



Walmart: Reviving Performance, Planning for the Next Big Thing

Having undergone multiple strategic shifts over the past several years, Walmart is now faced with the challenge of restoring U.S. sales through traditional tactics even as it invests in new ways to reach shoppers in a rapidly changing retail environment. Aligning to a different set of realities and anticipating the accompanying challenges will be critical to supplier success. **How will your business react to:**

- The ongoing slowdown in Supercenter growth, especially as conversions from Discount stores to Supercenters have been put on hold
- Profit demands in an EDLP/EDLC, wide assortment environment
- An emerging multi-format, multi-channel Walmart
- The balance between national and private brands across formats
- Walmart's recent decision to expand and elevate the use of data and insights with suppliers

Join Kantar Retail's Leon Nicholas as he navigates through an array of forward-looking topics, exposing the impact of Walmart's shifting fortune and focus on your business—and highlighting the things suppliers can do to leverage their equity at this critical point of inflection for Walmart.



Interested in walking stores with Kantar Retail's retail experts?

Call Jim Leonard at 617588.4105 for details.

Kantar Retail Events

Less Opinion, More Insight

- ▶ Your biggest customer has been going through a protracted difficult period.
- ▶ Significant growth could be ahead if Walmart can convert its opportunities.
- ▶ Your team's focus should be on 2 fronts:
 - ▶ Helping in the recovery
 - ▶ Putting energy behind Walmart's new initiatives—small stores, .com, mobile

Schedule at a Glance

Nov 1	Aligning with Walmart (8a-5p)
Nov 2	NEW Shopper Behavior (8a-12p) Walmart International (8a-12p) Sam's Club (1p-5p) Compact Formats (1p-5p)
Nov 3	The Road Ahead: Mapping Out Walmart's Horizons (8a-5p)

Logistics

Embassy Suites Northwest Arkansas
3303 Pinnacle Hills Parkway
Rogers, AR 72758
479.254.8400
Room rate: USD154
Cut-off date: 10/3

For More Information & Registration

Email CustomerService@KantarRetailIQ.com

Web KantarRetailIQ.com/Events

Call +1.617.588.4100

Half Day Rate USD 895

Full Day Rate USD 1650

Multi-day/multi-seat rates available. Please contact Kantar Retail for details. Kantar Retail accepts Visa, MasterCard, Discover, and American Express.

Nov 1 / 8a-5p

Aligning with Walmart

Designed for suppliers familiar with Walmart, this acclaimed interactive session examines the challenges that Walmart faces in today's landscape and the opportunities that its new initiatives create.

Walmart's ongoing initiatives to capture share of wallet include its expansion of Market and Walmart Express, multi-media shopper engagement--and efforts to re-invigorate the shopping experience even as the competitive environment has become more complex and challenging to its business model. Leon Nicholas and Robin Sherk explore different aspects of this rapidly-transforming retailer and pinpoint the strategies that suppliers can put in place today to align their business with Walmart tomorrow:

- **Merchandising:** Assess how the dynamics of Walmart's assortment, price, and promotional tactics continue to evolve.
- **Operations:** As store execution priorities change and challenges increase with the rise in format diversity, evaluate the effects it will have on the way you go to market.
- **Marketing:** Walmart's target audience is narrowing as the means to communicate with shoppers are expanding. Consider different methods of enhancing your brand presence at Walmart.

Join Kantar Retail and your peers as we discuss the unfolding implications of Walmart's tactical shifts and define how they impact supplier selling strategies.

Nov 2 / 8a-12p

Walmart International Workshop

The many and rapid changes that have impacted Walmart's Corporate staff since the shift of Castro-Wright to Global.com may now having an impact on the International business. For years the fastest growing part of the company, they have officially absorbed the Central American JV into Walmart de Mexico, recently purchased the Netto chain of small stores in the UK, and closed the deal for majority ownership of South Africa's Massmart. The complex, country-specific drivers that underlie all of Walmart International are made

more intense by the strong corporate directive of moving to EDLP. For some markets this is hardly an issue, for others it runs counter to their currently successful strategies, and in still others it 's likely to create branding issues. Overall understanding of Walmart's international scale and complexity will enhance your positioning and planning. In this class, we will discuss:

- **The Regional Lead Position:** Eduardo Solórzano and Scott Price are proving to be dynamic and undisputedly taking leadership in their positions. Does this mean a more predictable company at the regional level or just another layer to contend with?
- **EDLP Walmart:** Corporate has been quite clear as to the central position that Every Day Low Prices is supposed to take in ALL countries' strategy and execution going forward. But is that the winning formula for all of them?
- **Private Label:** The forcing of Great Value into all markets 3 years ago is now seen as failure, but the need for an active and value-managed program of private label has not gone away. Walmart needs a strong private label to make EDLP work, but the questions are when and where...
- **Walmart in Asia:** Walmart bet that Japan would change to understand and appreciate their value to the market and it appears to be the case, though post-earthquake it is hard to discern where the future is going. The government in India is now indicating that it may, sometime in the near future, accept majority foreign-owned retailers of size. Trust Mart in China is not only a different company but has a different shopper--is the replacement of the senior management team the answer or the advent of a great changeover to 'True' Walmart organizations?
- **The Possibility of a True Global.com:** The push behind a uniform online presence received a much-needed boost with the shift of Eduardo Castro-Wright to head the division. If online operations do become more centralized, are you prepared to offer a multi-regional, multi-channel strategy?
- **Post-Modern Market Growth:** Canada and the UK are facing strong headwinds in regards to growing topline sales. Walmart may need to shift drastically to continue growing in two of their largest, yet most challenging, markets. What will such developments mean to your business?

Nov 2 / 8a-12p

NEW Shopper Behavior: Current Trends in the Shopper Landscape

The recession had a profound effect on shopping patterns and behaviors. As the job market, housing market, and elevated prices continue to weigh on shoppers' spending intentions, shopping patterns and behaviors continue to evolve—and the need for rich and timely shopper insights has never been greater. Leveraging Kantar Retail's ShopperScape™ survey of primary household shoppers:

- Learn how shopping routines are evolving
- Navigate through the latest shopping trends, including shopper attitudes toward sustainability, use of private labels, and cross-shopping

Hear how online marketing and social networking influence store choice and shopping behavior

Nov 2 / 1p-5p

Sam's Club

Focused on growth and leverage, Sam's Club is gaining traction. Amid several shifts in strategy, its efforts to improve club standards have elevated expectations of its vendor partners. Join Kantar Retail as we examine the opportunities that the retailer's newest directions are posing for its suppliers.

- **Merchandising:** Review how merchandising is changing through Sam's more data-driven, membercentric approach; understand how its merchandising framework is manifesting itself to determine opportunities for your portfolio
- **Marketing:** Find out where and how the retailer's evolved marketing efforts may usher in new vendor partnership opportunities, particularly as it expands its online and mobile presence
- **Competition:** Gain insight into Sam's true competitive set and profile efforts to meaningfully distinguish its offer from its competitors to gain share of wallet and member mindshare
- **Differentiation:** Assess Sam's efforts to differentiate

through a growing emphasis on health and multi-channel, two areas of strategic focus that are poised to expand

- **Private Label:** Understand the retailer's portfolio approach to private label and its efforts to increase profitability through new brand introductions
- **Format:** Identify how Sam's Club is developing beyond "Project Portfolio" to enhance the club experience and drive member sign-ups and upgrades

Nov 2 / 1p-5p

Compact Formats: How Smaller Stores are Making a Big Play

Some of the fastest growth in retail, in both dollars and outlets, is coming from compact formats. There are a number of drivers that are pushing the industry toward smaller stores, lots of success stories (from Aldi and Trader Joe's to Value Discounters like Dollar General), and a host of prototypes by supermarket chains. Walmart has also invested in this global trend. The compact store is changing how people shop and what they expect from their retailer. This session helps suppliers answer core questions about the format's potential and the strategy's impact on Walmart.

- How do smaller formats succeed and what makes them attractive to Walmart?
- What are the key elements of design and shopper flow you need to understand?
- How do you allocate your resources to best service this channel of trade?
- Which other retailers are likely to enter—or have entered—compact formats? Which companies are experimenting and which are seriously invested? How are they performing?
- How do compact stores change the role of branded items and vendor business expectations?

Nov 3 / 8a-5p

The Road Ahead: Mapping Out Walmart's Horizons

This workshop is designed for attendees with multiyear planning responsibility.

While suppliers today are focused against Walmart's revived tactics—and how they will affect next quarter's results—the retailer is also laying the groundwork to become more relevant to the next generation of shoppers. Walmart is carving out a portfolio of formats, ramping up its fight for online retail share, and building its digital abilities to connect with shoppers as it aims to build greater returns. Additionally, its understanding of consumer products is also growing substantially, as it enhances its private brand capabilities.

- **Assess:** Step back from the 'day-to-day' and join Kantar Retail in a seminar-style evaluation of Walmart's strategic direction in the US, walking through the economic, demographic, and technological context.
- **Discuss:** Deliberate considerations to strategically address Walmart's course with other seasoned Walmart suppliers.
- **Plan:** Engage in breakout discussions with colleagues from across the industry to lay out impacts, challenges, and opportunities for your business and calibrate your response.

About Kantar Retail

Kantar Retail is an insight and consulting business that delivers a competitive advantage to clients through forward-looking insight, proven advisory and transformative education. The end result is enhanced revenue and profitability for our clients. By combining the resources of MVI, Glendinning, Cannondale, and Retail Forward, we can solve client issues from strategic to tactical and provide organizations with the skills and capabilities to act. We offer clients better internal alignment and project efficiency, from insight through strategy to activation, and across marketing through category to sales.

Kantar Retail's ShareGroups



Kantar Retail has a ShareGroup focused on the Warehouse Club Channel. Key Suppliers meet to share common challenges and opportunities as well as Best in Class practices. The Warehouse Club channel ShareGroup will meet November 2-3, Rogers, AR.

Please contact Steve Meehan at steve.meehan@kantarretail.com or at 800-370-3261 ext – 4173 if you are interested in knowing more.

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