

## SCINTILLA CASE STUDY



Inspire  
2025

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



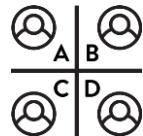
# The Opportunity



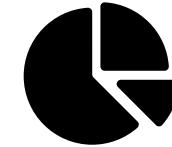
## Scintilla Case Study: Kids2

### 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



## Scintilla Case Study: Kids2

### 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.



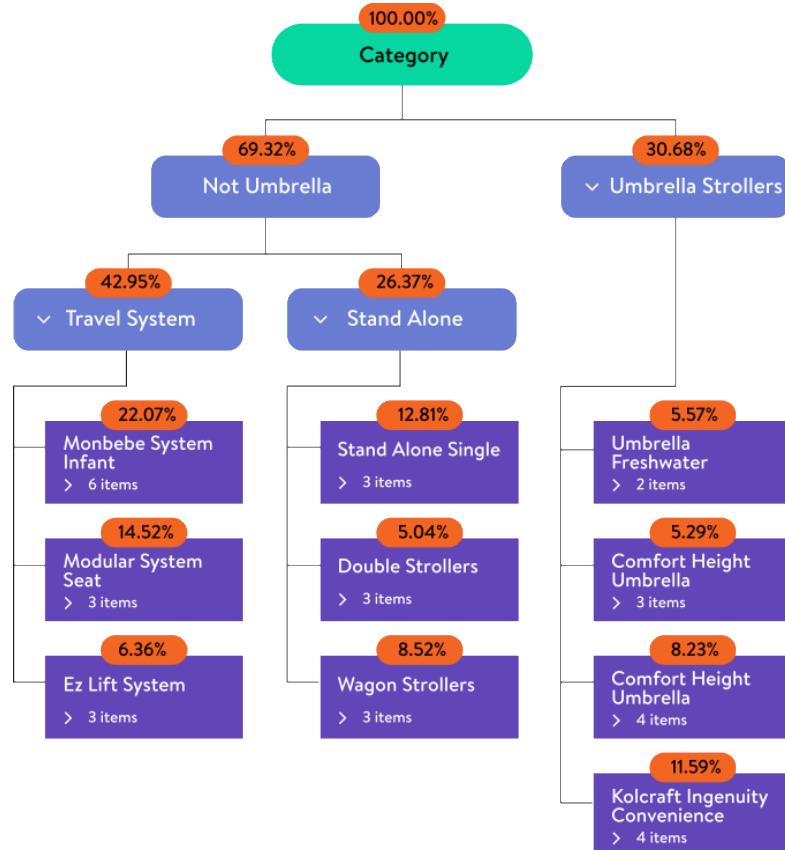
Source: Circana POS. 12ME September 2024 vs YAG. Walmart Scintilla Strollers Category/Subcategory 52WE Oct 6<sup>th</sup> 2024 vs YAG.  
Stand-alone Strollers include Umbrella Strollers, Jogging Strollers, Lightweight Strollers



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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.



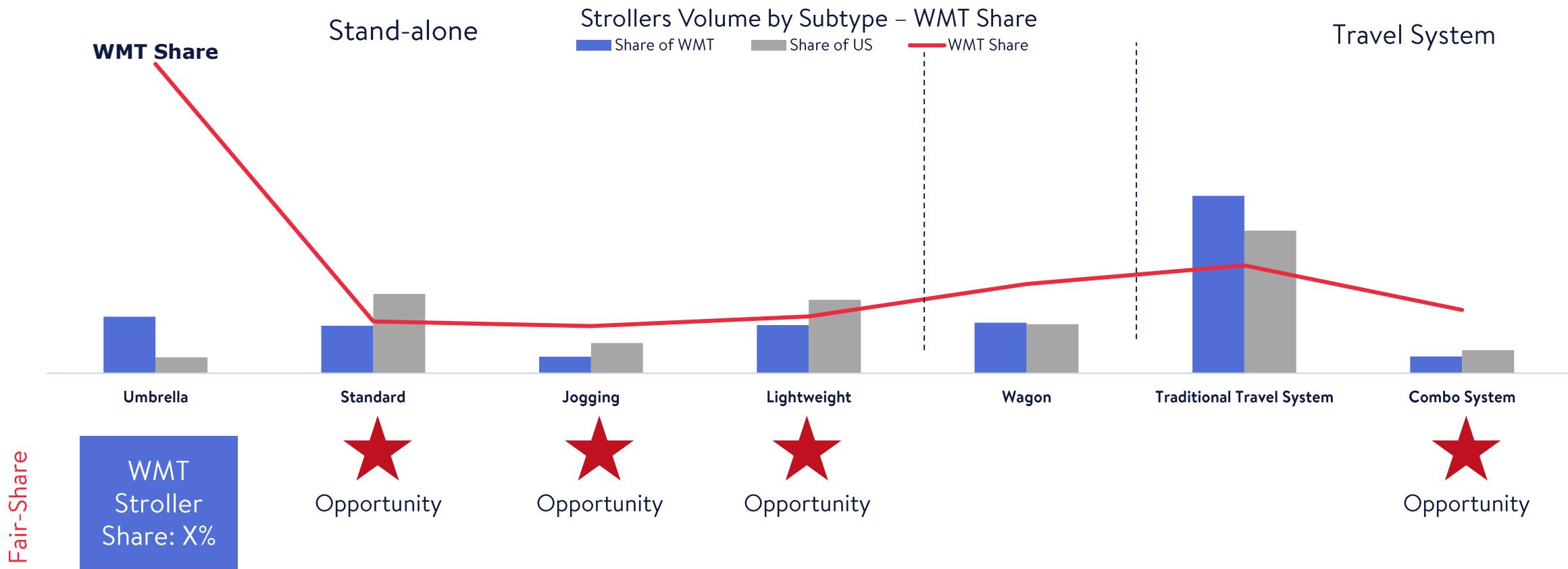
| BRAND / FEATURES |   |   |   |   |   |     |
|------------------|---|---|---|---|---|-----|
|                  | 7 | 1 | 0 | 2 |   |     |
| 7                |   | 3 | 0 | 0 |   |     |
| 1                | 3 |   | 1 | 1 |   |     |
| 0                | 0 | 1 |   | 1 |   | 0 1 |
| 2                | 0 | 1 | 1 |   | 2 |     |
|                  |   |   |   |   | 2 |     |
|                  |   |   |   |   |   | 0   |
|                  |   |   | 0 |   |   | 0 1 |
|                  |   | 1 |   |   |   | 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.





## Scintilla Case Study: Kids2

### 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 |
|------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| <b>Total</b>     | <b>5.05%</b>    | <b>-0.58pts</b> | <b>6.98%</b>    | <b>-1.01pts</b> | <b>3.38%</b>    | <b>-0.83pts</b> |
| 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        |
| <b>STROLLERS</b> | <b>37</b>       | <b>-0.02pts</b> | <b>37</b>       | <b>-0.05pts</b> | <b>36</b>       | <b>-0.04pts</b> |

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      | Price Sensitive-Mid<br>Market Index | Price Sensitive-Up<br>Market Index |
|-----------------|-----------------|----------------|----------------|-------------------------------------|------------------------------------|
| Analysis Level  | Latest          | Latest         | Latest         |                                     |                                    |
| <b>Total</b>    | <b>\$13.96</b>  | <b>\$15.94</b> | <b>\$48.11</b> | <b>114%</b>                         | <b>345%</b>                        |
| 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.



## Scintilla Case Study: Kids2

### Exploring the Impact of Shopping Channel on Spend

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

|                           | In-Store   | OPD  |
|---------------------------|--|--|
| <b>Umbrella Strollers</b> | Avg Spend per Basket (Focus)<br>\$24.79<br>Avg Spend per Basket (Total)<br>\$100.02  | Avg Spend per Basket (Focus)<br>\$31.92<br>Avg Spend per Basket (Total)<br>\$62.04   |
| <b>Wagon Strollers</b>    | Avg Spend per Basket (Focus)<br>\$176.44<br>Avg Spend per Basket (Total)<br>\$256.06 | Avg Spend per Basket (Focus)<br>\$208.94<br>Avg Spend per Basket (Total)<br>\$220.38 |
| <b>Total Strollers</b>    | Avg Spend per Basket (Focus)<br>\$67.07<br>Avg Spend per Basket (Total)<br>\$141.14  | Avg Spend per Basket (Focus)<br>\$132.84<br>Avg Spend per Basket (Total)<br>\$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%               |

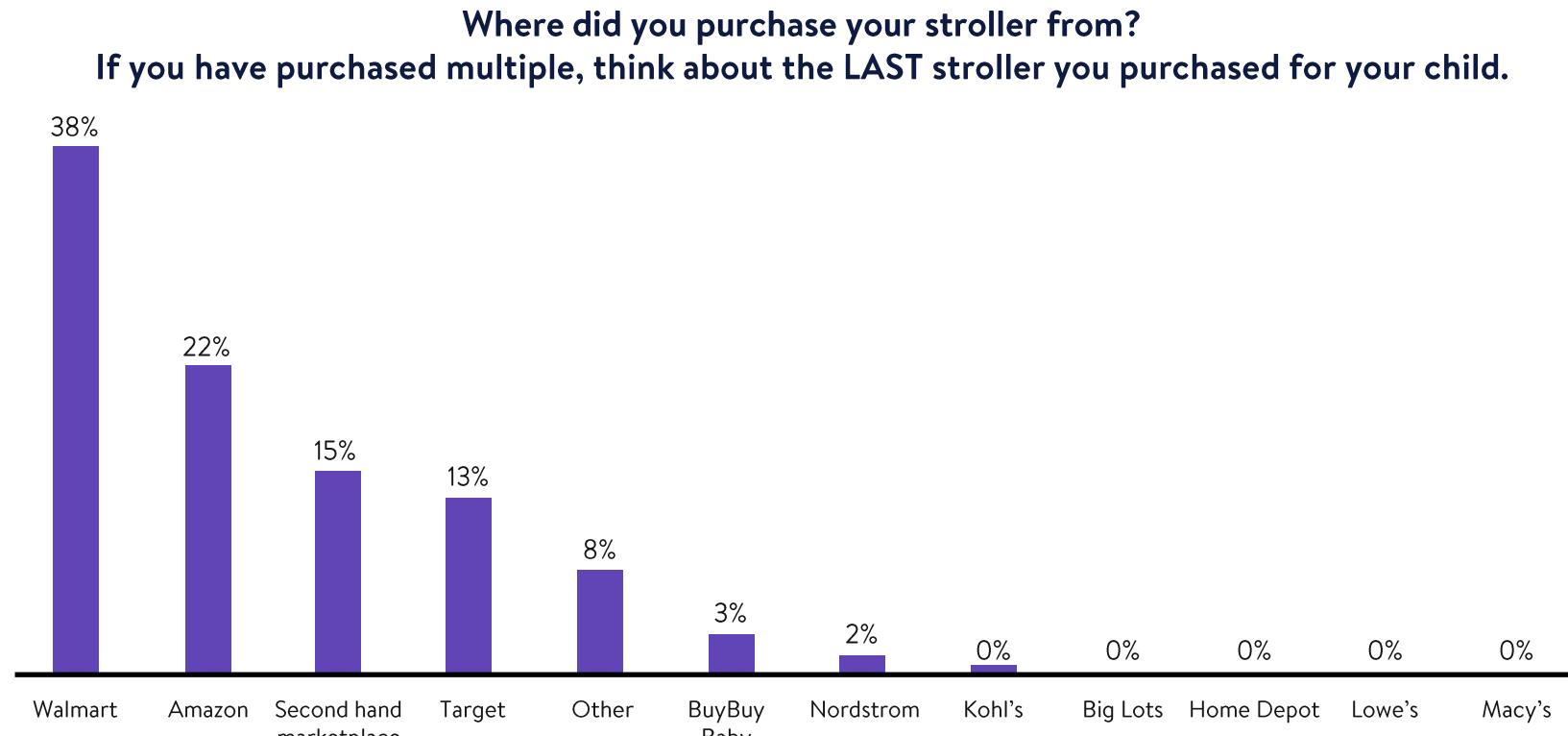
Shoppers who buy just an Umbrella Stroller spend \$26 on average, but that jumps to \$174 for shoppers who buy in any other Stroller category.



## Scintilla Case Study: Kids2

### 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.





## Scintilla Case Study: Kids2

### 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.

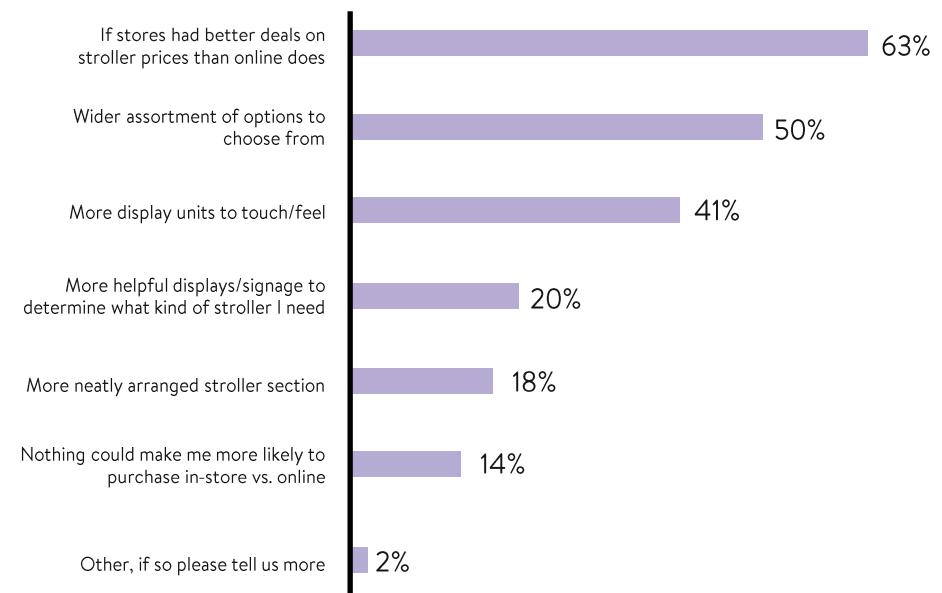
#### Why did you decide to purchase online in the end?

(Among those who visited a store but purchased online)



#### What could get you to purchase a stroller in store?

(Among those who purchased online)



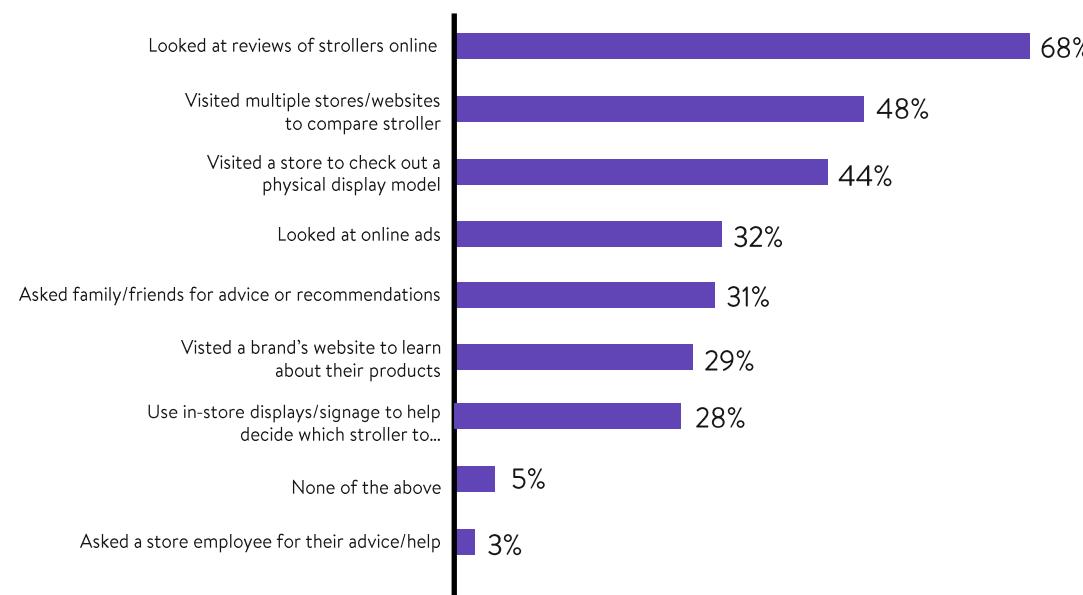


## Scintilla Case Study: Kids2

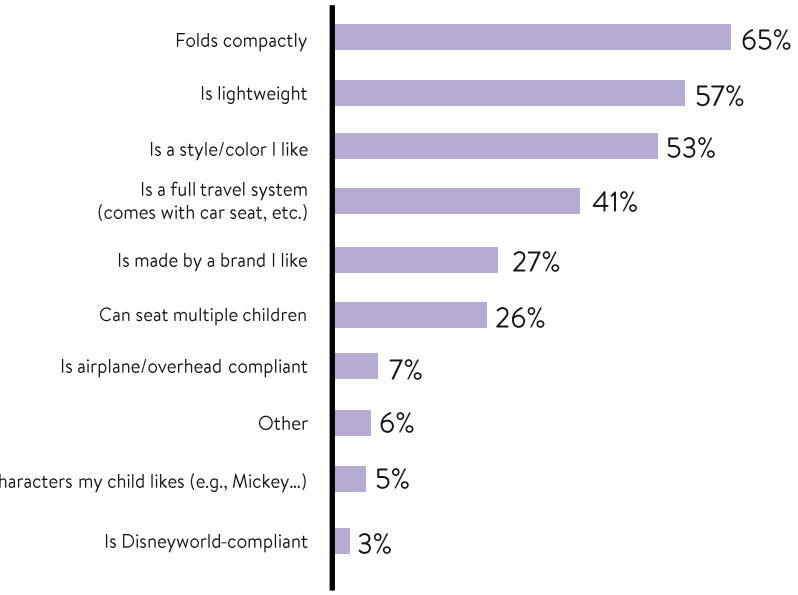
### Driving Assortment Decisions with the Voice of the Customer

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?





## Scintilla Case Study: Kids2

### 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



# Scintilla Case Study: Kids2

## 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 |

## SCINTILLA CASE STUDY

# Thank you.

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