

SCINTILLA CASE STUDY



This case study was shared live at Walmart Data Ventures Inspire Event, October 29, 2025.

Understanding the Stroller Customer to Maximize Growth

Overview

When Kids2 aimed to enhance their presence in the Walmart Stroller category, they turned to Scintilla to gain a deeper understanding of purchase dynamics. By leveraging tools like **Shopper Behavior** and **Customer Perception**, they identified the key drivers and barriers that influence customer decisions. With these insights, Kids2 made more strategic decisions in assortment and pricing to better appeal to specific customer groups and adapt to their evolving needs.

Key Takeaways

- 1 Scintilla helped Kids2 understand which customer segmentations were over- and under-indexing on specific barriers to purchase
- 2 Kids2 identified that most shoppers are new to the category, prompting a strategic focus on trend-driven products, digital shelf expansion, and impactful promotions to counter category decline
- 3 Analysis uncovered an opportunity to drive growth with cold-weather stroller accessories tailored to Walmart stores in cold-weather markets



Will Radke

Kids2
Director of Sales Analytics and
Demand Planning



Francesca Pompiano

Walmart
Senior Merchant

**We know that the data will
always spark more questions
and help us ensure that we
can serve the customer.**

Will Radke

Kids2

Director of Sales Analytics and Demand Planning



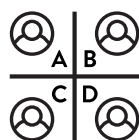
The Opportunity



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Performing a Deep Dive into the Walmart Stroller Customer

To better understand who was shopping for Strollers at Walmart, Kids2 alongside their merchant analyzed the category in Scintilla and uncovered four main points of emphasis:



PID/Customer
Segmentation



Scintilla and Market Data
to find white spaces



Customer Perception



PID Store
Segmentation Focus

The Approach



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Exploring Walmart's Performance vs. the Total Market

Using year-over-year data and Scintilla, they clearly saw where the market was growing or shrinking—and where Walmart could gain share. Their biggest opportunities were in stand-alone strollers and wagons.

Travel Systems

Stand-alone Strollers

Stroller Wagons

Initial Purchase

Secondary (incremental) Purchases



Category Size/Growth

Market/Walmart AUR

Walmart Share

Walmart Share Change

Category Size/Growth

Market/Walmart AUR

Walmart Share

Walmart Share Change

Category Size/Growth

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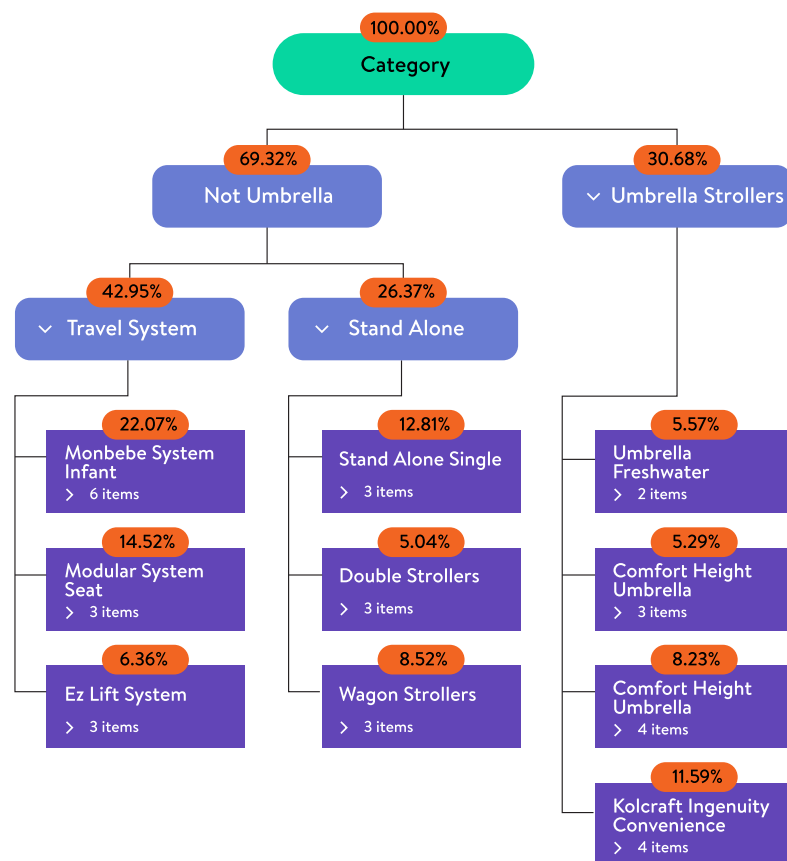
Source: Circana POS. 12ME September 2024 vs YAG. Walmart Scintilla Strollers Category/Subcategory 52WE Oct 6th 2024 vs YAG.
Stand-alone Strollers include Umbrella Strollers, Jogging Strollers, Lightweight Strollers



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Validating a Hypothesis with the Customer Decision Tree

They tested an alternate stroller categorization, separating Umbrella Strollers for a cleaner look at activity in other subcategories. They then validated this with the **Shopper Behavior** Customer Decision Tree.



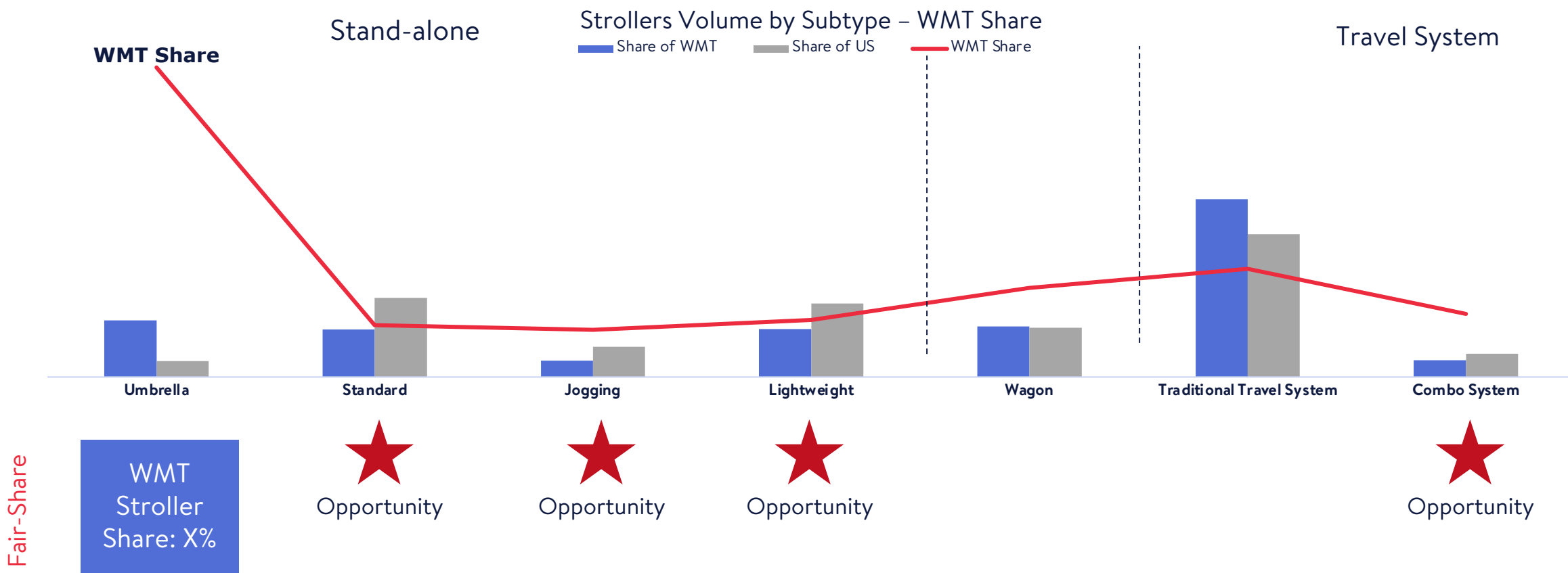
BRAND / FEATURES									
	7	1	0	2					
7		3	0	0					
1	3		1	1					
0	0	1		1				0	1
2	0	1	1		2				
				2					
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			0				0		1
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Walmart Outperforms in Umbrella Strollers and Traditional Travel Systems

This subcategory breakdown revealed that Walmart's strength in Umbrella Strollers was hiding other opportunities. This made clear the Standard and Lightweight segments were priorities for share growth.





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Strollers Have the Largest Mid and Upmarket Penetration in Baby Gear

In the **Shopper Behavior** Performance in Detail report, they indexed upmarket penetration across similar baby categories. Strollers over-indexed significantly, making it a strong platform for growth.

Item Name	Latest	% Change	Latest	% Change	Latest	% Change
Total	5.05%	-0.58pts	6.98%	-1.01pts	3.38%	-0.83pts
ACTIVITY CENTER	8	-0.01pts	8	-0.01pts	8	-0.01pts
PLAY YARD	15	-0.04pts	15	-0.05pts	15	-0.04pts
HIGH CHAIR	12	-0.01pts	12	-0.02pts	13	-0.01pts
WALKER	13	-0.02pts	13	-0.04pts	11	-0.03pts
STROLLERS	37	-0.02pts	37	-0.05pts	36	-0.04pts

Opportunity to push shoppers to other categories that lack penetration through adjacencies



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Discovering an Opportunity to Trade Up

Despite strollers attracting more upmarket shoppers, they weren't trading up like in other categories. That presented two clear opportunities: Drive the primary stroller purchase to Walmart and encourage trade-up within the category.

	Price Sensitive	Mid-Market	Up-Market		
Analysis Level	Latest	Latest	Latest	Price Sensitive-Mid Market Index	Price Sensitive-Up Market Index
Total	\$13.96	\$15.94	\$48.11	114%	345%
Swing Fullsize	\$93.94	\$145.24	\$145.85	155%	155%
Swing Midsize	\$115.80	\$126.50	\$142.08	109%	123%
Bassinet	\$77.40	\$92.71	\$101.83	120%	132%
Activity Center	\$71.08	\$79.55	\$83.95	112%	118%
Play Yard	\$68.24	\$74.01	\$79.65	108%	117%
High Chair	\$50.50	\$59.52	\$72.22	118%	143%
Swing Travel	\$60.53	\$65.26	\$66.69	108%	110%
Strollers	\$46.57	\$50.82	\$56.55	109%	121%

Strollers have the smallest absolute gap between shopper segment avg price. Raising the index of Mid Market Shoppers to 115% is a \$2m opportunity.



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Exploring the Impact of Shopping Channel on Spend

In **Shopper Behavior**, they noticed when customers make stroller purchases via Online Pickup and Deliver (OPD), their spend nearly doubles—but their associated category spend drops significantly.

	In-Store	OPD								
Umbrella Strollers	<table><tr><td>Avg Spend per Basket (Focus)</td><td>Avg Spend per Basket (Total)</td></tr><tr><td>\$24.79</td><td>\$100.02</td></tr></table>	Avg Spend per Basket (Focus)	Avg Spend per Basket (Total)	\$24.79	\$100.02	<table><tr><td>Avg Spend per Basket (Focus)</td><td>Avg Spend per Basket (Total)</td></tr><tr><td>\$31.92</td><td>\$62.04</td></tr></table>	Avg Spend per Basket (Focus)	Avg Spend per Basket (Total)	\$31.92	\$62.04
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\$24.79	\$100.02									
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\$31.92	\$62.04									
Wagon Strollers	<table><tr><td>Avg Spend per Basket (Focus)</td><td>Avg Spend per Basket (Total)</td></tr><tr><td>\$176.44</td><td>\$256.06</td></tr></table>	Avg Spend per Basket (Focus)	Avg Spend per Basket (Total)	\$176.44	\$256.06	<table><tr><td>Avg Spend per Basket (Focus)</td><td>Avg Spend per Basket (Total)</td></tr><tr><td>\$208.94</td><td>\$220.38</td></tr></table>	Avg Spend per Basket (Focus)	Avg Spend per Basket (Total)	\$208.94	\$220.38
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\$176.44	\$256.06									
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Total Strollers	<table><tr><td>Avg Spend per Basket (Focus)</td><td>Avg Spend per Basket (Total)</td></tr><tr><td>\$67.07</td><td>\$141.14</td></tr></table>	Avg Spend per Basket (Focus)	Avg Spend per Basket (Total)	\$67.07	\$141.14	<table><tr><td>Avg Spend per Basket (Focus)</td><td>Avg Spend per Basket (Total)</td></tr><tr><td>\$132.84</td><td>\$154.24</td></tr></table>	Avg Spend per Basket (Focus)	Avg Spend per Basket (Total)	\$132.84	\$154.24
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\$132.84	\$154.24									

Avg. \$76.30 gap

Avg. \$20.99 gap



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How many customers purchase multiple strollers and where do they purchase?

The **Shopper Behavior** Cross Shop report showed that umbrella strollers drive most of the unit penetration, but 96% of them don't buy other stroller types. Capturing a second stroller purchase would lead to an extra ~\$150 per customer on average.

Product Groups	(1) JOGGING STROLLERS	(2) STANDARD STROLLERS	(3) TRAVEL SYSTEMS	(4) UMBRELLA STROLLERS	(5) WAGON STROLLERS
Category Penetration	2.4%	17.3%	15.8%	60.3%	7.5%
(1) JOGGING STROLLERS	86.4%	4.0%	2.4%	7.8%	1.3%
(2) STANDARD STROLLERS	0.6%	89.2%	2.0%	7.4%	1.5%
(3) TRAVEL SYSTEMS	0.4%	2.2%	93.3%	3.9%	0.8%
(4) UMBRELLA STROLLERS	0.3%	2.1%	1.0%	95.8%	0.9%
(5) WAGON STROLLERS	0.4%	3.4%	1.7%	7.3%	88.2%

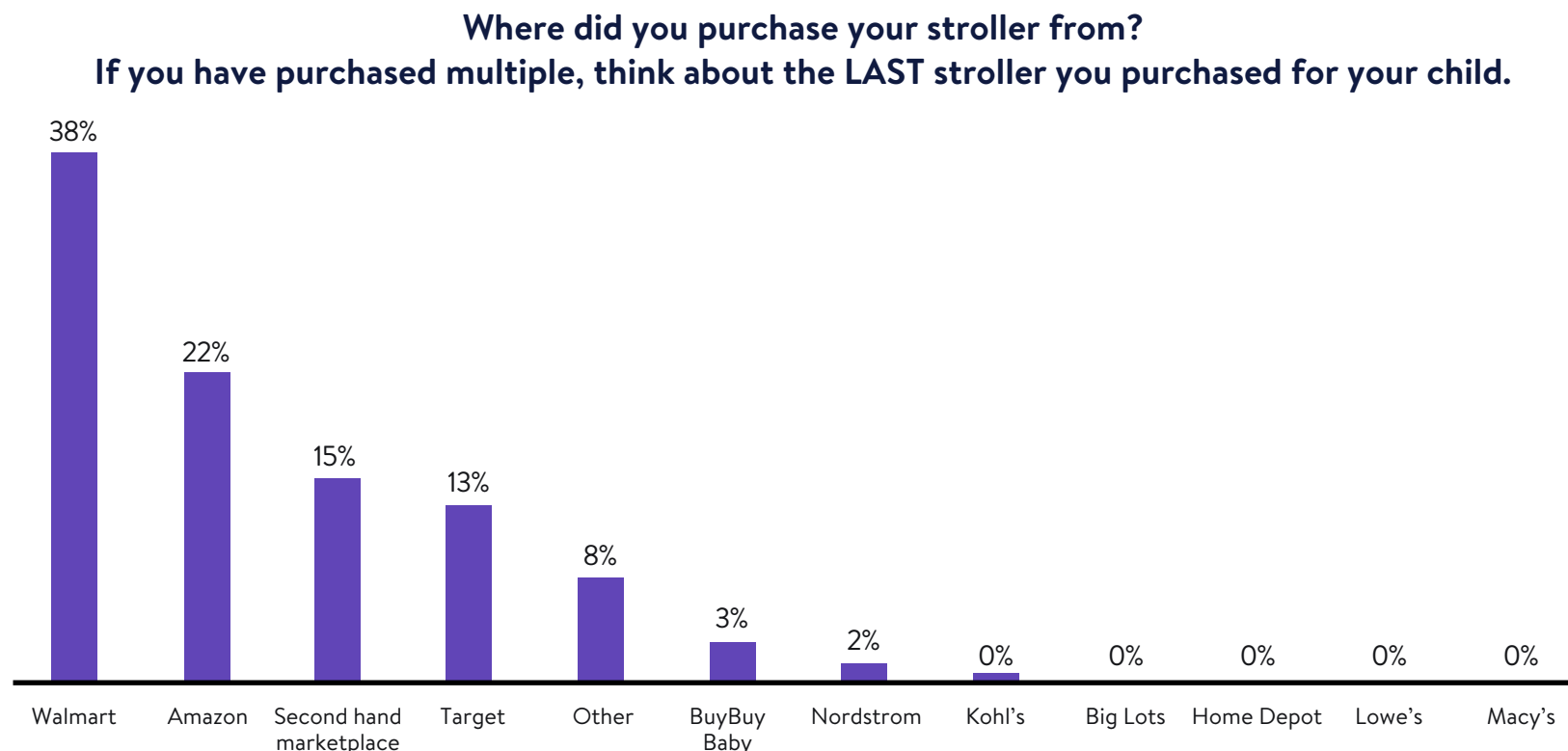
Shoppers who buy just an Umbrella Stroller spend \$26 on average, but that jumps to \$174 for shoppers who buy in any other Stroller category.



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Hearing How Customers Perceive Walmart in This Category

In **Customer Perception**, they learned that most stroller shoppers surveyed made their most recent stroller purchase at Walmart. Additionally, the secondhand market's growth was worth tracking as it could shape future purchase behaviors.





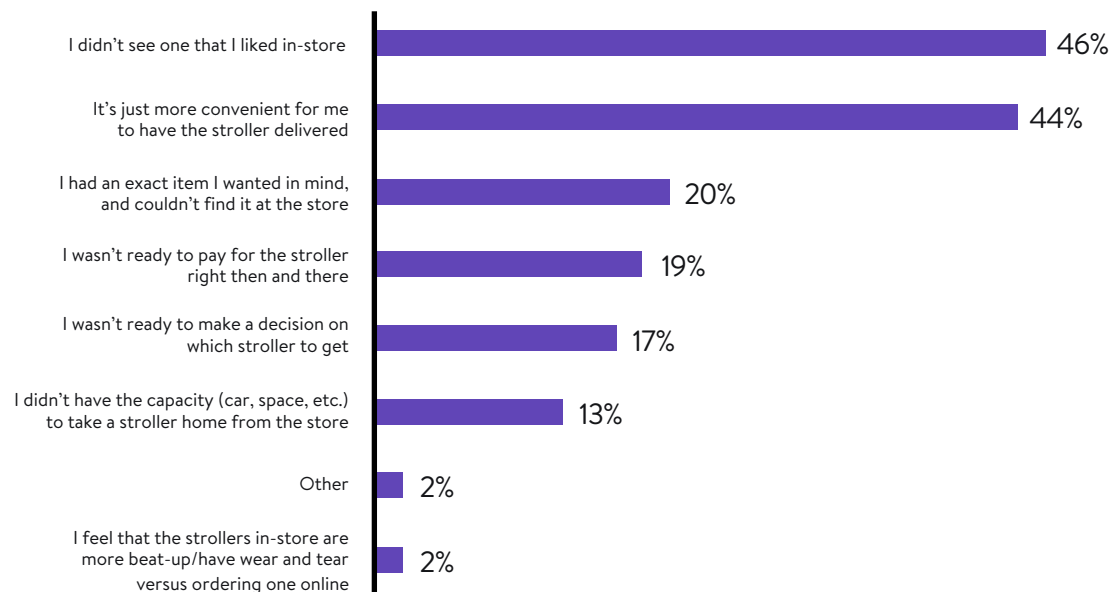
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Hearing Why Customers Choose their Shopping Channels

Continuing in the survey, they wanted to hear why customers choose to shop strollers online vs. in-store. These insights would help them balance convenience and value while still encouraging add-on purchases.

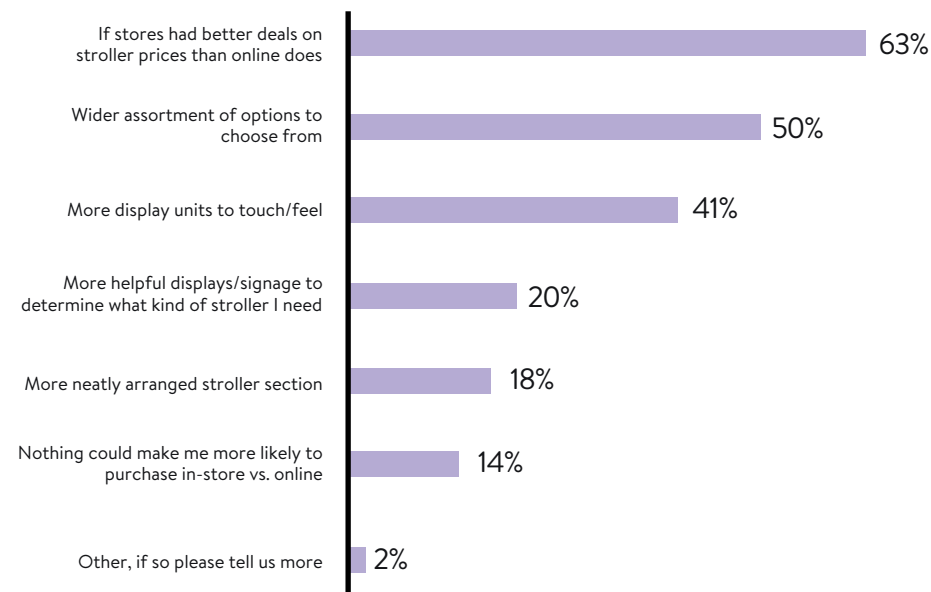
Why did you decide to purchase online in the end?

(Among those who visited a store but purchased online)



What could get you to purchase a stroller in store?

(Among those who purchased online)



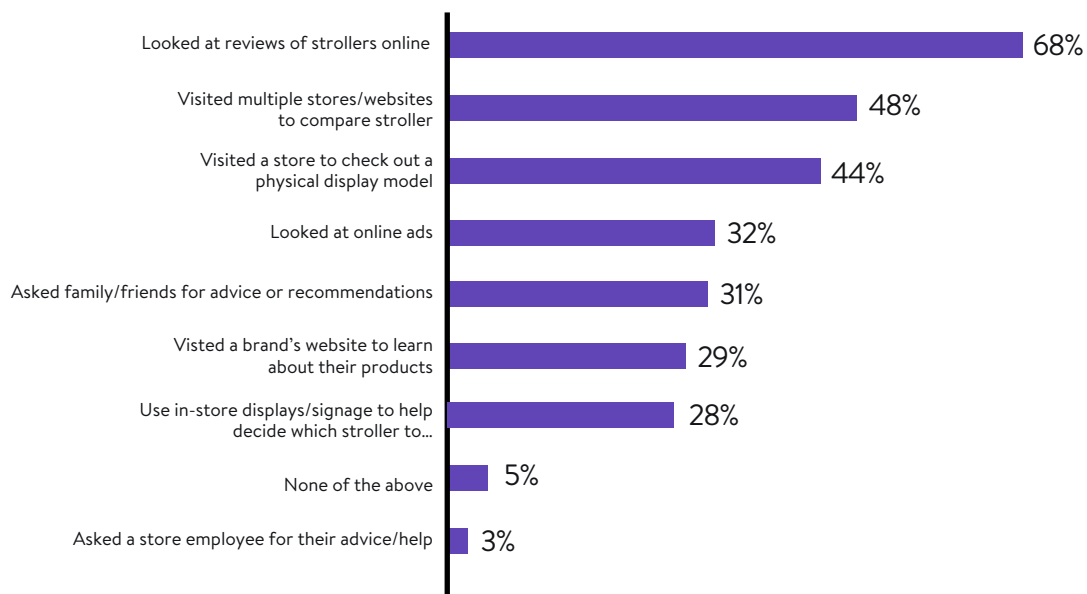


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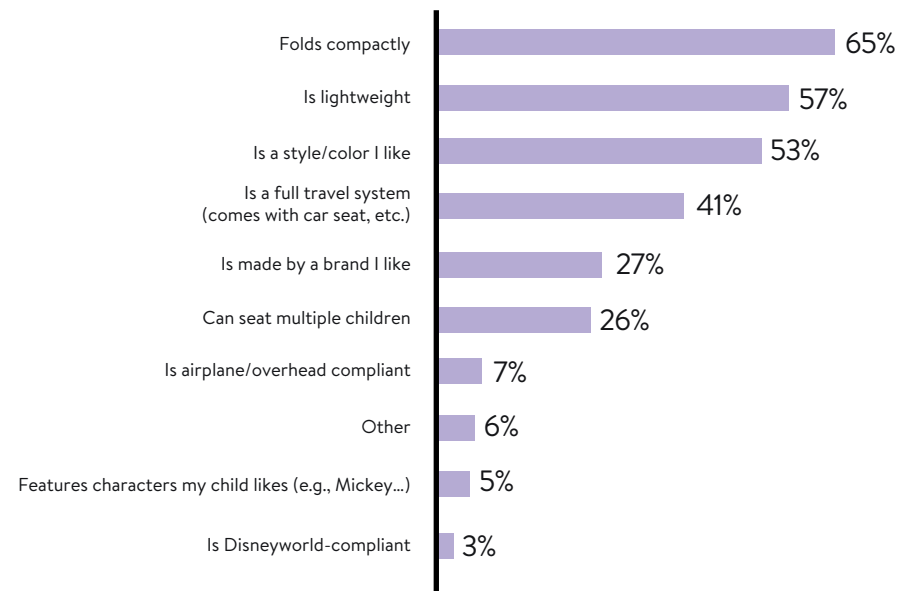
Driving Assortment Decisions with the Voice of the Customer

As 94% of Walmart stroller shoppers are new to the category each year, Kids2 asked how these first-time stroller buyers were researching their purchases and the specific features they were looking for.

Which of the following activities did you do while shopping for a stroller?



What specific features were you looking for in this stroller while you were shopping?

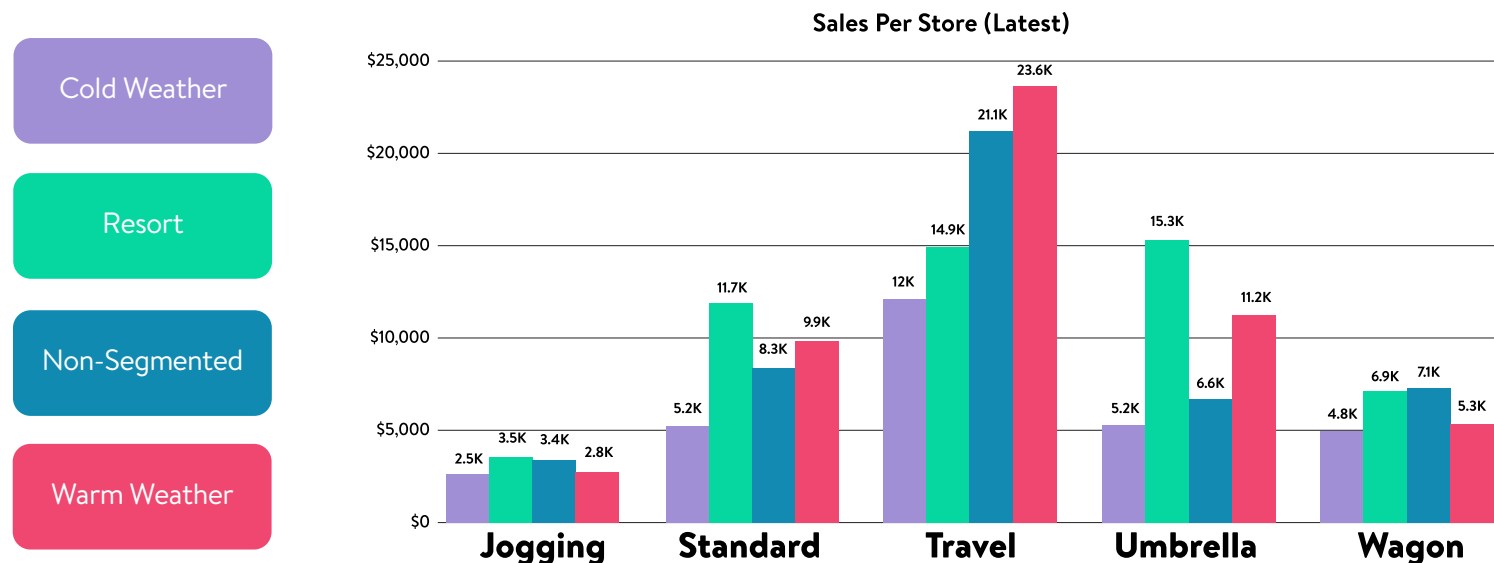




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Does store location impact performance trends?

Finally, they went back to the **Shopper Behavior** Performance in Detail to learn their assortments were well balanced, except in cold weather stores. These stores make up 18% of locations but are 34% less productive than Warm Weather or Resort Stores.



Segment	Stores Selling (Latest)	Sales Per Store (Latest)	Units Per Store (Latest)	Average Price Per Unit (Latest)	Sales Value (Latest)
Cold Extreme and Extended	707	\$26,403.98	356.90	\$73.98	\$18,667,616
Resort Group, excludes extreme or extended cold	179	\$49,032.63	883.18	\$55.52	\$8,776,840
Year Round Warm Weather	643	\$50,140.33	693.98	\$72.25	\$32,240,233
Non-Segmented	2,386	\$41,029.19	485.83	\$84.45	\$97,895,643
Total	3,915	\$40,250.40	514.90	\$78.17	\$157,580,331

The Results



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Uncovering Four Main Points of Emphasis

The following benchmarks will help both Kids2 and Walmart measure impact and track progress in the category.

Data Source / Method		Insight	Opportunity
Scintilla and Market Data to find white spaces		Share opportunity in strollers about \$50+ price point by capturing Pre-natal/Registry purchase	New Customers
PID/Customer Segmentation		Mid and Up market roller customers lag other gear categories in trade up Index vs price sensitive customers	Spend per Transaction
Customer Perception		Path to purchase includes displays and reviews, for ecomm and store shoppers alike	Assortment
PID Store Segmentation Focus		Regionality plays a heavier component in strollers than seasonality—this is different from most baby gear	Regional Segmentation

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Thank you.



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