Sara Lebow, Suzy Davidkhanian, Becky Schilling, and Jeremy Goldman

Reimagining Retail: The Unofficial Most Interesting Retailers List (June)

Audio

On today's podcast episode, we discuss the unofficial list of the most interesting retailers for the month of June. Each month, our analysts Arielle Feger, Becky Schilling, and Sara Lebow (aka The Committee) put together a very unofficial list of the top eight retailers they're watching based on which are making the most interesting moves: Who's launching new initiatives? Which partnerships are moving the needle? Which standout marketing campaigns are being created? In this month's episode, Committee members Becky Schilling and Sara Lebow will defend their list against vice president of content Suzy Davidkhanian and director of Briefings Jeremy Goldman, who will dispute the power rankings by attempting to move retailers up, down, on, or off the list.

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Episode Transcript:

Sara Lebow (00:00):

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Wednesday, June 26th. Welcome to Behind the Numbers re-Imagining RetAIl and e-Marketer Podcast Made Possible by Roundel. This is the show where we talk about how retAIl collides with every part of our lives. I am your host, Sara Lebow. Today's episode topic is our June unofficial most interesting retAIlers of the month list. Let's meet today's guests. We've got three of our analysts today. First up, it's Becky Schilling. Hey Becky.

Becky Schilling (00:59):

Hey, Sara. Great to be back here.

Sara Lebow (01:02):

Great to have you back here. Also with us is Jeremy Goldman. Hi, Jeremy.

Jeremy Goldman (01:07):

Excited to talk to you as always. Sara,

Sara Lebow (01:10):

Excited to talk to you and also excited to talk to us, I would assume is Suzy Davidkhanian. Hey Suzy.

Suzy Davidkhanian (01:17):

Hello. Thanks for having me. Thanks

Sara Lebow (01:19):

For being here. Okay, let's jump into our top eight unofficial most interesting retAIlers of the month.

Sara Lebow (01:31):

As always, Becky, our colleague, Ariel and I AKA. The committee put together this very unofficial list of eight retAIlers we're watching right now based on which retAIlers are making the most interesting moves this month. The list is highly subjective but supported with objective analysis. Becky and I are going to present the list in the first half of the episode and in the second half, Suzy and Jeremy will have an opportunity to edit our list if their arguments are convincing enough. So let's get into our top eight, starting with number eight, apple for a whole bunch of innovations that Becky is going to tell us about.

Becky Schilling (02:07):

Yeah, so Apple's back on our list. A lot of it was from the big event that it held this month. They announced Apple Intelligence and part of that is bringing AI across a lot of its devices, including an improved Siri. They also mentioned that Siri will be able to tap into chat GPT for certAIn requests and they're also working reportedly on a cheaper version of its Vision Pro headset.

Suzy Davidkhanian (02:32):

This one's tricky for me because I don't think about Apple. I mean I know it's a brand and a retAIler at the same time, but the things that they're doing, it's kind of like run of the mill. Everybody's thinking about how do you incorporate AI. I think they're trying to do too many things and updating too many, which is probably part of their playbook. Trying to update too many things that don't match back to older systems so that you have to buy all kinds of new systems. So maybe for that I give them number eight, but otherwise, I don't know.

Sara Lebow (02:59):

I mean there's nothing more Apple than changing the headphone port, the charger jack, so that you have to buy something new. So run of the mill for Apple.

Suzy Davidkhanian (03:06):

Bad for the customer though.

Sara Lebow (03:08):

Alright, number seven, TikTok shop for innovations in both livestream and visual search. Actually, livestream isn't so much an innovation as a milestone. TikTok shop had its first 1 million live stream this month. What does that mean? A beauty brand? Canvas Beauty, which I hadn't heard of before, did a million dollars in sales on one single live stream and TikTok shop introduced visual search where you can look up an image and see the products.

Jeremy Goldman (03:35):

I will say I think that the TikTok shop ranking anyway without editing anything ahead of time. Definitely really interesting to see the image search feature for TikTok shop users in the US and Southeast Asia can now take photos of items and upload them to be shown similar products and I think this is just obviously leaning into some of their strengths, particularly with

Gen Z, 25% less likely to use Google than Gen X and what we're really seeing is a fragmentation of search experience and TikTok shop is taking advantage of that.

Suzy Davidkhanian (04:07):

Did you hear that little jab at me not trying to edit the list before it's time to,

Sara Lebow (04:13):

You haven't done anything wrong yet. I

Suzy Davidkhanian (04:15):

Mean kind of would've taken Apple off the list. That was my underlying commentary there.

Sara Lebow (04:20):

Alright, we're going to keep moving on before we spoil the rest of the episode. Number six, Fenty for launching Fenty hAIr. That's right. Rihanna's beauty company has expanded. This is a really smart move for the company that was founded on finding a white space, which was lack of shade diversity in makeup and filling that space. Now the brand is leaning into diversity in hAIrcare and it's also leaning into just how successful beauty has been as a category.

Suzy Davidkhanian (04:48):

I love this one. I think it's so clever that they didn't just do an extension, but they did a whole new branding too, right? It's Fenty HAIr and HAIr. Celebrity beauty is like a 1 billion market. HAIrcare is small but growing and I happen to see the civic science data that sAId that for the Ulta and Sephora spring sale after skincare hAIrcare was what people sAId they were going to purchase. So it's definitely a growing category and she is leaning into her brand really well.

Jeremy Goldman (05:17):

I just feel bad that they missed using the tagline, make your hAIr shine bright like a diamond

Sara Lebow (05:24):

Fenty Beauty. Jeremy is avAIlable.

Jeremy Goldman (05:27):

Thank you. Thank you.

Sara Lebow (05:29):

Number five, Amazon for adding GrubHub to its prime membership and creating shoppable content for livestream tv. Becky, tell us more.

Becky Schilling (05:38):

Yeah, so Amazon sAId it was going to co-develop this shoppable content for its streaming Fast channel. They're working with Group M for the partnership and they're going to have a new content type that will enable brands to infuse product placements and messaging in their shows. We've seen a lot of great engagement with shoppers and shoppable content, so we're excited to see where that goes. From platform standpoint, they also added GrubHub to their Prime membership, trying to make sure that their membership stays top of mind for consumers and adding benefits as more subscription based products come on the market.

Sara Lebow (06:15):

Yeah, I mean this is smart. I have been a livestream shopping kind of naysayer hesitant on it in the past. I'm feeling that way less and less. There are so many different forms of livestream shop, this is just one of them, but I think even if it doesn't really work for Amazon, finding ways to incorporate buying in shows is smart for them.

Jeremy Goldman (06:36):

I don't think we can forget to mention also the fact that Amazon Prime Day news just broke. They're going to be leaning more into personalized offers this year, which is definitely interesting and noteworthy. They're going to be also hosting Prime Day on amazon.com/espanol, which is new, so kudos to them for trying to grow the prime day pie I guess you could say.

Sara Lebow (07:00):

Okay. Number four, Albertsons for partnering with Rocked. Becky, why is this important?

Becky Schilling (07:06):

Yeah, so it's all about retAIl media for Albertsons this month. That's what we put them on the list for. You mentioned the partnership with Rocked. They are doing that to introduce non-endemic ads to its retAIl media network and they are also launching the Albertsons Media Collective tv. It's a platform that combines retAIl media and CTV advertising capabilities.

AgAIn, CTV retAIl media measurements all into one. And so that is the reason why we have put Albertsons on our list

Jeremy Goldman (07:36):

And one of your favorite analysts wrote up. I think both of those stories if memory serves now,

Sara Lebow (07:41):

Who's my favorite analyst?

Suzy Davidkhanian (07:42):

Me.

Jeremy Goldman (07:43):

Oh me, it's me. No, I did it. Yeah.

Sara Lebow (07:46):

Number three, Instacart. We're still on the retAIl media trAIn Instacart's on here for adding shoppable YouTube ads and for a partnership with New York Times cooking, Instacart has one of the biggest retAIl media networks in the us. YouTube has one of the biggest CTV audiences, so the match more shoppable ads, it makes sense. We're seeing more and more offsite retAIl media. The last one, Albertsons was offsite retAIl media. So is this and so is the New York Times cooking partnership. I think that these are the kinds of partnerships we're going to continue to see and the New York Times cooking one is interesting to me. It almost reminds me of that Best Buy CNET partnership that we saw recently. It's definitely not one-to-one, but similar sorts of alliances are being forged.

Suzy Davidkhanian (08:30):

I bet. And it's also not new Walmart. I'm pretty sure it was Walmart did it with a recipe sort of magazine. And what I would say, agAIn from the consumer lens, it'd be amazing if it Instacart had the technology to tell me I already bought Pepper the last time I did a BI so that I don't have another pepper.

Becky Schilling (08:48):

This sounds like something you encountered, Suzy.

Jeremy Goldman (08:51):

It's a very specific issue. Yeah,

Sara Lebow (08:54):

I feel like if you have pepper, there's nothing maybe, but pepper

Suzy Davidkhanian (08:58):

Used pepper. I use pepper because it just was easy. Instead of talking about the basil, I'm growing and obviously then I don't need more basil, but I just think that there are some limitations to these shoppable media things and I am all in on shoppable media, especially live streaming. I think that it does a lot of great things. I just think there are still some customer friction points that we just need to solve through, but it's amazing that it's Instacart doing it because they have a much bigger view on different grocery stores versus when Walmart was doing it and they only know what you've bought from them.

Sara Lebow (09:28):

Well, New York Times cooking I think is also a key here. I mean there are a lot of recipe sites that get a lot of use, but New York Times cooking is a big one and it's like a really chic one. I think it sort of says something about who that consumer is.

Jeremy Goldman (09:41):

Agreed, and I think leaning into partnerships like that, I think that is something where you're building greater affinity for the retAIler. That's something that we're probably going to continue to see more of. We've seen a lot of these partnerships we've covered over the last year and expect more to come.

Sara Lebow (09:56):

Number two, Costco for That's right. Launching a retAIl media network. This is huge for those of us who have repeatedly sat in meetings with our retAIl team asking why Costco doesn't yet have a retAIl media network. They have one now it's launching, and I think that's a pretty big deal.

Suzy Davidkhanian (10:14):

I think the idea that they are, everybody is a member because you can't shop there if you're not a member is what's key. And they sell everything under the sun and I think the reason why we weren't talking about it as much as because they didn't typically have a very strong online business, but they certAInly have a strong sampling business and they do a lot in store, right? People know they're going to be there and they're going to be there for a long time. They have self-service checkout services in some stores. So I think it's ripe for the in-store retAIl media as well.

Sara Lebow (10:44):

That's a great point. I wonder how Costco launching an in-store retAIl media network will affect in-store retAIl media on the whole

Suzy Davidkhanian (10:52):

In-store, retAIl media is still tiny, tiny, and the amount of dollars that one would have to spend to go into all of the store footprints is gigantic compared to online. However, because everybody knows that sampling is one of the components of in-store retAIl media and Costco is such a big, big, big user of in-store sample. I could see where that would work for them. It's just hard to put TVs and other things that are digital across the entire store, across the entire country.

Sara Lebow (11:25):

Yeah, in-store, retAIl media is less than a billion dollars right now in the us, so still pretty small.

Jeremy Goldman (11:30):

Just a small point. I think what's interesting is all these retAIlers are making so many different moves at the same time in different facets of their business. So while I think they get huge accolades for the retAIl media move tied to member data where they've got a lot of historical data on each individual customer a lot more than the average retAIler because you can tie back to that member id. They also have an innovative partnership with General Motors offering EV discounts through Costco as automakers are working to produce lower cost EVs in the stalling market. So kudos to them for trying something unique agAIn and leaning into a partnership.

Sara Lebow (12:05):

Number one Walmart for 1 million different reasons. Becky, I'm going to have you lay out what these are.

Becky Schilling (12:13):

Yeah, Walmart regAIning the number one position agAIn for the month. They rolled out their new self-service insight solution, Walmart Luminate, which is integrating with Walmart Connect. They introduced their Walmart plus week. They're building a gen AI powered shopping assistant. They relaunched their No boundaries private label Targeting Gen Z digital shelf labels, expanding their premium beauty assortments, launching Walmart Realms, a 3D virtual shopping, everything. Walmart is hitting all of the highlights for this month. The

Sara Lebow (12:46):

Gen Z one private label was of particular interest to me because I feel like they're, I don't know, Targeting Abercrombie Sheen, urban Outfitters. This is a corner of the market that I don't associate Walmart with, so that was a really interesting move for me. Okay, that's our list. So the final list just to recap is number eight, apple back on our list. Number seven, TikTok shop back on our list. Number six, Fenty debuting on the list. Number five, Amazon, back on our list. Number four, Albertsons debuting on the list. Number three, Instacart, once agAIn, back on the list. Number two, Costco with its list debut and number one Walmart, which takes the same spot it did last month remAIning at number one. Going to give an honorable mention to nine and ten nine CVS for some retAIl media updates and 10 goPuff for launching a private label. Now it's time for the second half of this episode where Suzy and Jeremy get to tell us where we went wrong. Okay. Suzy's already kind of been doing that, but she gets to do it more officially now. Each of them, Suzy and Jeremy will have a chance to move a retAIler up or down on our ranking list and then to add a new company entirely. So Suzy, I'm going to have you go first make a move.

Suzy Davidkhanian (14:17):

Sure. So I would obviously take Apple off, but I would also not have goPuff as an honor go mention. I just think that instant commerce is not a thing in the US today. It won't be in the near future and I think it's kind of weird and upsurge to think that goPuff, I mean they are doing, I thought you had that on your list because of the Tom Brady tie up. They are doing some interesting things, but that is certAInly not going to help them. There is no way that they can, in their words, redefine the future of commerce by having one really strong partnership and nobody is going to go to buy goPuff CPG products. So I would take them off.

Sara Lebow (14:56):

This one's a little wishy-washy because our honorable mentions aren't technically part of the list, but we mentioned them so they're still there. They're in the graphic on Instagram. Go check that out.

Jeremy Goldman (15:05):

Did you expect Suzy to follow the rules and fAIrness? Go

Sara Lebow (15:08):

Check that out at eMarketer. I don't think we gave Suzy this specific rule, so I would be okay with taking goPuff off. I wouldn't be okay with taking Apple off.

Jeremy Goldman (15:18):

See what's interesting, sorry, I hope I'm not talking out of turn. This is not what I was going to say, but I will say with Apple, I understand Suzy's point because the moves that they made are very impressive, but they're not necessarily tied. They are a retAIler, but their moves were not tied to retAIl, if that makes any sense.

Becky Schilling (15:35):

They did, to be fAIr, they introduced new products and every time Apple introduces a new product, it's a smash. So I think you have to except for in certAIn countries,

Suzy Davidkhanian (15:46):

But they're not doing that well right now.

Becky Schilling (15:48):

No, but introducing these new products are what helps them to mitigate some of that loss.

Sara Lebow (15:55):

And you don't have to be doing well, you just have to be interesting. Correct.

Suzy Davidkhanian (15:59):

But yeah, I mean it's fine. You don't have to accept that I would remove them, but I don't think that just introducing a brand new Apple product makes you interesting. I don't know that the newness that they're introducing is revolutionary compared to their colleagues.

Sara Lebow (16:15):

I think that Apple has a lot of AI potential and so I think that shoving AI everywhere, even though it's not my favorite thing to do, I'm keeping 'em on Becky.

Becky Schilling (16:25):

I'll keep 'em on. I'm going to keep goPuff on too. I know that because Suzy tried to double take two things. Yes, she did. That's completely unfAIr. And so one, because you completely negated the rules, I'm going to say no, but also I hear what you're saying about goPuff, but it's an intermediary trying to do something different and interesting. It's challenged. I don't think that anybody on this call is going to say that their system is not challenged in this country in particular, but they're trying to do new things and they're introducing this private label line. Do I think it will work? No, but that's not the name of the game. The name of the game is interesting.

Sara Lebow (17:05):

I'm going to side with Becky because she's the committee and I'm a little indifferent on this one. Suzy, I support you breaking the rules. You're allowed to break the rules. Thank you. It didn't work this time. Keep trying, Jeremy.

Jeremy Goldman (17:17):

Well, for my breaking, I don't know if this breaks the rules. I think it actually does, but in a way that's somehow more respectful than the way that Suzy does it. Could you just

Suzy Davidkhanian (17:25):

Call me not respecting Irrespectful?

Sara Lebow (17:28):

What the No, you're hurting of your Canadian sensibilities.

Suzy Davidkhanian (17:31):

Oh, disrespectful.

Jeremy Goldman (17:32):

I just think that Albertsons for a lot of reasons, I would actually put it a little bit higher. I think that they've consistently kind of almost shown that irrespective of what happens with some of the backroom drama regarding Kroger and whether or they're going to actually settle down together and have a supermarket superstore. I think that Albertsons is making a lot of really strong moves to continually build their retAIl media empire and it's not a flash in the pan. So for that reason, I would actually just loop them up rather than I'm getting anybody off of

Sara Lebow (18:08):

It. Where are you moving them to for context? Ahead of Albertsons? You have number one, Walmart number two, Costco number three. Instacart.

Jeremy Goldman (18:16):

See, actually I would put them number one. I just think that they're not a flash in the pan continually every single month, virtually every other month they are making major moves, particularly on the retAIl media side.

Sara Lebow (18:29):

Albertsons does not get to be number one for retAIl media, TV ads. I think that's a really big deal. But Costco launched a retAIl media network, so they're not above Costco. Walmart did a million different things, so they're not above Walmart and I really liked Instacart's YouTube moves, so I'm keeping Albertons where they are. I'm sorry,

Jeremy Goldman (18:51):

Bear

Becky Schilling (18:52):

Jeremy, you almost had me, but then Sara talked last and she won.

Sara Lebow (18:56):

Sara talked last

Jeremy Goldman (18:59):

Also, by the way, since you did talk a lot about goPuff, I do think that it might be worthwhile to consider moving CVS up. I agree. I think it's worthwhile to just think about the CBS news, which you covered, right, which is beta launch of a new self-service offering partnership with the Trade Desk cover that right? And that has really nice audience Targeting features, greater transparency with ad pricing. I think it's opening up a lot more inventory so that ultimately they can become more of a player within the retAIl media landscape. They also have a lot of data that other players don't have, just given the nature of what they sell. Okay.

Sara Lebow (19:39):

We're breaking all sorts of rules. I'm going to pose a question so we can move to our next part. Becky, would you be okay with moving CVS into Apple's position and taking Apple into the Honorable mention position?

Suzy Davidkhanian (19:52):

I also vote for CVS moving up for different reasons, but I know you're trying to keep us moving, so I won't tell you how hard it must be to sell commodity things that are price given to you and make money.

Sara Lebow (20:07):

I'm glad you're not going to tell us that.

Suzy Davidkhanian (20:09):

No,

Becky Schilling (20:09):

I am not. No. The moves that CVS is making are moves that they need to make, but because of the retAIler and the environment that that retAIler is in, it feels more of a desperation rather than an interesting move.

Sara Lebow (20:26):

Fine with me. We'll keep it as is. Suzy, now's your opportunity to add a company to the list. What is your wild card?

Suzy Davidkhanian (20:34):

So I am adding Tractor Supply. We don't talk a lot about them. They were at a couple of conferences that I was at in the last few months. They are a very niche space. They have a lot of stores. They Target small and medium-sized communities that are more rural. But what I think is really interesting about what they do and what they have been talking about is trying to find different types of partnerships like with Martha Stewart and doing garden apparel lines or with the Grammy Award winner, Laney Wilson and doing a whole campAIgn around life out here. They are doing lots of stuff with pets. They realize what's driving people in store, but they also understand how to use online and what type of customer that drives. They've been able to use a lot of data and they have a new partnership. This was the newest news, the Revs. They're partnering with them to do better Targeting, better pricing, more advanced analytics, better understanding of who you are as a consumer to give you the right messaging at the right time. And so for that reason, I think they should be on our list.

Sara Lebow (21:43):

Becky, do you accept putting Tractor Supply Co on the list? It would kick Apple off.

Becky Schilling (21:47):

Oh, that's pAInful. We're big fans of Tractor Supply co. We're big fans

Sara Lebow (21:53):

On our desk.

Becky Schilling (21:54):

Yeah, because of all the things that Suzy had sAId. And so I think it's challenging because they've been doing a lot of really cool things over the past six months, and I think you went through some of those, but I'm going to go ahead and I'll accept this move. Thank

Sara Lebow (22:09):

You. I'm accepting this too. I like Tractor Supply code. I like these moves.

Suzy Davidkhanian (22:13):

So what I would add to it too is that their sales are fine kind of right, but they're not being shortsighted and trying to do things like cost cutting and figuring out how to get there faster. And instead they're expanding their store fleet. They're opening garden centers. They have this whole, I didn't even know, they have a whole different sort of co-brand pet sense. So they are really doing the right thing for their business and understanding their consumer and thinking about it. And so I think that's amazing.

Sara Lebow (22:42):

Okay. Tractor Supply Co is on. Jeremy, what is your wild card?

Jeremy Goldman (22:46):

So there's a little streaming company I've been looking into lately that I think has a chance at making it called Netflix. And what's interesting to me about them, and to me this is absolutely, this has to be on the list unless we're going to hold it agAInst that, this thing didn't happen yet. They're going to be debuting major brick and mortar investments in a few significant malls in Dallas and King of Prussia, Pennsylvania, which is one of the best malls ever, if you like malls. It is a good mall, and this is a really big deal. They kind of talked about it a little bit last year, but it's going to have activities and food based on major Netflix series. I think that these types of things, like on one hand, do you do them for the pr? Sure. On the other hand, is Netflix one of the biggest brands within the consumer zeitgeist? Absolutely. And is entering retAIl. And this is the kind of thing that obviously if you see more future expansion into malls that this could be a major kind of game changer in terms of mall traffic increasing the upswing that's happening post pandemic. And I think that you're going to start to see more and more, whoops, like this from other players that have a bit of larger from their online streaming profits. So thoughts.

Sara Lebow (24:04):

I'm rejecting this move and here are my reasons that I think Becky will agree with. You sAId this is kind of a PR move. It is. It's such a PR move that it's something that Netflix announced last year and then agAIn last month when it actually did make our list. Or maybe that was two months ago. April. April. So they announced it several months ago, announced it. They keep talking about it, which is why you're putting it on the list for now because the news is staying relevant, which is good for Netflix. That is what you have to do, but nothing has changed in order to get them on our list. AgAIn, I think that once Netflix gets in malls, if it's interesting, if I go to the Netflix movie theater, if they let me in because I'm a former password sharer, then maybe they can get back on the list. But for now they're not.

Suzy Davidkhanian (24:52):

If only they were so smart to know that you were a former password. Can you imagine if the data usage was that clever?

Sara Lebow (24:59):

And now I don't have Netflix.

Jeremy Goldman (25:01):

You're, I mean, honestly, it's like the kind of thing where if you think about the type of data that they have and could they give you a totally unique experience when you enter. So yes, it is not launched yet. That is totally fAIr. Your rejection, I take it. But I look forward to being on that episode with you when this launches next year. And then I will play back some of what you sAId and I will run this tape argument then Tape, yes, run the tape. Then.

Becky Schilling (25:24):

I'm afrAId of Netflix having a personalized experience for me if I went into a store because I watched the serial killer documentaries and I am terrified of what that in-person experience would be.

Sara Lebow (25:36):

Tape. All right, so we're rejecting Netflix. Sorry to Jeremy. Okay, so as our new and improved June unofficial most interesting retAIlers of the month list, we have number one, Walmart, number two, Costco number three, Instacart, number four, Albertsons, number five, Amazon. Number six, Fenty. Number seven, TikTok Shop, and number eight, tractor Supply co.

Suzy Davidkhanian (26:05):

Good thing I'm not competitive because I win, Jeremy. Sorry

Jeremy Goldman (26:11):

I don't. We all win because we have a really good list that we can be proud of. So I'm very team oriented. I dunno about you guys. Yeah, me too.

Suzy Davidkhanian (26:18):

Obviously

Sara Lebow (26:19):

That is all we have time for today, so thank you so much for being here. My co committee, Becky,

Becky Schilling (26:26):

This was a blasting.

Sara Lebow (26:28):

Thanks for being here, Suzy,

Suzy Davidkhanian (26:30):

Thank you for accepting Tractor Supply

Sara Lebow (26:33):

And thanks for being here. Jeremy,

Jeremy Goldman (26:35):

It was a pleasure.

Sara Lebow (26:37):

Please give us a rating and review wherever you listen to podcasts. Thank you. To our listeners and to Victoria who edits the podcast, we've given you a really fun one to edit this week. We'll be back next Wednesday with another episode of re-Imagining RetAIl and e-Marketer Podcast, made possible by Roundel. And tomorrow, join Marcus for another episode of the Behind the Numbers DAIly.