

Walmart Luminate Case Study

Data-Driven Merchandising: Leveraging Walmart Luminate Charter Insights to Optimize Facial Tissue Shelving Strategy



“By leveraging the comprehensive insights provided by Walmart Luminate, we were able to gain a deep understanding of consumer preferences and incrementality of the additives variety.



Stacey Johnson
Merchandising Director,
Bulk Paper
Walmart



Kaylin Orr
Sr. Team Lead,
Category Management
Kimberly-Clark



Walmart Luminate Case Study: Kimberly-Clark

The opportunity: Use Walmart Luminate Charter data to meet customer needs and add excitement at shelf in the facial tissue category

The facial tissue market is made of four variants that serve different purposes:

Ultra soft

The new everyday



Lotion

Occasion based / Illness



Mainline

Value



Additives

Relevant solutions





Walmart Luminate Case Study: Kimberly-Clark

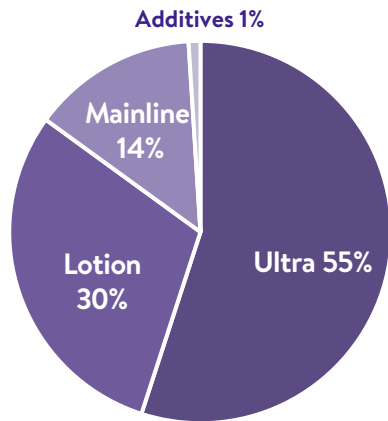
The opportunity: Walmart under indexed in additives facial tissues, while total market showed +7% growth

Total Facial Tissue Industry: \$893M | +11.2%

Walmart

\$230.3M

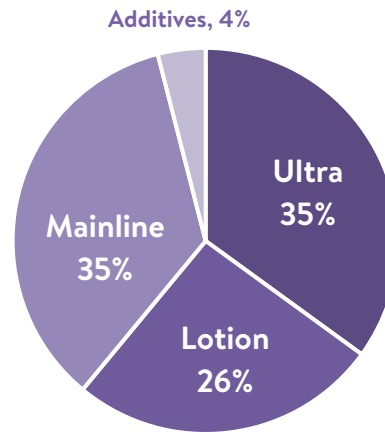
+6.7%



Remaining Market

\$663.2M

+12.6%



Additives \$ Total Market

Additives show sustained growth in Total Market:

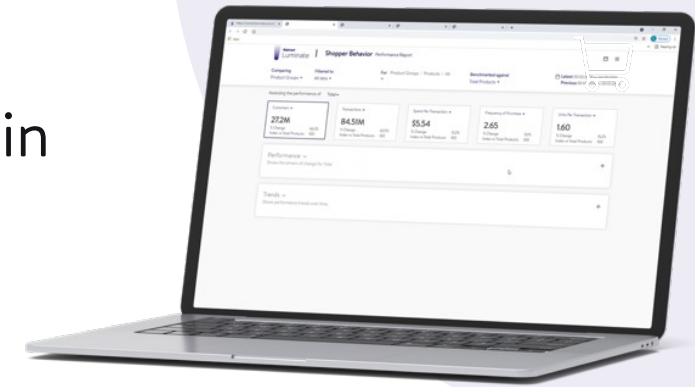
+7% vs YA





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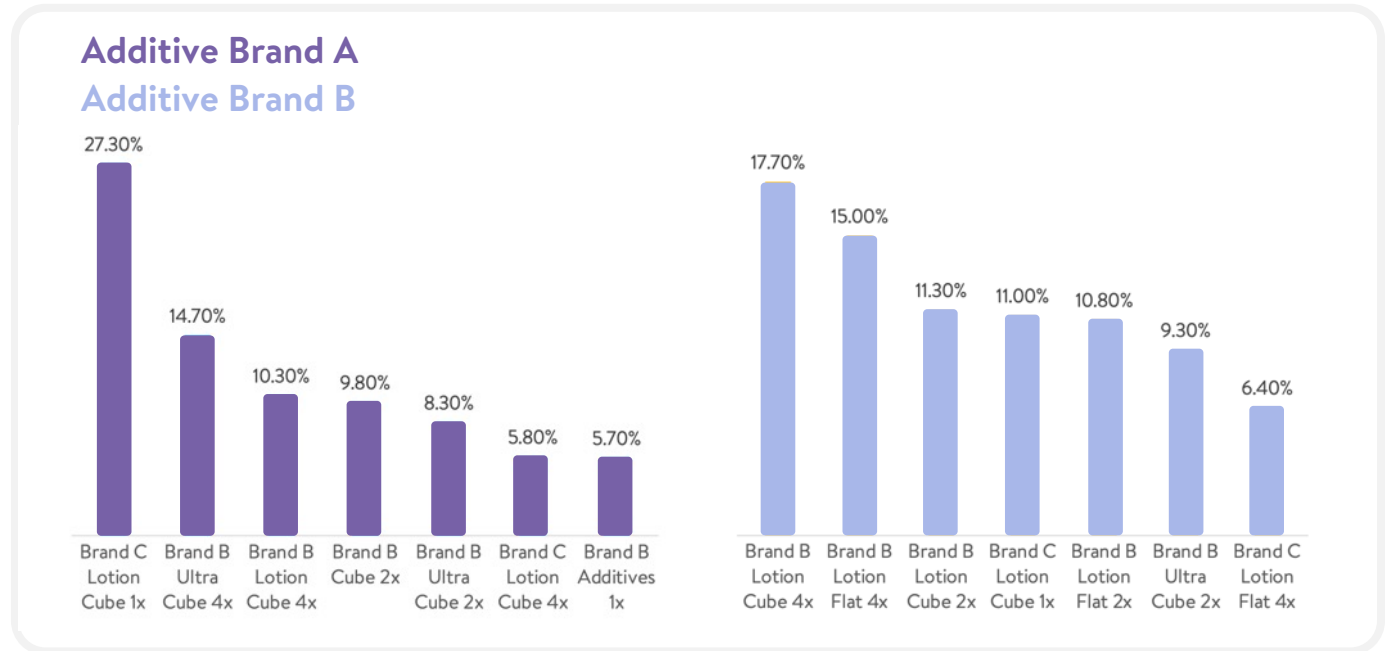
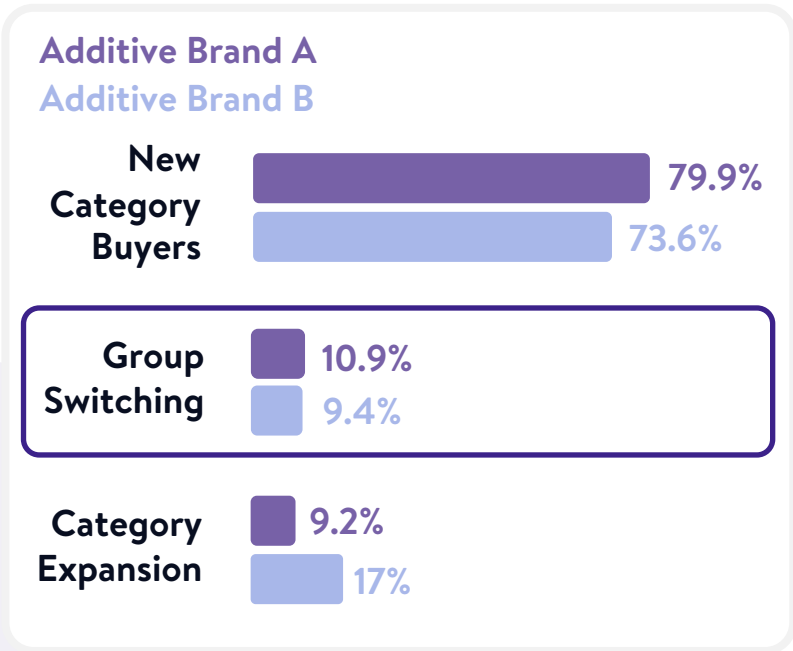
The approach: Clarity from the Switching report in Shopper Behavior



Switching

74% of customer volume for additives was New Category Buyers:

Relatively low switching at the item level led Kimberly-Clark to hypothesize additives were a basket-building purchase:





Walmart Luminate Case Study: Kimberly-Clark

The approach: The Basket report in Shopper Behavior



Basket

This revealed that nearly 35% of transactions had 2+ units in the basket, providing evidence that consumers would support multi-packs.

Purchase size additive brand A

Basket Qty	Sales Value	% Sales Value	Transactions	% Transactions
1	\$453,426	43.0%	270,013	66.0%
2	\$325,556	30.9%	97,225	23.8%
3	\$91,122	8.6%	16,770	4.1%
4	\$119,094	11.3%	15,508	3.8%
5+	\$64,440	6.1%	9,663	2.4%

34% of transactions have 2+ in the basket

Purchase size additive brand B

Basket Qty	Sales Value	% Sales Value	Transactions	% Transactions
1	\$1,169,896	41.9%	550,570	64.3%
2	\$937,671	33.6%	220,280	25.7%
3	\$300,864	10.8%	47,020	5.5%
4	\$216,151	7.7%	25,370	3.0%
5+	\$168,440	6.0%	12,380	1.4%

35% of transactions have 2+ in the basket



Walmart Luminate Case Study: Kimberly-Clark

The approach: Test the theory

Kimberly-Clark expanded relevant assortment solutions with a modular incorporating additives and multipacks in 437 test stores across the US.

Base Mod



Additives Test Mod



Ultra Variant Blocking

Lotion Variant Blocking

Mainline/OPP Blocking

Additives Blocking



Walmart Luminate Case Study: Kimberly-Clark

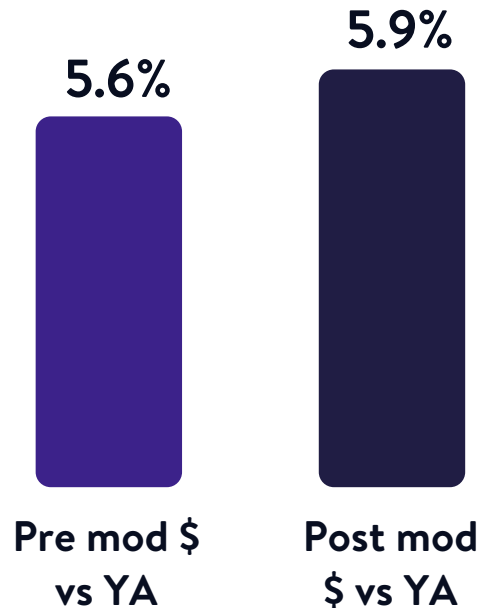


Report Builder

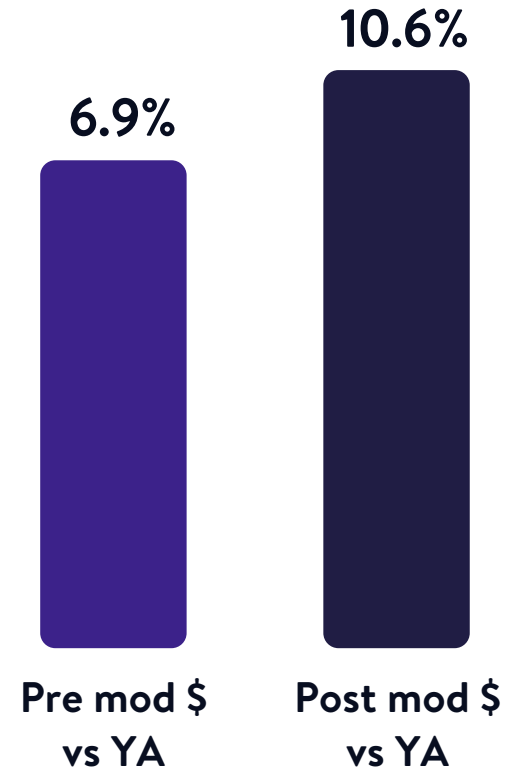
The results:

Report Builder in Channel Performance showed that post-modular reset, additive test stores are growing nearly 2x the rate of base stores year over year.

Base stores
+30 basis points



Additive test stores
+370 basis points



nearly
2x
growth
rate



Walmart Luminate Case Study: Kimberly-Clark

The results:



Cross Shop

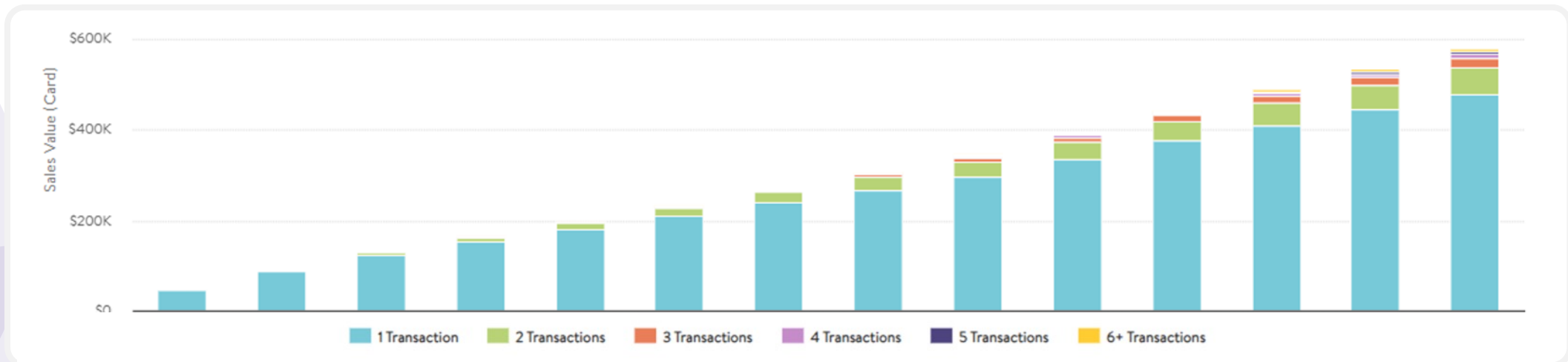


Trial & Repeat

After only 13 weeks, the Shopper Behavior Cross Shop report shows additives and other variants are being increasingly purchased together ahead of cough, cold, and flu season.

	Ultra soft	Lotion	Mainline	Additives
Additive facial tissues cross-purchase rate	25.2%	17.2%	17.9%	52.4%

And the Trial and Repeat report shows repeat purchases at a faster rate than the typical purchase cycle—despite not being in flu season.





Walmart Luminate Case Study: Kimberly-Clark

The results:

By leveraging the comprehensive insights provided by Walmart Luminate, Kimberly-Clark gained deeper understanding of consumer preferences and incrementality of the additives variety.



74% of volume contribution for additives varieties were New Category buyers – showing the incrementality of this segment.



Nearly 35% of transactions had 2+ units in the basket, providing evidence that consumers want multi-packs.



By implementing targeted tests of an additives block on shelf within facial tissue, Kimberly-Clark optimized the customer shopping experience and drove incremental sales, resulting in 2X growth



Products used

Shopper Behavior



Channel Performance API Feed

We're in the early stages of cough, cold, and flu [season] and we're already seeing incredible results in the additives category. All of this information allowed us to better serve our customers by better serving the category.



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