

May 2-3, 2023

Walmart and Sam's Club Virtual Event

Walmart's rapid adoption of technology and services: Challenges and opportunities

As Walmart enters the second full year of its flywheel strategy, inflation and uncertainty are the hallmarks of the US economy and shopper sentiment. How well is Walmart satisfying customers' needs and wants? Which retailers are outperforming Walmart and why? And what does Walmart's investment strategy indicate about current and future expectations for suppliers? We'll address all of these questions during this two-day workshop.



Insights you'll gain from this event include:

- A strong grasp of macroeconomic, shopper, and retail trends to help you plan your business at Walmart and other key retail customers
- An understanding of how Walmart and other key retailers are changing their strategies to encompass services, omnichannel options, and loyalty programs
- A clear action plan for assessing the benefits and costs of Walmart's services and how to appropriately decline offers to participate

Kantar Presenters



Karen Kelso
Vice President,
Retail Insights



Doug Hermanson
Principal Economist,
Retail Insights



Julie Craig
Vice President,
Shopper Insights



Anna Brennan
Senior Analyst,
Retail Insights



Nishant Shrikhande
Senior Analyst,
Retail Insights



Taylre Stumpf
Senior Analyst,
Retail Insights



Kate Hohenstatt
Lead Analyst,
Retail Insights



Tiffany Hogan
Director,
Retail Insights



Mary Brett Whitfield
Senior Vice President,
Shopper Insights



Amar Singh
Senior Director,
Retail Insights



Simon Johnstone
Senior Director,
Retail Insights



David Marcotte
Senior Vice President,
Retail Insights



Barry Thomas
Senior Retail
Commerce
Thought Leader

Virtual Event

Listen live or consume later

Live:

Day 1 | 9:00 AM-4:10 PM CT

Day 2 | 9:00 AM-4:15 PM CT

Registration

Register today by emailing

events@kantarc consulting.com

or visiting our [event website](#).

Day 1: May 2

9:00-9:10 AM CT

Welcome and introduction

Karen Kelso, Vice President, Retail Insights

9:10-9:55 AM CT

Helping Walmart navigate the complex macro environment

Doug Hermanson, Principal Economist, Retail Insights

Shoppers and retailers will continue to face inflation headwinds and recession risks in 2023 that will bring opportunities and challenges to Walmart. Topics we'll discuss include:

- The complexities of inflation in 2023
- Trends in consumer spending and savings
- How changes to government programs affect Walmart

9:55-10:10 AM CT

Taking a look at Walmart shoppers

Julie Craig, Vice President, Shopper Insights

Walmart's shoppers are beset with inflation worries and stress. We'll dig into the key attributes and perceptions to understand what's top of mind. Topics we'll discuss include:

- Walmart shopper demographics and what they mean for the future
- How to evolve with changing shopper behavior and preferences
- Ways to keep up with digital engagement

10:10-10:35 AM CT

Examining Walmart's FY23 performance

Anna Brennan, Senior Analyst, Retail Insights

Walmart had record sales in FY23, but it was not all good news as the retailer forecasts nominal growth in FY24. Topics we'll discuss include:

- The impacts of inflation on inventory and investment
- How shifting purchase patterns will affect future profitability
- What Walmart's investment choices mean for suppliers

10:35-10:50 AM CT | **Break**

10:50-11:35 AM CT

Walmart's flywheel: Year Two check-in

Karen Kelso, Vice President, Retail Insights

Walmart's flywheel strategy is entering its second full year. How effective has the strategy been in building a network of products and services with families at the center? Topics we'll discuss include:

- Widening products and services available to customers
- Leveraging traffic and efficiency with B2B services
- Understanding Walmart's current and future priorities

11:35 AM-Noon CT | **Break**

Noon-12:45 PM CT

What Walmart wants and needs from its suppliers

Karen Kelso, Vice President, Retail Insights

Over the last two years, Walmart's challenges and business objectives have changed dramatically. The retailer's expectations and additional requests of suppliers will evolve to reflect these changes. Topics we'll discuss include:

- Walmart's current and future supplier expectations
- How to plan for the necessary modifications to your team and business
- How to buy time while your company adapts to new ways of working

12:45-1:30 PM CT

Twinning: Walmart and Amazon look more alike than ever

Nishant Shrikhande, Senior Analyst, Retail Insights

Amazon and Walmart have similar go-to-market strategies and similar ambitions as one-stop retailers. As Walmart looks to emulate Amazon, what does this mean for its business and suppliers? Topics we'll discuss include:

- How Walmart and Amazon approach their assortment, fulfillment, marketplace, and other business areas
- Where Walmart is following — and diverging from — Amazon's lead
- What all of this means for suppliers and the future of Walmart's business

1:30-2:15 PM CT

Walmart and Target: Diverging paths in digital evolution

Anna Brennan, Senior Analyst, Retail Insights

Taylre Stumpf, Senior Analyst, Retail Insights

The digital strategies of Walmart and Target differ in many ways yet are rooted in the common goal of driving sales and shopper engagement. Discover how you can best work with each retailer to get results. Topics we'll discuss include:

- How the digital evolution is impacting both retailers and how each plans to define success
- The platforms and capabilities each retailer is using to achieve its digital goals
- How you can align your own digital strategy with each retailer to ensure mutual success

2:15-2:30 PM CT | **Break**

2:30-2:45 PM CT

Profiling Sam's Club members

Julie Craig, Vice President, Shopper Insights

Sam's Club members are the lifeblood of its club business, and understanding them better will forge a stronger bond with the retailer. Topics we'll discuss include:

- Key motives, attitudes, and behaviors of Sam's Club members
- How Sam's Club members' priorities and preferences are evolving
- How you can best align your strategy to connect with Sam's Club members

2:45-3:15 PM CT

Sam's Club's plan to grow

Kate Hohenstatt, Lead Analyst, Retail Insights

Sam's Club enjoyed another strong financial performance in FY 2023 and has continued its momentum. What do we expect from Sam's Club in 2024? Topics we'll discuss include:

- The club's current and future growth drivers
- Investment plans for 2023 and beyond
- Future areas of competition in the club channel

3:15-4:00 PM CT

Walmart: Connecting everything, all at once

Anna Brennan, Senior Analyst, Retail Insights

Walmart's strategies to grow its services businesses rely heavily on utilizing its in-store traffic and marketplace visitors. What leverage points will Walmart want to capitalize on and what are the implications for suppliers? Topics we'll discuss include:

- The growth of Walmart's marketplace and the opportunities and challenges facing third-party sellers
- How Walmart Connect plans to develop retail media and integrate real-time communications
- Why Walmart+ is the untapped link to Walmart customers and what your company can do to leverage this connection

4:00-4:10 PM CT

Day 1 recap

Karen Kelso, Vice President, Retail Insights

Day 2: May 3

9:00-9:10 AM CT

Welcome and introduction

Karen Kelso, Vice President, Retail Insights

9:10-9:55 AM CT

Performance comparison: Walmart vs. other top retailers

Tiffany Hogan, Director, Retail Insights

Walmart is the largest retailer in the world and plans to get even bigger. But is being the biggest synonymous with being the best? Topics we'll discuss include:

- Channels and retailers that are outperforming Walmart
- Key factors impacting retail success
- Predictions for which channels and retailers are best positioned for success

9:55-10:40 AM CT

Walmart's competitive set: The Shopper POV

Mary Brett Whitfield, Senior Vice President, Shopper Insights

Walmart is not the only retailer drawing shoppers during times of high inflation. Why have shoppers chosen to spend with other retailers? Topics we'll discuss include:

- How Walmart shoppers evaluate the strengths and weaknesses of key competitors
- When, why, and how Walmart shoppers shop at clubs, dollar stores, and Amazon
- The Walmart+-Amazon Prime overlap and impact

10:40-10:55 AM CT | **Break**

10:55-11:40 AM CT

Walmart's focus on services

Karen Kelso, Vice President, Retail Insights

Walmart's flywheel strategy is predicated on growing both B2C and B2B services. What is driving this push and what does it mean for suppliers? Topics we'll discuss include:

- Factors behind the growth of services
- Which services may be appropriate for your business
- How to prepare a consistent POV about your company's use and adoption of services

11:40 AM-12:30 PM CT

The convergence of digital, healthcare, and personalization

Amar Singh, Senior Director, Retail Insights

Healthcare is becoming more digital and service-oriented. What does this mean for Walmart as it expands its health and wellness footprint in store and online? Topics we'll discuss include:

- How Walmart is increasing its primary health and telehealth dominance
- Ways in which Walmart is differentiating itself within health and wellness
- The retailer's approach to health-related assortment and merchandising decisions

12:30-1:00 PM CT | **Break**

1:00-1:45 PM CT

Value channel challenge: Breaking Walmart's lock on EDLP

Simon Johnstone, Senior Director, Retail Insights

As inflation challenges shoppers to make their budgets stretch further, value retailers have outperformed Walmart with regard to sales growth. What can Walmart learn from value retailers to provide even better value to shoppers? Topics we'll discuss include:

- How value channel retailers have reset their sales equation to cater to core shopper needs
- How retailers continue to redefine the value of a dollar
- The unique ways value retailers are ensuring long-term shopper retention

1:45-2:30 PM CT

How to 'opt out' of Walmart's requests

Karen Kelso, Vice President, Retail Insights

Walmart's business model increasingly relies on B2B services, including Walmart Connect, Walmart Luminate, and Walmart Fulfillment Services, to name just a few. Your company will almost certainly be asked to participate in one or more of these programs, so knowing how to indicate that you appreciate the offer but can't participate is critical. Topics we'll discuss include:

- Understanding the ask and whether it fits within your business processes
- Starting with agreement on the underlying objectives
- Crafting a compelling and irrefutable story

2:30-2:45 PM CT | **Break**

2:45-3:30 PM CT

The \$100 billion business of Walmart International

David Marcotte, Senior Vice President, Retail Insights

Given all the changes to ownership and markets that have occurred in Walmart's international division, it's easy to forget that Walmart International contributes over \$100 billion a year in revenue. And it's still an incubator for innovation and management development within Walmart. A review of how this division differs from the US is critical to understanding Walmart's global plans. Topics we'll discuss include:

- Where Walmart is today, the status of key country groups, and the potential for growth
- How international differs from Walmart US in financial and channel innovation
- Whether it's time for Walmart China to renew growth with its partners

3:30-4:05 PM CT

The future of retail

Barry Thomas, Senior Retail Commerce Thought Leader

Nearly every leading retailer's strategy is based on an ecosystem. We'll help demystify this concept and show you how to win with ecosystem retailers. Topics we'll discuss include:

- The future of global commerce in context
- Key retailer ecosystem attributes and benefits for brands
- How FMCG brands are winning with these growth customers

4:05-4:15 PM CT

Day 2 recap and close

Karen Kelso, Vice President, Retail Insights