealth than the bottom 42 per cent of Americans.

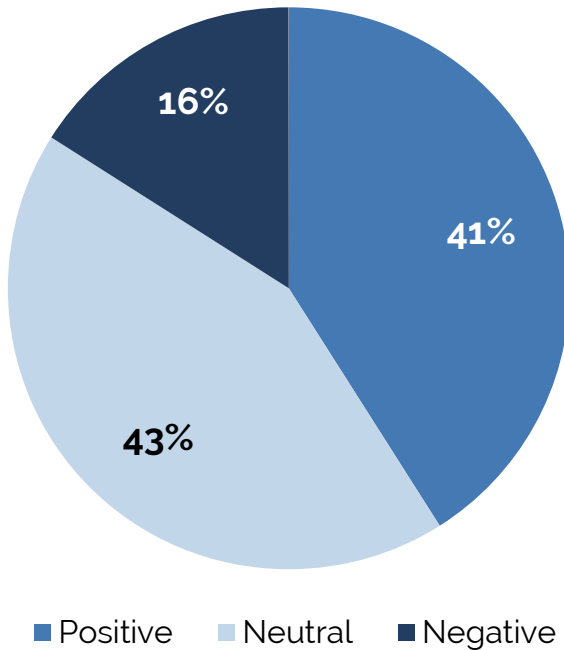
## Top influencers by retweet reach



- The top three Twitter users by followers for retweets were @premiolonuestro (Latin Awards show handle), @kateuhldean (personal blog handle), and @BernieSanders (U.S. Democratic nominee candidate handle).
- @premiolonuestro was regularly retweeted as Walmart sponsored social media for the event, particularly showcasing urban Colombian singer Maluma.
- @kateuhldean, social media events coordinator at @CollectiveBias, held a contest for a \$100 Walmart gift card, leading to several posts.

# TOP LINKS & TONE

## Twitter Tone



- Walmart received a large amount of positive coverage from regular personal tweets about individuals frequenting the business for various items (whether food, clothing, or cosmetic). The Supercenters were particularly popular for tweets about unique items.
- Walmart received negative coverage associated with perceived low wages for employees (highlighted particularly in Oklahoma), unsatisfactory working conditions, and commentary from individuals who were dissatisfied with either unavailable stock at locations (electronics particularly) or customer service (searching for a response).

Top Walmart Links	Mentions
<a href="#">MPlus Places, online Cell Phone rewards program</a>	2,827
<a href="#">Spiral Toys Introduces TubeFriends - Yahoo! Finance</a>	2,450
<a href="#">Zika Virus Health Advisory - Carnival Cruise Lines</a>	1,449
<a href="#">Petition to Walmart to stop purchasing from Canadian sealers</a>	990
<a href="#">Spiral Toys Introduces TubeFriends - Yahoo! Finance (secondary link)</a>	952
<a href="#">Walmart donating water to students in Flint- Walmart Newsroom</a>	479
<a href="#">Family Beauty Haul! - KeyKali YouTube channel (Walmart backed)</a>	464
<a href="#">Game Day Traditions &amp; Recipes - Guide 4 Moms</a>	345
<a href="#">Walmart Gift Card Giveaway Contest - Lifesabargain</a>	323
<a href="#">Game Day Traditions &amp; Recipes - Melisa Source/Guide 4 Moms</a>	272



## About MediaMiser

**MediaMiser** clients, from Fortune 500 companies to startups to government departments, trust our web-based media monitoring and analysis solutions. They count on us for timely traditional and social media analytics generated by our patented software, the customized reporting options provided by our responsive and proactive client services team, and our 24-hour technical support. We turn news into knowledge for clients based in Canada, the United States, Europe, and Australia.

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