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The National Retail Clinic Summit

Walmart Health and Wellness

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Saving
people
money
so they
can live
better

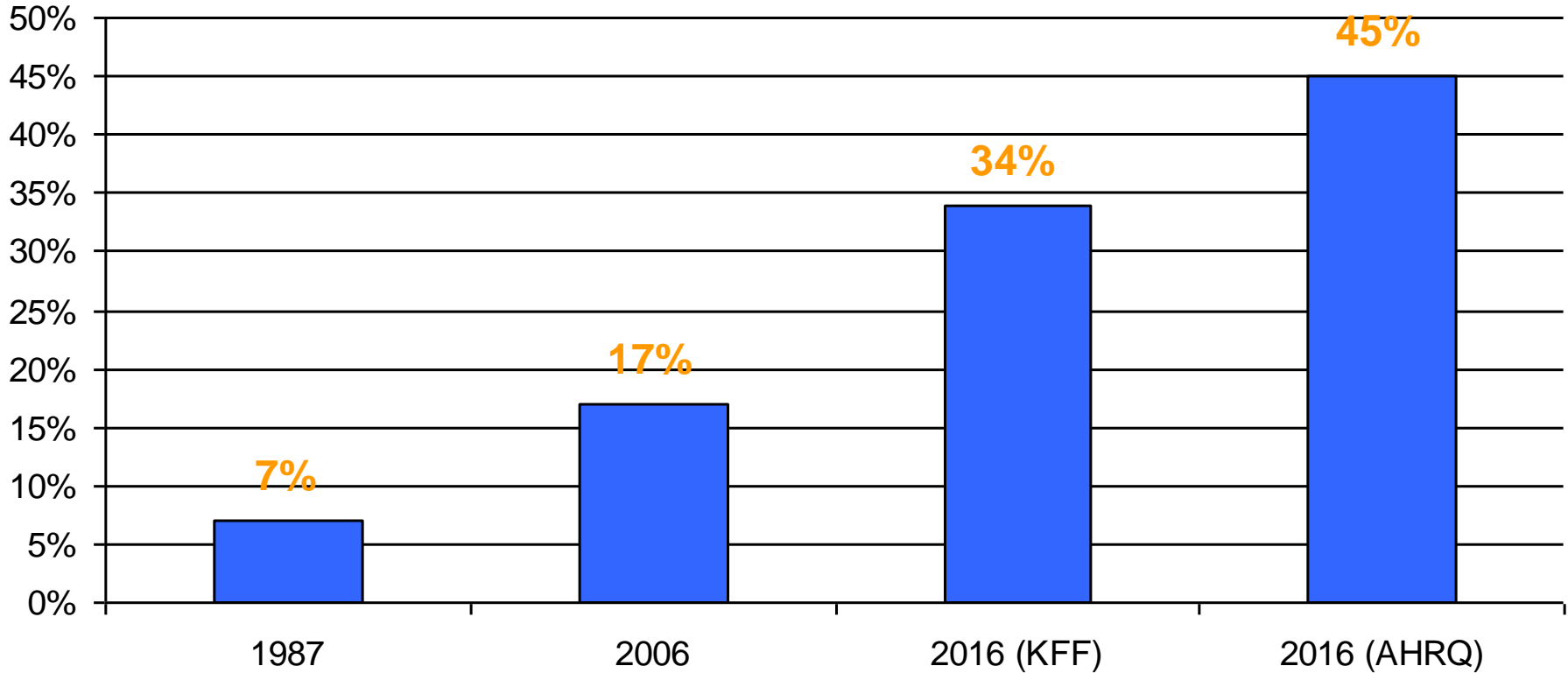
Walmart Stores Info

- US Stores serve +150 million US customers each week
- 4200+ Pharmacies
 - ✓ 1 Mail Order
 - ✓ 1 Specialty Pharmacy
- 3,000 Vision Centers
- Additional Partnered Health Services
 - ✓ Retail Clinics
 - ✓ Lab Services
 - ✓ Audiology
 - ✓ Dentistry
 - ✓ Wellness



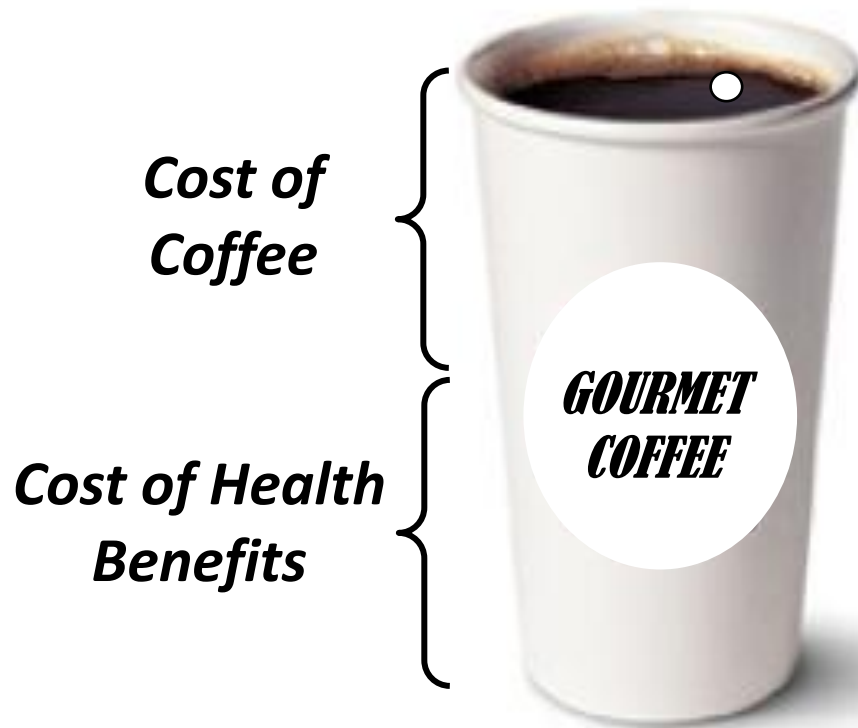
The Bigger Reason - Our Customers Need Help!

% of Median Family Income Required to Purchase Family Health Insurance in the U.S.



**Challenges of the economy, war, etc. rise and fall, but
healthcare costs remain the one constant concern**

Rising Employer Healthcare Cost



- Employer health premiums have increased 8-14% annually since 2000.
- This while inflation and changes in workers' earnings grew 3-4%.

Walmart's Healthcare Principles

- I. Every person in America must have quality, affordable health insurance
- II. Businesses, individuals & government must share the responsibility for financing & managing the American healthcare system
- III. The healthcare system must reduce the financial strains on individuals, businesses & government by eliminating waste & unnecessary procedures, & by adopting technology that will bring efficiency & value into the system
- IV. Individuals have a responsibility to maintain & protect their health
- V. America's healthcare system must be focused on Health, not just the treatment of illness
- VI. Walmart will play a role as a retailer, employer & influencer by driving transformational changes in America's healthcare system

Walmart Healthcare Solutions

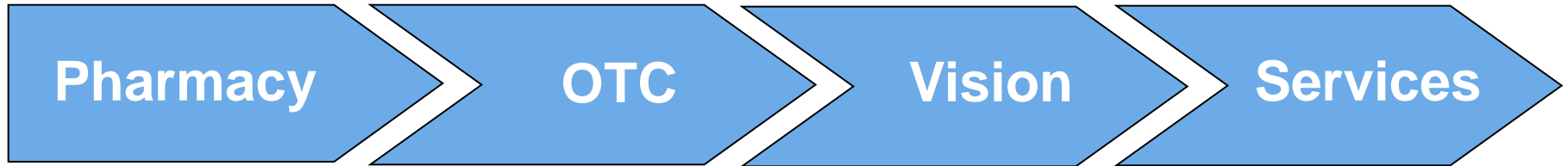


Save Money. Live Better.



Walmart 
Save money. Live better.

Our Contribution to Lowering Costs Health & Wellness



- Affordable prescriptions program which began with \$4 prescriptions and grew
- Low Price network
- \$4 over-the-counter program
- \$9 diabetes care solutions
- Affordable frames/lens package with 12-month guarantee
- (800) Contacts
- Clinic 2.0
- Health IT
- Other Services



Driving Access & Affordability: Clinics 2.0

Many ER visits could be performed in a different care setting



Walmart Health & Wellness

Convenient Clinics Mission Alignment:

- Expand access to affordable, quality healthcare by offering a convenient one-stop health shop for people short on time
- Benefit communities by reducing the burden on hospital's ED
- Represents another opportunity to take costs out of the system to benefit consumers through every day low price

Convenient Clinics

- Overview of Convenient Clinics
- Where we've been
- Where we're going
 - Current Clinics
 - Development Pipeline

Where We've Been ...

- Venture-backed NP/PA model
- Venture-backed MD/DO model
- Health Systems

Convenient Clinics



Where We're Going ...

Convenient Clinics

- **Partner with Community Health Providers**¹
 - Operated by local hospitals and practitioners
 - Walmart provides a standard layout and turnkey solution
- **“The Clinic at Walmart” Brand**
 - “The Clinic at Walmart” operated by *<Health System>*
 - Promotes a consistent ‘Look & Feel’
 - Ensures patient privacy



¹ Clinic Optimization Study. Dec 2008.

² Clinic Look & Feel Concept Test. Sept 2007.

Clinics at Walmart: A Partnership

- Landlord-Tenant relationship with fair market value pricing
- Stark and Anti-Kickback laws govern our relationship
- Patients have freedom of choice in their pharmacy provider



Next Steps: Total Healthy Living at Walmart



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Discussion & Questions

Thank You

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