Scintilla
Case Study

Health Care & Wellness:
Walmart Department Dynamics

sanofi

How Sanofi used a single report from Scintilla to define questions and drive deeper conversations with Walmart Merchants.

Inspire 2023 This case study was shared live at the **Walmart Data Ventures Inspire Event**, October 17, 2023.

One (Scintilla) report equaled massively robust analysis.

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Sanofi

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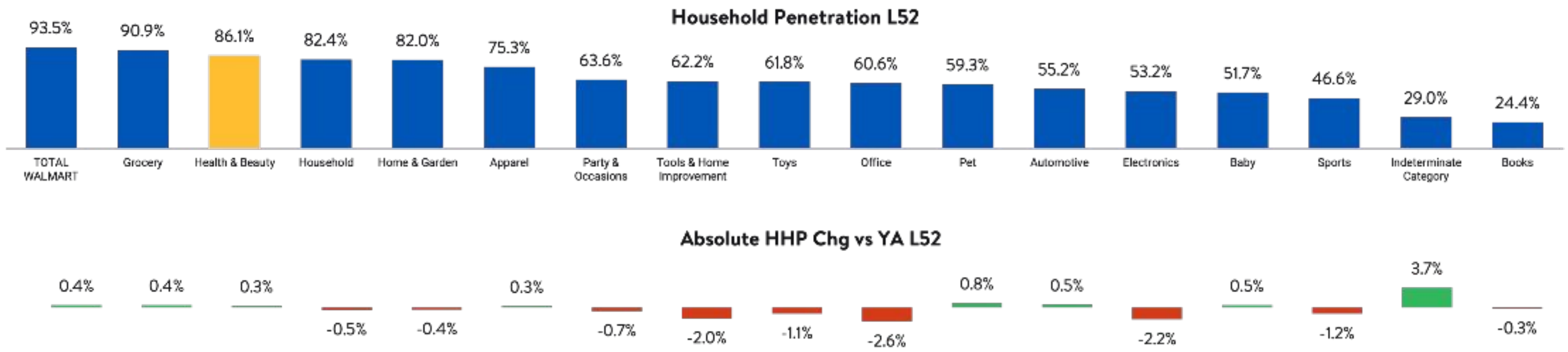
Top categories during the pandemic (office, home improvement, and electronics) showed the largest declines in household penetration at Walmart. Notably for Sanofi, Health & Beauty showed slight gains instead.



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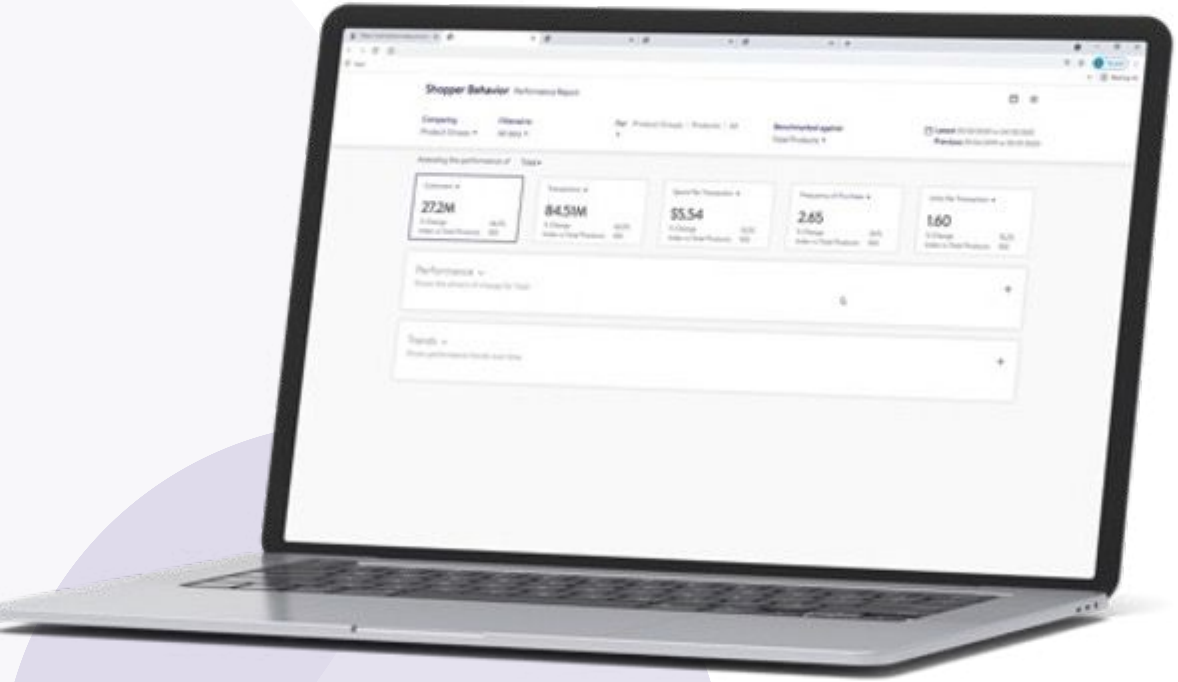
In light of these trends, Sanofi turned to the Shopper Behavior Performance in Detail report to analyze the Health Care and Wellness categories at Walmart and identify new opportunities ahead of Merchant conversations.



Health Care

Allergy, analgesics, diabetes (over the counter), first aid, foot care, pediatrics and humidifiers

Wellness

Antacids, functional vitamins, laxatives, probiotics

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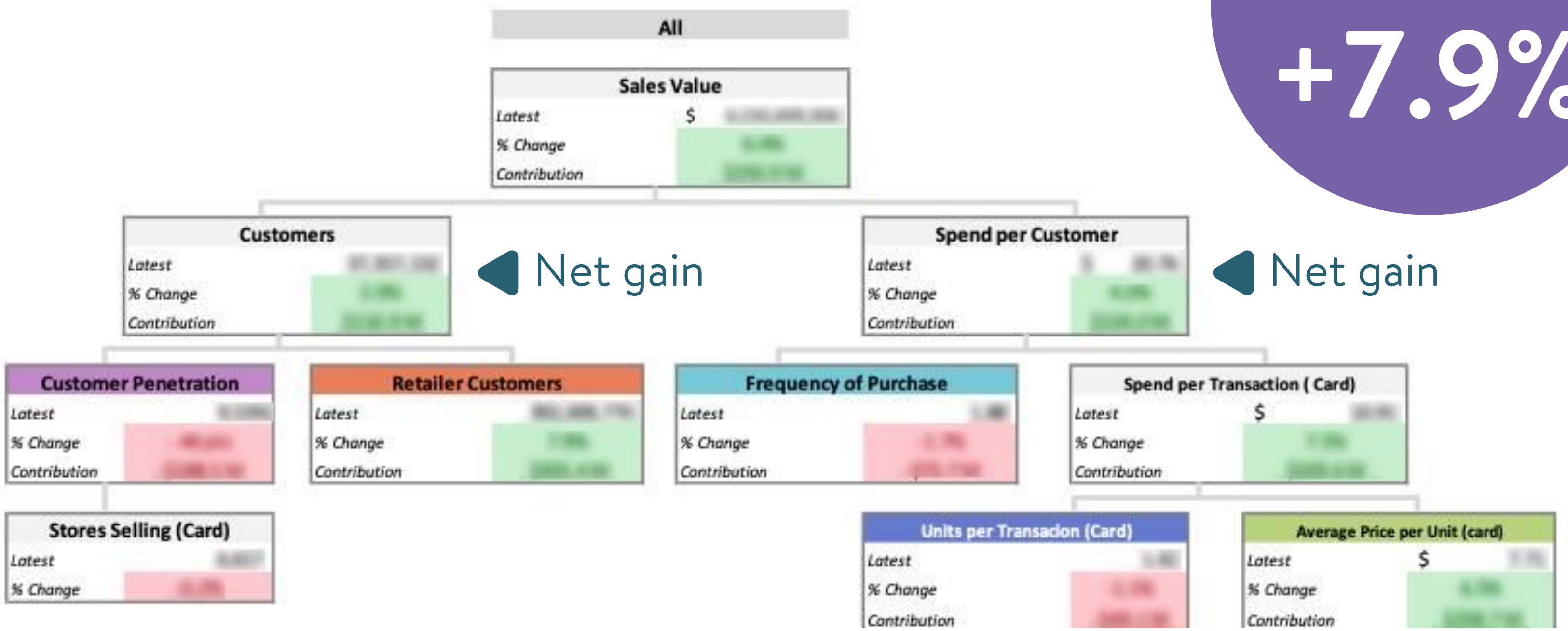
Insight 1 They learned that higher Dollar Rings and more customers are driving growth across heath care and wellness.



Net gain

Net gain

Total Walmart Customers +7.9%

Deeper question

How can we drive consumers down the health care and wellness aisles?

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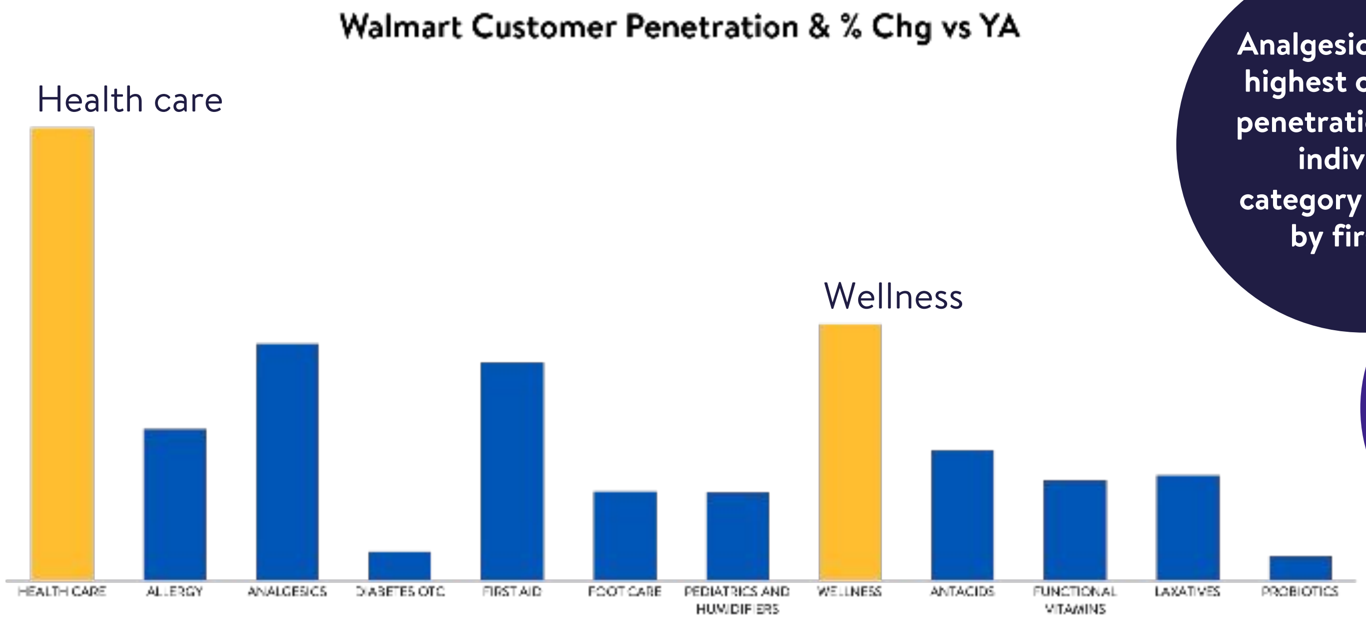
Insight 2 More customers are shopping at Walmart, but penetration is declining in health care and wellness.

Diabetic over the counter (OTC) is the most productive category per point of customer penetration—growing this category +1 point equals a $165 million opportunity.



Analgesics has the highest customer penetration of any individual category followed by first aid

Vitamins and foot care are the fastest declining categories in customer penetration

Customer Penetration*

47.83%

(-1.45% vs YA)

*Customer penetration total change for total Scintilla Charter data – personal care, beauty, health care & wellness

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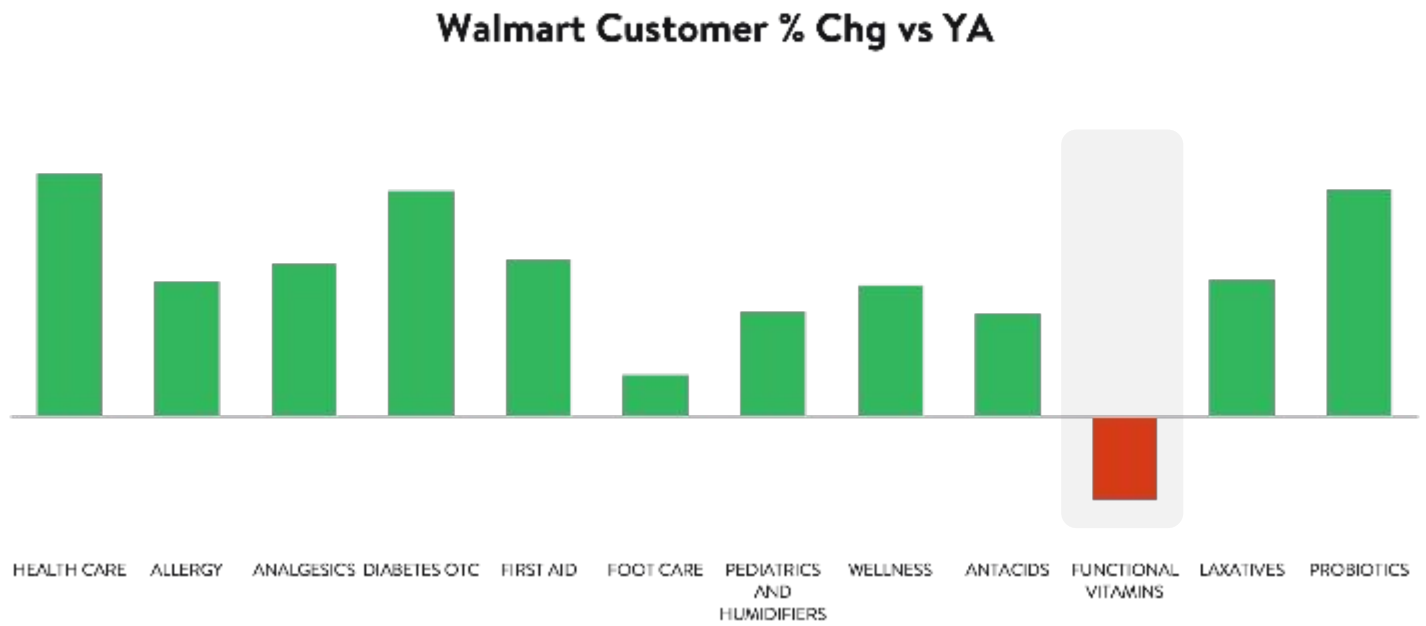
Insight 2 There are large-dollar opportunities in bringing customer penetration back in line with total Walmart trends—and functional vitamins, a wellness subcategory, is the largest at $78 Million.



Deeper question

How can these strong customer penetration categories be leveraged to drive awareness to other categories in the larger set?

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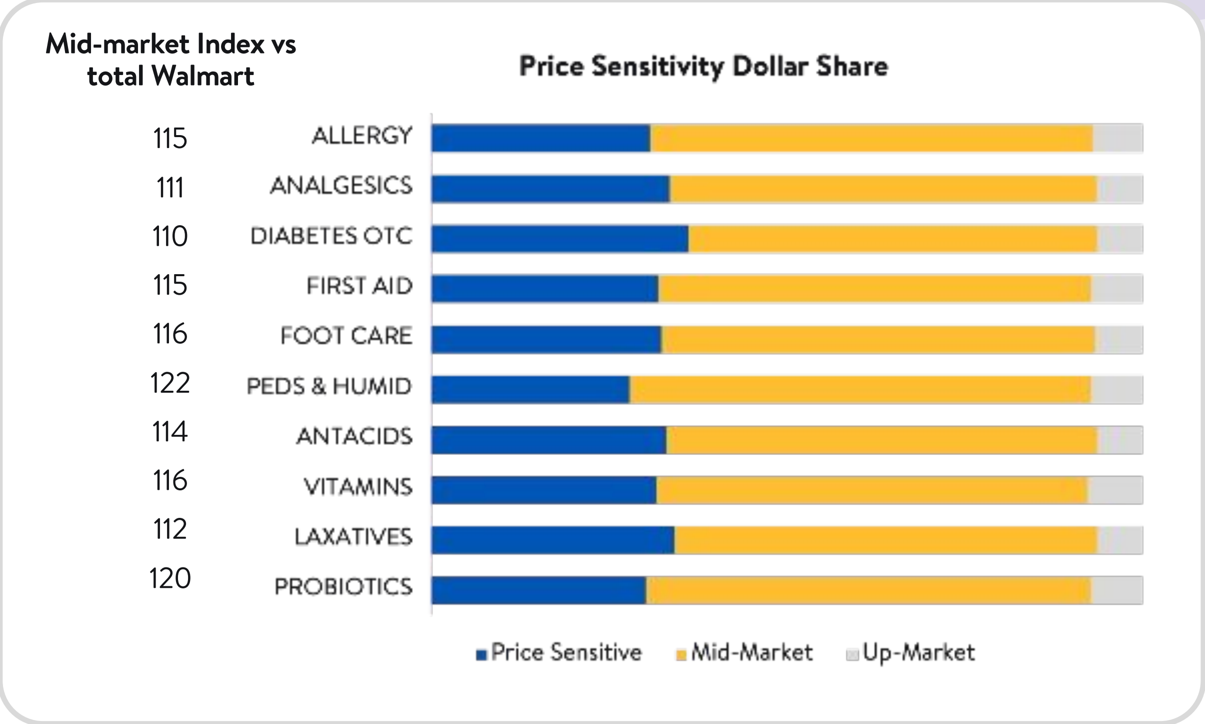
Insight 3 Share shifts across individual categories are aligned with total heath care and wellness.

Categories are growing ~2pts in the price-sensitive segment; the mid-market price segment is slightly over index vs total Walmart across all categories.



©2023-2024 Walmart Inc. All rights reserved. | Source: Scintilla Shopper Behavior Total Category Performance in Detail report 6/24/22-6/23/23 – excludes unclassified items

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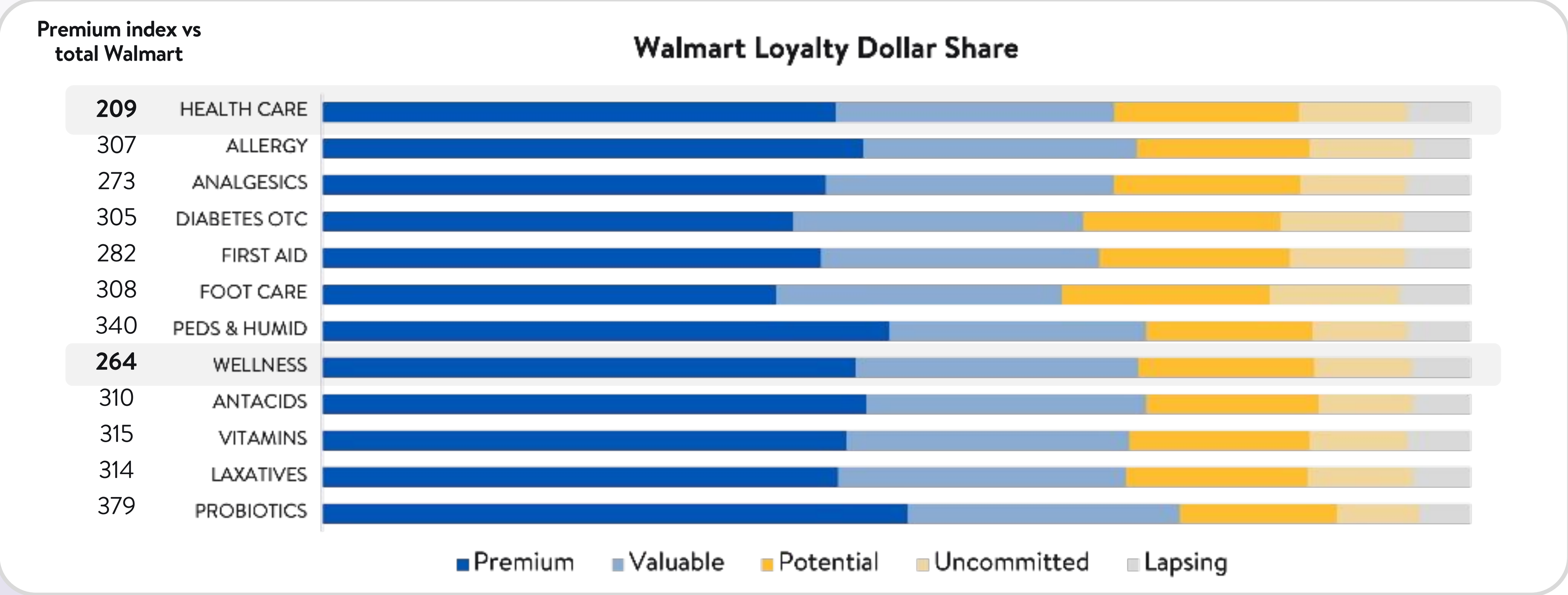
Insight 3 Loyal Walmart customers (premium shoppers) over index in health care and wellness categories.

Dollar sales are shifting into premium and lapsing loyalty segments but declining or flat in others. This shows Walmart is converting shoppers to be more loyal, but losing less loyal shoppers as consumers lapse in the categories.



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L52 Ending 6/24/22-6/23/23 – excludes unclassified items

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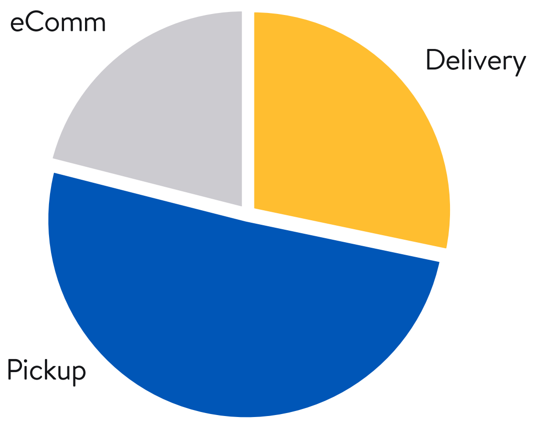
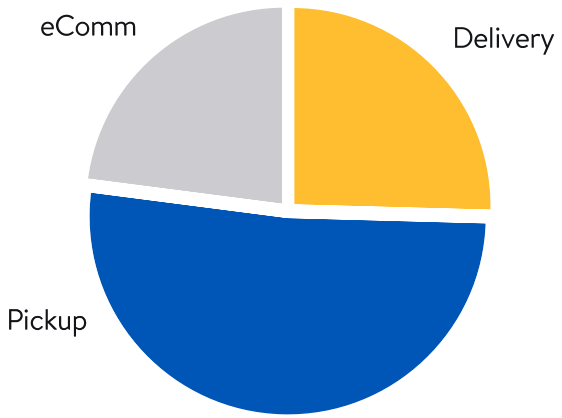
Insight 3 There is opportunity to expand across channels; up-market consumers over index in eComm, creating the chance to engage higher price-point shoppers.

Health Care Digital Channel Share
Index vs. Total Walmart



	Price Sensitive	Mid-Market	Up-Market
Delivery	98	103	86
Pickup	97	104	85
In-store	92	111	73
eComm	101	95	**127**

Wellness Digital Channel Share
Index vs. Total Walmart



	Price Sensitive	Mid-Market	Up-Market
Delivery	97	104	86
Pickup	97	104	85
In-store	91	112	72
eComm	98	96	**135**

Deeper question

How do we expand the footprint of alternate shopper channels for continued category growth as well as ease for consumers?

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Clear data was the starting line for better collaboration.
The insights from the Shopper Behavior Performance in Detail report helped Sanofi determine the right questions to drive Merchant conversations.

	Insight	Opportunity
Insight 1	Walmart customers are up +7.9% (28 million customers) vs YA but health care and wellness are not capturing their fair share of consumers	How can we drive consumers down the health care and wellness aisles?
Insight 2	Analgesics has the highest customer penetration of any individual category followed by first aid	How can these strong customer penetration categories be leveraged to drive awareness to other categories in the larger set?
Insight 3	eComm customers in health care and wellness categories over index in up-market price segment: Health care: 127 index Wellness: 135 index	How do we expand the footprint of alternate shopper channels for continued category growth as well as ease for consumers?

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