



THE NEXT WAVE

John Tavorieri
May 18°, 2018

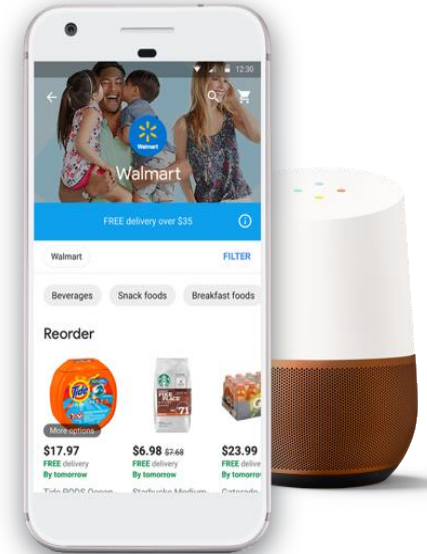
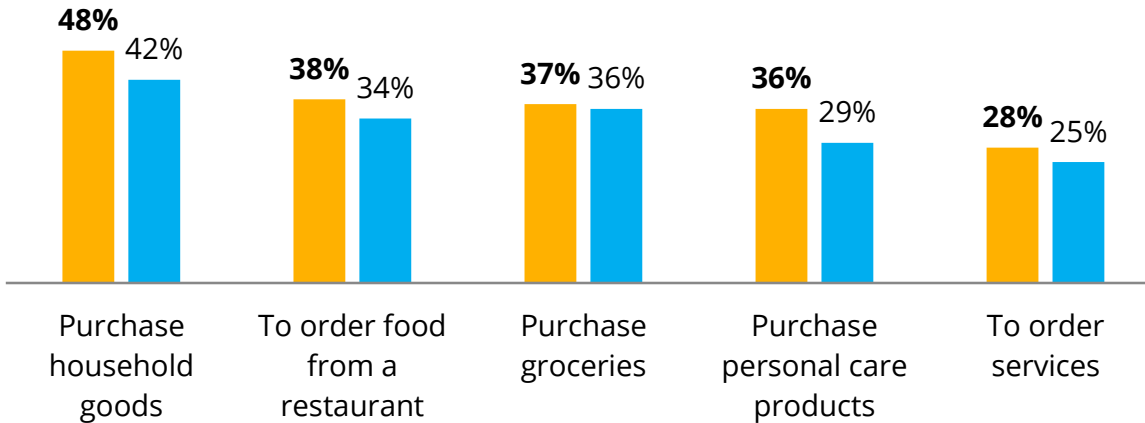
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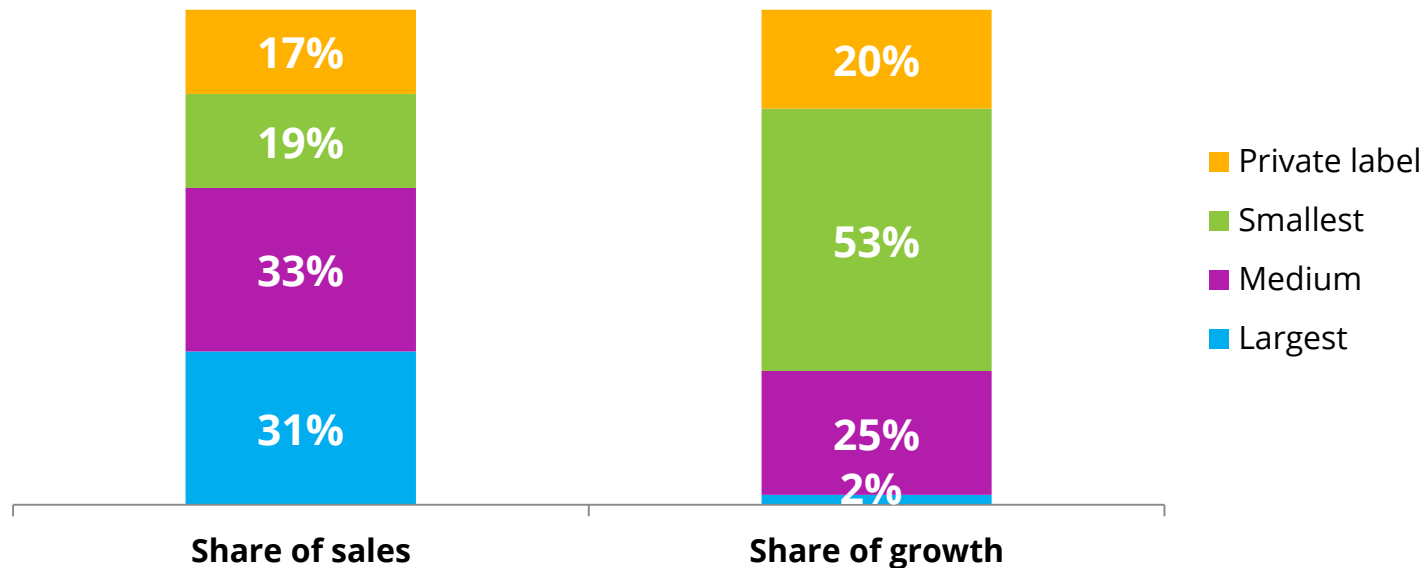
GOOGLE HOME USERS ARE ACTIVELY PURCHASING FROM THEIR DEVICES

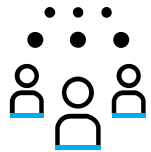
GENERAL VOICE USAGE *Percent of Owners*

■ Google Home ■ Amazon Echo

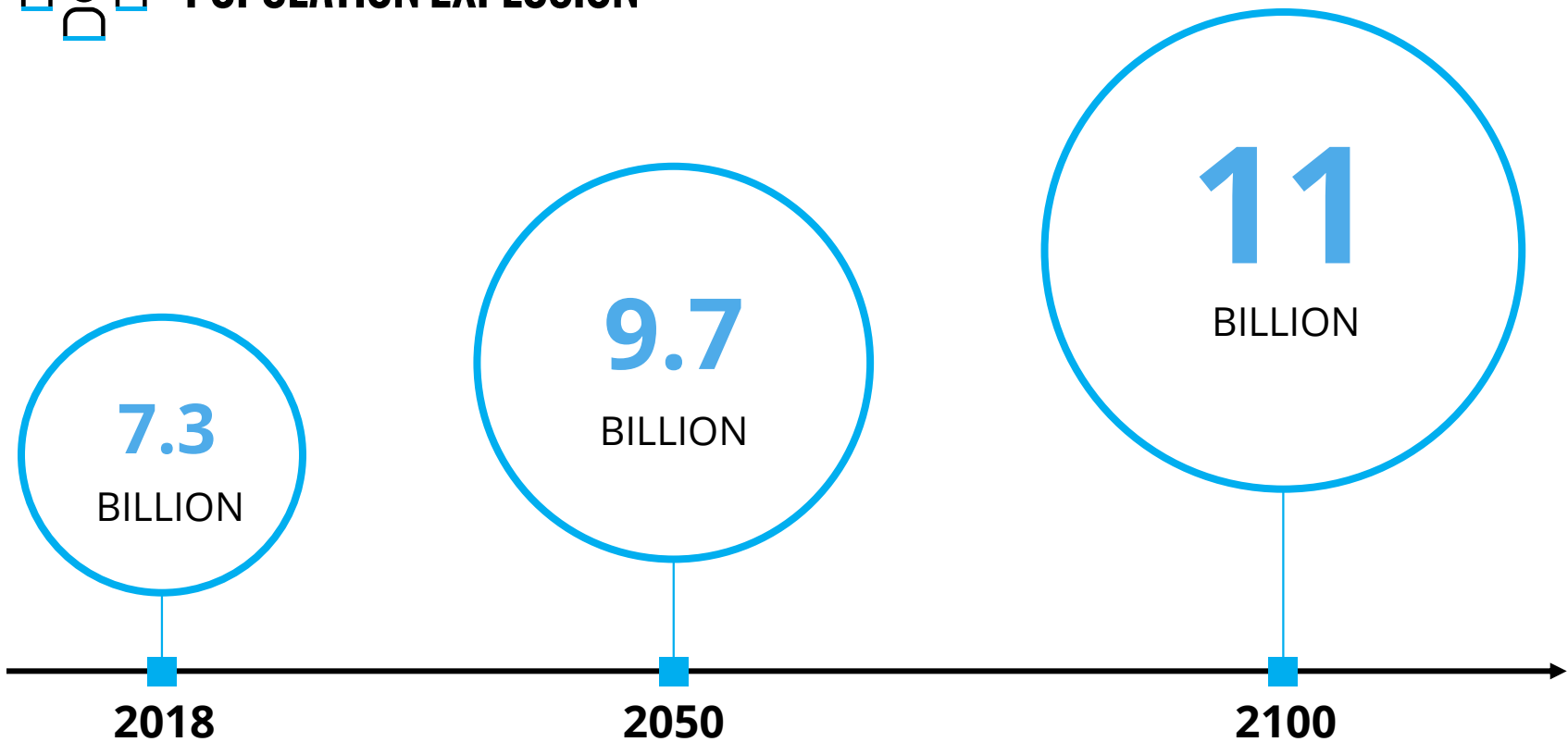


THE SMALLEST MANUFACTURERS ARE DRIVING MORE THAN HALF OF THE GROWTH





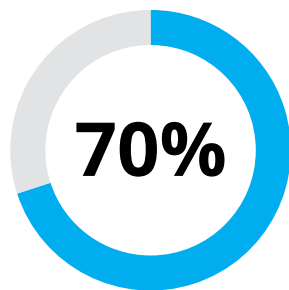
POPULATION EXPLOSION



CHANGING SHOPPER EXPECTATIONS

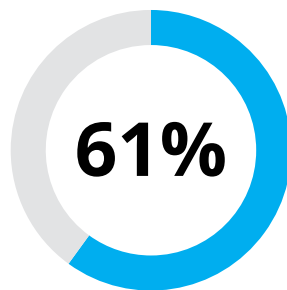
Example: South Korea

CONVENIENCE



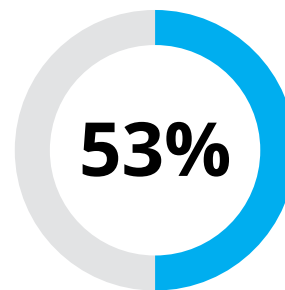
- 50%** Flexible delivery / pick up
- 45%** Transportation / gas
- 35%** Large / heavy items
- 30%** Saves time

PRICE/VALUE



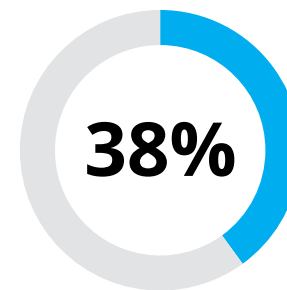
- 40%** Low prices on items
- 35%** Free shipping
- 30%** Sale / promos
- 25%** Good value

ASSORTMENT



- 35%** Unique assortment
- 30%** Wide selection
- 20%** Bulk items
- 15%** High quality

EXPERIENCE



- 40%** Fun / exciting
- 35%** Easy to navigate
- 30%** Product information
- 20%** Discreet purchases



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