

February's most interesting retailers: Walmart buys a mall while Nike courts female consumers

Article

Walmart bought a mall, Coca-Cola launched a soda, and Nike partnered with SKIMS in February, marking some of the month's most interesting retail moves.

Here are the eight most interesting retailers and brands from last month, as ranked on our "[Behind the Numbers](#)" podcast.

8. Amazon

Amazon made some key developments in February: opening a brick-and-mortar beauty store in Italy and testing links to products not available on its platform in a play for ad dollars.

"[Amazon is in some cases] making it clear they want that ad revenue more than they want to sell that product," said our analyst Arielle Feger. The move will help Amazon retain its forecasted 76.2% US [retail media](#) share this year.

7. Reformation

Reformation's new ad campaign featured "Saturday Night Live" alum Pete Davidson as the "Official Boyfriend" of the apparel brand. The campaign capitalized on press surrounding "Saturday Night Live's" 50th anniversary event and featured the formerly inked comedian without any tattoos, a look that offered the campaign earned-media buzz.

6. Coca-Cola

Coca-Cola launched Simply Pop, a prebiotic soda line competing with upstart brands like Poppi and Olipop. The move represents an established brand disrupting the disruptors in the "healthy" soda category. It also shows that Coca-Cola views these disruptors as potential competition.

"I think it's interesting that they waited this long to do it. I think that it feels very purposeful," rather than a scramble to protect market share, noted Feger.

5. Wayfair

Wayfair released a new AI-powered app called Muse, designed to help shoppers visualize furniture and decor in their homes. The app allows users to enter prompts like "Moody 1920s-style living room" and generates scenes featuring Wayfair products. The functionality shows the importance of AI in retail and functions somewhat similar to Pinterest by helping customers visualize products in context—a critical factor in home furnishing purchases.

4. Poppi

Prebiotic soda brand Poppi's Super Bowl campaign sent full-sized vending machines to [influencers](#), prompting social media backlash about wasteful marketing spending.

The controversy intensified when competitor Olipop commented on a post claiming the machines cost \$25,000 each, fueling criticism that the costly campaign was out of touch.

"It's just kind of one of those miss-the-mark campaigns," said Feger.

3. Lidl

German grocery retailer Lidl launched a [TikTok](#) Shop pop-up in the UK, marking one of the first major [grocery](#) retailers to experiment with TikTok's [ecommerce](#) capabilities.

While Lidl described this as a small-scale promotion rather than a permanent ecommerce strategy, the move shows TikTok Shop is an important tool not only for making sales, but for generating marketing buzz, particularly for food and beverage retailers.

"Does it make sense as a full-on ecommerce plan? Not really, but I think it's a fun way to get some attention," said Feger.

2. Walmart

[Walmart](#) bought the Monroeville Mall in Pittsburgh, Pennsylvania—famously the filming location for horror classic "Dawn of the Dead."

The acquisition could signal a [shift in Walmart's approach to physical retail spaces](#), either by serving as a mall anchor store or by creating its own mall-sized brick-and-mortar experience.

"I am so excited about this, because in Canada, Walmarts are anchor stores at the mall, but in the US, they aren't," said our analyst Suzy Davidkhanian. "It'll be interesting to see if Walmart decides that the entire composition of the mall, including how we define traffic drivers and anchor stores, will change."

1. Nike

Nike earned the No. 1 position by launching NikeSKIMS in partnership with Kim Kardashian's shapewear company, and for releasing a powerful Super Bowl ad featuring prominent female athletes like WNBA rookie Caitlin Clark.

Nike is making a clear push to connect with female consumers, though the two moves may result in some mixed messaging as it relates to female empowerment. "It's an interesting play with Kim Kardashian. She's obviously so incredibly famous, but her position is kind of controversial at times," Feger said.

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