

SCINTILLA CASE STUDY

*** Kimberly-Clark**

Inspire
2025

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

Unlocking Category Growth Through Inclusive Shopper Strategies

Overview

Kimberly-Clark Corporation used Scintilla to analyze challenges they were facing within the Facial Tissue category at Walmart—specifically a strategic gap in the market. By utilizing the Scintilla ecosystem, they were able to identify a targeted, data-backed strategy that ultimately attracted new shoppers and drove category growth. In addition to targeting a new shopper audience, their strategy included modular recommendations that resulted in measurable improvements in shopper engagement and overall category performance.



Kaitlyn Oliu

Kimberly-Clark Corporation
Senior Category Development
Manager, Facial Tissue



Abbey Hennessey

Walmart
Associate Merchant,
Facial Tissue

Key Takeaways

- 1 Rethinking how you can best serve your customers can lead to engagement with new shopper groups
- 2 Underperforming items can be essential to capturing an underrepresented customer group
- 3 Rationalizing your assortment based on customer preferences is a recipe for better performance

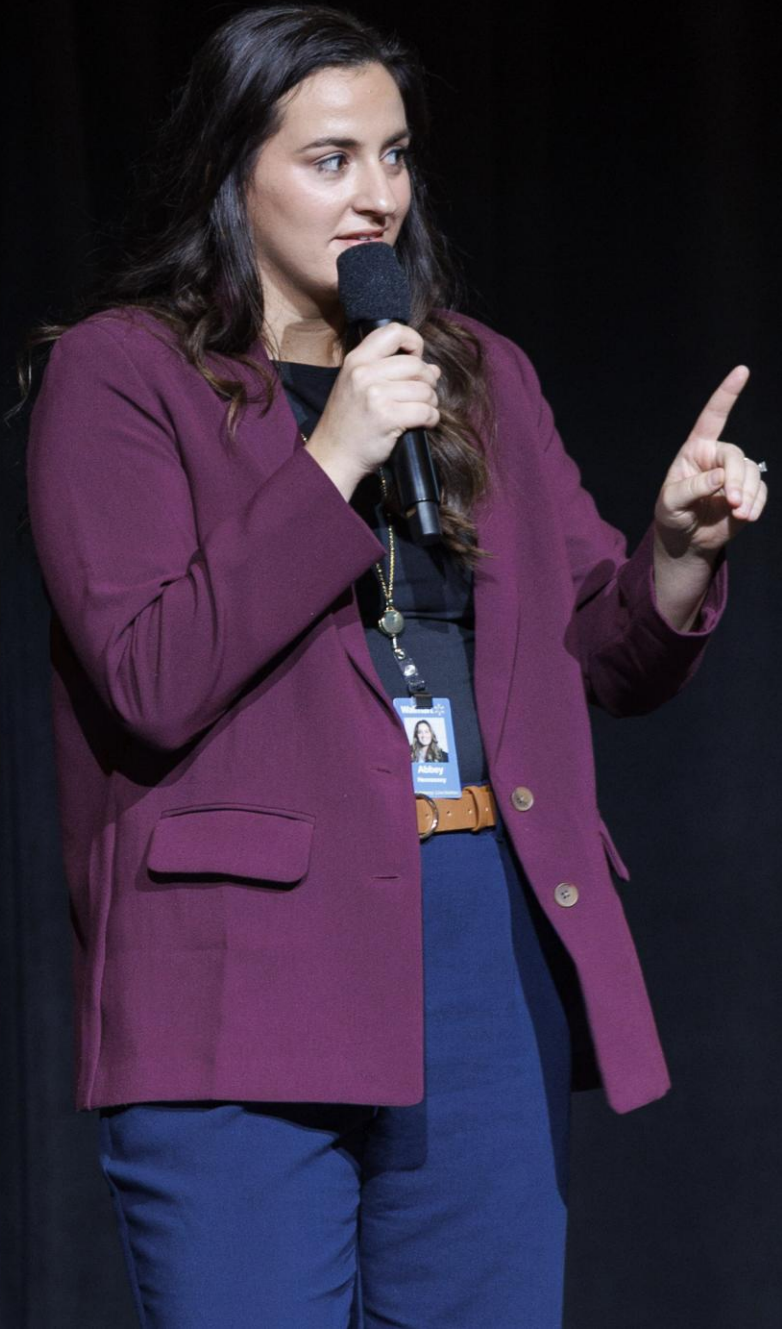
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**If you take calculated risks
grounded in data, you can
gain sustainable growth.**

Abbey Hennessey

Walmart

Associate Merchant, Facial Tissue

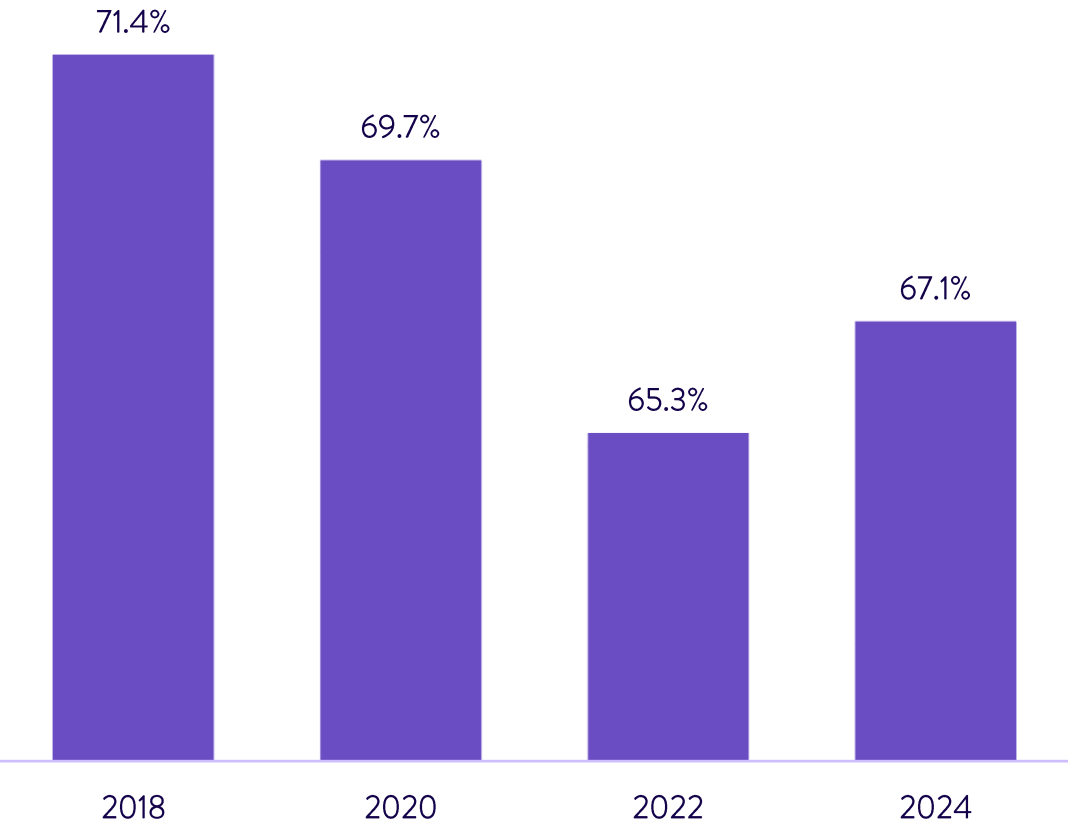


The Opportunity


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Improve Household Penetration in a Stagnant Category Facing Multiple Challenges


Facial Tissue Household Penetration




High Substitution




Seasonal Volatility



Declining Everyday Relevance



Supply Constraints



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Identify 3 Areas to Grow the Facial Tissue Category

1

Right Assortment

Sub-brand and item selection
based on affinity

2

Right Place

Optimized distribution by
using sales and
demographic data

3

Shelf Optimization

Simplified flow, better
adjacencies, increased
holding power

The Approach

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Build a Data-Driven and Shopper-First Approach

Right Assortment



Shopper Behavior

Performance in Detail, Trial & Repeat,
Switching, Basket, Assortment Deep Dive



**Channel
Performance**



**Customer
Perception**

Right Place



Shopper Behavior

Performance in Detail, Cross Shop,
Source of Value (Come From)



**Channel
Performance**

Shelf Optimization



Shopper Behavior

Performance in Detail,
Cross Shop, Switching



**Channel
Performance**



**Customer
Perception**

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Increase Penetration by Understanding Category Gaps



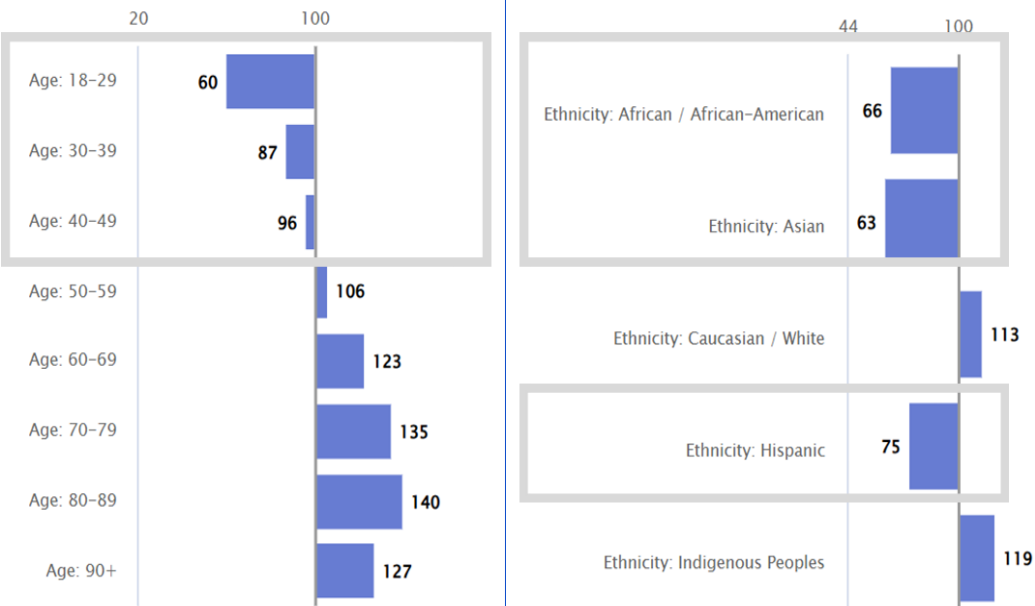
Shopper
Behavior

Performance in
Detail



Customer
Perception

Facial category under-indexes with key customer groups vs. the total store.



Facial Tissue underperforms with key ethnic and generational segments.

Sub-Brand Index vs Total Products by Ethnicity				
Sub-Brand	Sub-Brand Rank	African/African-American	Asian	Hispanic
Sub-Brand A	1	92	99	89
Sub-Brand B	3	96	88	102
Sub-Brand C	2	96	97	91
Sub-Brand D	4	86	72	82
Sub-Brand E	8	114	102	126
Sub-Brand F	9	131	131	123
Sub-Brand G	10	86	83	124

Top sub-brands A-D make up over half of category sales and distribution, but **resonate less** with key customer groups, revealing whitespace in the assortment.

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Use Learnings to Develop Ideas to Re-engage Shoppers



Shopper Behavior

Cross Shop
Source of Value
(Come From)
Basket

They discovered that 37% of shoppers either **substitute** or **don't think of using** facial tissue.

Ideas to re-engage shoppers:

Better solutions for
On-the-Go Shoppers

Expand *Specialty Segment items to
reduce substitution

Create destinations in the aisle to
encourage basket building

*Specialty Segment = Additives and On-the-Go

Variant Group	% Incremental Sales	% Sales from New Category Customers
Specialty	23.6%	48.2%
Ultra	0.8%	30.7%
Lotion	0.5%	31.0%
Mainline	2.7%	30.8%



Basket Facts

Cross-purchased with **all brands**
Facial Tissue basket size is 12% larger than facial baskets without
23% of baskets have 2 or more in the basket

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Rethink the Shelf



Shopper Behavior



Channel Performance



Customer Perception

Performance in
Detail
Switching
Cross Shop

Scintilla insights revealed that shoppers are overwhelmed by variety and underwhelmed by clarity.

Facial Tissue is complex. The most common set sizes are 8-12ft.

4

Brands

3

Pack Types

14

Sub-Brands

5

Pack Sizes



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Adjustments for Merchandising Flow Strategy

Two different modulares were created intentionally to balance shopper demand with long-term category health.

Old Modular: Horizontal Variant-led Flow



Concept #1: Vertical Brand-led Flow



Concept #2: Vertical Variant-led Flow



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Smart Trade-Offs Developed a Stronger Strategy

Backed by Scintilla insights, the team made a big shift in their strategy.



Pros

- **Simplified shopping experience** through flipped merchandising flow
- **Expanded sub-brand variety** to engage new and diverse shoppers
- **Growth in large** count packs aligned with shifting household needs



Trade-Offs

- **Assortment rationalization and flow change** may impact shopper habits
- **Legacy assortment rationalization** to make space for new sub-brands and pack sizes
- Expansion of Mainline segment meets shopper demand, but **risks reinforcing substitution behavior**

The Results

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New Customers, New Modularity, and Additional Market Share at Walmart

How did Kimberly-Clark perform against its goals?



Engagement with New Customer Groups

- By expanding underdeveloped sub-brands, Walmart is attracting a more diverse and younger customer
- New items are averaging a **23%** increase in customer adoption



Basket Building

- By incorporating facial tissue into various formats, it becomes more easily accessible for places like cars and purses!
- This led to an increase of **+12%** new items being added to existing baskets



Market Share Gains

- Walmart is experiencing significant market share gains across units, dollars, and EQ volume
- These gains solidify the success of their modular strategy and decisions

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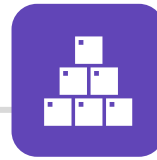
With Scintilla, Kimberly-Clark learned to use the power of data to disrupt and lead with a new and improved strategy.

Key Takeaways:



Challenge your current assumptions

Rethink if you are **serving the customer the best way** you can.



Don't discount underperforming items

These items might be essential for capturing a **key customer group**.



Be willing to rationalize your assortment

Simplified flow, better adjacencies, increased holding power is a **recipe for better performance**.

Remember, **running the same play will only get you the same results**. Be willing to take calculated risks to achieve success!

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Thank you.



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