

A large, stylized red maple leaf is positioned behind the main text, centered horizontally and partially obscured by the letters.

NYSE:WMT

2012 International Meeting for the Investment Community



Customer Insights & Retail Strategy Breakout Session



Emma Fox

Senior Vice President, Marketing

Walmart Canada's strategy



Two new normals

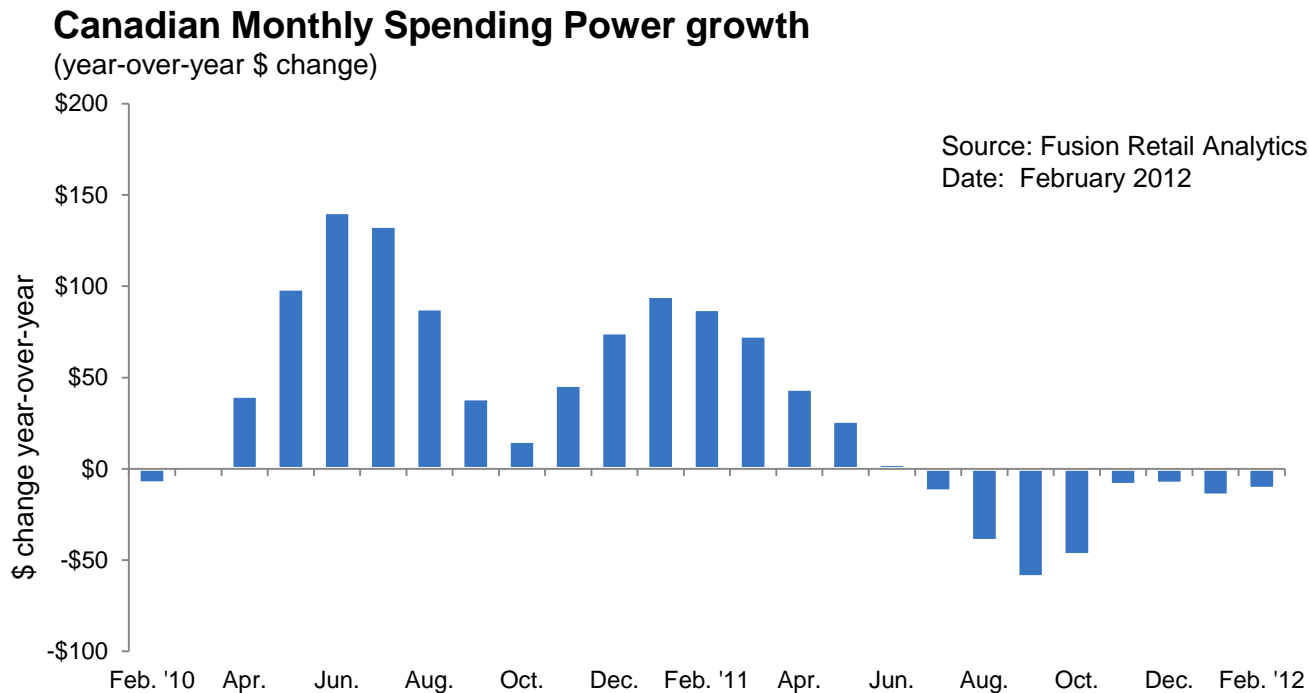
1. The changing face of Canada



2. Changing shopping behaviour

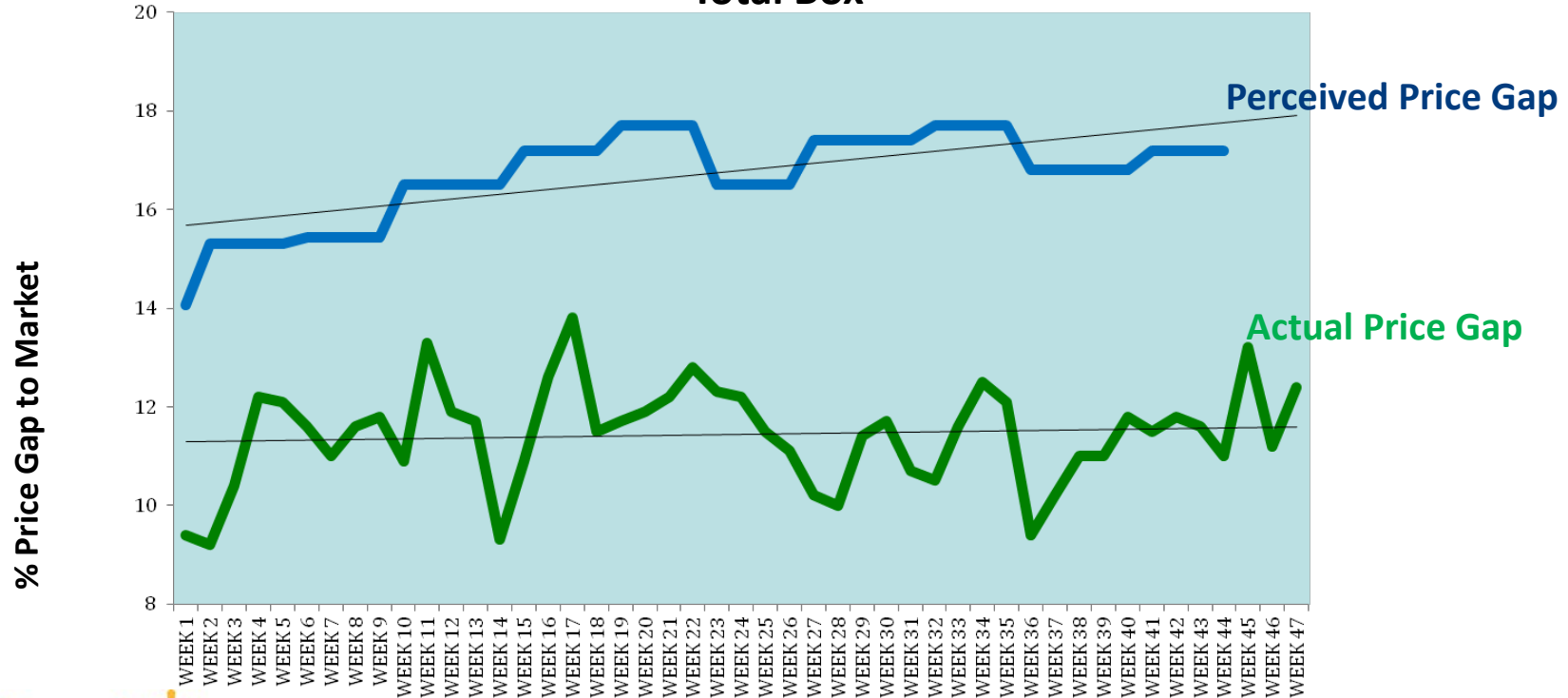


Income tracker



Price leadership

Walmart Price Perception & Actual Gaps Total Box



Two new normals

1. The changing face of Canada

2. Changing shopping behaviour





Alan Blundell

VP, Merchandise Operations

Winning one store at a time



- Space
- Assortment
- Communication

Space: reflecting the community



Waterloo



Urban 90



North Bay

Assortment: tailored to demographics



 **Furama** 富麗華 餅店
Cake & Desserts Garden

Operating in
Walmart
Save money. Live better.™

 **MEAT** 以客為先
以誠為本

Operating in
Walmart
Save money. Live better.™

東海洋 **Seafood**
Ocean Premium

Operating in
Walmart
Save money. Live better.™

Assortment: executing locally

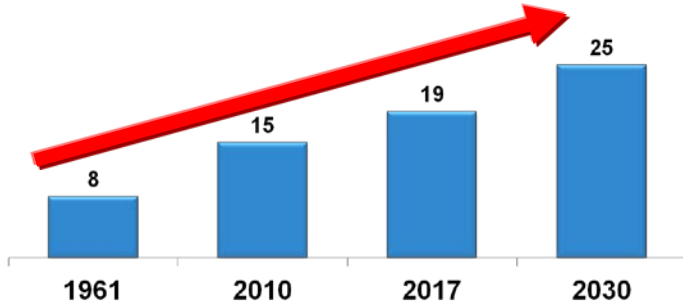


- Customer insights drive assortment decisions
- Local promotions on items that matter
- Listening drives results

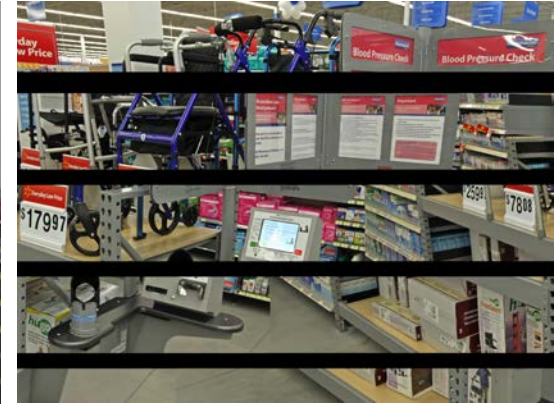
Assortment: life stage

Canada's aging population will reach 25% of the population by 2030

% of the population 65+



Source: Statistics Canada, 2006 Census



Communication

Walmart
Save money. Live better.

Happy Chinese New Year
新年快樂



Celebrate Chinese New Year with unbeatable prices!

 10⁹⁸ each	 5⁴⁸ each
 1⁶⁸ each	 2⁵⁰ each
 2⁵⁰ each	 68¢ each
 11⁸⁸ each	 4⁹⁸ each
 1⁹⁸ each	 8⁸⁸ each

Ad Match
Flyer effective Friday, January 13th to Thursday, February 2nd, 2012.



- 360° approach
- TV, print, radio, online
- In-store: dedicated space, food demos, signing

Customer first

Our Customer



The Community



The Store



Merchandise





Jennifer Stahlke

Marketing Director

Our customer is ever-evolving



Knowing her deeply is key



- Understanding mom at an intimate level
- Tailor merchandise and communication
- Drive loyalty

Walmart Mom bloggers



- First time engaging blogger Moms
- Sharing of personal experiences
- Building insights through these personal experiences
- Leveraging for our broader customer base

Intimate activities

BELINDA'S APPROACH

"I'm treating my Xmas prepping as a project: outlining the scope, what I need, duration, timelines, and deadlines."



PROJECT CHRISTMAS PROJECT MANAGER: MOM

- ☐ Project list
- ☐ Budget
- ☐ Time
- ☐ Resources



Harnessing technology

Saskatchewan



Manitoba



Nova Scotia



Ontario



Insights into action



- January Rollback event
- Leveraged knowledge to drive business
- Saved Canadians \$30 million/month
- Resulted in one of our strongest Januarys ever

Key takeaways

- The customer is at the heart of our business
- We will continue to better understand our customers to drive our business forward
- Our 18 years in Canada and our unique customer insights give us a competitive advantage to serve the changing customer

A large red maple leaf logo is positioned behind the text.

NYSE:WMT

2012 International Meeting for the Investment Community