IBM Basket Insights

Users' Guide

IBM

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Chapter 1. Overview

Basket Insights is a collection of dashboards that utilize transaction data to reveal various insights. In this guide, you will learn how IBM Basket Insight's next-generation dashboards can help serve your business needs.

Before You Begin

Before you begin using Basket Insights, make sure that you review the requirements for your system.

System Requirements

The following details standard system recommendations for using Basket Insights:

	Recommended
RAM	1.5 GB
CPU	2 GHz
Free Disk Space	100 MB
OS	Windows 7 32-bit or 64-bit
Browser	Internet Explorer 11 or higher **Note:** Internet Explorer 11 in Enterprise Mode is not supported Mozilla Firefox 14.0 or higher The browser must have support of 128-bit encryption enabled.
Export Applications	Adobe Acrobat Reader10.x or higher Microsoft Office 2003-2013
Adobe Flash	Adobe Flash Player 11.x or higher
Screen Resolution	1440 x 900 or 1920 x 1080
Connection	T1
Mouse	Three-button with scroll feature

Dashboard Overview

Each Basket Insights dashboard provides a different perspective, offering new ways to aggregate and analyze your data.

- **Affinity Dashboard**: Demonstrates item co-occurrence, allowing you to see which items are frequently bought together, and might therefore be candidates for cross-promotion or cross-merchandising.
- **Multiples Per Trip Dashboard**: Shows how the selected items are purchased together on individual trips, providing insight into which segments purchase multiples per trip and how frequently multiples occur in trips during the selected time period.

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- **Overlap Dashboard**: Helps users understand which categories or items shoppers buy together over time or in the same trip, as well as items which are frequently purchased exclusively.
- **Purchase Summary Dashboard**: Enables users to compare key sales driver metrics across multiple product selections by segment.
- **Sales Driver Dashboard**: Displays which metrics drive sales growth or decline compared to last year.

What can I do with Basket Insights?

IBM Basket Insights provides a new way to visualize your enterprise, delivering key insights embedded within the workflows of IBM merchandising and trade optimization software services.

Working in Basket Insights

Each Basket Insights dashboard has been developed to provide you with answers to specific business questions. These dashboards can help you quickly gather information and communicate actionable research with other parts of your organization:

- **Intuitive, Usable Design**: Each dashboard was designed to provide quick access to information by product, time period, and shopper segment.
- **Toggling**: View data from different perspectives, such as revenue vs. trips, or actual vs. growth.

- **Drop-downs**: Select key data groups using simple drop-down menus, allowing you to show specific data for segments, geographies, products, and time periods.
- **Drilling**: Easily move from high-level overviews of your entire enterprise to detailed information about specific products using drill-down capabilities within the same dashboard.

- **Metrics**: Each dashboard is built around a set of key sales driver metrics, enabling you to understand complicated relationships quickly. These will enable you to quickly analyze performance of trial and repeat, co-occurrence, and more.
- **Security**: Security measures enable you to restrict access in ways that meet your business and internal security goals.
- **Exporting to Flash**: Dashboards can be exported to Flash to enable single dashboard manipulation, such as changing segments or metric views, offline or outside of the Basket Insights User Interface.

- **Exporting to Excel and PDF**: Data contained in Basket Insights dashboards are easily accessible in common formats, such as Microsoft Excel and Adobe PDF. To export the data from a dashboard, select the information you'd like to export from the **Choose Export** drop-down list, then click the Excel icon:

From the resulting page, you can use the buttons at the top of the screen to export to Excel or PDF, or to print the data shown:

For more information about individual metrics, please see Chapter 3, "Metric Dictionary," on page 17.

Navigating Basket Insights

Hierarchy Navigation

The hierarchy on the left-hand side of the screen is divided into logical units to access information at various levels, such as Department, Category, Type, and Item, or Department, Class, Subclass, and Type. The same dashboard opened from two different levels from the left-hand side navigation will yield different input prompts. For example, opening the Product Dashboard from the Category level will default to category prompts and opening the Product Dashboard from the Item level will default to item prompts.

Note: This guide refers to product hierarchy levels using Department, Category, Type, and Item. However, these terms may vary in your environment, and are customizable upon request. For more information, please contact your IBM representative.

Drilling Down to Lower Hierarchy Levels

Some dashboards accommodate drill-down analysis through multiple levels of the product hierarchy, allowing you to quickly move from one level to another:

Clicking on one of the drill-down buttons on the top-left portion of the page will allow view the next level of that dashboard in a new window. For example, this can enable you to analyze categories within a department or products within a category.

If you cannot drill down within a particular dashboard, close the dashboard and access the dashboard through lower-level navigation instead. For example, if you accessed the Product Dashboard from the Category Navigation Menu and cannot to drill down to item information. Try accessing the Product Dashboard from the Item Navigation Menu instead.

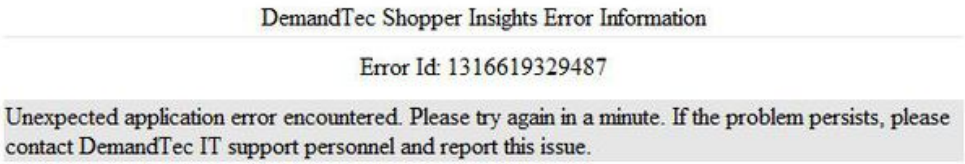
Dashboards Open in New Windows

Some business-critical questions may require the use of multiple dashboards. When loading the dashboards from the Basket Insights User Interface, each dashboard loads in a new window, allowing you to compare reports side by side or drill down to find the exact data you need to make better decisions.

Application Time-Out

IBM Omni-Channel Merchandising applications time out after 30 minutes of inactivity to protect you and prevent security issues. Because Dashboards open in new windows, it may not always be clear when the application has timed out. If you experience any of the following, try re-loading Basket Insights to check whether your session has timed out:

- A dashboard stops responding to metric changes
- A Run Document request does not return within a reasonable timeframe
- The following error message is displayed:



You should close your browser completely and re-log in to the Basket Insights application if you are timed out.

User Access

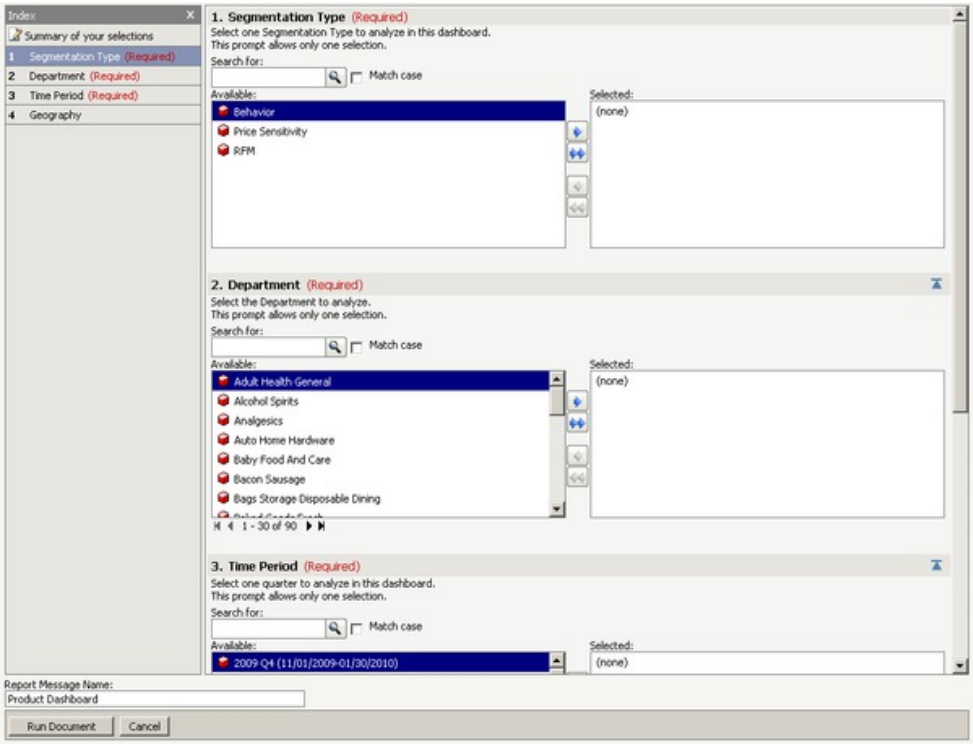
The Basket Insights application is intended to be used as a collaboration tool. As such, Merchants and Vendor representatives both can have access to the same information. To ensure data integrity and confidentiality, Vendors may have restricted access to the retailer's data in the Basket Insights application. Typically, this means that certain dashboards and metrics, such as profit, are not available to a vendor user.

Dashboard Prompts

When you run a dashboard, you must select the criteria you wish to analyze in the selected dashboard. In each selection, prompts explain how the selections will affect your dashboard, showing which fields are required and what types of entries are allowed. After choosing to run your document, some criteria selections will require additional information on a secondary selection criteria page (e.g., The Product Group criteria selection will require an additional entry of the desired Product Group). Required selections vary by dashboard, and may include:

- **Segmentation Type —** Use this menu to select the segmentation schema you wish to see in your analysis. You can only select one segmentation type each time you run a dashboard, even if multiple segmentation schemes are available.
- **Department** — Some Dashboards prompt for a Department to analyze. The Department heading is your product hierarchy and typically correlates to your product category or class structure. The departments displayed are based on your application permissions.

- **Product** — Depending on the dashboard, the product prompt may be used to select a Department, Category, or Product. This selection sets the product focus of the dashboard, whether it is the entire product category or one UPC.
- **Product Hierarchy Level, UPC, or UPC Grouping —** Depending on the dashboard, the product prompt may be used to select a Department, Category, or Product. This selection sets the product focus of the dashboard, whether it is the entire product hierarchy, one UPC, or a group of UPCs. The exact prompt shown will vary, depending on the dashboard drill-down level you select.
- **Time Period —** Each dashboard enables you to analyze a specific time period. In this prompt, you can select the quarter, quarters, or date range to show in the dashboard. In some dashboards, the quarter selected will be compared to the same quarter a year before.
- **Geography or Store Group Level** — Most dashboards allow you to focus your analysis on individual geographic regions or Divisions, while some dashboards may prompt you to specify multiple regions.



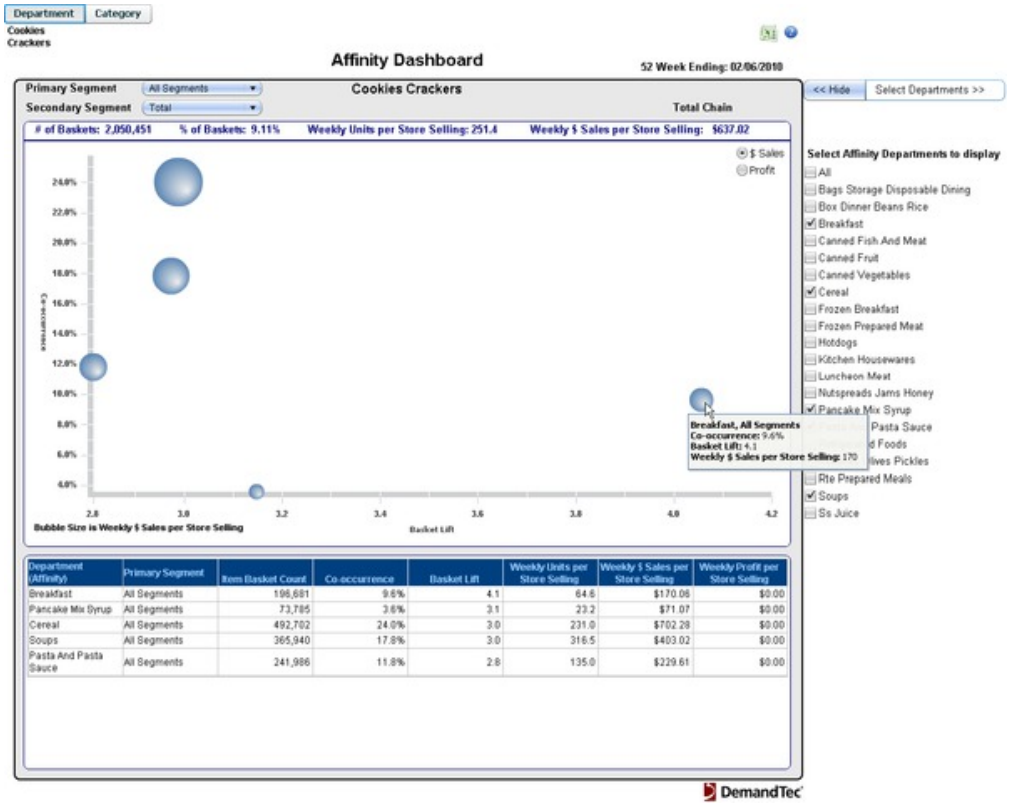
Some Dashboards will give you a secondary prompt page based on the prompts selected on the first page. For example, if you choose Store Groups, a secondary prompt page will display to allow you to select which of the established Store Groups you would like to analyze.

Chapter 2. Using Basket Insights Dashboards

Each of the dashboards included in IBM Basket Insights is outlined below, including descriptions of common usage, the data shown in each dashboard, and how to use that information to enhance your decision-making process.

Affinity Dashboard

The Affinity Dashboard shows how often products or product groups are purchased together in the same basket. This allows you to find products that are likely to have positive indirect effects from promotions, as well as to evaluate items that are suitable for co-promotion or co-merchandising.



In the example above, we see that there is a strong affinity between cookies and items in the Breakfast category, and that items from the two categories co-occurred in 9.6% of baskets. To change the products shown in the bubble graph, you can select or de-select products from the list on the right:

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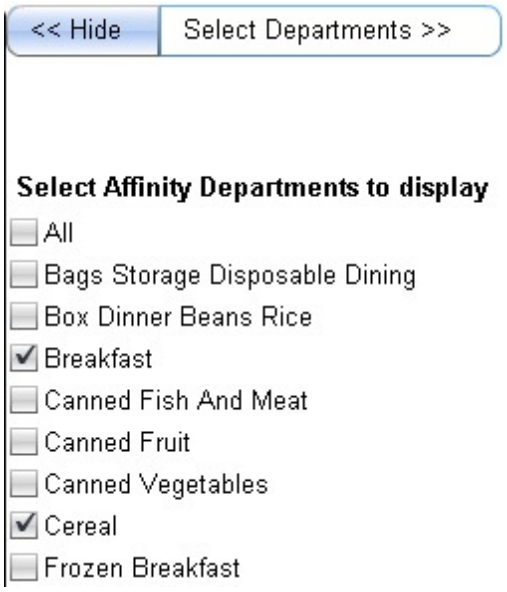


The table at the bottom of the dashboard shows additional relevant data for related products, including basket lift and sales information.

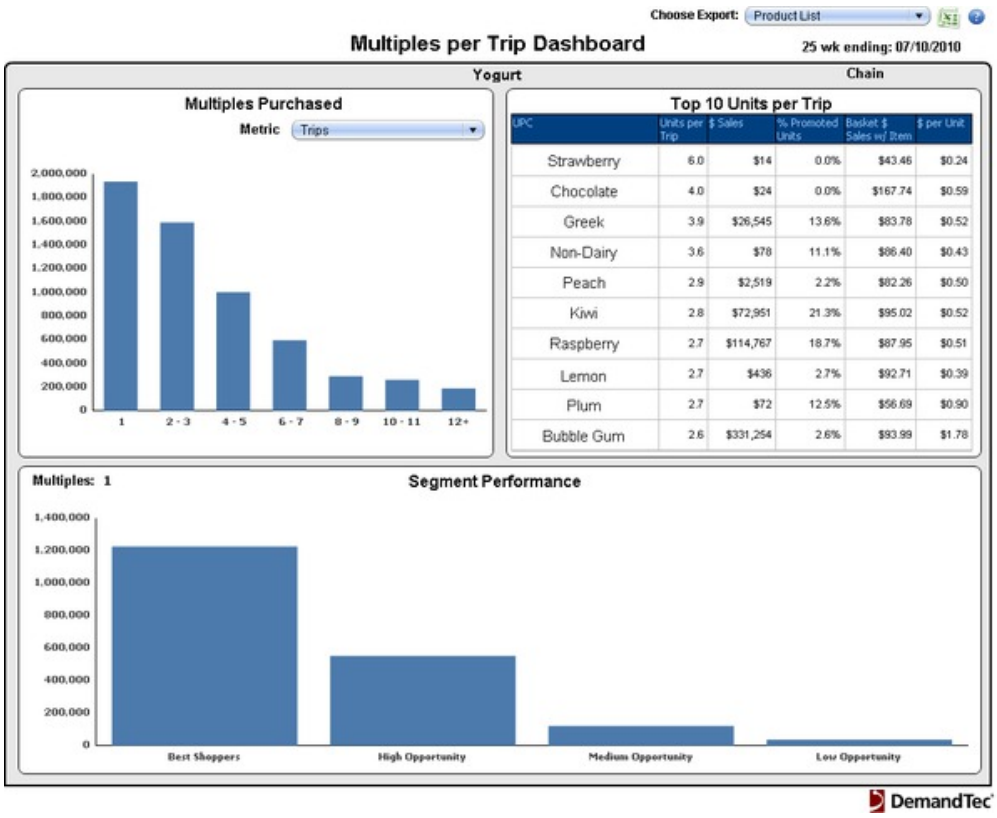
Note: You can choose to analyze trips as well as individual transactions. This is useful if there may be multiple transactions in a single trip due to separate in-store registers. Contact your IBM representative for more information.

The Affinity Dashboard uses the following metrics:

- # of Baskets
- % of Baskets
- Basket Lift
- Co-occurrence
- Item Basket Count
- Weekly Units per Store Selling

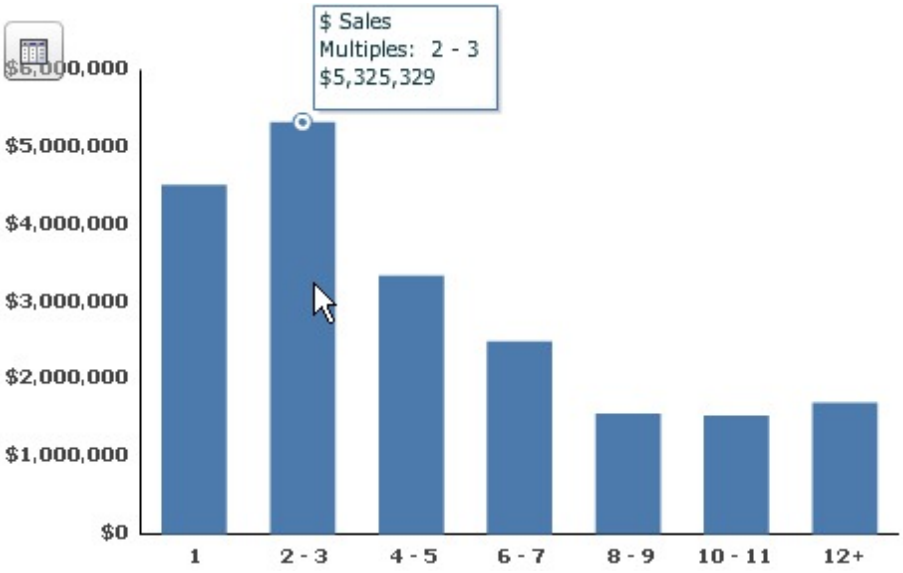
Multiples Per Trip Dashboard

The Multiples Per Trip Dashboard displays information about shopper purchasing patterns when buying one versus multiple items during a trip. In the example below, the **Multiples Purchased** section of the dashboard shows **Trips** for the Yogurt category, aggregated by number of yogurt items purchased during each trip. From the graph, we can see that single purchases accounted for the most Trips, but quite a few shoppers also bought 2-3 yogurts at one time, 4-5 yogurts at one time, etc.

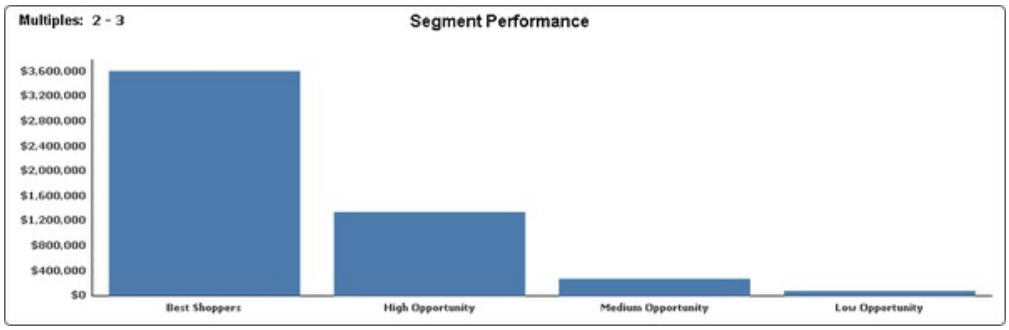


To change the metric displayed in the **Multiples Purchased** and **Segment Performance** sections of the dashboard, select from the **Metric** drop-down menu. The upper right section of the dashboard shows **Top 10 Units per Trip**, displaying UPCs from your selections that drive the most multiples purchasing.

Mousing over any of the bars in the **Multiples Purchased** section displays the characteristics for that bar. The example below shows that shoppers who purchased 2-3 yogurts in one trip accounted for a greater portion of the **$ Sales** for yogurt than any other group:



Clicking on any bar in the graph above changes the view for the **Segment Performance** section to reflect segment performance for the selected group of shoppers. For example, the graph below shows that the "Best Shoppers" segment accounted for most of the $ Sales among shoppers who purchased 2-3 yogurt items in a trip.



Interpreting Results

This dashboard provides a deeper understanding of your shoppers' multiples purchasing behavior, allowing you to tailor your multiples strategies for segments, locations, and products.

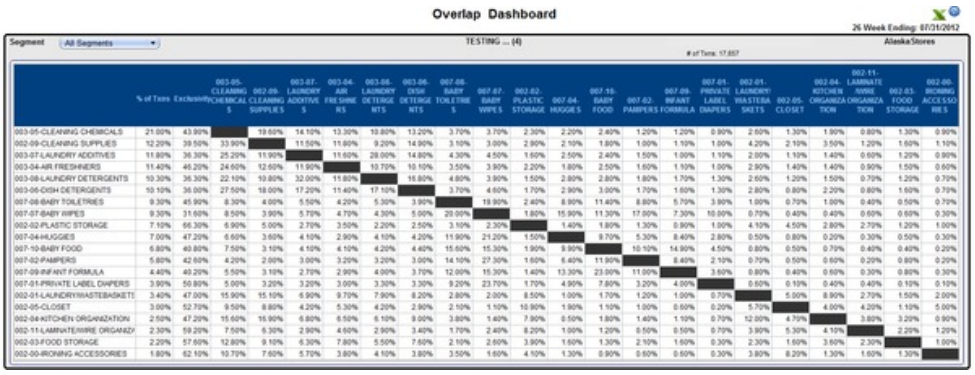
The Multiples Per Trip Dashboard uses the following metrics:

- $ per Trip
- $ per Unit
- $ Sales
- % of $ Sales
- % of Promoted Units
- % of Trips
- Basket $ Sales with Item
- Trips
- Units
- Units per Trip

Overlap Dashboard

The Overlap Dashboard shows how frequently products, or portions of your product hierarchy, are purchased together over the time period analyzed. The dashboard displays a grid of up to 20 products or product hierarchy levels, sorted by the percent of trips that contained those items out of all trips that contained any of the selected products. The Overlap Dashboard includes:

- Flexible product selection — use customized Product Groups or browse your product hierarchy to select products for analysis
- Segmentation — select from your available segmentation types and view sales metrics by segment
- Time period — use any time period with sales data, up to 52 weeks
- Flexible store groups — use predefined store groups or store divisions to select locations



Overlap Dashboard

26 Week Ending: 07/31/2012

Segment: All Segments | TESTING ... (4) | # of Tens: 17,857 | Alaska Stores

	% of Tens	Exclusivity	003-05-CLEANING CHEMICALS	002-09-CLEANING SUPPLIES	003-07-LAUNDRY ADDITIVES	003-04-AIR FRESHINERS	003-08-LAUNDRY DETERGENTS	003-06-DISH DETERGENTS	007-08-BABY TOILETRIES	007-07-BABY WIPES	002-02-PLASTIC STORAGE	007-04-HUGGIES	007-10-BABY FOOD	007-02-PAMPERS	007-09-INFANT FORMULA	007-01-PRIVATE LABEL DIAPERS	002-01-LAUNDRY/WASTEBASKETS	002-05-CLOSET	002-04-KITCHEN ORGANIZATION	002-11-LAMINATE/WIRE ORGANIZATION	002-03-FOOD STORAGE	002-00-IRONING ACCESSORIES
003-05-CLEANING CHEMICALS	21.00%	43.90%		19.60%	14.10%	13.30%	10.80%	13.20%	3.70%	3.70%	2.30%	2.20%	2.40%	1.20%	1.20%	0.90%	2.50%	1.30%	1.90%	0.80%	1.30%	0.90%
002-09-CLEANING SUPPLIES	12.20%	39.50%	33.90%		11.50%	11.80%	9.20%	14.90%	3.10%	3.00%	2.90%	2.10%	1.80%	1.00%	1.10%	1.00%	4.20%	2.10%	3.50%	1.20%	1.60%	1.10%
003-07-LAUNDRY ADDITIVES	11.80%	36.30%	25.20%	11.90%		11.60%	28.00%	14.80%	4.30%	4.50%	1.60%	2.50%	2.40%	1.50%	1.00%	1.10%	2.00%	1.10%	1.40%	0.60%	1.20%	0.90%
003-04-AIR FRESHINERS	11.40%	46.20%	24.60%	12.60%	11.90%		10.70%	10.10%	3.50%	3.90%	2.20%	1.80%	2.50%	1.60%	1.10%	1.00%	2.90%	1.40%	1.40%	0.90%	1.50%	0.60%
003-08-LAUNDRY DETERGENTS	10.30%	36.30%	22.10%	10.80%	32.00%	11.80%		16.80%	4.80%	3.90%	1.50%	2.80%	2.80%	1.80%	1.70%	1.30%	2.60%	1.20%	1.50%	0.70%	1.20%	0.70%
003-06-DISH DETERGENTS	10.10%	36.00%	27.50%	18.00%	17.20%	11.40%	17.10%		3.70%	4.60%	1.70%	2.90%	3.00%	1.70%	1.60%	1.30%	2.80%	0.80%	2.20%	0.80%	1.60%	0.70%
007-08-BABY TOILETRIES	9.30%	45.90%	8.30%	4.00%	5.50%	4.20%	5.30%	3.90%		15.90%	2.40%	8.90%	11.40%	8.80%	5.70%	3.90%	1.00%	0.70%	1.00%	0.40%	0.50%	0.70%
007-07-BABY WIPES	9.30%	31.60%	8.50%	3.90%	5.70%	4.70%	4.30%	5.00%	20.00%		1.80%	15.90%	11.30%	17.00%	7.30%	10.00%	0.70%	0.40%	0.40%	0.60%	0.60%	0.30%
002-02-PLASTIC STORAGE	7.10%	66.30%	6.90%	5.00%	2.70%	3.50%	2.20%	2.50%	3.10%	2.30%		1.40%	1.80%	1.30%	0.90%	1.00%	4.10%	4.50%	2.80%	2.70%	1.20%	1.00%
007-04-HUGGIES	7.00%	47.20%	6.60%	3.60%	4.10%	2.90%	4.10%	4.20%	11.90%	21.20%	1.50%		9.70%	5.30%	8.40%	2.80%	0.50%	0.80%	0.20%	0.30%	0.50%	0.30%
007-10-BABY FOOD	6.80%	40.80%	7.50%	3.10%	4.10%	4.10%	4.20%	4.40%	15.60%	15.30%	1.90%	9.90%		10.10%	14.90%	4.50%	0.80%	0.50%	0.70%	0.40%	0.40%	0.20%
007-02-PAMPERS	5.80%	42.60%	4.20%	2.00%	3.00%	3.20%	3.20%	3.00%	14.10%	27.30%	1.60%	6.40%	11.90%		8.40%	2.10%	0.70%	0.50%	0.60%	0.20%	0.80%	0.20%
007-09-INFANT FORMULA	4.40%	40.20%	5.50%	3.10%	2.70%	2.90%	4.00%	3.70%	12.00%	15.30%	1.40%	13.30%	23.00%	11.00%		3.50%	0.80%	0.40%	0.60%	0.30%	0.80%	0.30%
007-01-PRIVATE LABEL DIAPERS	3.90%	50.80%	5.00%	3.20%	3.20%	3.00%	3.30%	3.30%	9.20%	23.70%	1.70%	4.90%	7.80%	3.20%	4.00%		0.60%	0.10%	0.40%	0.40%	0.10%	0.10%
002-01-LAUNDRY/WASTEBASKETS	3.40%	47.00%	15.90%	15.10%	6.90%	9.70%	7.90%	8.20%	2.80%	2.00%	8.50%	1.00%	1.70%	1.20%	1.00%	0.70%		5.00%	0.90%	2.70%	1.50%	2.00%
002-05-CLOSET	3.00%	52.70%	9.50%	8.80%	4.20%	5.30%	4.20%	2.90%	2.10%	1.10%	10.90%	1.90%	1.10%	1.00%	0.60%	0.20%	5.70%		4.00%	4.20%	1.10%	5.00%
002-04-KITCHEN ORGANIZATION	2.50%	47.20%	15.60%	15.90%	6.80%	6.50%	6.10%	9.00%	3.80%	1.40%	7.90%	0.50%	1.80%	1.40%	1.10%	0.70%	12.00%	4.70%		3.80%	3.20%	0.90%
002-11-LAMINATE/WIRE ORGANIZ	2.30%	59.20%	7.50%	6.30%	2.90%	4.60%	2.90%	3.40%	1.70%	2.40%	8.20%	1.00%	1.20%	0.50%	0.50%	0.70%	3.90%	5.30%	4.10%		2.20%	1.20%
002-03-FOOD STORAGE	2.20%	57.60%	12.80%	9.10%	6.30%	7.80%	5.50%	7.60%	2.10%	2.60%	3.90%	1.60%	1.30%	2.10%	1.60%	0.30%	2.30%	1.60%	3.60%	2.30%		1.00%
002-00-IRONING ACCESSORIES	1.80%	62.10%	10.70%	7.60%	5.70%	3.80%	4.10%	3.80%	3.50%	1.60%	4.10%	1.30%	0.90%	0.60%	0.60%	0.30%	3.80%	8.20%	1.30%	1.60%	1.30%	

For each row, the value in the column for that row shows the **% Overlap** — how frequently purchasers of the item in the row also purchased the item in the column over the same period. In the example below, 33.90% of people who purchased "cleaning supplies" during this period also purchased "cleaning chemicals" during the same period. By contrast, only 19.60% of people who purchased "cleaning chemicals" during this period purchased "cleaning supplies" during the same period.

	% of Trips	Exclusivity	CLEANING CHEMICALS	CLEANING SUPPLIES
CLEANING CHEMICALS	21.00%	43.90%		19.60%
CLEANING SUPPLIES	12.20%	39.50%	33.90%	
LAUNDRY	11.80%	36.30%	25.20%	11.90%

In addition to a matrix showing the percentage of co-purchasing between each of the 20 items, you can use the **Exclusivity** column to view how frequently the items were purchased alone. If you want to review results for a particular segment, use the **Segment** drop-down menu in the upper left-hand corner of the dashboard.

Note: The Overlap Dashboard is a flexible report, reporting metric based on a 10% sample. You can not drill down through your product hierarchy in the Overlap Dashboard.

Interpreting Results

You can use the Overlap Dashboard to answer a wide variety of questions, such as:

- What products do shoppers purchase together over time?
- What % of trips are exclusive to a single product?
- What products appear together in the same trip?

You can use the overlap percentages to determine opportunities for co-promotion, identify unique co-purchasing behavior by segment, and identify items that are likely to bring shoppers in for an exclusive trip.

Note: You can choose to analyze trips as well as individual transactions. This is useful if there may be multiple transactions in a single trip due to separate in-store registers. Contact your IBM representative for more information.

The Overlap Dashboard uses the following metrics:

- % of Trips
- Exclusivity
- % Overlap (label not displayed in User Interface)
- % of Shoppers

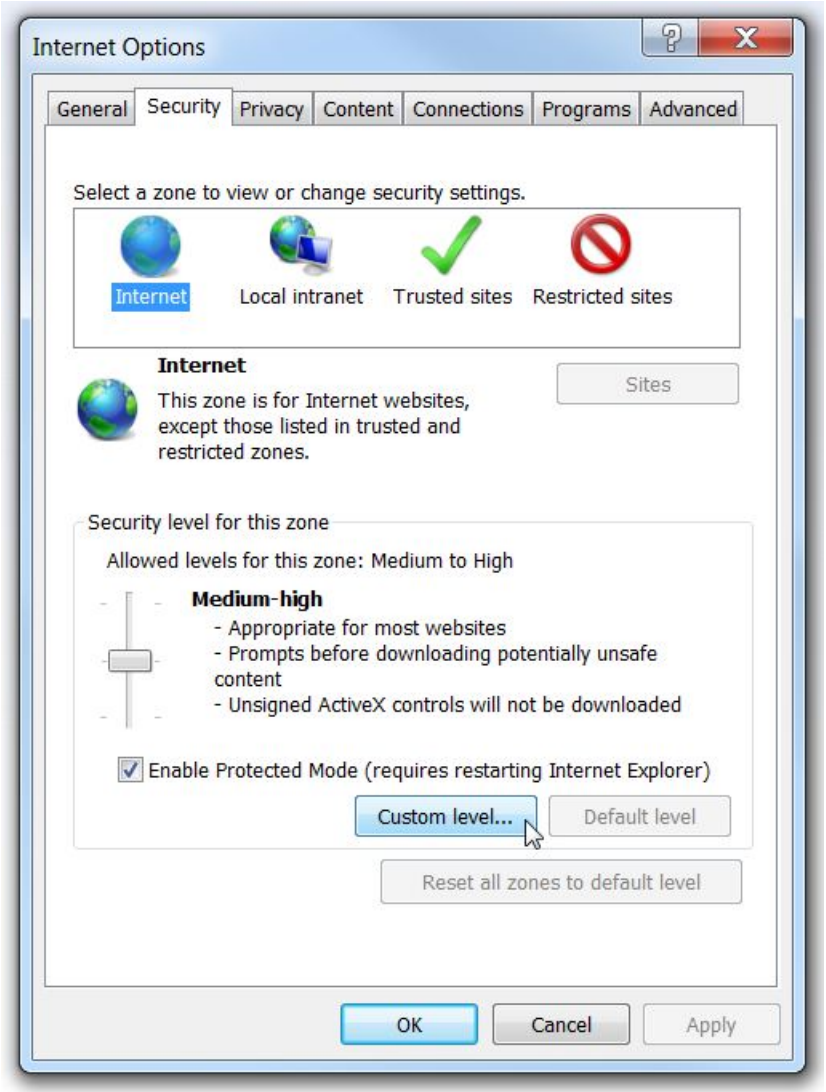
Exporting Overlap Dashboard Results

About this task

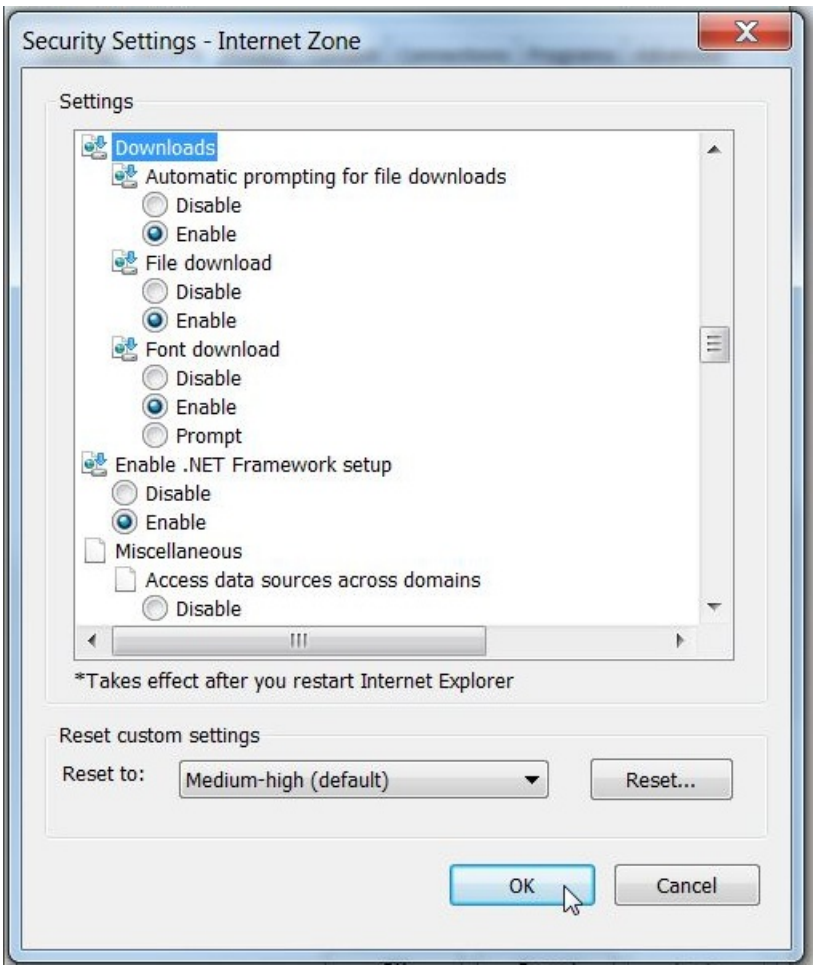
When Overlap Dashboard results are exported, they are sent directly to Microsoft Excel. To ensure successful export, Internet Explorer 8 must have the following settings enabled: **Automatic prompting for file download**, **File download**, and **Allow script-initiated windows without size or position contraints**. To enable these settings:

Procedure

1. In the browser menu, navigate to **Tools** > **Internet Options**.
2. Navigate to the **Security** tab and click on **Custom level...**.



3. Scroll down to the **Downloads** section and click on the **Enable** radio button directly underneath **Automatic prompting for file downloads** and the **Enable** radio button directly underneath **File download**.



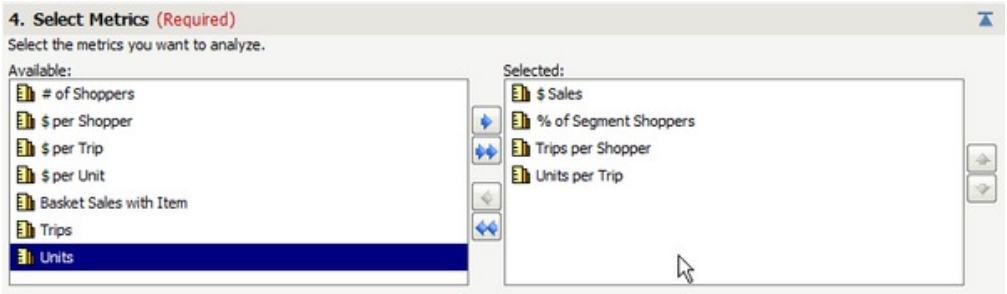
4. Scroll down to the **Miscellaneous** section and click on the **Enable** radio button directly underneath **Allow script-initiated windows without size or position constraints**.
5. Click **OK** in the **Security Settings - Internet Zone** box.
6. Click **Apply** in the **Internet Options** box.

Purchase Summary Dashboard

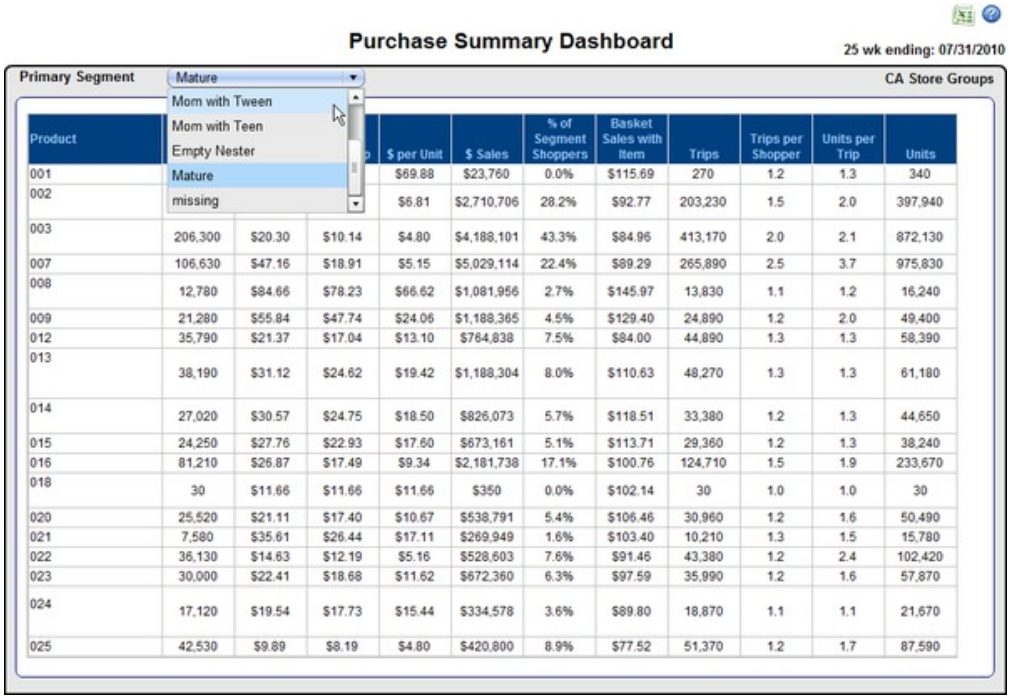
The Purchase Summary Dashboard enables you to analyze key metrics across segments using flexible product selections and custom metric selections. You can use the Purchase Summary Dashboard to create on-demand reports, using:

- Flexible product selection — use customized Product Groups, browse your product hierarchy, or search for products to analyze.
- Segmentation — select from your available segmentation types and view sales metrics by segment
- Time period — use any time period with sales data, up to 52 weeks
- Flexible store groups — use predefined store groups or store divisions to select locations

When loading the dashboard, you can choose the metrics to display in the Select Metrics area. After loading the dashboard, you will be able to see these metrics for the selected products by segment.



To view a different segment's sales performance metrics, select a segment from the **Primary Segment** drop-down menu. If your segmentation type has secondary segments, you will also be able to select from secondary segmentation types.



Product				$ per Unit	$ Sales	% of Segment Shoppers	Basket Sales with Item	Trips	Trips per Shopper	Units per Trip	Units
001				$69.88	$23,760	0.0%	$115.69	270	1.2	1.3	340
002				$6.81	$2,710,706	28.2%	$92.77	203,230	1.5	2.0	397,940
003	206,300	$20.30	$10.14	$4.80	$4,188,101	43.3%	$84.96	413,170	2.0	2.1	872,130
007	106,630	$47.16	$18.91	$5.15	$5,029,114	22.4%	$89.29	265,890	2.5	3.7	975,830
008	12,780	$84.66	$78.23	$66.62	$1,081,956	2.7%	$145.97	13,830	1.1	1.2	16,240
009	21,280	$55.84	$47.74	$24.06	$1,188,365	4.5%	$129.40	24,890	1.2	2.0	49,400
012	35,790	$21.37	$17.04	$13.10	$764,838	7.5%	$84.00	44,890	1.3	1.3	58,390
013	38,190	$31.12	$24.62	$19.42	$1,188,304	8.0%	$110.63	48,270	1.3	1.3	61,180
014	27,020	$30.57	$24.75	$18.50	$826,073	5.7%	$118.51	33,380	1.2	1.3	44,650
015	24,250	$27.76	$22.93	$17.60	$673,161	5.1%	$113.71	29,360	1.2	1.3	38,240
016	81,210	$26.87	$17.49	$9.34	$2,181,738	17.1%	$100.76	124,710	1.5	1.9	233,670
018	30	$11.66	$11.66	$11.66	$350	0.0%	$102.14	30	1.0	1.0	30
020	25,520	$21.11	$17.40	$10.67	$538,791	5.4%	$106.46	30,960	1.2	1.6	50,490
021	7,580	$35.61	$26.44	$17.11	$269,949	1.6%	$103.40	10,210	1.3	1.5	15,780
022	36,130	$14.63	$12.19	$5.16	$528,603	7.6%	$91.46	43,380	1.2	2.4	102,420
023	30,000	$22.41	$18.68	$11.62	$672,360	6.3%	$97.59	35,990	1.2	1.6	57,870
024	17,120	$19.54	$17.73	$15.44	$334,578	3.6%	$89.80	18,870	1.1	1.1	21,670
025	42,530	$9.89	$8.19	$4.80	$420,800	8.9%	$77.52	51,370	1.2	1.7	87,590

To export or print your custom dashboard results, click the Excel icon in the upper-right-hand corner of the dashboard.

Interpreting Results

This dashboard provides a flexible custom report baseline, which you can use to split up and analyze your sales data using product groups, specific metrics, segmentation types, and more. You can use these reports to:

- Analyze segment performance for the selected products over the time period
- See which metrics are driving growth for product groups or parts of your product hierarchy
- Compare segment performance across equivalent stores, timeframes, and metrics

The Purchase Summary Dashboard uses the following metrics:

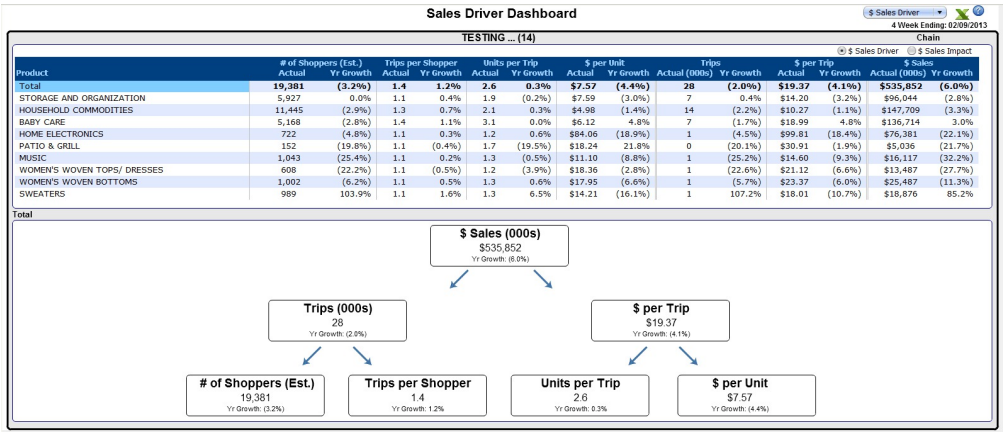
- # of Shoppers
- $ per Shopper

- $ per Trip
- $ per Unit
- $ Sales
- % of Segment Shoppers
- Basket $ Sales with Item
- Trips
- Trips per Shopper
- Units per Trip
- Units

Sales Driver Dashboard

The Sales Driver Dashboard displays which metrics drive sales growth or decline compared to last year. It takes into account all transactions, not only transactions made by shoppers. Key metrics in the Sales Driver Dashboard include:

- # of Shoppers
- Trips per Shopper
- Units per Trip
- $ per Unit
- Trips
- $ per Trip
- $ Sales



Product	# of Shoppers (Est.) Actual	# of Shoppers (Est.) Yr Growth	Trips per Shopper Actual	Trips per Shopper Yr Growth	Units per Trip Actual	Units per Trip Yr Growth	$ per Unit Actual	$ per Unit Yr Growth	Trips Actual (000s)	Trips Yr Growth	$ per Trip Actual	$ per Trip Yr Growth	$ Sales Actual (000s)	$ Sales Yr Growth
Total	**19,381**	**(3.2%)**	**1.4**	**1.2%**	**2.6**	**0.3%**	**$7.57**	**(4.4%)**	**28**	**(2.0%)**	**$19.37**	**(4.1%)**	**$535,852**	**(6.0%)**
STORAGE AND ORGANIZATION	5,927	0.0%	1.1	0.4%	1.9	(0.2%)	$7.59	(3.0%)	7	0.4%	$14.20	(3.2%)	$96,044	(2.8%)
HOUSEHOLD COMMODITIES	11,445	(2.9%)	1.3	0.7%	2.1	0.3%	$4.98	(1.4%)	14	(2.2%)	$10.27	(1.1%)	$147,709	(3.3%)
BABY CARE	5,168	(2.8%)	1.4	1.1%	3.1	0.0%	$6.12	4.8%	7	(1.7%)	$18.99	4.8%	$136,714	3.0%
HOME ELECTRONICS	722	(4.8%)	1.1	0.3%	1.2	0.6%	$84.06	(18.9%)	1	(4.5%)	$99.81	(18.4%)	$76,381	(22.1%)
PATIO & GRILL	152	(19.8%)	1.1	(0.4%)	1.7	(19.5%)	$18.24	21.8%	0	(20.1%)	$30.91	(1.9%)	$5,036	(21.7%)
MUSIC	1,043	(25.4%)	1.1	0.2%	1.3	(0.5%)	$11.10	(8.8%)	1	(25.2%)	$14.60	(9.3%)	$16,117	(32.2%)
WOMEN'S WOVEN TOPS/ DRESSES	608	(22.2%)	1.1	(0.5%)	1.2	(3.9%)	$18.36	(2.8%)	1	(22.6%)	$21.12	(6.6%)	$13,487	(27.7%)
WOMEN'S WOVEN BOTTOMS	1,002	(6.2%)	1.1	0.5%	1.3	0.6%	$17.95	(6.6%)	1	(5.7%)	$23.37	(6.0%)	$25,487	(11.3%)
SWEATERS	989	103.9%	1.1	1.6%	1.3	6.5%	$14.21	(16.1%)	1	107.2%	$18.01	(10.7%)	$18,676	85.2%

The above grid is interactive and the visualization will update based on your product selection.

You can also use the **$ Sales Impact** radio button to see what effect changes to your key sales metrics had on your bottom line sales. For example, the $ Sales Impact view might help you answer the following question: "Was the decline in sales for this category more due to trips or dollar per trip?"

Note: The Sales Driver Dashboard is based off of a 10% sample of sales data. You cannot drill down on this report. If your company has customized your product level labels, you will see customized labels on the Basket Insights home page and in the report. Vendors can browse and select only those products to which they have access.

Chapter 3. Metric Dictionary

The Metric Dictionary provides brief explanations of the metrics used throughout IBM Basket Insights. Usage of these metrics may vary by dashboard, as noted.

of Baskets

Also known as: Purchase Occasions, Trips

Description: Number of distinct trips that contained the product

Calculation: Count of distinct baskets that contained the product

Additive: No

of Shoppers

Description: Number of identified shoppers who purchased the product at least once

Calculation: Count of distinct shoppers who purchased the product at least once

Additive: Yes

of Shoppers (PDI) (Drillable Segment Compare)

Description: Relative importance, based on # of Shoppers, of a product for a segment in comparison to the importance of the product's parent for the segment

Calculation: [(% of shoppers in a segment who purchased a product) / (% of all shoppers in a segment who purchased the product's parent)] * 100

Additive: No

of Shoppers Index

Description: Relative importance, based on % of Shoppers, of a product for a segment in comparison to the size of the segment

Calculation: [(% of shoppers in a segment who purchased a product) / (% of shoppers in the segment)] * 100

Additive: No

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of Triers

Description: Number of shoppers who purchased a product once

Calculation: Count of distinct shoppers who purchased a product once

Additive: No

$ per Shopper

Also known as: Buy Rate

Description: Dollars spent per shopper for a product

Calculation: $ Sales of a product / # of shoppers who purchased the product

OR

Trips per Shopper * $ per Trip

Additive: No

$ per Shopper Index

Description: Relative importance, based on $ per Shopper, of a product for a segment in comparison to the importance of the product for all shoppers

Calculation: [(Average $ Sales of a product by a segment) / (Average $ Sales of the product by all shoppers)] * 100

Additive: No

$ per Trip

Also known as: $ per Txn, Purchase Size

Description: Dollars spent per trip on a product

Calculation: $ Sales of a product / # of trips that contained the product

OR

$ per Unit * Units per Shopper

Additive: No

$ per Trip Index

Also known as: $ per Txn Index

Description: Relative importance, based on $ per Trip, of a product for a segment in comparison to the importance of the product for all shoppers

Calculation: [(Average $ Sales per Trip that contained a product by a segment) / (Average $ Sales per Trip that contained the product by all shoppers)] * 100

Additive: No

$ per Unit

Also known as: Average Retail Price (ARP)

Description: Average unit price for a product

Calculation: $ Sales of a product / # of units of the product that were purchased

Additive: No

$ per Unit Index

Description: Relative importance, based on $ per Unit, of a product for a segment in comparison to the importance of the product for all shoppers

Calculation: [(Average $ Sales per Unit of a product by a segment) / (Average $ Sales per Unit of a product by all shoppers)] * 100

Additive: No

$ Sales

Description: Dollars spent on a product

Calculation: Sum of $ Sales for a product

Additive: Yes

$ Sales (PDI) (Drillable Segment Compare)

Description: Relative importance, based on $ Sales, of a product for a segment in comparison to the importance of the product's parent for the segment

Calculation: [(% of $ Sales for a product by a segment) / (% of $ Sales for the product's parent by the segment)] * 100

Additive: No

$ Sales Index

Description: Relative importance, based on $ Sales, of a product for a segment in comparison to the size of the segment

Calculation: [(% of $ Sales for a product by a segment) / (% of shoppers in the segment)] * 100

Additive: No

$ Sales per Week

Description: $ Sales per shopper per week for a product

Calculation: $ Sales / # of Weeks

Additive: No

% ACV

Description: Percent of $ Sales of stores that sold a product out of $ Sales of all stores

Calculation: $ Sales of stores that sold the a product / $ Sales of all stores

Additive: No

% of $ Sales (Multiples, Purchase Frequency)

Description: Percent of $ Sales of a product in a basket. For example, 20% of $ Sales were purchased by people buying two units at a time.

Calculation: $ Sales of a product in a basket / $ Sales of the product

Additive: No

% of Baskets

Also known as: % of Trips

Description: Percent of all baskets that contained a product

Calculation: # of Baskets that contained a product / # of Baskets

Additive: No

% Overlap (Shopper)

Description: Percent of shoppers who purchased both products out of all shoppers who purchased the product in the rows

Calculation: # of Shoppers who purchased both products / # of Shoppers who purchased the product in the rows

Additive: No

% Overlap (Trip)

Description: Percent of trips that contained both products out of all trips that contained the product in the rows

Calculation: # of Trips that contained both products / # of Trips that contained the product in the rows

Additive: No

% of Promoted Units (Multiples, Purchase Frequency)

Description: Percent of units of a product in a basket that were purchased on promotion. For example, 20% of all units were purchased on promotion.

Calculation: Units Sales on promotion / Unit Sales

Additive: No

% of Repeat

Description: Percent of triers who are repeaters. The value is <= 100%.

Calculation: (Cum - # of Repeaters / Cum - # of Triers) * 100

Additive: No

% of Segment Shoppers

Also known as: Segment Penetration,

Description: Percent of segment shoppers who purchased a product

Calculation: (# of segment shoppers who purchased a product / # of segment shoppers) *100

Additive: No

% of Shoppers (Overlap)

Description: Percent of shoppers who purchased a product out of all shoppers who purchased any of the selected products

Calculation: # of Shoppers who purchased a product / # of Shoppers who purchased any of the selected products

Additive: No

% of Trips (Multiples)

Also known as: % of Baskets, % of Txns

Description: Percent of trips that contained x # of units of a product. For example, 20% of all trips contained two units of the product.

Calculation: # of Trips with x # of units of a product / # of Trips

Additive: No

% of Trips (Overlap)

Also known as: % of Baskets, % of Txns

Description: Percent of trips that contained a product out of all trips that contained any of the selected products

Calculation: # of Trips that contained a product / # of Trips that contained any of the selected products

Additive: No

of Shoppers (PDI) (Flexible Segment Compare)

Description: Relative importance, based on # of Shoppers, of a product for a segment in comparison to the importance of all the selected products for the segment

Calculation: (% of shoppers in a segment who purchased a product / % of shoppers in the segment who purchased any of the selected products) * 100

Additive: No

$ Sales (PDI) (Flexible Segment Compare)

Description: Relative importance, based on $ Sales, of a product for a segment in comparison to the importance of all the selected products for the segment

Calculation: (% of $ Sales of a product by a segment / % of $ Sales by the segment for the sum of the selected products) * 100

Additive: No

Trips (PDI) (Flexible Segment Compare)

Also known as: Txns (PDI)

Description: Relative importance, based on # of Trips, of a product for a segment in comparison to the importance of all the selected products for the segment

Calculation: (% of Trips by a segment that contained a product / (% of Trips by a segment that contained any of the selected products) * 100

Additive: No

Units (PDI) (Flexible Segment Compare)

Description: Relative importance, based on # of Units, of a product for a segment in comparison to the importance of all the selected products for the segment

Calculation: (% of Units of product purchased by a segment) / (% of Units of all the selected products purchased by the segment) * 100

Additive: No

Basket $ Sales with Item

Description: Average dollar value of baskets that contained a product

Calculation: $ Sales of all baskets that contained a product / # of baskets that contained the product

Additive: No

Basket Lift

Description: Probability that two products will be purchased together. The value should be read as "x times more likely."

Calculation: Co-occurrence of two products / # of baskets that contained the second product / # of total baskets

Additive: No

Basket Unit Sales with Item

Description: Average number of units in all baskets that contained a product

Calculation: # of units in baskets that contained a product / # of baskets that contained the product

Additive: No

Co-occurrence

Description: Percent of baskets that contained both products

Calculation: (# of Baskets that contained both products / # of Baskets) * 100

Additive: No

Cum - # of Triers

Description: Cumulative number of shoppers who purchased a product once. For each week in the dashboard, it adds the additional number of triers.

Calculation: Count of baskets that contained a product

Additive: No

Cum - # of Repeaters

Description: Cumulative number of shoppers who purchased a product two or more times. For each week in the dashboard, it adds the additional number of repeaters.

Calculation: # of Shoppers who purchased a product at least twice

Additive: No

Exclusivity (Shopper)

Description: Percent of shoppers who purchased only the indicated product(s) and nothing else, out of all shoppers who purchased the product.

Calculation: # of Shoppers who purchased only a product and nothing else / # of Shoppers who purchased the product

Additive: No

Exclusivity (Trip)

Description: Percent of trips that contained only the indicated product(s) and nothing else, out of all trips that contained the product.

Calculation: # of Trips that contained only the product and nothing else / # of Trips that contained the product

Additive: No

$ per Unit Index (Event Compare)

Description: $ per Unit per week for a product during Event 2 compared to Event 1

Calculation: [((Event 2 $ Sales / Units)) / # of Weeks) / ((Event 1 $ Sales / Units))/# of Weeks)] * 100

OR

(Event 2 Weekly $ per Unit / Event 1 $ per Unit) * 100

Additive: No

$ Sales per Week Index (Event Compare)

Description: $ Sales per Shopper per week for a product during Event 2 compared to Event 1

Calculation: [(Event 2 $ Sales/# of Weeks) / (Event 1$ Sales/# of Weeks)] * 100

OR

(Event 2 $ Sales per Week / Event 1 $ Sales per Week) * 100

Additive: No

Basket $ Sales with Item Index (Event Compare)

Also known as: Total Basket Ring Index

Description: $ Sales of a basket that contained a product during Event 2 compared to Event 1

Calculation: (Event 2 dollar value of baskets that contained a product / Event 1 dollar value of baskets that contained a product) * 100

Additive: No

Units per Week (Event Compare)

Description: Unit Sales for a product per week during Event 2 compared to Event 1

Calculation: Event 2 Unit Sales / # of Weeks

Additive: No

Units per Week Index (Event Compare)

Description: Unit Sales for a product per week during Event 2 compared to Event 1

Calculation: [(Event 2 Unit Sales/# of Weeks) / (Event 1 Unit Sales/# of Weeks)] * 100

OR

(Event 2 Units per Week / Event 1 Units per Week) * 100

Additive: No

$ per Trip Index (Event Compare)

Also known as: $ per Txn Index

Description: $ Sales per Trip per week for a product during Event 2 compared to Event 1

Calculation: [((Event 2 $ Sales / Trip))/ # of Weeks) / ((Event 1 $ Sales / Trip)) / # of Weeks)] * 100

OR

(Event 2 Wkly $ per Trip / Event 1 Wkly $ per Trip) * 100

Additive: No

Wkly Trips Index (Event Compare)

Also known as: Wkly Txns Index

Description: # of Trips that contained a product per week during Event 2 compared to Event 1

Calculation: [(Event 2 Trips / # of Weeks) / (Event 1 Trips/# of Weeks)] * 100

OR

(Event 2 Trips / Event 1 Trips)*100

Additive: No

Units per Trip Index (Event Compare)

Also known as: Units per Txn Index

Description: Units per Trip per week for a product group during Event 2 compared to Event 1

Calculation: [(Event 2 Trips / # of Weeks) / (Event 1 Trips / # of Weeks)] * 100

OR

(Event 2 # of Shoppers / Event 1 $ per Shopper) * 100

Additive: No

Item $ per Basket

Description: Dollars spent on a product per trip

Calculation: $ Sales of a product / # of Trips that contained the product

OR

$ per Unit * Units per Shopper

Additive: No

Item Basket Count

Description: Number of baskets that contained both products

Calculation: Count of distinct baskets that contained both products

Additive: No

Item Profit per Basket

Description: Number of units in a basket that contained a product, excluding the product

Calculation: Count of units in a basket that contained a product, excluding the product's units

Additive: No

Item Units per Basket

Description: Number of units of a product per basket

Calculation: Unit Sales of a product / # of Trips that contained the product

Additive: No

Non Promoted Units

Description: Number of units of a product that were purchased without a promotion

Calculation: # of non-promoted units of a product

Additive: Yes

POS $ Sales

Description: Total dollars of a product based on all transactions

Calculation: Sum of $ Sales for a product across all transactions

Additive: Yes

POS Units

Description: Number of units of a product that were purchased based on all transactions

Calculation: Sum of units of a product across all transactions

Additive: Yes

Profit

Description: Variance between $ Sales and Cost

Calculation: $ Sales of a product - Costs of a product

Additive: Yes

Profit per Shopper

Description: Profit per shopper for a product

Calculation: Profit / # of Shoppers

OR

Trips per Shopper * Profit per Trip

Additive: No

Profit per Trip

Also known as: Profit per Txn

Description: Profit per trip for a product

Calculation: Profit / Trips

OR

Profit per Unit * Units per Shopper

Additive: No

Profit per Unit

Description: Average profit for a product

Calculation: Profit / Units

Additive: No

Promoted Units

Description: Number of units of a product that are purchased during a promotion

Calculation: Count of promoted units

Additive: Yes

Rest of Basket $ Sales

Description: Average dollar value of baskets that contained a product, excluding the product

Calculation: $ Sales of baskets that contained a product - $ Sales of the product

Additive: No

Rest of Basket Profit Sales

Description: Profit of baskets that contained a product, excluding the product

Calculation: Profit of baskets that contained a product - Profit of the product

Additive: No

Rest of Basket Units

Description: Average number of units in baskets that contained a product, excluding the product

Calculation: Number of units in baskets that contained a product - number of units of the product

Additive: No

Share of Requirements

Also known as: Loyalty

Description: Percent of $ Sales that a product represents among shoppers who purchased from the product's parent

Calculation: ($ Sales of a product by a segment / $ Sales of the product's parent by the segment) * 100

Additive: No

Trips

Also known as: # of Baskets, Transactions, Txns

Description: Number of trips that contained a product

Calculation: Count of trips that contained a product

Additive: Yes

Trips (PDI) (Drillable Segment Compare)

Also known as: Txns (PDI)

Description: Relative importance, based on # of Trips, of a product for a segment in comparison to the importance of the product’s parent for the segment

Calculation: [(% of Trips that contained a product) / (% of Trips that contained the product's parent)] * 100

Additive: No

Trips Index

Also known as: Txns Index

Description: Relative importance, based on % of Trips, of a product for a segment in comparison to the size of the segment

Calculation: [(% of Trips that contained a product) / (% of Shoppers in the segment)] * 100

Additive: No

Trips per Shopper

Also known as: Traffic, Frequency, Txns per Shopper

Description: Number of Trips per shopper that contained a product

Calculation: # of Trips that contained a product / # of Shoppers who purchased the product

Additive: No

Trips per Shopper Index

Also known as: Txns per Shopper Index

Description: Relative importance, based on # of Trips per Shopper, of a product for a segment in comparison to the importance of the product for all shoppers

Calculation: [(Average # of Trips per Shopper that contained a product for a segment) / (Average # of Trips per Shopper that contained the product)] * 100

Additive: No

Units

Description: Number of units of a product

Calculation: Sum of units of a product

Additive: Yes

Units (PDI) (Drillable Segment Compare)

Description: Relative importance, based on # of units, of a product for a segment in comparison to the importance of the product’s parent to the segment

Calculation: [(% of Units of a product by a segment) / (% of Units of a product's parent by the segment)] * 100

Additive: No

Units Index

Description: Relative importance, based on % of Units, of a product for a segment in comparison to the size of the segment

Calculation: [(% of Units for a product by a segment) / (% of Shoppers in the segment)] * 100

Additive: No

Units per Shopper

Also known as: Buy Rate

Description: Number of units of a product per shopper

Calculation: Unit Sales of a product / # of Shoppers who purchased the product

OR

Trips per Shopper * Units per Trip

Additive: No

Units per Trip

Also known as: Item Count, Units per Txn

Description: Number of units of a product per trip

Calculation: Unit sales of a product / # of trips that contained the product

Additive: No

Units per Trip Index

Also known as: Units per Txn Index

Description: Relative importance, based on Units per Trip, of a product for a segment in comparison to the importance of the product for all shoppers

Calculation: [(Average # of Units per Trip that contained a product for a segment) / (Average # of Units per Trip that contained the product)] * 100

Additive: No

Weekly $ Sales per Store Selling

Description: $ Sales of a product per week by stores that sold the product

Calculation: $ Sales of a product / # of stores that sold the product

Additive: No

Weekly Profit

Description: Profit of a product per week

Calculation: Profit / # of Weeks

Additive: No

Weekly Profit per Store Selling

Description: Profit of a product per week by stores that sold the product

Calculation: Weekly Profit / # of stores that sold the product

Additive: No

Weekly Units per Store Selling

Description: Number of units of a product per week by stores that sold the product

Calculation: Units of a product / # of stores that sold the product

Additive: No

Wkly $ per Trip (Event Compare)

Also known as: Wkly $ per Txn

Description: $ Sales per Trip per week for a product during Event 2 compared to Event 1Calculation: (Event 2 $ Sales / Trips) / # of Weeks

Additive: No

Wkly Trips (Event Compare)

Also known as: Wkly Txns

Description: # of Trips that contained a product per week during Event 2 compared to Event 1

Calculation: Event 2 # of trips / # of Weeks

Additive: No

Wkly Units per Trip (Event Compare)

Also known as: Wkly Units per Txn

Description: Number of units of a product per trip per week during Event 2 compared to Event 1

Calculation: Event 2 # of Shoppers / # of Weeks

Additive: No

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