

9-10 December 2020

Retail Insights Conference: A Virtual Event

Achieving agility amid ambiguity

We've heard much about 2020 losses, but what are we learning from 2020 gains? Before COVID-19 struck, many retail trends were emerging that the pandemic has only accelerated. Capitalizing on these shifts requires a proactive approach and a commitment to agility. Agile teams and strategies have propelled select retailers and suppliers to the forefront to achieve real growth in a time fraught with consolidation. We can learn from these retail winners about how to carve a path forward not from a pandemic mindset, but from a growth mindset.

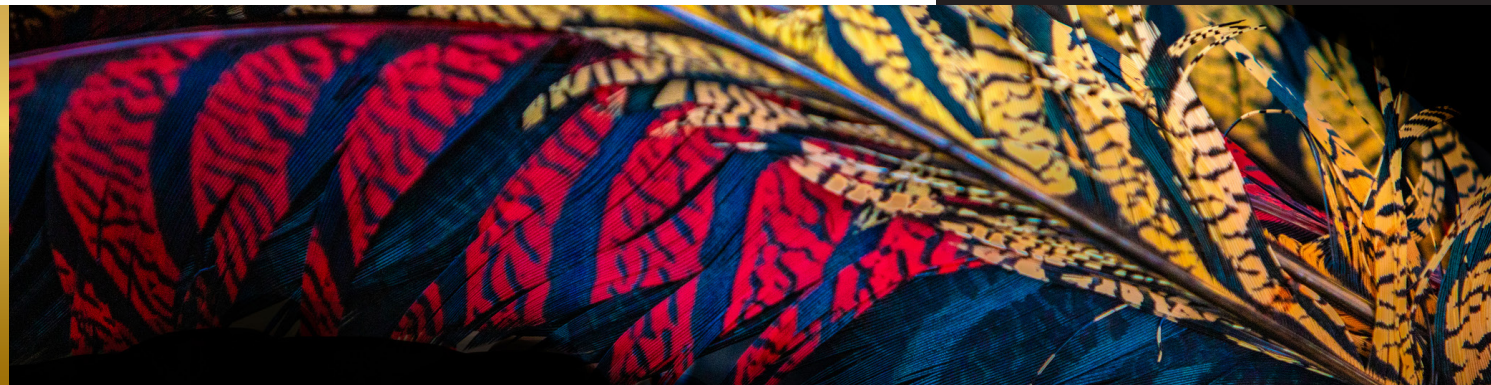
At our 2020 Retail Insights Conference, we will empower your teams to embrace agility, capitalize on opportunities, and execute for growth.

Walmart's Q2 US sales rose 9.5% to USD93.3 billion with USD8.9 billion in incremental sales.

Target posted comp growth of 24.3%, the strongest in the company's history.

Dollar General Q2 2020 sales up 24.4%

Source: Kantar



This conference will help suppliers:

- Create and convert consumer demand.
- Understand the retailer metamorphosis underway.
- Have effective conversations with retailer partners.

This conference will help retailers:

- Adapt to changing shopper behavior.
- Balance short-term pandemic tactics with long-term strategy.
- Capitalize on emerging trends in retail.

Registration

Register today by emailing events@kantarkonsulting.com or visiting [our event page](#).

New this year

Replay Room

Since we can't be in more than one place (yet), Kantar has you covered! On day 2, access select sessions from day 1 on replay whenever it's most convenient for you. After the event, you'll have access to all recordings from the event.

Kantar Connect

Missing those networking moments at in-person events? With our new networking offer, our platform matches you with other attendees who share similar interests. Easily exchange contact information to continue those meaningful connections.

1:1 Analyst Meeting

Have a question about a slide? Want to dig more deeply into some data? Kantar analysts will carve out time to connect with you during the event. Your Kantar account manager will coordinate a meeting that focuses on the insights you want to dive into more deeply. New to Kantar and don't yet have a Kantar contact? We have a team ready to support you in connecting with our analysts.



10:00–10:10 AM

Welcome and setting the stage

Todd Szahun, Senior Vice President



10:10–10:20 AM

Insights from Kantar's CEO of Retail, Sales & Shopper

John Barry, CEO NA Retail



10:20–11:05 AM

From disrupted to proactive: How retail is organizing for 2021

David Marcotte, Senior Vice President

2020 has been a year of ongoing disruptions with retailers, shoppers, and vendors reacting to new unknowns. 2021 will be the year that retail channels get ahead of changes and organize for success. This session will define:

- The channels to invest in for a stronger 2021
- New requirements for partnering with key retailers
- New rules for omnichannel success emerging from 2020



11:05–11:35 AM

The aftermath: COVID-19's lasting macro effects

Doug Hermanson, Principal Economist

In the aftermath of the COVID-19 crisis, there will be many policies, investments, and strategies to tear down, not just build. But deciding which ones to build upon and how to dismantle short-term policies safely will be among the most important issues of the coming years since each choice carries a risk to the recovery. This session will analyze:

- Changes to the macro landscape that have occurred due to the crisis
- The macro trends likely to remain and fade in the recovery
- The implications for retailers and suppliers in this new environment

11:35–11:45 AM | BREAK

11:45 AM–12:15 PM

Shopping shifts: What do they mean for the future?

Mary Brett Whitfield, Senior Vice President

Over the past year, the contours of shopping have changed in ways that no one would likely have anticipated a year ago. Some of these changes will prove transitory, but others represent a more permanent reset of baseline behaviors. In this session:

- Learn how “big picture” issues loom over shopper decisions.
- Explore how and where shopping gets done and how enduring the flight to online shopping is.
- Discover how the shape of retailers' shopper bases is changing.



12:15–12:25 AM

Transition

Todd Szahun, Senior Vice President

12:25–12:55 PM

Ask the experts: Day 1 presenters Q&A panel

1:00–1:25 PM

Executive topic table:**The next marketplace, a future perspective**

J. Walker Smith, Chief Knowledge Officer, Brand & Marketing

Moderated by Don Abraham, Senior Partner, Consulting

See description above

New!**Executive topic table****Focus:**

This strategic discussion will be catered toward executives, focused on dialogue around Kantar's perspective on the post-pandemic marketplace and strategic implications.

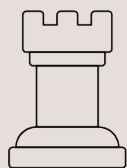
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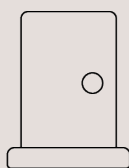
During the session:

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12:25 – 1:30 PM | BREAK



Foundational
retail skills



Emerging retail
opportunities

Breakout
session tracks



1:30 – 2:00 PM

The year of self-care: 2020 and beyond

Caroline Dumas, Analyst

In an era of unprecedented uncertainty, shoppers' approach to managing their mental and physical health continues to evolve. And amid the pandemic in 2020, mental and physical wellness have arguably never been more important. This session will:

- Delve into the four quadrants of self-care: sustaining, indulging, seeking, and isolating.
- Explain how to cater to shoppers' unique health and wellness needs.
- Explore how cannabis/CBD, organic, and natural products play a role in shoppers' health and wellness routines.



1:30 – 2:00 PM

New seasonal shopping dynamics

Taylor Galland, Senior Analyst

Timothy Campbell, Director

Lei Duran, Senior Vice President

Shoppers and retailers have been forced to rethink their traditional plans for popular seasons and holidays. The future of seasonal spend is in transition as COVID-19 alters traditional celebrations, seasonal activities, and financial security. Join us to:

- Assess shopper sentiment and preferences around seasonal celebrations.
- Unpack retailer responses to greater seasonal uncertainty in light of COVID-19.
- Understand new online and offline dynamics for seasonal shopping.



1:30 – 2:00 PM

Kantar connect: Network speed dating

2:00 – 2:05 PM | BREAK



2:05 – 3:00 PM

COVID-19 economic patterns: Uncertainty and opportunity

Timothy Campbell, Director

Doug Hermanson, Principal Economist

COVID-19 has thrown the nation's economy into disarray with stark divides across different industries and professions. Shoppers are increasingly economically fragmented and their ability and willingness to spend at retail will be changing for a long time to come. This session will cover:

- How COVID-19 has affected shoppers' ability to spend
- How different income segments are reacting to the pandemic
- The new level of opportunity across income segments post-COVID-19



2:05 – 3:00 PM

The business of retail and your success

David Marcotte, Senior Vice President

Retail is a business, so successful partnering requires financial knowledge. In 2021, you will need to connect beyond the buyer to the financial responsibilities of procurement, marketing, operations, and company stakeholders. This session will cover:

- The unique financial drivers of the retail business
- Effectively partnering and engaging for a continued omnichannel presence
- The four key points of leverage you can use to partner with a retailer



2:05 – 3:00 PM

Online grocery: Double-clicking 2020's biggest retail trends

Brian Gillis, Insights Director, Instacart

Pam Goodfellow, Director

Generally considered online laggards in the retail world, the grocery industry was shaken to its core this year thanks to the COVID-19 pandemic. Concerns about the virus led shoppers across the US to explore pickup and delivery alternatives, advancing online grocery trends forward about five years over the course of a month. In this session, we will:

- Identify key trends driving grocery's digital future in 2021 and beyond. How physical grocery stores continue to augment the digital experience.
- Explore changing online grocery shopper behaviors and attitudes.
- Talk with Brian Gillis, Insights Director at Instacart, about how online grocery trends are playing out at Instacart

3:00 – 3:15 PM | BREAK



3:15–4:00 PM

**Kantar connect:
Network speed dating**

3:15–4:00 PM

**Leveraging human insights
to enhance growth****Colleen Sharp, Vice President, MONITOR
Analytics, Consulting Division****Phoebe Roer, Senior Consultant**

Market expansion is always risky — and it's even more so in a disruptive environment like the one we're experiencing today. Join us as we share three real market-expansion case studies. We'll look at a homewares retailer that used big data infused with human insights to prioritize new store site selection and optimize its new store launch initiatives. We'll also examine how a global beer company uncovered "hip" beer drinkers' motivations to inform the rebranding and new market-expansion efforts for a legacy beer brand. Finally, we'll review how an appliance manufacturer used consumer attitudes to identify the target consumer and the best retailers in the best markets for a new product it was launching. You'll come away from this session knowing how to:

- Integrate attitudinal data and human insights into your standard geo-demo data for assessing market expansion.
- Apply human insights and better targeting to new product and store launch promotional activities.
- Minimize expansion risks and maximize expansion efforts by better understanding the human elements of successful growth.



3:15–4:00 PM

**Plant-based Food Category
Trends in the Face of COVID-19****Kate McGee, Senior Vice President****Lauren Winkler, Consultant****Colombe Bommelaer, Director**

Plant-based food in the U.S. has been enjoying double-digit growth lead by dairy and meat, while more traditional segments of these categories are on the decline. The onset of COVID created an even bigger shift towards semi-vegetarian (aka "flexitarian") shopping. In this session, we will:

- Review recent trends in plant-based food and the impact of COVID on consumer trends, food supply chain and shopping habits
- Examine case studies of food players investing in plant-based
- Understand implications for suppliers and retailers alike around investments in plant-based capabilities

4:00 – 5:00 PM | Kantar connect: Network speed dating

4:00 – 5:00 PM | Topic tables



4:00 PM - 4:20PM

Go to Market

Patrick Fellin, Head of Advisory, Go To Market



4:20 PM - 4:40PM

Category Leadership

Ted Reidel, Head of Advisory, Category Leadership



4:40 PM - 5:00PM

Omnicommerce

Reid Greenberg, Head of Advisory, Omnicommerce

Topic Tables

Our advisory leads have set aside time for you to join them. Ask questions, learn more about our advisory practices, or just pop in and say hello.

9:15 – 10:00 AM | Kantar connect: Network speed dating

10:00 – 10:05 AM

Welcome and setting the stage**Todd Szahun, Senior Vice President**

10:05 – 10:45 AM

The role of stores in a post-pandemic world**Tory Gundelach, Senior Vice President**

With the accelerated growth of online sales and shopper concerns over safety and hygiene, where does that leave brick-and-mortar stores, which have long been the backbone of retail? In this session, we'll examine

- How shoppers engage with physical stores
- The pandemic's short- and long-term implications for brick-and-mortar
- How retailers and suppliers need to adjust to the new role of the store



10:45 – 11:30 AM

Maximizing opportunities with product fulfillment**Rachel Dalton, Director**

Before the COVID-19 pandemic, shoppers were opting to receive their online orders in a variety of ways. While traditional ship-to-home delivery was the most prominent, click-and-collect and last-mile immediate delivery were becoming more popular. The pandemic changed this, fast-forwarding pickup and immediate delivery to wide-spread use. In this session, we will explore:

- Macro trends affecting the product fulfillment landscape
- The changing nature of click-and-collect, last-mile delivery, and other product fulfillment methods
- Shopper expectations post-COVID-19 and how to capitalize on the growing range of fulfillment options

11:30 – 11:40 AM | BREAK

11:40 AM – 12:00 PM

Getting to yes with top retail customers**Lei Duran, Senior Vice President**

The average buyer sees over 100 proposals a month for marketing and merchandising programs, yet most never make it past the proposal stage. With a robust career working at and supporting Walmart in merchandising and marketing leadership roles, our Kantar expert will share her unique perspective as the person on the other side of the table making those retailer decisions. In this eye-opening session, she will discuss three key strategies that can help you get to "yes" and share concrete examples of how to break through.

- Learn how to use Kantar data in conjunction with company data to find breakthrough insights for each retailer.
- Understand retail organizational structures and how they impact decisions and behavior.
- Find ways to align with retailers' big bets and support their ecosystems.

New!**Executive topic table****Focus:**

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12:00–12:05 PM

Wrap-up and transition**12:05–1:30 PM | LUNCH**

12:05–12:35 PM

Ask the experts: Day 2 presenters Q&A panel

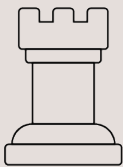
12:40–1:10 PM

Planning for the new retail partner needs in 2021

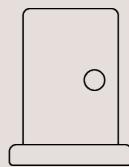
Discussion led by **David Marcotte, Senior Vice President, Kantar**
 & **Bob Musman, Director, Customer Success, VR, Kantar**

Moderated by **Amar Singh, Principal Analyst, Kantar**

See description on previous page



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1:30–2:10 PM

The future of small-box retailing

Simon Johnstone, Director

The COVID-19 outbreak and resulting trip consolidation has undoubtedly disrupted small-box models built on high frequency and lower basket values. Here, we examine how small-box retailers across drug, discounter, and convenience channels are now forced to reinvent and adapt their business models to new conditions

- Review global best practices in small-box innovation.
- Find out where and how to adjust your go-to-market strategy.
- Learn how to advocate for greater resources in small-box channels.



1:30–2:10 PM

The digitalization of retail healthcare

Amar Singh, Principal Analyst

With global healthcare spending expected to rise at a CAGR of 5% from 2019-23, the level of engagement for consumer and patient digital health solutions has exploded, and the current COVID-19 pandemic will only accelerate this trend. Tech giants, global retailers, and direct-to-consumer disrupters are demonstrating that there is an easier way to deliver consumer healthcare.

- Explore the new digital health and retail marketing opportunities for consumer and pharmaceutical brands.
- Learn to leverage digital health through new trade spending investments.
- Discuss new opportunities to trade up loyal shoppers.



1:30–2:10 PM

Searching for growth: The marketplace opportunity

Reid Greenberg, Executive Vice President

Many brands are looking to marketplaces as a new route to reach shoppers beyond traditional brick-and-mortar and ecommerce channels. Suppliers and brands are starting to see the benefit of having a marketplace strategy to drive incrementality with new consumers in new markets and with new product innovation.

- Gain an understanding of the US marketplace ecosystem.
- Understand how brands and suppliers are successfully leveraging ecommerce marketplaces to drive brand awareness, new product launches, and incremental revenue streams.
- Evaluate the pros, cons, and implications of developing a marketplace strategy.

2:10–2:15 PM | BREAK



2:15–3:00 PM

**The battle of the titans:
Amazon vs. Walmart****Rachel Dalton, Director****Lei Duran, Senior Vice President**

As Amazon continues to expand its influence and battle Walmart to be the most-shopped retailer in America, the comparisons — and faceoffs — between the two have been hard to ignore. In this session, we will address:

- The evolving Amazon and Walmart ecosystems to dissect how each retailer is positioning itself to win
- The key pillars of omnichannel retail and how the two retailers are driving them
- New ways to think about retailer-specific activations for optimal growth



2:15–3:00 PM

**The retail reality of cannabis
in North America****Amar Singh, Principal Analyst**

In this session, we will examine four key areas that retailers and suppliers need to understand with respect to cannabis: the consumer, the cross-category impact, the path to purchase, and the acquisition environments. Specifically, we will cover:

- The current state of the North American cannabis retail landscape
- Need states and use cases of cannabis across the spectrum of sick care and self-care
- The cross-category impact of the cannabis economy



2:15–3:00 PM

Revisiting the boomers**Ben Antenore, Analyst****Ann Clurman, EVP, MONITOR**

Laser-focused on millennials and Gen Z, many retailers make the mistake of relegating boomers to the rear-view mirror. Ignoring the clout of boomer numbers, boomer spending power, and boomer attitudes and values has long meant missed opportunity. Even though they may be aging, the members of the original “Me” generation still expect the marketplace to value them and adapt to their desires. Now boomers — like everyone else — face unprecedented disruption in their everyday lives as COVID-19 overshadows today and tomorrow, job security concerns jeopardize future plans, and an underlying sense of uncertainty sends anxiety levels soaring. This session will answer these questions:

- How are new realities impacting boomers’ unique core values, current life stage, and future priorities, and what will be the retail impact?
- How might boomers’ never-ending marketplace demands escalate and where might boomers possibly cut the marketplace some slack?
- What new retail incentives might resonate with boomers?

3:00–3:15 PM | BREAK

3:15–4:00 PM

**The state of the mall:
COVID-19 edition****Tiffany Hogan, Principal Analyst**

The pandemic has been devastating for malls and the discretionary retailers that occupy them. With the accelerated decline of some primary mall tenants, the mall as we know it could finally be on its way out as it’s forced to reshape its role in a new retail reality.

- Learn how the recent slew of retailer bankruptcies, the emergence of new ownership models, and potential new tenants could change the face and future of the mall.
- Explore the strategies and challenges of the mall’s current and future key tenants.
- Understand the impact that changes at the mall will have for the broader retail landscape and your business.



3:15–4:00 PM

**The disrupted shelf:
Adjusting to assortment changes****Taylor Galland, Senior Analyst**

As the COVID-19 pandemic set in, demand surges and supply chain disruptions forced retailers and suppliers to find solutions to inventory shortages and surpluses. Now, as retailers and brands continue to adapt to the pandemic, new best practices are evolving for SKU optimization and space allocation across the omni shelf. Join this session to learn how to:

- Navigate accelerated assortment, merchandising, marketing, and layout changes.
- Capitalize on omni-shelf opportunities.
- Minimize disruption and position your portfolio for the future.



3:15–4:00 PM

**Food as Medicine: Understanding
retailer’s role in the healthcare
journey****Ellie Pinto, Analyst****Ben Antenore, Analyst**

With organic and natural now table stakes for fresh and shelf-stable products, healthy eating has become a core shopping consideration. As shoppers seek alternatives to traditional health products, edible grocery has emerged in both grocery and drug channels as a category where shoppers can address both self-care and sick-care needs.

- Understand shopper preferences for organic and natural products, and the importance of healthy eating in their health and wellness journey.
- Gain insight into cohort and income preferences for organic and natural products.
- Align with major drug and grocery retailers’ recent strategic moves.



4:00–4:30 PM

Walmart’s COVID response: Key learnings for the supplier community

Andrea Shoppach, Senior Director II – Customer Metrics & Measurements

Follow how Walmart is weathering the pandemic by listening closely to its customer and taking action accordingly. With pages from their natural disaster playbook in hand, Walmart was able to focus on customer needs by consolidating government data, articles, research, and customer insights from their partnership with the supplier community. This is Walmart’s view of how the customer has changed through 2020. Explore:

- Pandemic learnings
 - How Walmart will operate moving forward into 2021
 - How you can partner for success
-



4:30–4:45 PM

Applying what we’ve learned

Todd Szahun, Senior Vice President

As we close out two packed days of insights, we’ll review key learnings. Distilling some of the most crucial takeaways across all our sessions into the key slides you and your team can immediately leverage/share back as we head into 2021.