IBM Shopper Insights

Version 17 Release 1
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Users' Guide

Contents

Chapter 1. Overview

In this guide, you will learn how IBM Shopper Insights next-generation shopper-centric dashboards can help you better understand and serve shoppers. These dashboards provide insights into the behavior of shopper segments, geographies, and much more.

New Features in IBM Shopper Insights 17.1

In IBM Shopper Insights 17.1, many dashboard issues and bugs have been resolved to provide enhanced application usability and performance.

Before You Begin

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

System Requirements

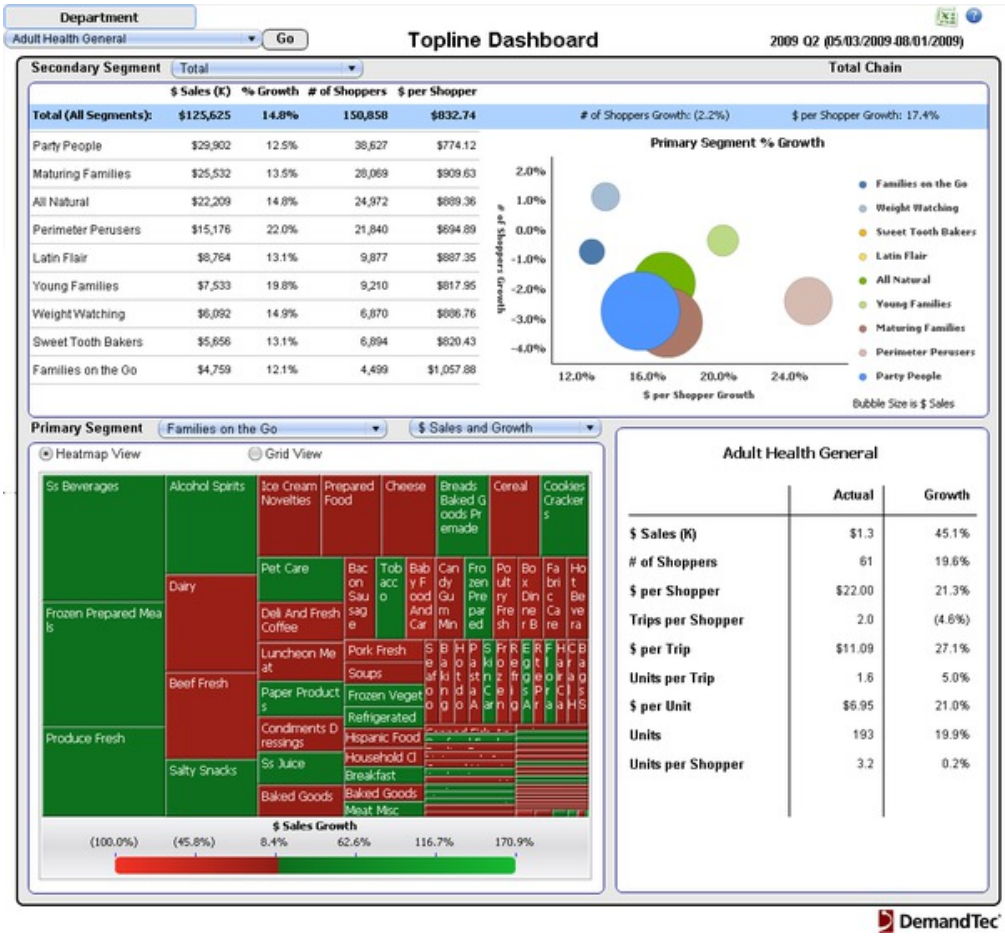
The following details standard system recommendations for using Shopper Insights.

	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 Google Chrome Version 39 or higher The browser must have support of 128-bit encryption enabled.
Export Applications	Adobe Acrobat Reader 10.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

What is IBM Shopper Insights?

Shopper Insights is a shopper-centric tool you can use to view and analyze your data, providing powerful segment-based dashboards that can help your company make better pricing, promotion, assortment, and strategic decisions.

These dashboards integrate standard analyses with an intuitive graphical user interface:



Shopper Insights provides 21 dashboards, each containing vital information about your shoppers at various levels of analysis, from the enterprise-level Topline Dashboard to the individual item level, using granular drill-down dashboards like the Item Importance Dashboard. Using these interactive dashboards, you can research performance across:

- Shopper segments, using a variety of segmentation schemes
- Geographies and store clusters
- Different time periods using historical data

These dashboards provide a new outlook for analyzing your business — rather than focusing on the overall results of a promotion, pricing decision, or assortment choice, you can focus on your shoppers's specific behavior. This data can help you to increase effectiveness in reaching key segments by showing you which products, promotional activities, and other decisions are important to those high-value shoppers. Here are some of the questions you can answer with IBM Shopper Insights:

- Which segments should I target?
- What are the key sales drivers for those segments?
- What are my key value items (KVIs) and how valuable are other items by segment?

- What causes my most important shoppers to purchase more, or visit more frequently?
- What products are most effective for co-promotions?
- Were my tactics effective for my targeted segments?

Getting Started

To get started using Shopper Insights, you can:

- Learn how Shopper Insights can change your business: "What can I do with Shopper Insights?" on page 5
- Learn how to navigate the dashboards: "How do I get Started?" on page 7
- Learn more about the dashboards: "Dashboard Overview"
- Get more details about specific dashboards: Chapter 2, "Using Shopper Insights Dashboards," on page 25

Related Topics

"What can I do with Shopper Insights?" on page 5

"How do I get Started?" on page 7

"Dashboard Overview"

Dashboard Overview

Each Shopper Insights dashboard provides a different perspective, offering new ways to aggregate and analyze your data. This can help you understand your shoppers' behavior and create effective programs to meet their needs.

Note: Some dashboards may not be available for your company.

- "Affinity Dashboard" on page 25: 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. It has attribute availability for filtering and report level.
- "Event Compare Dashboard" on page 26: Compares sales performance of products between two time periods, allowing you to evaluate promotions or events by segment. It has attribute availability for filtering. You can also run this dashboard by Aggregate + Detail.
- "Item Importance Dashboard" on page 28: Identifies how important a product is to a given segment. This allows you to see which items drive loyalty among particular segments, and where growth opportunities exist. It has attribute availability for filtering and report level. You can also run this dashboard by Aggregate + Detail.
- "KVI Dashboard" on page 29: Uses model-by-segment data to plot items by their relative elasticity and volume. The resulting quadrant analysis identifies categories of items such as image items and profit drivers.

  Note: This dashboard may not be available for all retailers.
- "Multiples Per Trip Dashboard" on page 34: 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. It has attribute availability for filtering. You can also run this dashboard by Aggregate + Detail. The maximum number of multiples is 50.

- "New Item Dashboard" on page 36: Enables analysts to assess the performance of a new product by segment, including detailed geography analysis.

  Note: This dashboard may not be available for all retailers.
- "New Lost Retained Dashboard" on page 38: Depicts the buyer flow for an item showing new, lost and retained shoppers' purchasing behavior for the item by segment over the selected time period. It has attribute availability for filtering. You can also run this dashboard by Aggregate + Detail.
- "Overlap Dashboard" on page 39: 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. It has attribute availability for filtering and report level.
- "Product Compare Dashboard" on page 41: Compares multiple products and multiple time periods allowing you to analyze consumer purchasing for all shoppers and by segment.

  Note: This dashboard may not be available for all retailers.
- "Product Dashboard" on page 42: The Product Dashboard (also called Sales Behavior Dashboard by some retailers) provides breakdown of the key sales drives for categories and individual items by segment. This can help to drive business strategies and tactics.
- "Promotion Response Dashboard" on page 45: Shows changes in purchasing behavior in response to promotional activity, aggregated by segment and promotion vehicle. Lifts are available at both individual item and product group levels.

  Note: This dashboard may not be available for all retailers.
- "Purchase Frequency Dashboard" on page 48: Provides insight into purchase patterns for the selected items, showing how the product performs among shoppers by purchase frequency and segment. It has attribute availability for filtering. You can also run this dashboard by Aggregate + Detail.
- "Purchase Summary Dashboard" on page 50: Enables users to compare key sales driver metrics across multiple product selections by segment. You can also run this dashboard by Aggregate + Detail.
- **Sales Behavior Dashboard**: Refer to Product Dashboard.
- "Sales Decomposition Dashboard" on page 52: Depicts the trends over time for key sales drivers among selected segments, geographies, and products.

  Note: This dashboard may not be available for all retailers.
- "Sales Driver Dashboard" on page 54: Displays which metrics drive sales growth or decline compared to last year. It has attribute availability for filtering and report level. You can also run this dashboard by Aggregate + Detail.
- "Segment Compare Dashboard" on page 55: Enables comparison of segments across categories. This allows you to see how key items perform for various segments, and which segments may provide growth opportunities.
- "Segment Dashboard" on page 56: Shows detailed purchasing information for the selected segment, including trend insights, top items, and performance of the segment across a variety of geographies.

  Note: This dashboard may not be available for all retailers.
- "Source of Volume Dashboard" on page 58: The Source of Volume dashboard is a way to understand shopper behavior within a category between two time periods. It helps us understand what switching is taking place and to dissect

where gains and losses are coming from for a group of products. The attribute availability is filtering for this dashboard. You are limited to 10 anchor products and can only export Net Switchers to Excel.

- "Time Series Dashboard" on page 59: Helps identify whether certain metrics, products, product attributes, or customer segment behaviors are changing over time
- "Topline Dashboard" on page 60: Shows a big-picture view of recent financial performance for the retailer, showing results for all departments by segment and drilling down to categories within specific departments for the key sales driver metrics.

  Note: This dashboard may not be available for all retailers.
- "Trial and Repeat Dashboard" on page 65: The Trial and Repeat Dashboard (also called New Item Launch Dashboard by some retailers) helps you assess a new item's trial and repeat performance. Evaluate the product's sales, promotion response, repeat purchases, and average retail as distribution builds by segment and store grouping. The Trial and Repeat Dashboard has attribute availability for filtering. You can also run this dashboard by Aggregate + Detail.

What can I do with Shopper Insights?

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

Using a set of interactive dashboards tailored to retail and consumer products analysis, you can:

- Approach business problems armed with new information
- Track core metrics that influence shopper segment performance
- Quantitatively analyze shopper, segment, and basket-specific trends
- Grow your business with accurate and actionable shopper analytics

Each of these capabilities is useful for different parts of retail and consumer products organizations; Shopper Insights dashboard are organized accordingly, providing answers to key questions for pricing, promotion, and assortment initiatives.

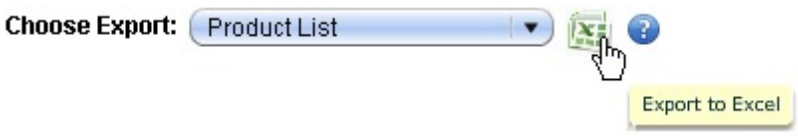
Working in Shopper Insights

Each Shopper 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.

- **Segmentation Flexibility**: While each Retailer's implementation is different, IBM Omni-Channel Merchandising data structure provides multiple ways to analyze your existing shopper segmentations.
- **Segment-Neutral Dashboards**: Dashboards contain information that use customer-defined shopper segmentation, rather than conforming dashboard design to existing segmentation.
- **Segmentation Hierarchy**: By creating a nested segmentation hierarchy, users can access high-level information about the intersection of different segmentation schemes.
- **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 Shopper Insights User Interface.
- **Exporting to Excel and PDF**: Data contained in Shopper 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 getting started, please see “How do I get Started?.”

For more information about individual metrics, please see Chapter 3, “Metric Dictionary,” on page 69.

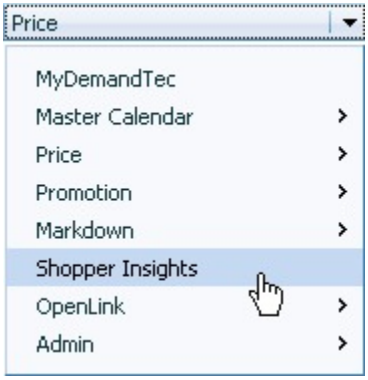
Related Topics

“How do I get Started?”

How do I get Started?

IBM Shopper Insights begins with a question: what do you want to know? Each of the dashboards holds insights about your shoppers, which can be used to help you make business-critical strategic and tactical decisions.

To get started, navigate to Shopper Insights in the services drop-down menu:



If you have access to Shopper Insights, there are two ways to start using the dashboards to answer your questions:

- Use the built-in navigation interface to find your question on the left-hand side of the screen:

- To navigate directly to a dashboard, click on the dashboard in the thumbnail view. Hold your mouse cursor over each dashboard thumbnail to read a description of the dashboard's functionality.

Navigating Shopper Insights

Hierarchy Navigation

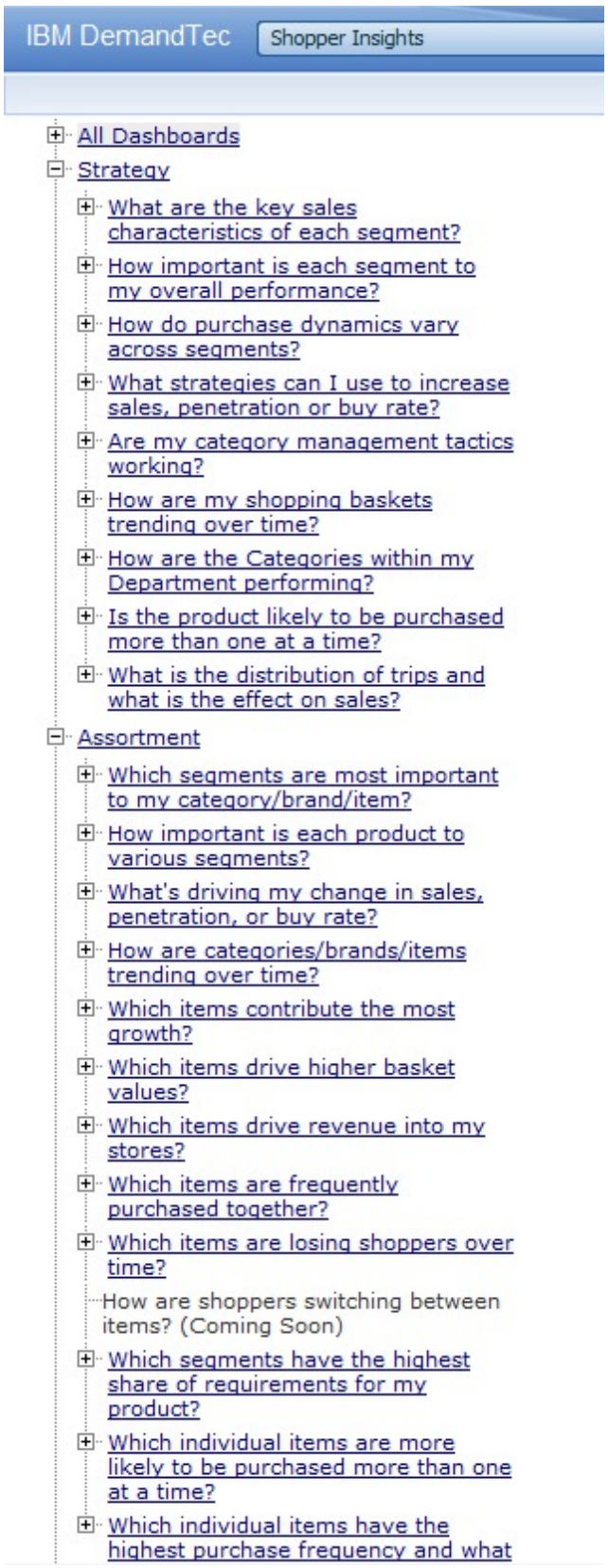
The hierarchy on the left-hand side of the screen is divided into logical units to access information at various levels, such as Group, Division, Department, Category, Type, and Item, or Group, Division, Department, Class, Subclass, and Type.

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.

Navigation Questions

The questions on the left-hand side of the screen are divided into a variety of roles, enabling you to quickly find a question that meets your needs. Once you find a question, clicking on it will show you a list of dashboards that can help you answer the question. For most questions, you can also specify a product hierarchy level you would like to examine.



Once you have chosen a dashboard, click it in the thumbnail view to the right. After reaching a dashboard, you can learn more about its usage, sections, and

particular details by clicking the **Help** icon:

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

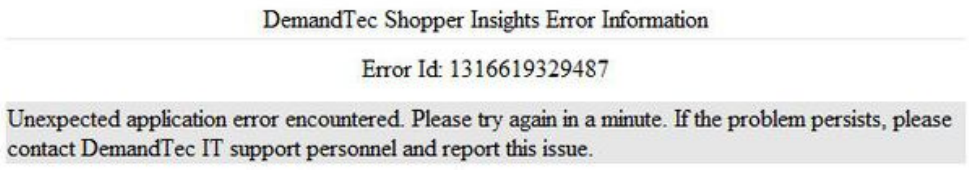
Some business-critical questions may require the use of multiple dashboards. When loading the dashboards from the Shopper Insights User Interface, each dashboard loads in a new window, allowing you to compare reports side by side or drill down to find the exact data you need to make better decisions.

Application Time-Out

IBM Omni-Channel Merchandising applications time out after 180 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 Shopper 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 Shopper Insights application if you are timed out.

User Access

The Shopper 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.

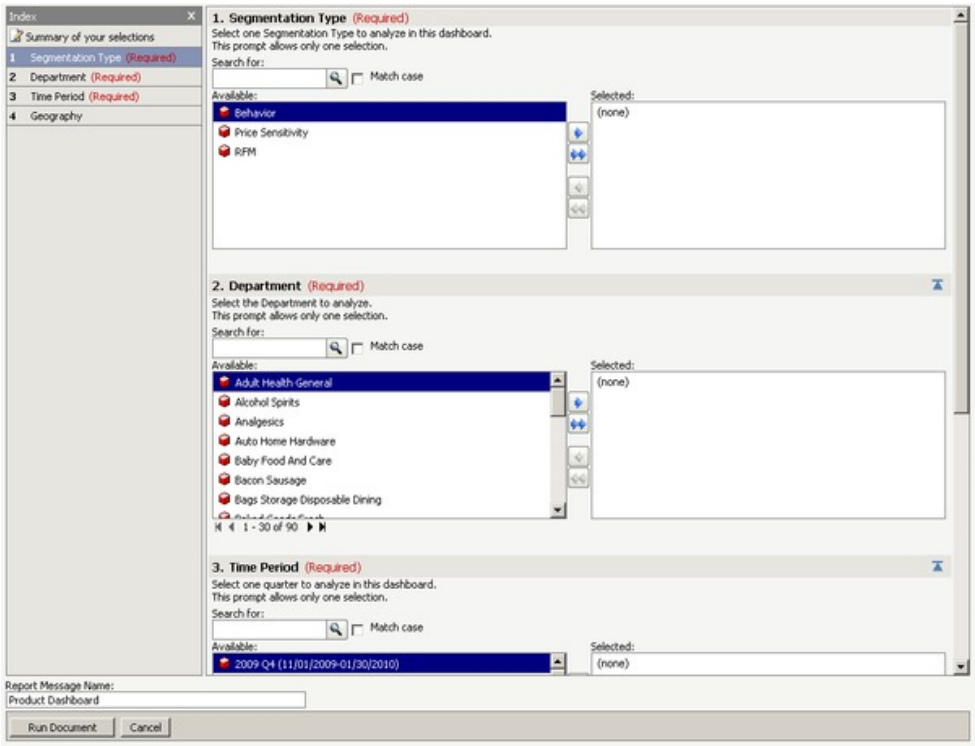
To ensure data integrity and confidentiality, Vendors may have restricted access to the retailer's data in the Shopper Insights application. Typically, this means that certain dashboards and metrics, such as profit, are not available to a vendor user.

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 (for example, 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, Product, or Item Attributes for specific dashboards. This selection sets the product focus of the dashboard, whether it is the entire product category or one item. Some dashboards also allow you to choose from Product Groups your company has created, allowing you to focus analysis on a brand, manufacturer or test product group. For more information, please see "Setting up Groups" on page 15.
- **Product Hierarchy Level, Item, or Item 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 item, or a group of items. 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. Some dashboards (Purchase Summary, Product, and Sales Driver) also have flexible time frames to choose customized "base" and "analysis" time frames.
- **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 also allow you to choose a Store Group, a grouping of stores that you create, to focus analysis on a group of regions, pricing zone or test store group. For more information, please see "Setting up Groups" on page 15.



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.

Related Topics

"Setting up Groups" on page 15

Saving Dashboards

You can now save dashboards with prompt answers, so you can more quickly run favorite dashboards with typical prompt answers across different sessions.

After running a dashboard, you now have the option to save it and prompt answers for future use. You can then run saved dashboards from the Shopper Insights home page. You can also opt to select the Most Recent Week for any dashboard, allowing you to analyze the data for the most recent week that is available.

Exporting Dashboards

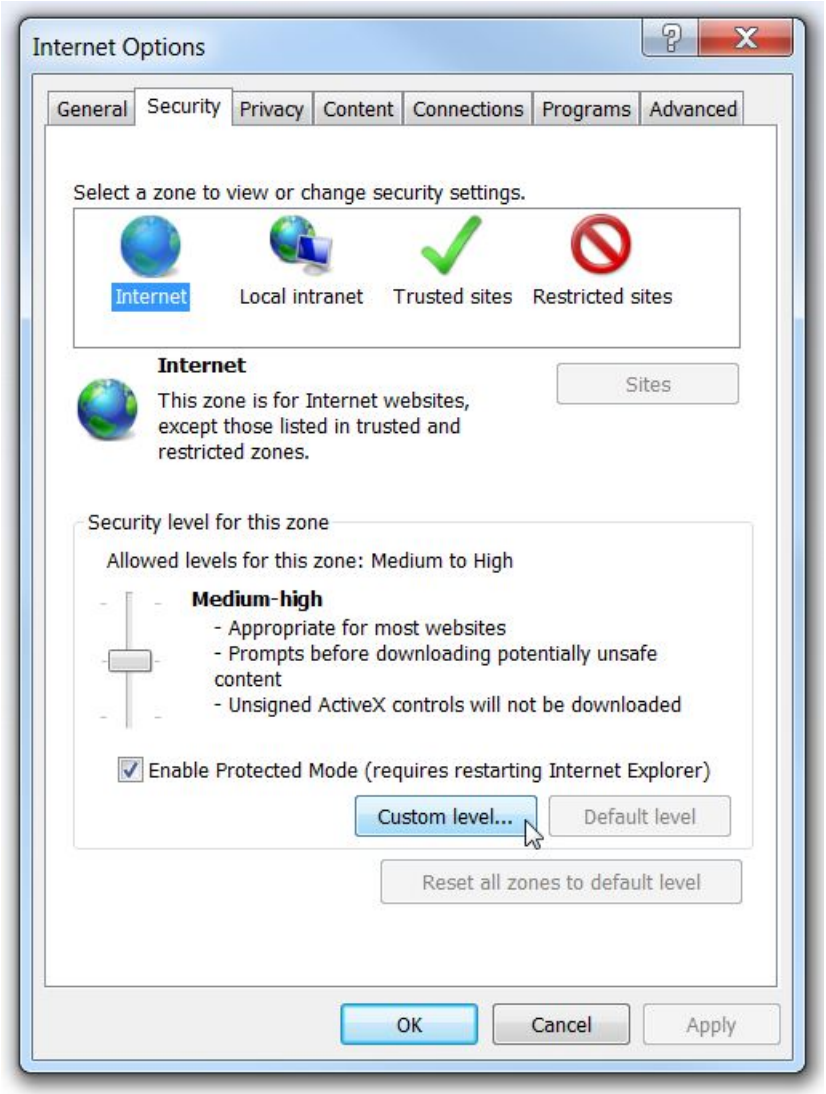
When dashboards are exported, they are sent directly to Microsoft Excel. To ensure successful export, you must have the following settings enabled: **Automatic prompting for file download**, **File download**, and **Allow script-initiated windows without size or position contraints**.

About this task

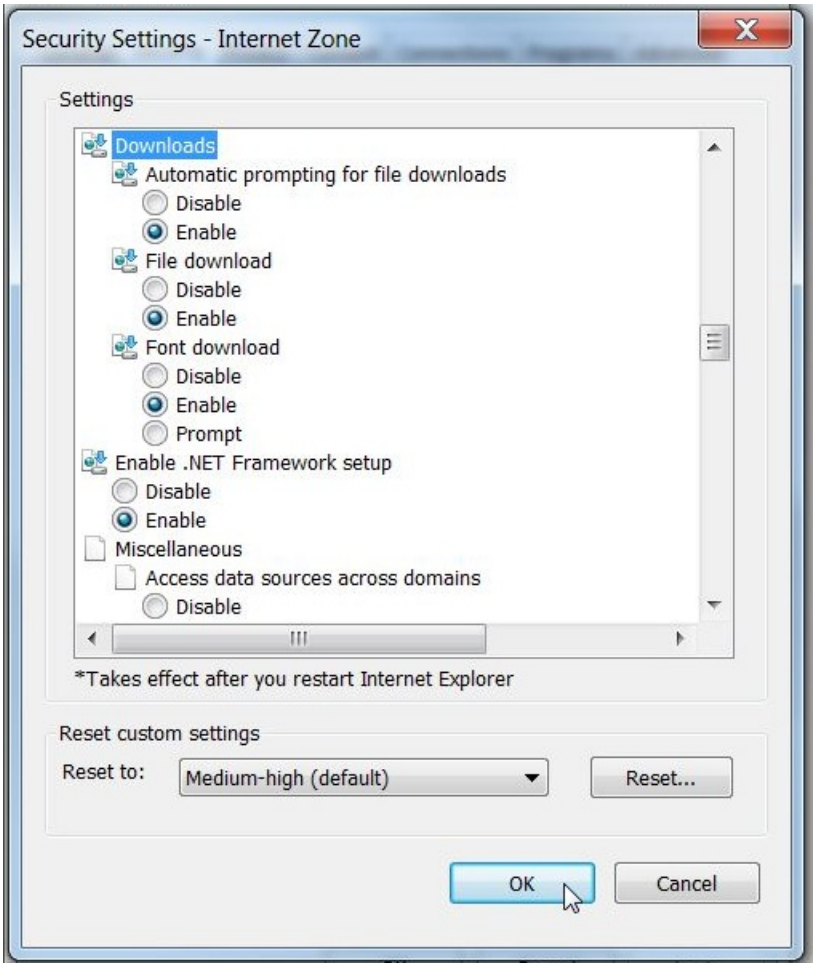
To enable these settings:

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**.



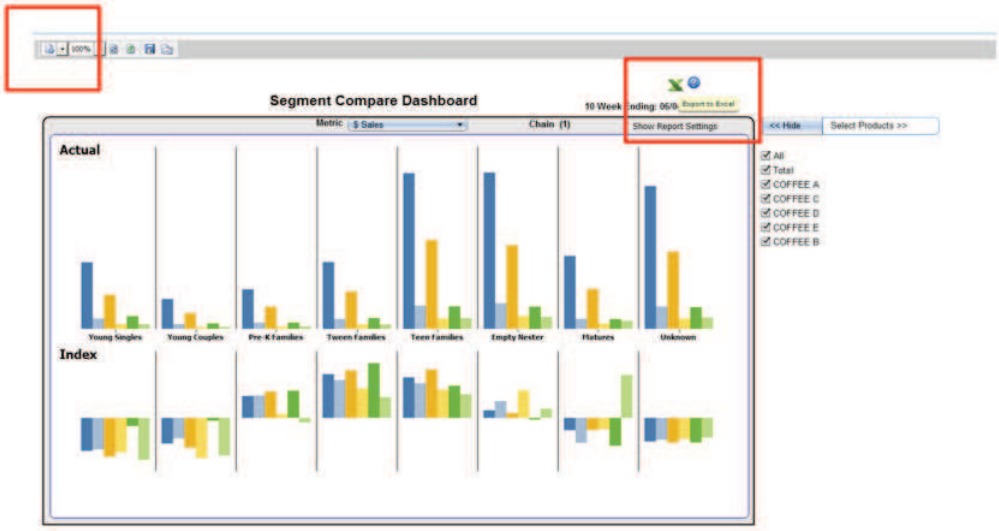
4. Scroll down to the **Miscellaneous** section and click on the **Enable** radio button directly underneath **Allow script-initiated windows without size or position constraints**.
5. Click **OK** in the **Security Settings - Internet Zone** box.
6. Click **Apply** in the **Internet Options** box.

What to do next

You can export to a flash file or to Excel, as illustrated in the following diagram.

- The upper left corner is where you can export to a flash file.
- The upper right corner is where you can export to Excel.

Note: Exporting to Excel will quickly re-prompt the server and it can take several minutes.



Setting up Groups

Groups are collections of products or stores that you create organized by type of product or store region.

A product group can contain products in any combination you choose, such as a single category, KVIs, products in a single brand, or products from a particular manufacturer. Similarly, a store group may contain stores in a specific region, state, or neighborhood.

You can select groups of products and stores when creating scenarios in IBM Price, promotions in Promotion, markdown plans in Markdown Optimization, or when you use the following Shopper Insights dashboards:

- Flexible Affinity
- Flexible Item Importance
- Flexible Product
- Flexible Segment Compare
- Event Compare
- Multiples
- New Item
- New Lost Retained
- Purchase Frequency
- Purchase Summary
- Sales Driver
- Source of Volume
- Time Series
- Trial and Repeat

Creating Shopper Insights Product Groups

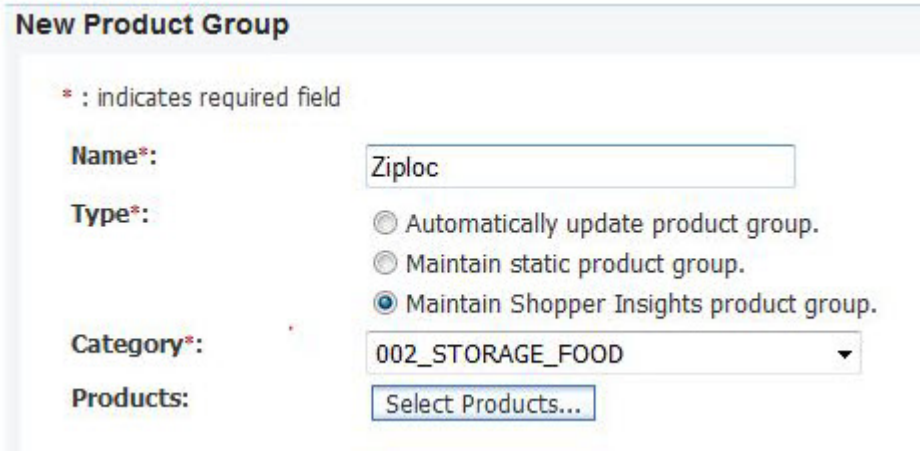
Shopper Insights product groups are static after you create them; they do not automatically change or update. When products are added to the assortment that belong to the Product Group, you should manually update the group.

About this task

To create a Shopper Insights product group:

Procedure

1. Choose **Data** > **Product Groups**. The **Product Groups** page shows existing product groups for the selected category, number of members in each group, last date updated, and the user who made the update.
2. Click **New Product Group** to create a new product group. The New Product Group page opens.



3. Enter a name for the group in the **Name** field. Use a unique name that is easily identifiable.
4. Choose a product category from the **Category** list. Use the scrollbars to move up and down the list.
5. For the product group type, select **Maintain Shopper Insights product group**. You will select the individual products for a Shopper Insights product group on the next page.
6. Click **Select Products** to navigate to the Products page.

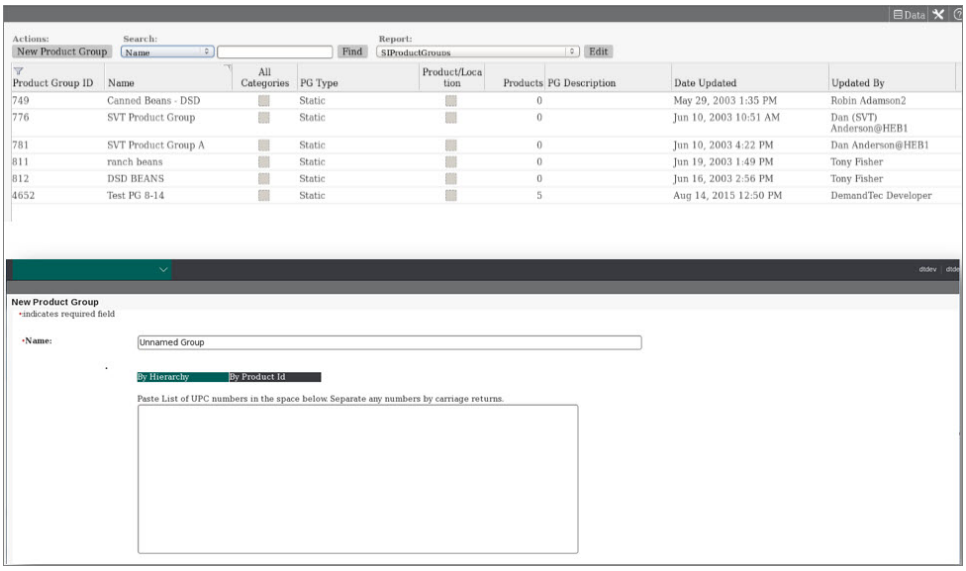
   Note: You can click **Add Next Product Group** at the bottom of the New Product Group page to define new product groups, and add the products to this group later.

   The following reports are available on the **Select Products** page:

   - **All Products – Basic** – Displays active products for the category. Includes basic product information; does not include pricing or selling information.
   - **All Sellable Items** – Displays active products for the category. Includes average pricing and selling information for a product at the chain or division level.
   - **All Logistical Units** – Displays active logistical units for the category. This report is only viewable if your company creates promoted product groups by Logistical Unit.
7. Check the **Include** checkbox next to each product that you want in your group. Click the checkbox again to deselect the product.
   - Press **Ctrl-click** or **Shift-click** to select multiple products.
   - Click **Check All** to select all products. Click **Uncheck All** to remove all products from the group.

8. Click **Save**. You are done. The **Product Groups** screen opens, including the product group you just created.

   Note: You can choose to build Product Groups **By Hierarchy**, **By Product Id**, or by Product Attributes.



Editing Shopper Insights Product Groups

You can edit Shopper Insights product groups.

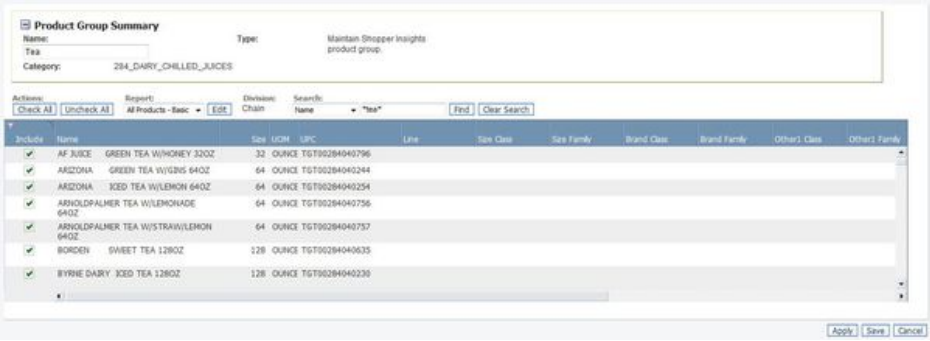
About this task

To edit a Shopper Insights product group:

Procedure

1. Open the Product Groups page (**Data** > **Product Groups**).
2. Right-click on a Shopper Insights product group in the list, and choose **Edit/View Details**.

3. The **Product Group Summary** screen opens. Add or remove products from the group by setting or clearing products in the list.
   - Press **Control-click** or **Shift-click** to select multiple products.
   - Click **Check All** to select all products. Click **Uncheck All** to remove all products from the group.



4. Click **Save** when you have finished editing. Your changes are saved, and you return to the Product Groups page.

Importing Shopper Insights Product Groups

If you prefer to add or modify Shopper Insights Product Groups using Microsoft Excel, you can also import and export product groups. These groups are available wherever you would select a Product Group when loading dashboards.

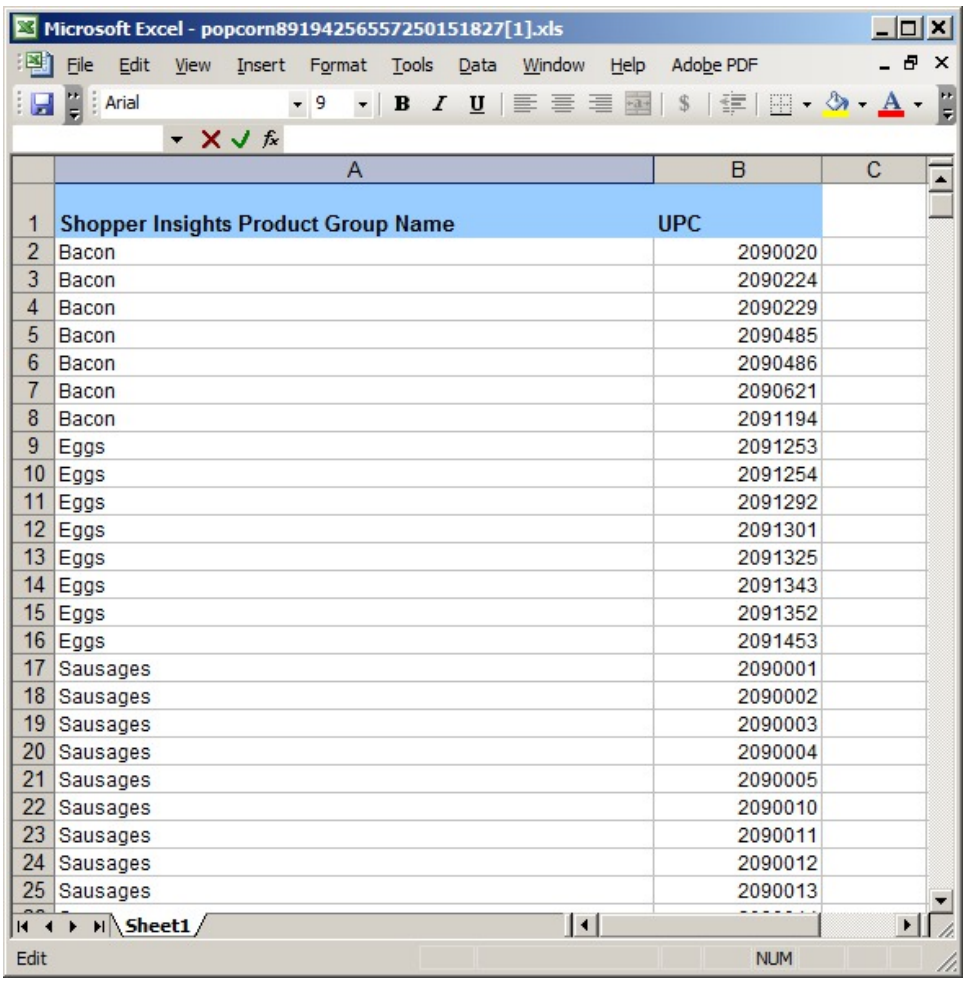
About this task

To import a Shopper Insights Product Group:

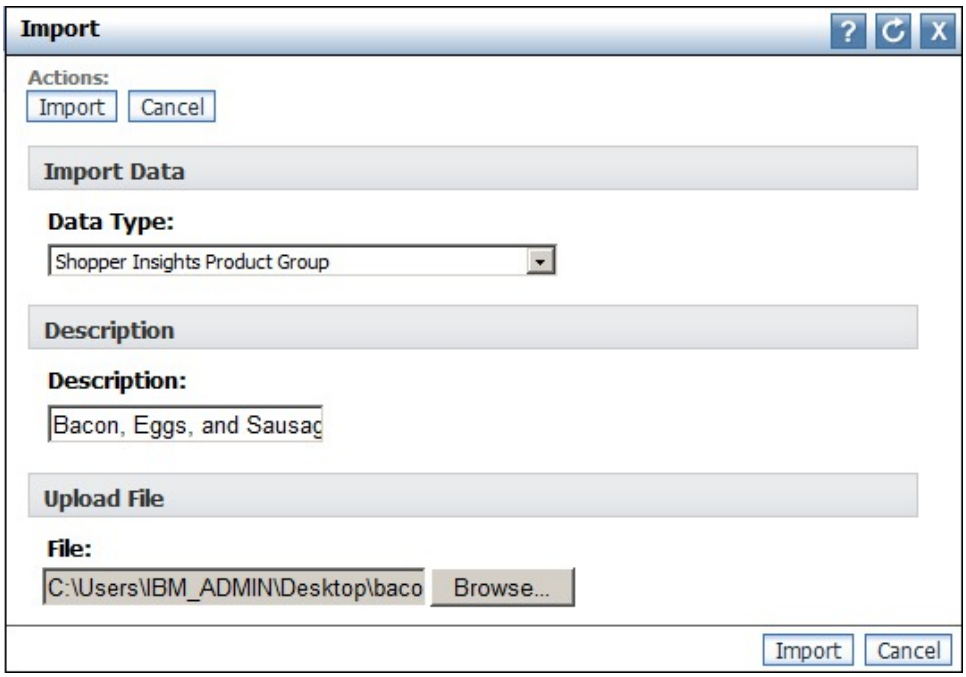
Procedure

1. Load the Shopper Insights Product Group import template.

   Note: You must have appropriate application permissions to import and export Shopper Insights Product Groups. If you do not have the permissions necessary to complete these steps, please contact your administrator.
2. In the template Excel file, add the product groups names, as well as the items you would like to add to those product groups. When you have finished editing the excel file, it should resemble the figure below:



3. Save your file and return to your Shopper Insights session.
4. From the main Shopper Insights screen, select **Data** > **Import**.
5. Select **Shopper Insights Product Group** from the **Data Type** drop-down menu.



6. Add a description of your import and click **Browse**.
7. Select your file and click **Import** to complete your Import.

   Once your import has processed, you will be able to see information about the import, as well as any errors, in the **Data** > **Import Status** window.

Importing Static Product Groups

You can import static product groups for usage in both Shopper Insights and Promotion Planning and Optimization. These groups are read-only, helping to mirror groupings from third-party systems to IBM Omni-Channel Merchandising workflows.

About this task

To import Product Groups:

Procedure

1. Navigate to **Data** > **Import**.
2. In the **Data Type** drop-down, select **Product Group**.
3. Add a description, browse to your import file, and click **Import**.

   Your imported product group will be visible in the **Data** > **Product Groups** report, and will be available in the following products, if you have access to them:

   - IBM Promotion Planning, Optimization, and Execution
   - IBM Shopper Insights

Exporting Shopper Insights Product Groups

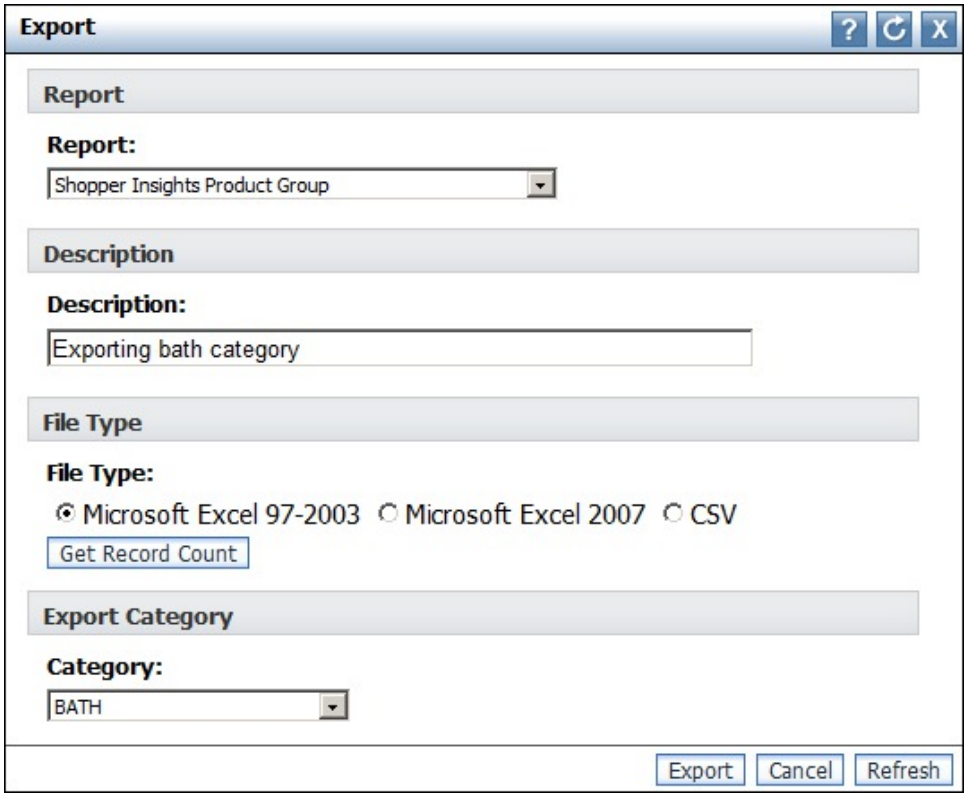
You can also export existing Shopper Insight Product Group information for any category to Excel or CSV.

About this task

To export your groups:

Procedure

1. Navigate to **Data** > **Export**.
2. In the **Export** window, select **Shopper Insights Product Group** from the **Report** drop-down menu.



3. Write a description, choose an export file type, and choose the category to export from the **Category** drop-down menu.
4. Click **Export**. When your export has finished, you will be able to download the file by clicking the link from the **Data** > **Export Status** window.

Creating Shopper Insights Store Groups

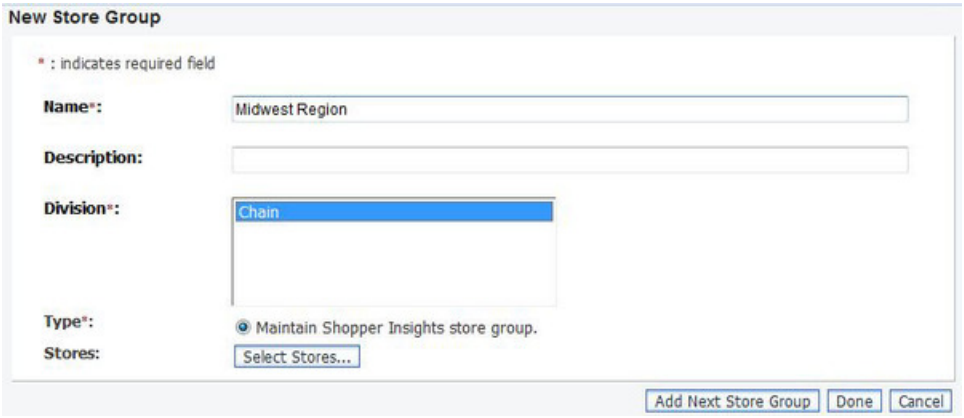
Shopper Insights Store Groups are static and do not change. When stores are added to the chain that belong to the Store Group, the group must be manually updated.

About this task

To create a Shopper Insights store group:

Procedure

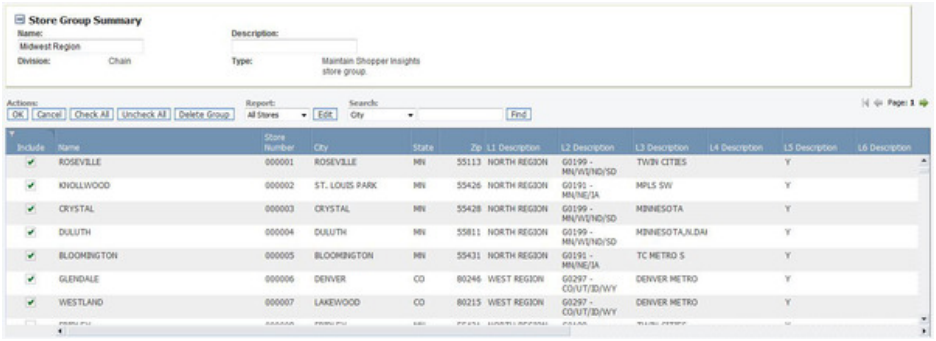
1. Navigate to **Data** > **Shopper Insights Store Groups**. The Shopper Insights Store Groups page shows the store groups, number of members in each group, division level, last date updated, and the user who made the update.
2. Click **New Store Group**. The New Store Group page opens.



3. Enter a name for the store group in the **Name** field. Use a unique name that is easily identifiable. Duplicate Store Group names will cause an error.

   Note: Store Groups can be seen by all users for your company so, be specific when naming a store group.
4. Enter a description of the store group in the **Description** field.
5. Select the Division for the store group. Choose Chain if no divisions exist.
6. In the **Type** field, select **Maintain Shopper Insights store group** to create a Shopper Insights store group.
7. Click **Select Stores** to navigate to the **Store Group Summary** page.

   Note: You can click **Add Next Store Group** at the bottom of the New Store Group page to define new store groups, and add the stores to this group later. The following reports are available on the Stores page:
   - **All Stores** – Displays all stores where a product has sold in the category.
   - **Members Only** – Displays members of the store group. This report will be blank when creating a new store group.



8. Set the **Include** checkbox next to each store that you want in your group. Click the checkbox again to deselect the store.
   - Press **Control-click** or **Shift-click** to select multiple stores.
   - Click **Check All** to select all stores. Click **Uncheck All** to remove all stores from the group.
9. Click **OK** when you are done. The Shopper Insights Store Groups page opens with your new group in the list.

Editing Shopper Insights Store Groups

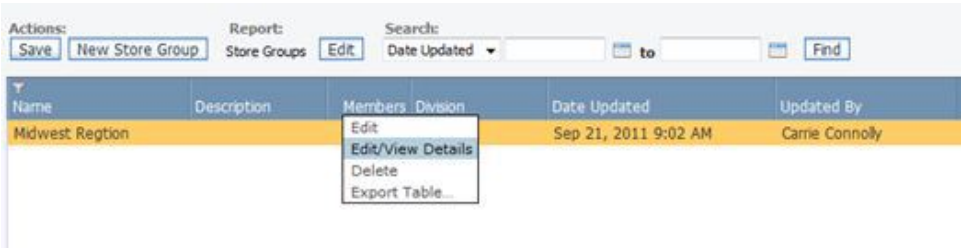
You can edit Shopper Insights store groups.

About this task

To edit a Shopper Insights store group:

Procedure

1. Open the Shopper Insights Store Groups page (**Data** > **Shopper Insights Store Groups**).
2. Right-click on a Shopper Insights store group in the list, and choose **Edit/View Details**. The **Store Group Summary** page opens.

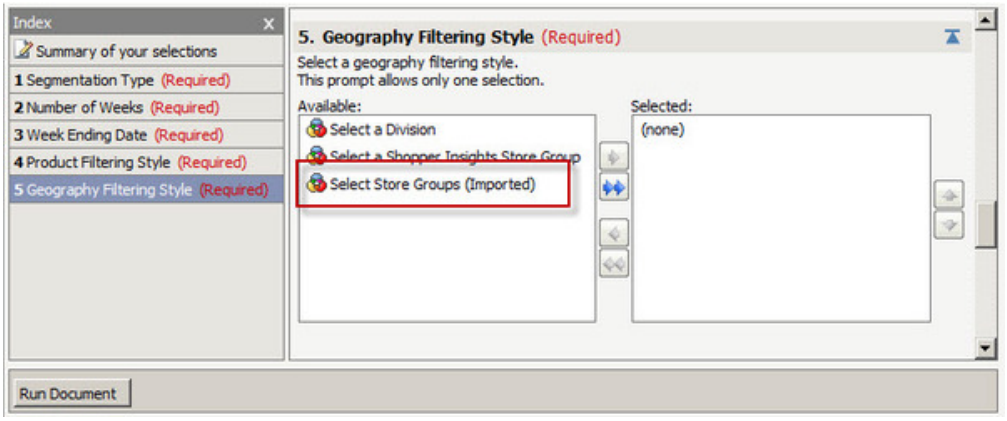


3. Choose whether you would like to view all stores or group members only from the **Report** drop-down menu.
4. You can change the group name in the **Name** field, and add or remove stores from the group by setting or clearing stores in the list.
   - Press **Control-click** or **Shift-click** to select multiple stores.
   - Click **Check All** to select all the stores. Click **Uncheck All** to remove all stores from the group.
5. Click **OK** when you are done. Your changes are saved, and the Shopper Insights Store Groups page opens.

Using Imported Store Groups

If your company has configured Imported Store Groups, you will be able to select them when generating a dashboard.

About this task

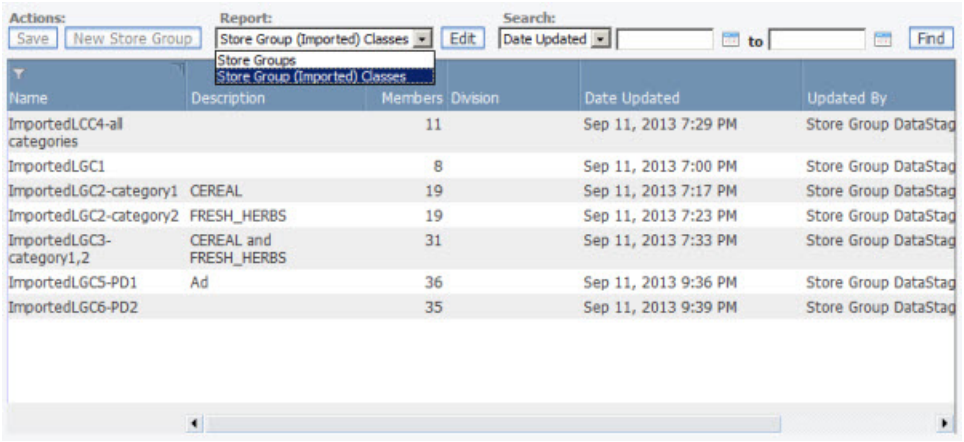


Note: Your prompts and screens may look different if your company uses customized labels. You cannot directly import Store Groups into Shopper Insights. For more information about importing Store Groups, please contact your IBM representative.

You can also use the **Store Group (Imported) Classes** report to view the details of imported Store Groups, as described below:

Procedure

1. Navigate to **Data** > **Shopper Insights Store Groups**.
2. In the **Report:** drop-down, select **Store Group (Imported) Classes**.



3. The grid lists imported Shopper Insights store groups. Right-clicking any group provides access to additional **Details** and the ability to **Export Table**.

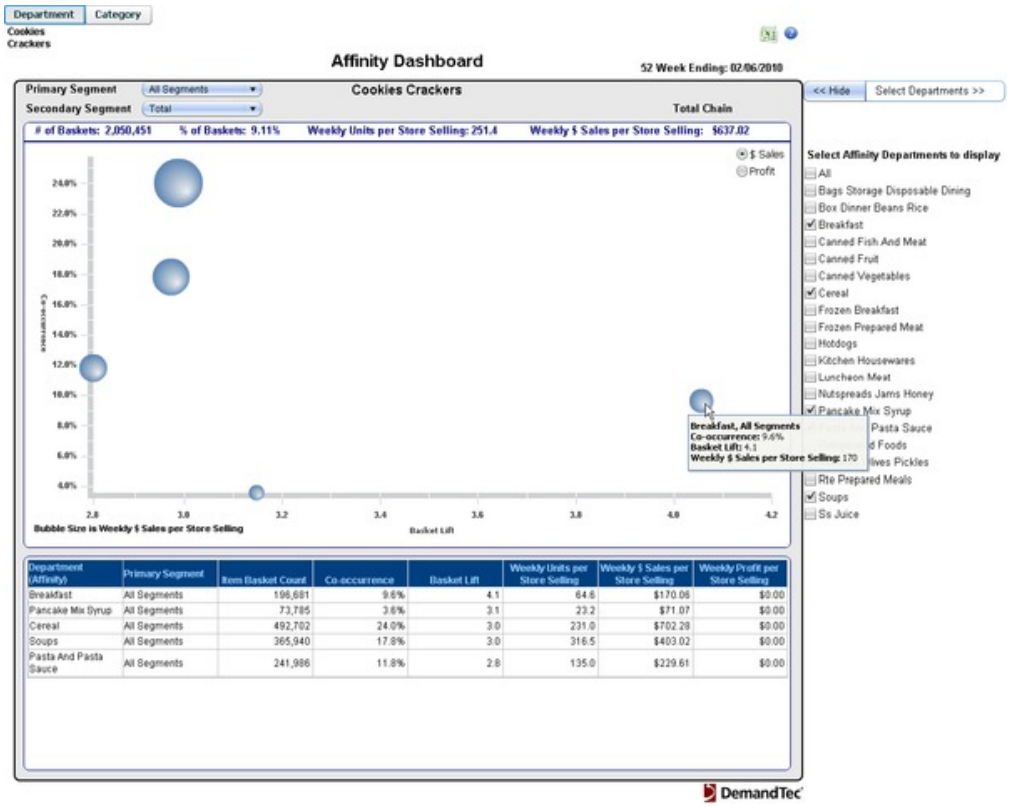
Chapter 2. Using Shopper Insights Dashboards

Each of the dashboards included in IBM Shopper 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.

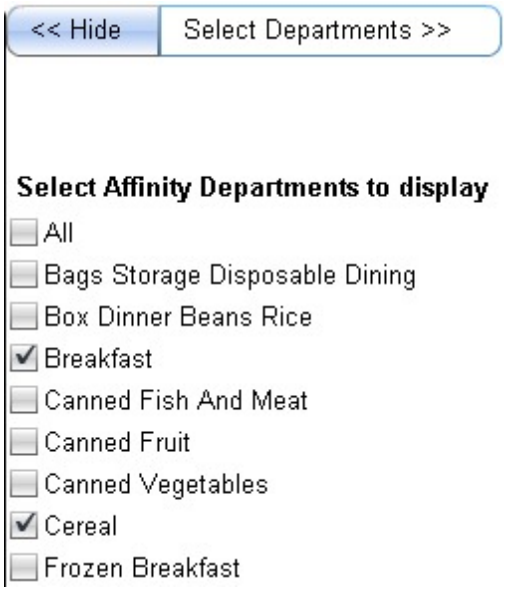
Affinity Dashboard

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.

Note: You are limited to the top 100 affinities (by basket lift) when exporting.



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:



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

There is a minimum threshold for products to appear in the affinity report. There are three pieces of criteria:

- The number of baskets threshold is currently 4 baskets per week at the item level, 8 baskets per week at the subclass level, 16 baskets per week at the class level, and 32 baskets per week at the department level.
- The Basket Lift must be greater than or equal to 1.
- The product must be one of the top 100 in terms of Basket Lift.

Product groups as part of the universe are considered "item" level.

Note: You can 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" on page 69
- "% of Baskets" on page 77
- "Basket Lift" on page 80
- "Co-occurrence" on page 81
- "Item Basket Count" on page 83
- "Weekly Units per Store Selling" on page 92

Event Compare Dashboard

The Event Compare Dashboard shows financial metrics for a product or group of products over two events, allowing you to compare promotional effectiveness during the two selected time periods.

This can help you decide on a promotional strategy, using insights from segment-by-segment data and key sales metrics:

The top sections of the dashboard show overall financial performance for the two selected time periods, while the **Segment Performance** graphs below shows segment-by-segment response to each event through key sales driver metrics. You can select a different sales driver in the **Metric** drop-down menu.

Interpreting Results

The **Event Compare Performance** graph shows the overall performance of the two events. Use the **Metric** drop-down menu to show comparative performance in key sales metrics.

Note: These values are not adjusted for the length of the event.

The table in the upper right and area of the dashboard shows a wide variety of per-week metrics for both events, allowing you to see the effectiveness of each event side-by-side. The table also includes an **Index** column, showing the relative effectiveness of Event 2 on an average index of 100. For more information about the metrics in the table, please see Chapter 3, “Metric Dictionary,” on page 69.

The Event Compare Dashboard uses the following metrics:

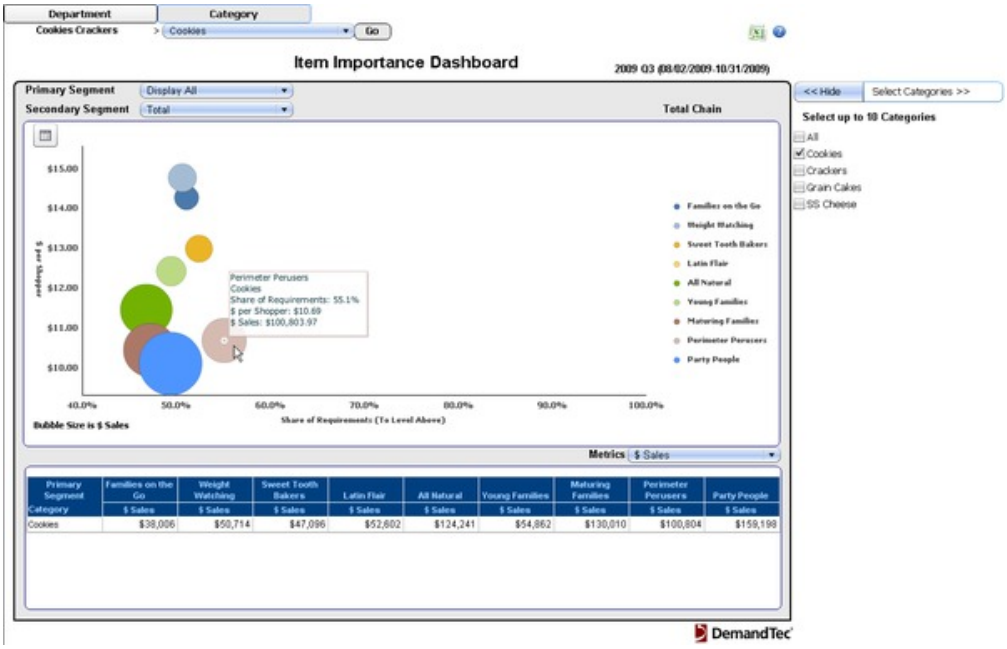
- “# of Shoppers” on page 70
- “$ per Shopper” on page 71
- “$ per Trip” on page 72
- “$ per Unit” on page 73
- “$ per Unit Index (Segment Compare)” on page 74
- “$ Sales” on page 74
- “$ Sales per Week” on page 76

- "$ Sales per Week Index" on page 76
- "% of Promoted Units" on page 77
- "Basket $ Sales with Item" on page 80
- "Basket $ Sales with Item Index" on page 80
- "Trips per Shopper" on page 87
- "Units" on page 88
- "Units per Shopper" on page 90
- "Units per Trip" on page 90
- "Units per Week" on page 91
- "Units per Week Index" on page 91
- Wkly $ per Shopper
- Wkly $ per Shopper Index
- "Wkly $ per Trip" on page 93
- "Wkly Trips" on page 93
- "Wkly Trips Index" on page 94
- Wkly Units per Trip Index

Item Importance Dashboard

The **Item Importance Dashboard** compares product loyalty by segment. Loyalty, also known as **Share of Requirements**, highlights the importance of a given product to an individual shopper or group of shoppers.

Beyond sales, Share of Requirements uses dollar share to show which products are selected more definitively by a given group of shoppers. High-loyalty products are often considered less substitutable because their high share of a shopper's category dollars.

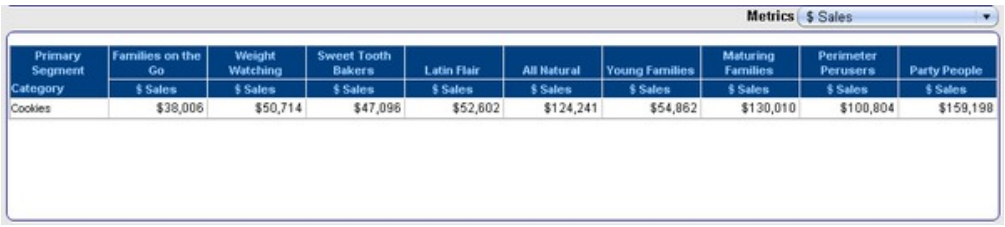


Each of the colored bubbles in the graph represents one product or product group for one segment. In the case above, the selected bubble represents the Perimeter Perusers segment, and mousing over its bubble shows the metrics for that group.

We can see from this graph that Perimeter Perusers have a greater Share of Requirements (loyalty) for cookies than the other segments, since it is farther right on the x-axis.

To select additional product groups, you can use the check-boxes on the right. You can also use this list to eliminate products and simplify the bubble graph.

The lower portion of the dashboard shows the data values corresponding to your selections, using the **Metrics** drop-down menu:



Primary Segment	Families on the Go	Weight Watching	Sweet Tooth Bakers	Latin Flair	All Natural	Young Families	Maturing Families	Perimeter Perusers	Party People
Category	$ Sales	$ Sales	$ Sales	$ Sales	$ Sales	$ Sales	$ Sales	$ Sales	$ Sales
Cookies	$38,006	$50,714	$47,096	$52,602	$124,241	$54,862	$130,010	$100,804	$159,198

The Item Importance Dashboard uses the following metrics:

- "$ per Shopper" on page 71
- "$ Sales" on page 74
- "Share of Requirements" on page 85

KVI Dashboard

The Key Value Item (KVI) Dashboard uses model-by-segment data to plot items by their relative elasticity and volume. The resulting quadrant analysis identifies categories of items such as image items and profit drivers. You can use these quadrants to identify important products, such as image items and profit drivers.

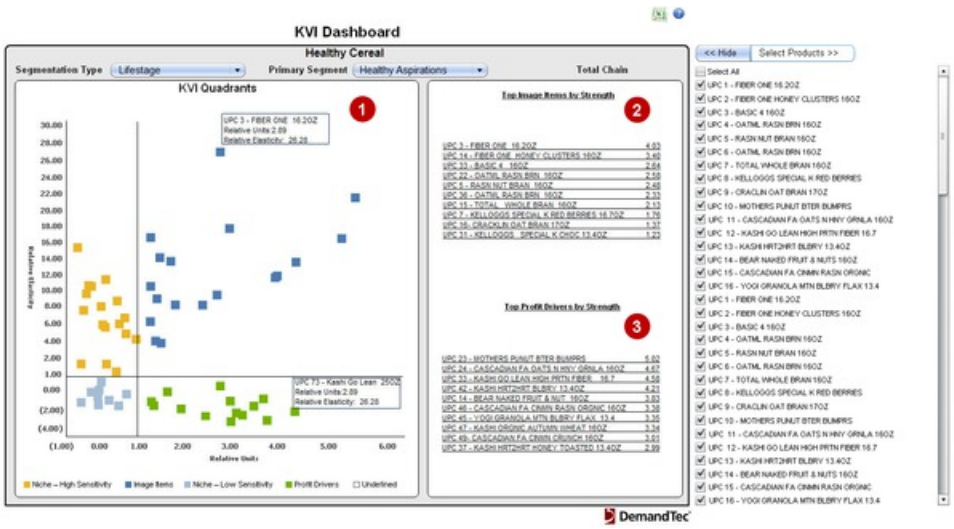
About this task

Note: This dashboard may not be available for all retailers.

The KVI dashboard contains 4 sections:

Procedure

1. KVI Quadrant Scatter Plot
2. Top 10 Image Items by Strength
3. Top 10 Profit Drivers by Strength
4. Product Filter



The KVI dashboard also allows you to view data by segment by selecting from the **Segmentation Type** and **Primary Segment** drop-downs at the top of the dashboard. This allows you to view the image items and profit drivers for a group of product, both for your overall population and for key segments.

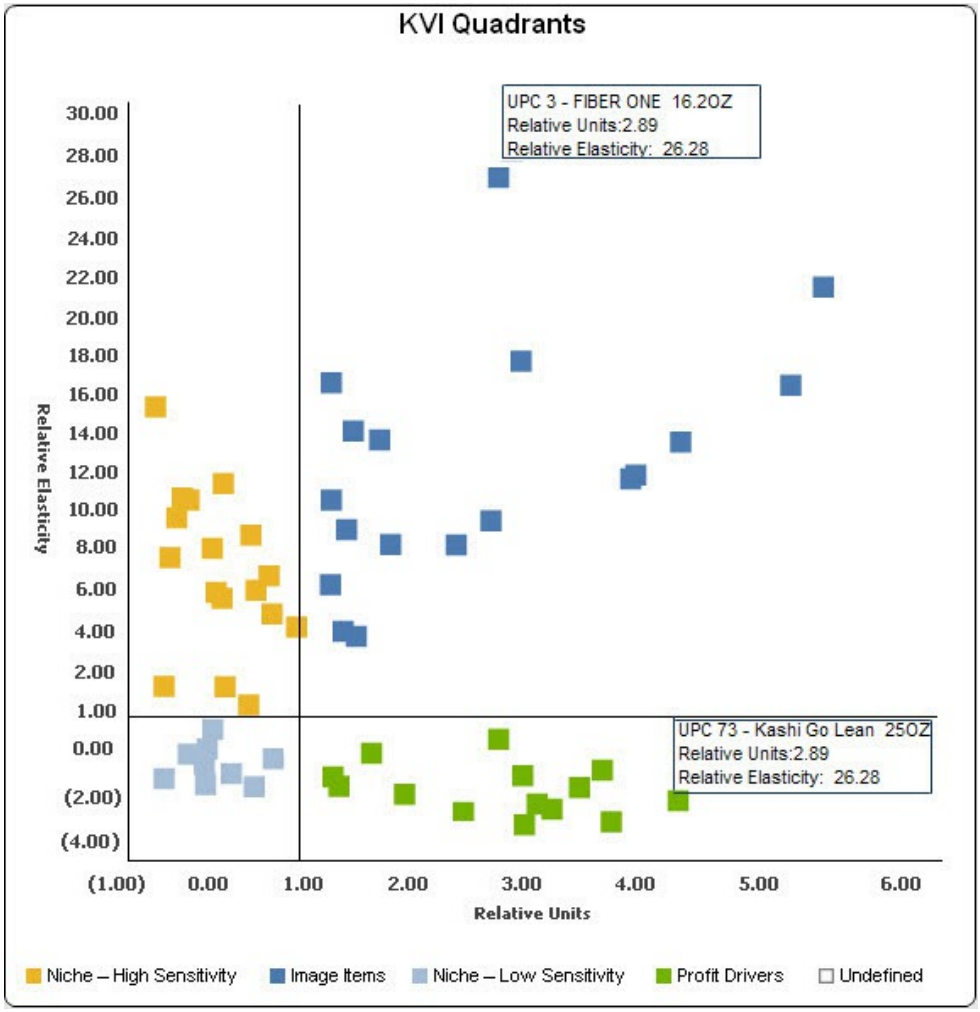
Note: This dashboard uses a 10% sample size for all calculations. Data displayed are representative of this 10% sample.

KVI Quadrant Scatter Plot

The main area of the dashboard contains the **KVI Quadrants** scatter plot.

This plot has 4 sections, each of which contains a subset of the selected products. The total list of the chosen products are shown in the Product Filter area. Using **Elasticity** on the left side of the graph and **Relative Unit** sales on the right side of the graph, products are sorted into four groups:

- Image Items
- Profit Drivers
- Niche Items — Low Sensitivity
- Niche Items — High Sensitivity



Mouse over any individual data point to see the specific data for that product, as well as the product name. The top image items and profit drivers are listed to the right of the main graph area, sorted by strength.

The **Elasticity** metric shows how price sensitive shoppers of a particular item are. Objects that rank as highly elastic tend to be very price sensitive; small changes in price can cause major changes in shopper behavior. The **Relative Units** metric is an index of how frequently the item is purchased, relative to the other items selected for the dashboard.

Top 10 Image Items by Strength

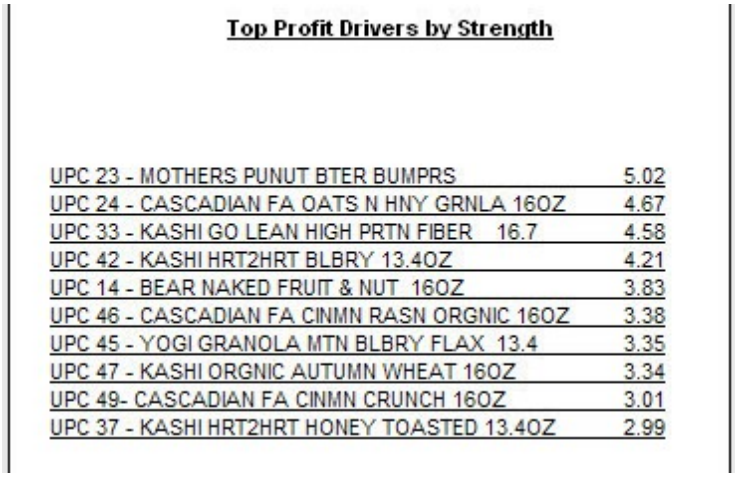
This section of the KVI dashboard lists the top 10 items identified in the upper right quadrant of the KVI scatter plot, sorted by strength.

Strength is calculated by identifying the distance of the item from the center of the scatter plot's x and y axes (1,1). These products provide a quick list of items that are both highly elastic and sell a high number of relative units.

Top 10 Profit Drivers by Strength

This area of the KVI dashboard shows the top 10 profit drivers from the selected group of products, as shown in the lower right portion of the KVI scatter plot, sorted by strength.

Strength is calculated by identifying the distance of the item from the center of the scatter plot's x and y axes (1,1). These products are very popular, selling high numbers of units relative to other selected products, but have low elasticity, and are not very sensitive to price changes or promotional activity



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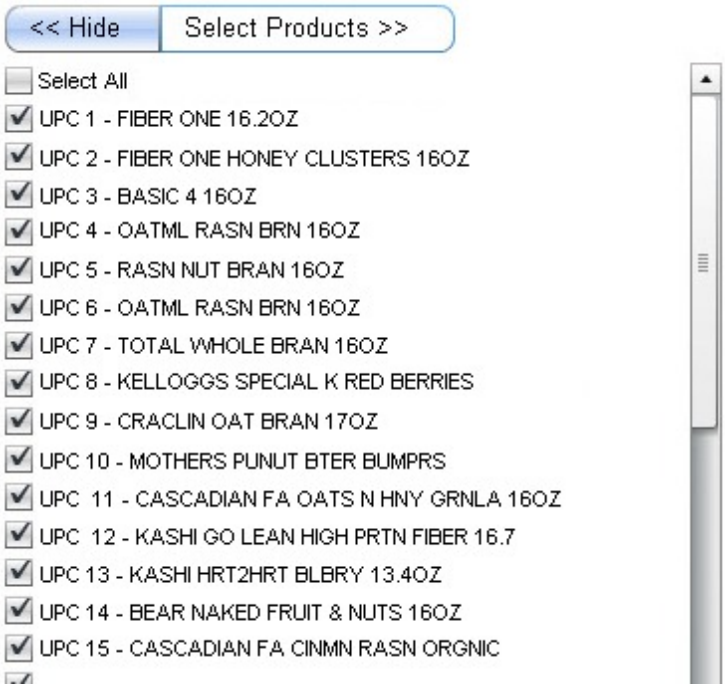
Product Filter

The product filter allows you to select which products are displayed in the **KVI Quadrants** section of the dashboard.

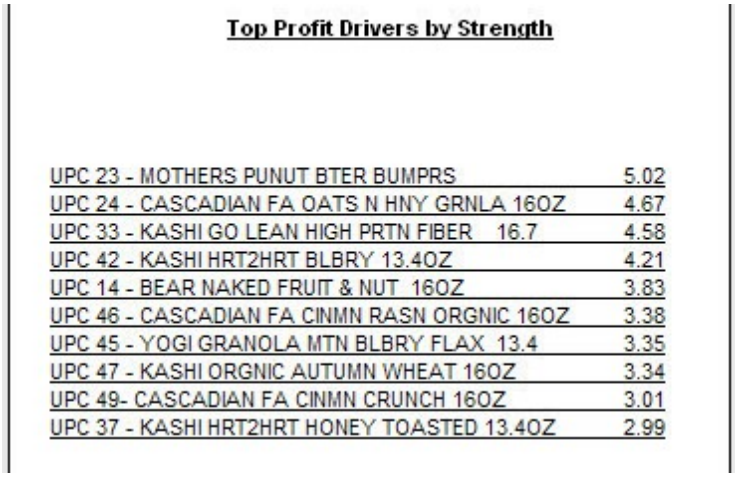
Selecting or deselecting products will update the dashboard dynamically, allowing you to see changes in relative performance with or without some of the products selected during the dashboard prompts.



Interpreting Results

Locating key Image Items and Profit Drivers can help drive your decision-making processes for promotion, pricing, and assortment. The image items listed in the upper right portion of the **KVI Quadrants** section are highly sensitive to price changes, and may be very important for competitive advantage. For example, in the example below, it may be very important to maintain a competitive price for FIBER ONE 16.2OZ and FIBER ONE HONEY CLUSTERS 16OZ.

And the Profit Drivers section identifies items that may be very important in making additional margin; as low-elasticity items with high unit sales, you may be able to increase prices or change merchandising and marketing activities for items such as MOTHERS PUNUT BTER BUMPRS or CASCADIAN FA OATS N HNY GRNLA 16OZ:



Top Profit Drivers by Strength

UPC 23 - MOTHERS PUNUT BTER BUMPRS	5.02
UPC 24 - CASCADIAN FA OATS N HNY GRNLA 16OZ	4.67
UPC 33 - KASHI GO LEAN HIGH PRTN FIBER 16.7	4.58
UPC 42 - KASHI HRT2HRT BLBRY 13.4OZ	4.21
UPC 14 - BEAR NAKED FRUIT & NUT 16OZ	3.83
UPC 46 - CASCADIAN FA CINMN RASN ORGNIC 16OZ	3.38
UPC 45 - YOGI GRANOLA MTN BLBRY FLAX 13.4	3.35
UPC 47 - KASHI ORGNIC AUTUMN WHEAT 16OZ	3.34
UPC 49- CASCADIAN FA CINMN CRUNCH 16OZ	3.01
UPC 37 - KASHI HRT2HRT HONEY TOASTED 13.4OZ	2.99

Niche items are lower-selling items, but may still represent a significant opportunity for your business, allowing you to identify items that have strong brand presence but low relative unit sales and high elasticity. These items could potentially benefit from promotion, increasing share easily.

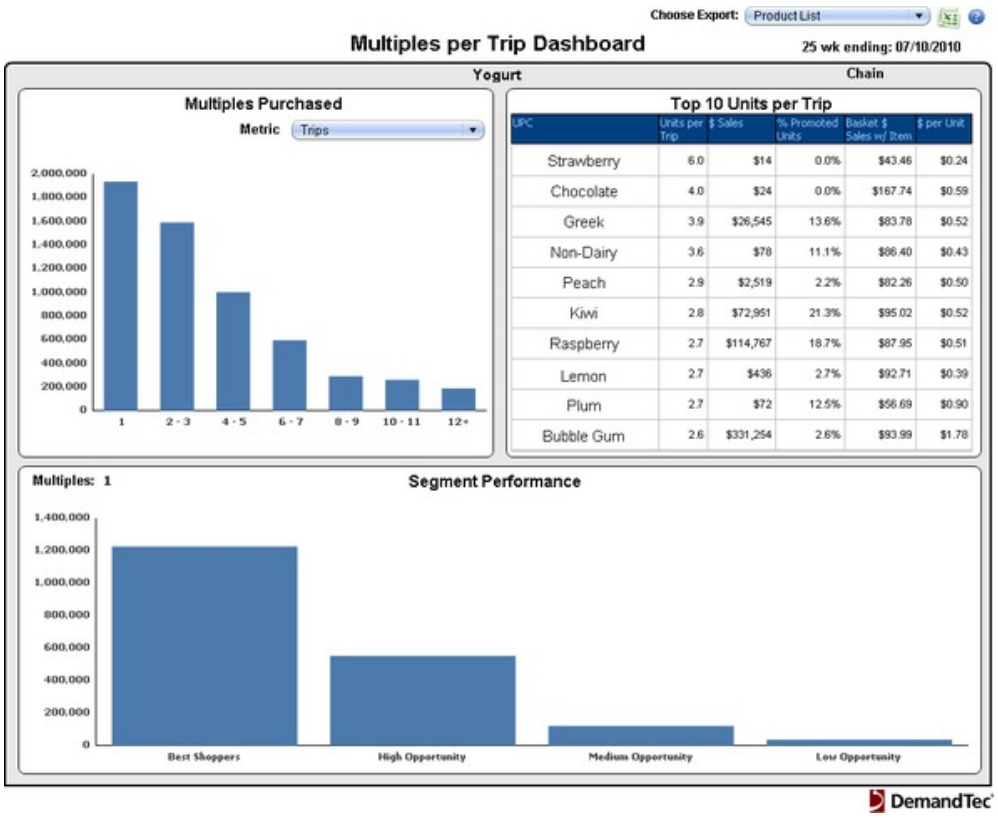
The KVI Dashboard uses the following metrics:

- Image Items
- Niche - High Sensitivity
- Niche - Low Sensitivity
- Profit Drivers
- Relative Elasticity
- Relative Units

Multiples Per Trip Dashboard

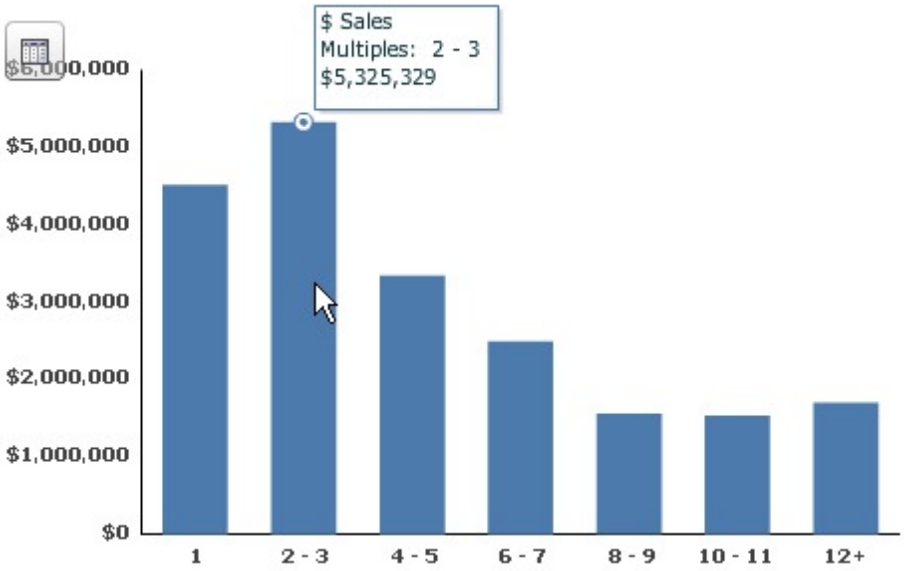
The Multiples Per Trip Dashboard displays information about shopper purchasing patterns when buying one versus multiple items during a trip.

In the following example, 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.

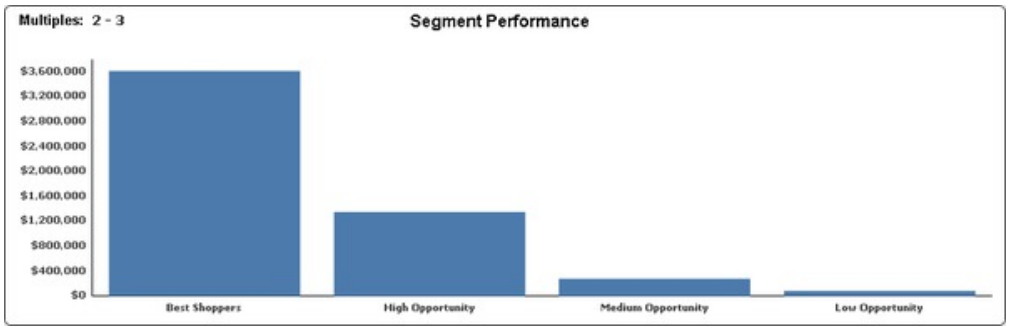


To change the metric displayed in the **Multiples Purchased** and **Segment Performance** sections of the dashboard, select from the **Metric** drop-down menu. The upper right section of the dashboard shows **Top 10 Units per Trip**, displaying items from your selections that drive the most multiples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

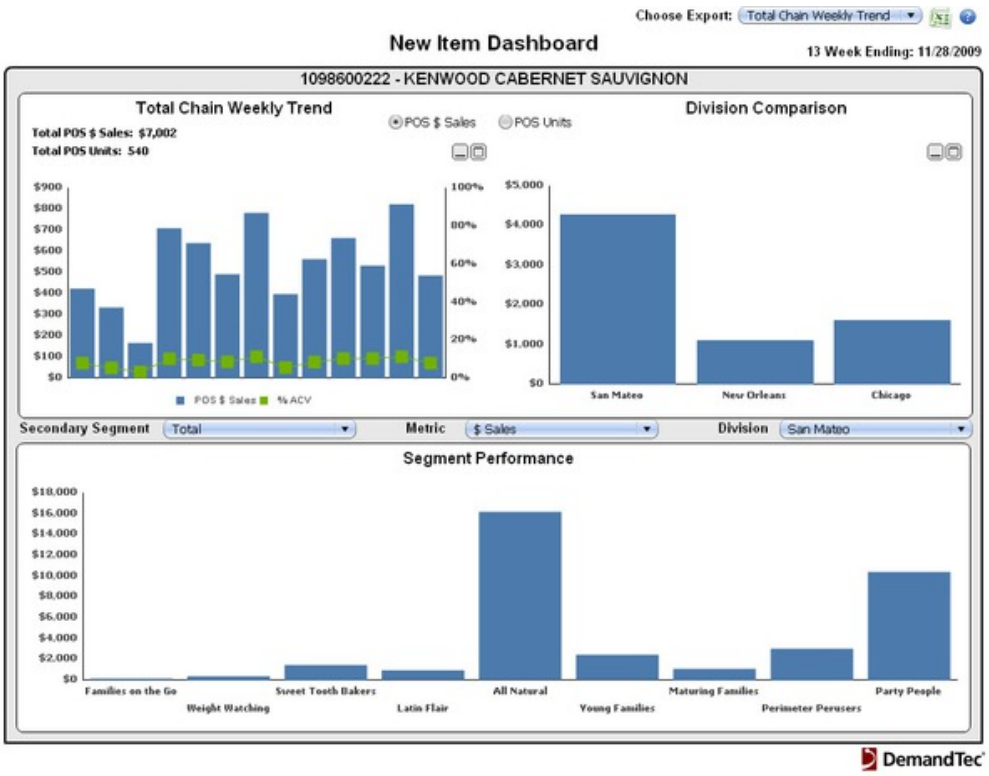
The Multiples Per Trip Dashboard uses the following metrics:

- "$ per Trip" on page 72
- "$ per Unit" on page 73
- "$ Sales" on page 74
- "% of $ Sales" on page 77
- "% of Promoted Units" on page 77
- "% of Trips (Multiples)" on page 79
- "Basket $ Sales with Item" on page 80
- "Trips" on page 86
- "Units" on page 88
- "Units per Trip" on page 90

New Item Dashboard

The New Item Dashboard enables you to assess the performance of a new product, showing financial performance at the Total Chain level, as well as sales information for up to ten selected geographies.

Note: This dashboard may not be available for all retailers.



The dashboard has three sections:

- The **Total Chain Weekly Trend** section shows trends for Point-of-Sale (POS) Sales, POS Unit Sales, and % ACV Distribution. This allows you to monitor compliance and sales at the total chain level for the new item.
- The **Division Comparison** section shows sales across the geographies you selected.
- The **Segment Performance** section shows segment-by-segment performance in the selected time period and geographies for the selected **Metric**.

Interpreting Results

Using the New Item Dashboard, you can see the effectiveness of a product launch, including week-by-week results for each geography. Additionally, you can see the trends in sales and distribution for the new product.

You could use this dashboard to determine:

- Is the item gaining as much distribution as you would expect?
- Which segments are driving initial purchasing behavior of this item?
- How is the item performing in particular geographies?

The New Item Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "$ per Shopper" on page 71
- "$ per Trip" on page 72
- "$ per Unit" on page 73
- "$ Sales" on page 74
- "% of Segment Shoppers" on page 78

- "POS $ Sales" on page 84
- "POS Units" on page 84
- "Trips per Shopper" on page 87
- "Units" on page 88
- "Units per Shopper" on page 90
- "Units per Trip" on page 90

New Lost Retained Dashboard

The New Lost Retained Dashboard provides insight into the buyer flow for the selected time period and geography. It separates each shopper into one of three groups.

- **New** — The shopper did not purchase the selected product during Period 1, but did purchase during Period 2.
- **Lost** — The shopper purchased the selected product during Period 1 but not in Period 2.
- **Retained** — The shopper purchased during Period 1, and also purchased during Period 2.

Note: To be counted as a shopper, each counted individual **must** have purchased the selected product at least once in Period 1, Period 2, or both.

Interpreting Results

Using the New Lost Retained Dashboard, you can immediately determine whether your new shoppers are making up for lost shoppers. In the **Period 1 vs. Period 2** graph, you can see how new, lost, or retained shoppers accounted for each key sales driver metric. Select a value from the **Metric** drop-down menu to view performance for a different sales driver. The height of the bar represents total

performance for the selected period; the colored sections at the top of the bars show how much of the total performance for the selected metric is attributable to new or lost shoppers.

The **Primary Segments** graph shows how your new, lost, or retained shoppers are distributed among primary segments. Each pie chart shows how the new, lost, or retained groups are comprised; change the view by selecting from the **Shopper Group** drop-down. You can also see segment-specific analysis in the **Segment Performance** graph, showing comparative numbers of new, lost, and retained shoppers by segment. Select **Period 1** or **Period 2** to view distribution for each time period. The pie chart is created using the metric you chose in the **Period 1 vs. Period 2** chart shown previously.

The New Lost Retained Dashboard uses the following metrics:

- "$ Sales" on page 74
- "Units" on page 88
- "# of Shoppers" on page 70
- "Trips" on page 86
- "$ per Shopper" on page 71
- "Trips per Shopper" on page 87
- "$ per Trip" on page 72
- "Units per Trip" on page 90
- "Units per Shopper" on page 90
- "Promoted Units" on page 85

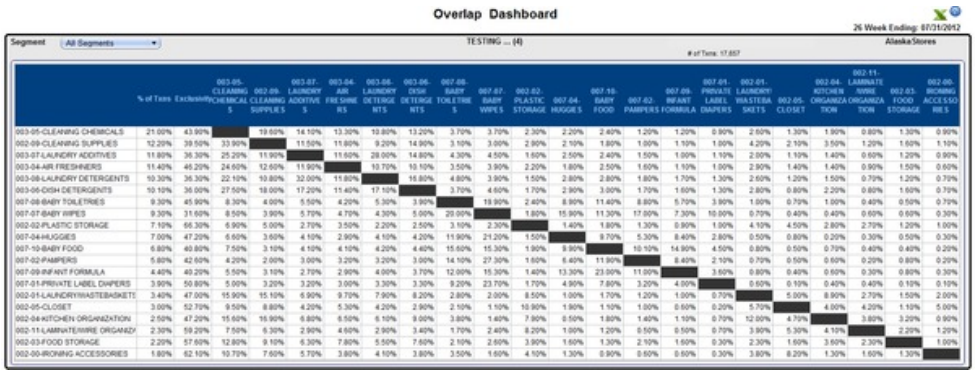
Overlap Dashboard

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. You can export up too 100 overlaps into Excel.

The Overlap Dashboard includes:

- Flexible product selection — use customized Shopper Insights 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



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. If you are looking at transactions, this refers to each specific transaction (for example, checking out at the Pharmacy, Electronics, and the front register are all one transaction). If you are looking at trips, this includes all of the person's shopping behavior in one day at one store.

	% 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.

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 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.

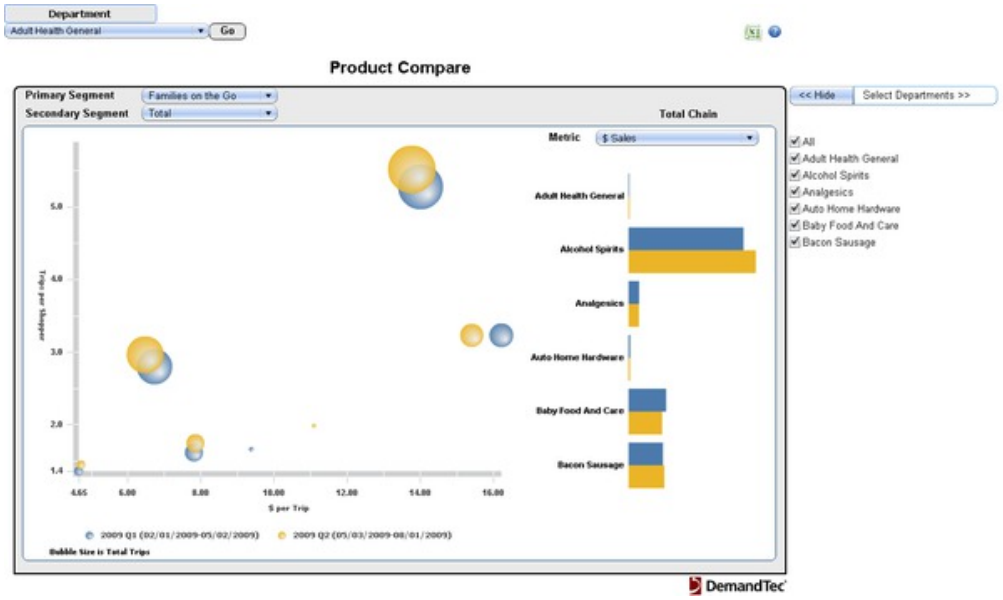
The Overlap Dashboard uses the following metrics:

- "% of Trips (Overlap)" on page 79
- "Exclusivity (Trip)" on page 82
- "Exclusivity" on page 82
- "% Overlap (Trip)" on page 77 (label not displayed in User Interface)
- "% Overlap (Shopper)" on page 76
- "% of Shoppers" on page 78
- % of Txns

Product Compare Dashboard

The **Product Compare Dashboard** allows you to compare between two and ten products, visually representing the selected products in a bubble chart, displaying change versus the previous year for key metrics such as dollars per trip and number of trips.

You can also focus the data on a particular segment by using the **Primary Segment** and **Secondary Segment** drop-down menus.



Note: This dashboard may not be available for all retailers.

The bubble graph allows users to quickly identify which products are driving higher traffic on the y-axis of **Trips per Shopper**, with the x-axis showing the items that drive higher basket value, **$ per Trip**. The size of the bubble represents the relative **Total Trips** for the item.

On the right-hand side of the dashboard, you can select and deselect products, allowing you to reduce the number of bubbles or eliminate outliers.

The Product Compare Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "$ per Shopper" on page 71
- "$ per Trip" on page 72
- "$ per Unit" on page 73
- "$ Sales" on page 74
- "Basket $ Sales with Item" on page 80
- "Basket Unit Sales with Item" on page 80
- "Item $ per Basket" on page 82
- "Item Units per Basket" on page 83
- "Rest of Basket $ Sales" on page 85
- "Rest of Basket Units" on page 85
- "Trips" on page 86
- "Trips per Shopper" on page 87
- "Units" on page 88
- "Units per Shopper" on page 90
- "Units per Trip" on page 90

Product Dashboard

The Product Dashboard (also called Sales Behavior Dashboard by some retailers) provides insights to help you develop and evaluate business strategies and tactics.

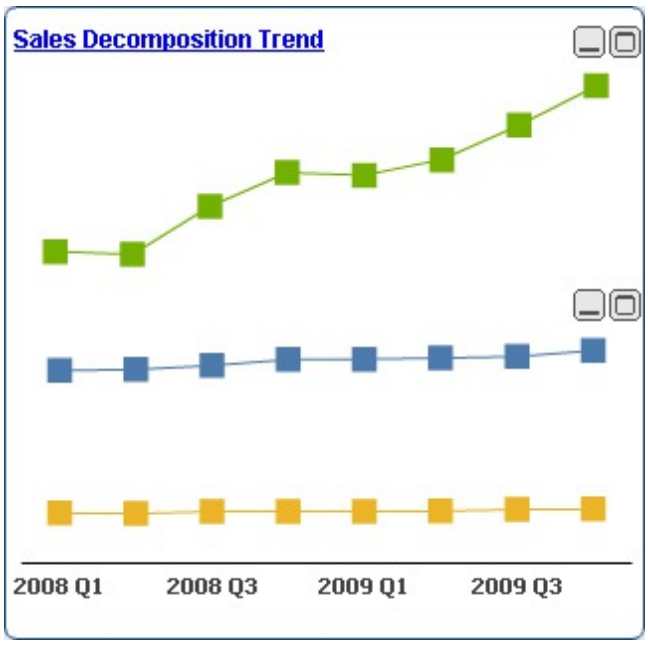
This is done by identifying the key sales drivers for each shopper segment:

- **# of Shoppers** — how many people purchased the selected product or products buying from the selected categories during the specified time period. This is also known as Penetration.
- **$ per Shopper** — the amount of money spent by each shopper during the specified time period. This is also known as Buying Rate.

Note: The Product Dashboard is called Sales Behavior Dashboard by some retailers and it will not display the lower left chart.

The top portion of the dashboard is a graph showing the decomposition of sales for the selected quarter. Each metric is shown as an absolute value and shows the percent change versus one year before, allowing users to identify which metrics are driving business performance.

The line graph in the lower left hand corner of the dashboard is the Sales Decomposition Trend, showing a time series for sales, number of shoppers, and dollars per shopper. Each line's color corresponds to the colored stripe in the sales decomposition graphic above. If you want to see the graph in more detail, click **Sales Decomposition Trend** to open the Sales Decomposition Dashboard.



The bottom right-hand corner shows information about your primary segments, showing actual or growth values for each segment in key sales driver metrics. Select **Growth** to view the segment's performance versus the year before.

Interpreting Results

The Product Dashboard can help you discover product performance issues quickly, acting as a "Product Report Card". For example, if particular sales drivers are declining for a segment, you can more effectively target those issues for resolution. You could interpret results and use them to drive actions:

- You could discover that a sales decline is not due to decreasing units sold per shopper, but to decreased trips per shopper. This insight allows you to focus on tactics that bring more shoppers into the store.
- You could find an unexpected trend in a particular segment's performance, indicating that you may need to examine your promotional plan to better engage that segment.

The Product Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "$ per Shopper" on page 71
- "$ per Trip" on page 72
- "$ per Unit" on page 73
- "% of Segment Shoppers" on page 78
- "POS $ Sales" on page 84
- "Profit per Shopper" on page 84
- "Profit per Trip" on page 84
- "Profit per Unit" on page 85
- "Trips" on page 86
- "Trips per Shopper" on page 87
- "Units per Trip" on page 90

Promotion Response Dashboard

The **Promotion Response Dashboard** enables you to analyze how much revenue increase occurs for selected products when using particular discounts and promotional tactics. These results can be filtered by category, promotion types, and segment.

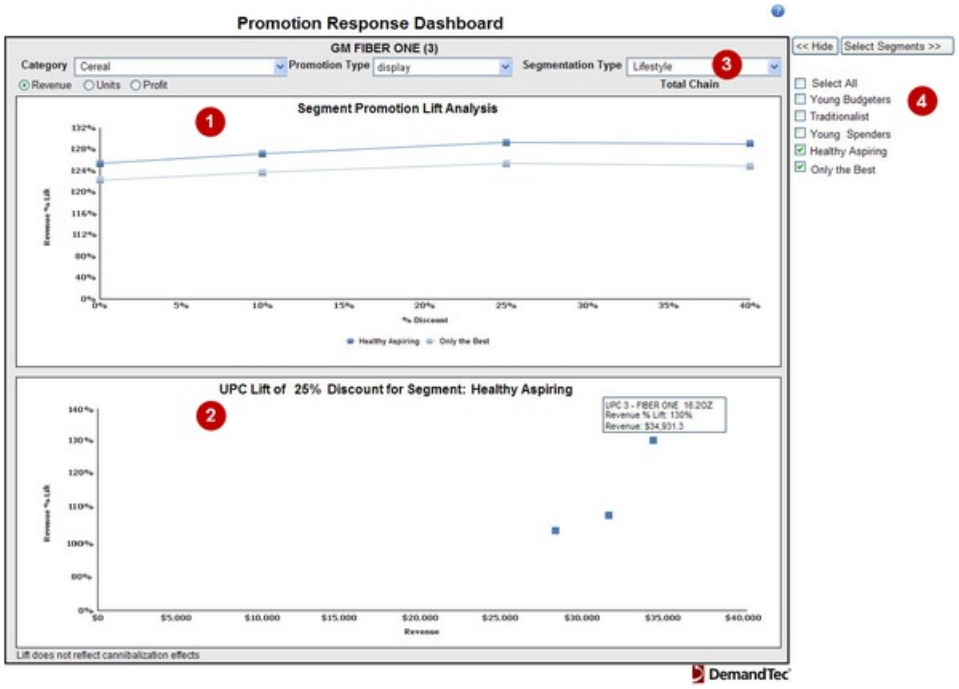
About this task

Note: This dashboard may not be available for all retailers.

The **Promotion Response Dashboard** is separated into 4 areas:

Procedure

1. Segment Promotion Lift Analysis
2. Item Lift for Selected Segment/Discount
3. Graph Display Criteria
4. Segment Filter



Note: This dashboard uses a 10% sample size for all calculations. Data displayed are representative of this 10% sample.

Choosing Data to Display

To use the dashboard, you must first select the **Category**, **Promotion Type**, and **Segmentation Type** you wish to view. Then, using the line graph in the **Segment Promotion Lift Analysis** area, click on a particular data point to update the graph below. Each of the data points in the graph above represents the revenue increase for a certain segment and discount percent. Clicking on that data point will show the item-by-item data for that segment and discount amount, showing which items are most affected by the selected discount percentage.

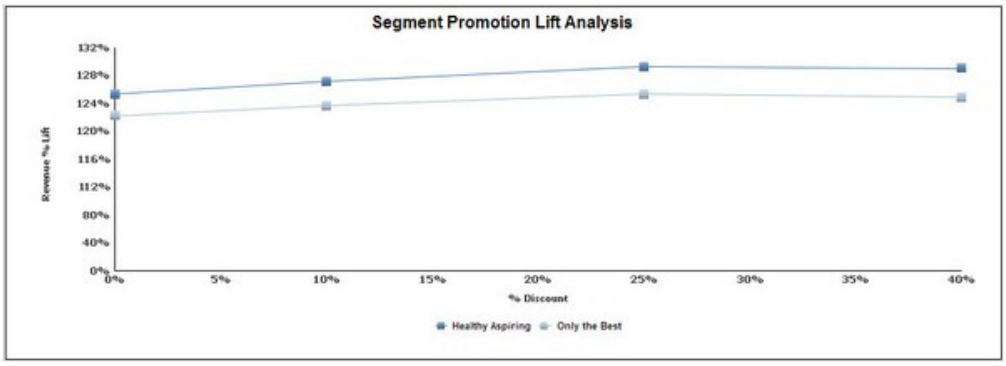
Changing any of the selections in these drop-downs changes the data filter, selecting a different category, promotional tactic, or segmentation type for the

dashboard. For example, the graph above shows an analysis of the Cereal category for promotions using a Display tactic. The two lines shown are for the two segments selected on the right: the "Healthy Aspiring" segment and the "Only the Best" segment.

Segment Promotion Lift Analysis

The **Segment Promotion Lift Analysis** area of the dashboard shows an overview plot for each segment selected in the right-hand check-box list. Each segment is represented by a line in the graph, showing the revenue lift percentages associated with certain discount or Temporary Price Reduction (TPR) levels.

For example, the graph below shows that revenue % lift for the selected products peaks at around a 25% discount for both the "Healthy Aspiring" and "Only the Best" segments. a 25% discount yields approximately a 125% revenue lift for each, though lift is slightly lower for the "Only the Best" segment.

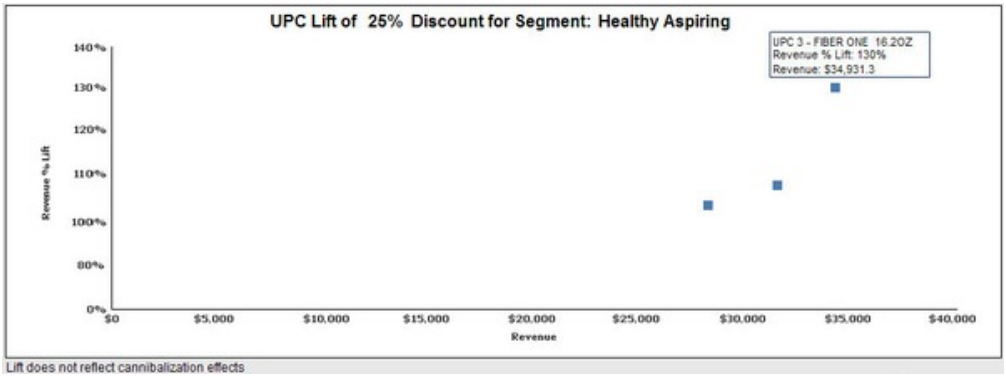


When you mouse over any data point on this graph, you will see the associated data for that point. Clicking on that data point updates the lower graph, showing revenues and percentage lifts for the selected items.

Item Lift for Selected Segment/Discount

After you click a data point from the **Segment Promotion Lift Analysis** area of the dashboard, this area updates to reflect the item-by-item revenue and lift data for the selected discount percent and segment.

For example, the graph below shows that the user clicked the data point for "Healthy Aspiring" shoppers at a discount percentage of 25%:



Mousing over any of the data points in this graph shows the relevant data for the item. This shows how discounts and promotional tactics vary by item, discount,

and segment. If you want to see specific data for another segment or discount percentage, select that data point on the graph above.

Graph Display Criteria

The Graph Display Criteria area is required each time you run the dashboard. These three drop-down menus at the top of the dashboard allow you to focus in on one category, promotional tactic, and segmentation type for the dashboard display.

Note: Each of these drop-downs is required; to show data in the graphs below, you must select a category, promotion tactic, and segmentation type. The segments available for the segmentation type are shown in the segment filter section, as described in the Segment Filter section below.

If you have selected multiple categories in the dashboard loading prompt, you must select one of the categories from the **Category** drop-down. If you selected only one category, it will be loaded by default. The **Promotion Type** drop-down allows you to show criteria for a single promotion tactic, such as display or ad. This allows you to examine promotion tactics' effectiveness for segments and categories.

Finally, use the **Segmentation Type** drop-down to choose the segmentation scheme you would like to use in your analysis. The segments available for the selected segmentation type will be displayed in the filter list on the right-hand side of the dashboard.

Segment Filter

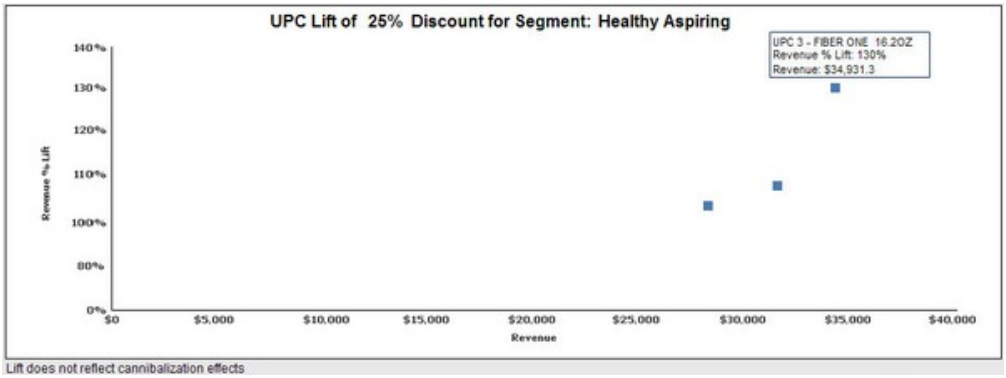
The **Segment Filter** allows you to select segments for display in the top graph of the Promotion Response dashboard. Each selected segment will have a line in the **Segment Promotion Lift Analysis** graph, and selecting individual nodes from that line will show the relevant data by item for the lower graph.

Interpreting Results

The Promotion Response Dashboard provides a granular view of how your products respond to discounts by segment. For example, this dashboard could help you answer the following questions:

- How steeply should I discount Chex if I want to maximize promotional effectiveness for Families with Young Children?
- Which items in Dairy are most effective in driving increased profit from Baby Boomers?
- Which segments will see the greatest lift from the promotion I am planning to execute?
- Which promotional tactic will provide more lift with this promotion: Ad or Display?

In the graph below, the Promotion Response Dashboard shows an important insight: for Healthy Aspiring shoppers, a 25% discount with a display tactic for FIBER ONE 16.2OZ provides a much greater lift than for the other items selected for analysis. Using this data, you would likely select this product for promotion over the other items shown in the dashboard.



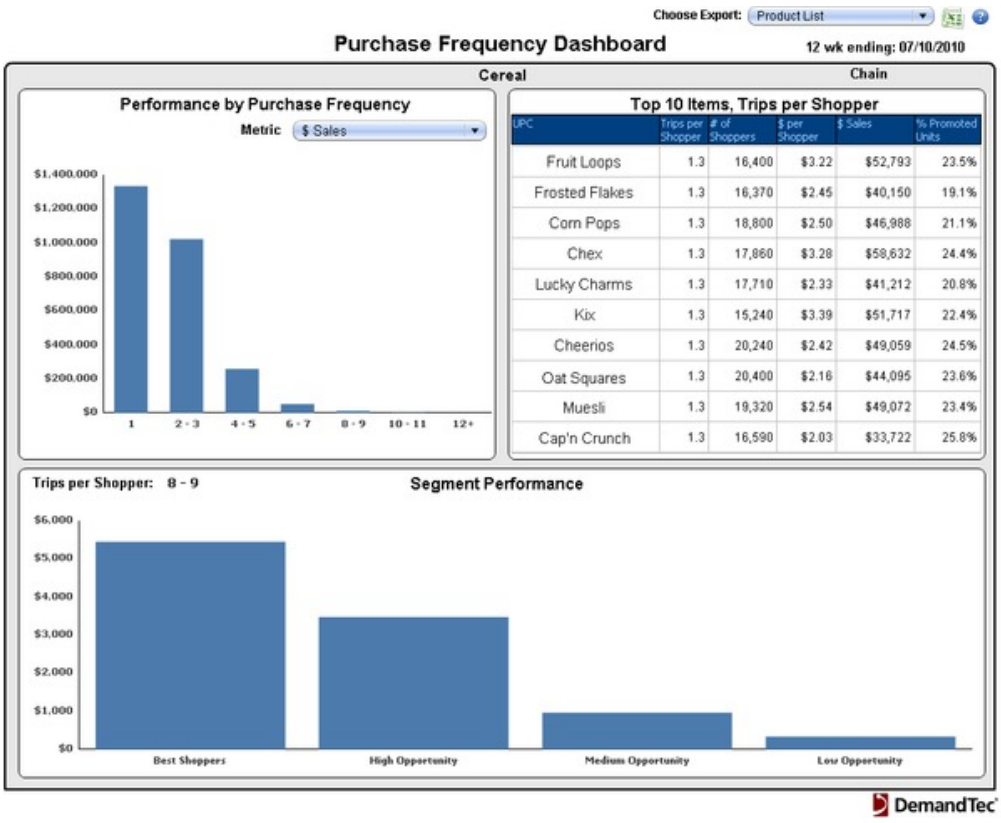
The Promotion Response Dashboard uses the following metrics:

- % Discount
- Profit % Lift
- Revenue % Lift
- Revenue
- Unit % Lift

Purchase Frequency Dashboard

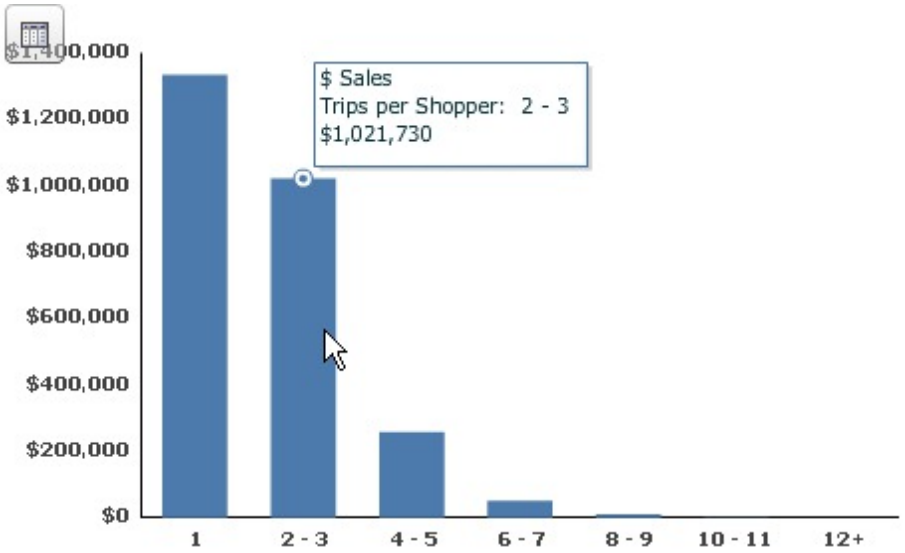
The Purchase Frequency Dashboard details how financial performance for the selected items is distributed among shoppers who bought one time or multiple times, as selected when loading the dashboard.

For example, the **Performance by Purchase Frequency** section of the dashboard below shows metric values for shoppers who purchased one of the selected items 1 time, 2-3 times, 4-5 times, etc.

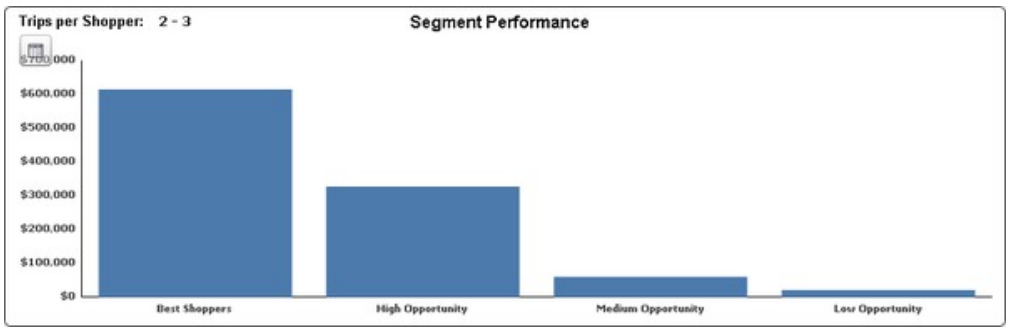


Use the **Metric** drop-down to show performance of shoppers and segments in each group across other metrics. The **Top 10 Items, Trips Per Shopper** section of the dashboard shows the top 10 items from the selected group, sorted by Trips Per Shopper.

Mousing over any bar in the **Performance by Purchase Frequency** section will show the characteristics used to create that bar:



Clicking on a bar selects that group of shoppers, showing data for that group by segment in the **Segment Performance** section at the bottom of the dashboard:



For example, the graph above shows that for all shoppers who bought any of the selected products 2-3 times in the selected time period, the "Best Shoppers" segment contributed most of the $ Sales. Changing the metric selection in the **Metric** drop-down will also change this graph to show segment performance by the selected metric.

Interpreting Results

Identifying products that generate trips can help you leverage the draw of those products to bring shoppers into the store. More importantly, segment performance characteristics can help you identify areas with potential for growth. You can leverage insights from the Purchase Frequency Dashboard to:

- Determine how frequently shoppers are coming to your store and purchasing from the selected category or product group
- Identify key segments that can drive additional trips
- Understand shopping patterns for your segments and frequent shoppers

The Purchase Frequency Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "$ per Shopper" on page 71
- "$ per Trip" on page 72
- "$ per Unit" on page 73
- "$ Sales" on page 74
- "% of $ Sales" on page 77
- "% of Promoted Units" on page 77
- "Basket $ Sales with Item" on page 80
- "Trips" on page 86
- "Units" on page 88
- "Units per Shopper" on page 90
- "Units per Trip" on page 90

Purchase Summary Dashboard

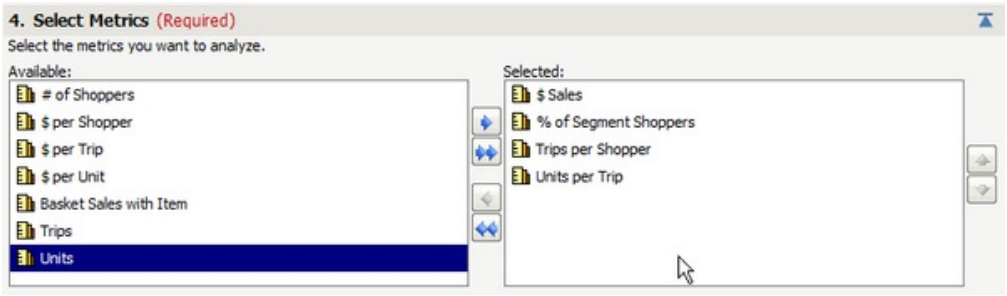
The Purchase Summary Dashboard enables you to analyze key metrics across segments using flexible product selections and custom metric selections.

You can use the Purchase Summary Dashboard to create on-demand reports, using:

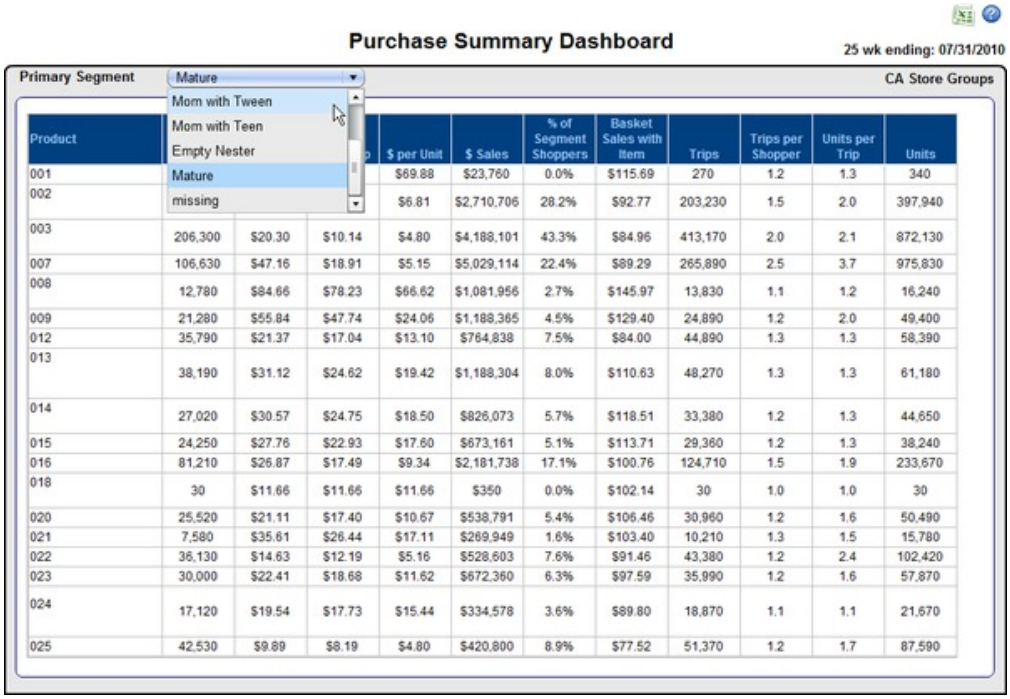
- Flexible product selection — use customized Shopper Insights Product Groups, browse your product hierarchy, or search for products to analyze.

- 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" on page 70
- # of Shoppers Growth
- # of Shoppers Last Year
- "$ per Shopper" on page 71
- $ per Shopper Growth
- $ per Shopper Last Year
- "$ per Trip" on page 72
- $ per Txn Growth
- $ per Txn Last Year
- "$ per Unit" on page 73
- $ per Unit Growth
- $ per Unit Last Year
- "$ Sales" on page 74
- $ Sales Growth
- $ Sales Last Year
- "% of Segment Shoppers" on page 78
- % of Total Txns
- Basket $ Sales with DPCI
- Exclusivity in Total Txns
- "Trips" on page 86
- Txns Growth
- Txns Last Year
- "Trips per Shopper" on page 87
- Txns per Shopper Growth
- Txns per Shopper Last Year
- "Units" on page 88
- Units Growth
- Units Last Year
- "Units per Shopper" on page 90
- "Units per Trip" on page 90
- Units per Txn Last Year

Note: The Purchase Summary Dashboard does not take returns into consideration.

Sales Decomposition Dashboard

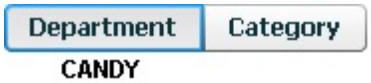
The Sales Decomposition Dashboard can help you determine which of the key sales metrics shown in the graphs are driving sales over time. This dashboard is available at various drill-down levels, allowing you to analyze the performance of a product or product hierarchy level.

Note: This dashboard may not be available for all retailers.

A change in any of the key metrics may help you determine which tactics should be explored more thoroughly. For example, if a decline is sales is driven by a decline in units per trip, you could adjust the mix of promotions to deliver optimal results, focusing on big items versus little items, or buy-one-get-one versus a single price point.

By using the check-boxes at the top of the dashboard, you can select the metrics you would like to view individually, adding or removing lines from the line graph below. For a fair comparison between lines, click **Log Scale** to display the graph in a log scale.

To drill down to a category, type, or item, click the drill-down buttons at the top of the dashboard:



The Sales Decomposition Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "$ per Shopper" on page 71
- "$ per Trip" on page 72
- "$ per Unit" on page 73
- "$ Sales" on page 74
- "Trips per Shopper" on page 87
- "Units per Trip" on page 90

Sales Driver Dashboard

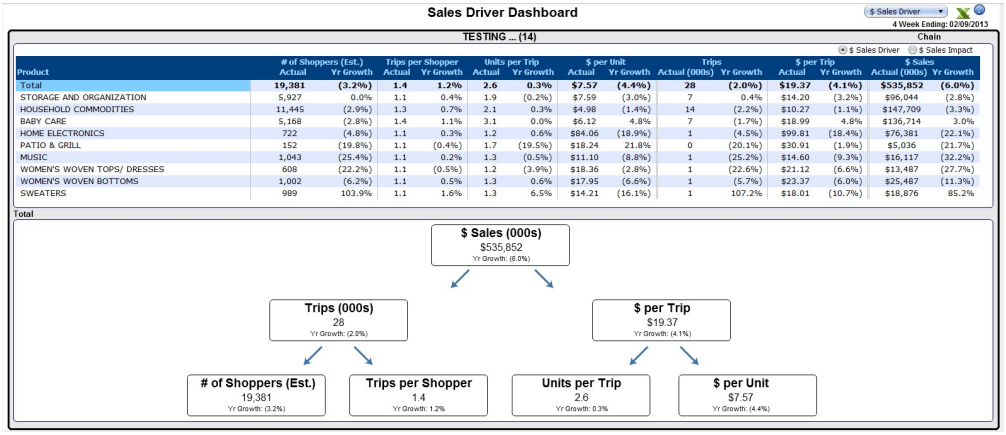
The Sales Driver Dashboard displays which metrics drive sales growth or decline compared to last year. It takes into account all transactions, not only transactions made by shoppers.

Key metrics in the Sales Driver Dashboard include:

- "# of Shoppers" on page 70
- "Trips per Shopper" on page 87
- "Units per Trip" on page 90
- "$ per Unit" on page 73
- "Trips" on page 86
- "$ per Trip" on page 72
- "$ Sales" on page 74

Note: Some retailers do not have these shopper metrics available.

Growth numbers for all metrics are also included. The comparison is for the same time period a year ago (that is, year over year).



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%)	$18,876	85.2%

The above grid is interactive and the visualization will update based on your product selection. The sales driver accounts for returned items.

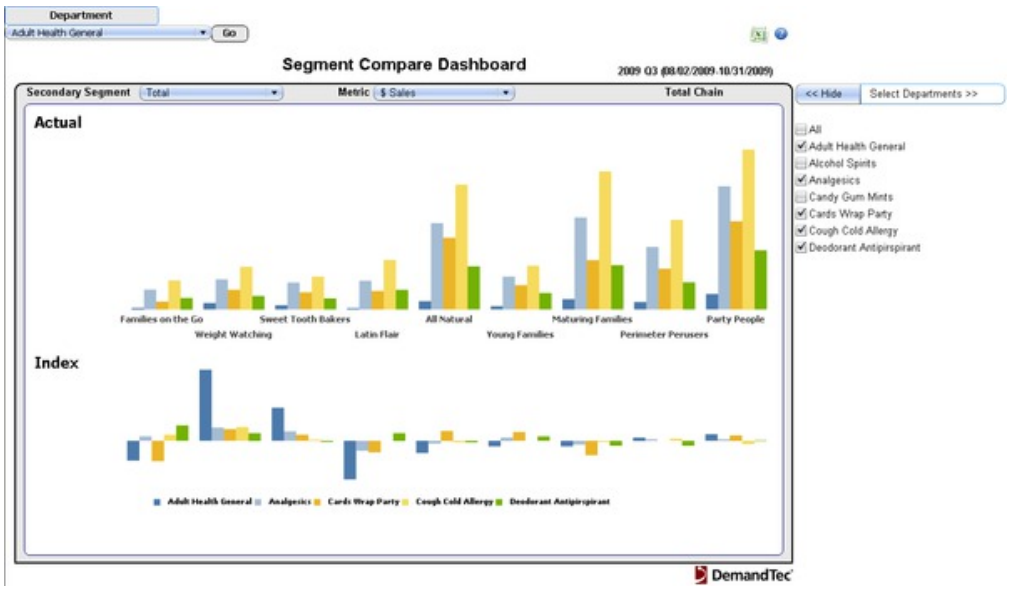
You can also use the **$ Sales Impact** radio button to see what effect changes to your key sales metrics had on your bottom line sales. For example, the $ Sales Impact view might help you answer the following question: "Was the decline in sales for this category more due to trips or dollar per trip?"

Note: The **$ Sales Impact** radio button is applicable to only some companies.

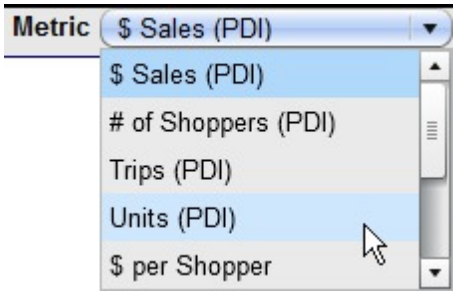
Note: The Sales Driver Dashboard is based off of a 10% sample of sales data. You cannot drill down on this report. If your company has customized your product level labels, you will see customized labels on the Shopper Insights home page and in the report. Vendors can browse and select only those products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

Segment Compare Dashboard

The **Segment Compare Dashboard** enables you to compare shopper preferences across multiple products. Select the products to view in the list on the right side of the screen, and you will see each segment's purchasing behavior for the selected products in the bar charts to the left.



The dashboard contains two sets of graphs: the top set of graphs displays **Actual** results for the selected quarter across segments, while the **Index** section shows indexed values for the same metric. The graphs shown reflect the key sales driver metric shown in the **Metric** drop-down. By default, the value is **$ Sales (PDI)**, but you can use the drop-down to view cross-segment performance on any available metric:



The Index graphs show variance of each segment's performance around a mean of 100, showing how each segment's purchasing behavior compares other segments. If the index is high, the segment is "over-indexing" for the selected product groups, showing an increased penetration in that segment relative to expected penetration.

The Segment Compare Dashboard uses the following metrics:

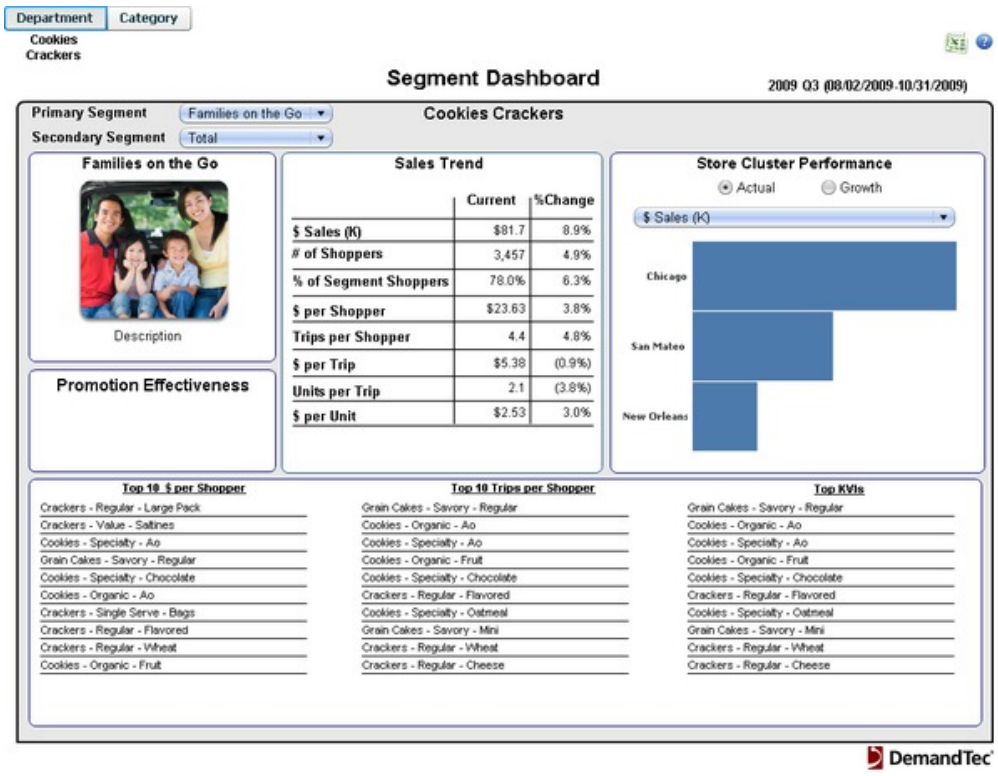
- "# of Shoppers (PDI) (Drillable Segment Compare)" on page 70
- "# of Shoppers Index" on page 71
- "$ per Shopper" on page 71

Segment Dashboard

The **Segment Dashboard** can provide in-depth insights into each segment's purchasing decisions, showing how shoppers in the segment purchase the selected product, along with key sales metrics and their trends versus the year before.

This dashboard also drills down, showing top products for the selected segment. You can use information about top purchases to identify products that can drive segment behavior changes.

Note: This dashboard may not be available for all retailers.



To view characteristics for a segment, use the drop-downs at the top of the dashboard:

The results shown in the dashboard will be updated to match your selections, providing key metrics for the selected segments, showing both current sales metrics for the selected quarter, as well as metrics from the same quarter a year before. In addition to the Primary Segment, choosing a secondary segmentation schema could allow you to analyze, for example, the behavior of your most loyal shoppers.

The Segment Dashboard uses the following metrics:

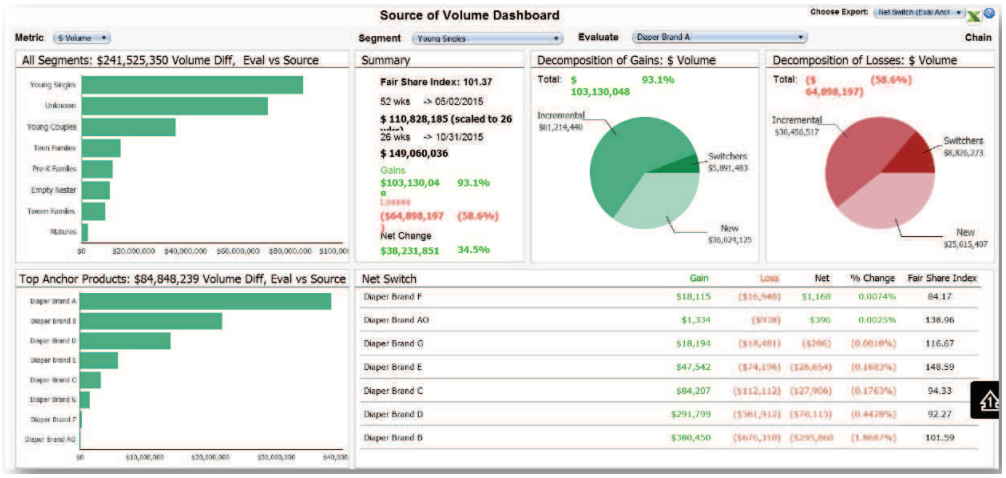
- "# of Shoppers" on page 70
- "$ per Shopper" on page 71
- "$ per Trip" on page 72
- "$ per Unit" on page 73
- $ Sales (K)
- "% of Shoppers" on page 78
- "Trips per Shopper" on page 87
- "Units per Trip" on page 90

Source of Volume Dashboard

The Source of Volume dashboard decomposes revenue and unit gains/losses between different products at two different time periods.

It is useful in answering business questions, such as:

- Did my new item launch help introduce new customers to the category?
- Did my recent promotion help take share away from my competitors?
- Which ones were most affected by it?
- Did it cause a shift in behavior between my own brands or cause cannibalization?
- For the shoppers that stayed loyal to my brand between the two time periods, did they spend more or less with my brand than they did historically?



Defining the Evaluation Time Period

The Source of Volume dashboard requires two different time periods: the evaluation time period and the source time period. The evaluation time period typically represents an event or the most recent time period and shows what customers ended up buying. The number of weeks in an evaluation time period is typically less than or equal to the number of weeks in the source time period. You can currently only enter a maximum of 52 weeks for the evaluation time period.

Defining the Source Time Period

The source time period is typically used to define the baseline of customer behavior before the evaluation time period. When you want to normalize behavior from the source time period, you can use a longer time duration. As a result, the number of weeks in the source time period will typically be greater than or equal to the number of weeks in the evaluation time period.

Defining Anchor Products

Anchor products are the specific set of products, product groups, or brands that you are interested in tracking specific switching behavior in the Net Switch report between the two time periods. Anchor products can be your primary competitors or your own brands if you wish to track cannibalization within your own portfolio. Typically, these products are within one category or department, but can be used to track products in adjacent categories that are potential substitute

products. For example, you may want to track carbonated beverages together with juices as anchor product because consumers may switch their spending between these items despite being in two different categories. The source of volume dashboard currently limits the number of anchor products that you can track up to ten selections.

Product Universe

The product universe is defined as the general set of products, product groups, or brands which you consider to be substitutable products. It will contain products or brands in addition to those defined in the anchor products section. The product universe should be a superset of products that also contains the anchor products. This is typically defined as an entire category or department, but may include additional products in other categories or departments which are believed to be possible substitutes. This will help the application track which shoppers are completely new to this universe in the evaluation time period for the decomposition of gains section and which ones left the product universe in the decomposition of losses section.

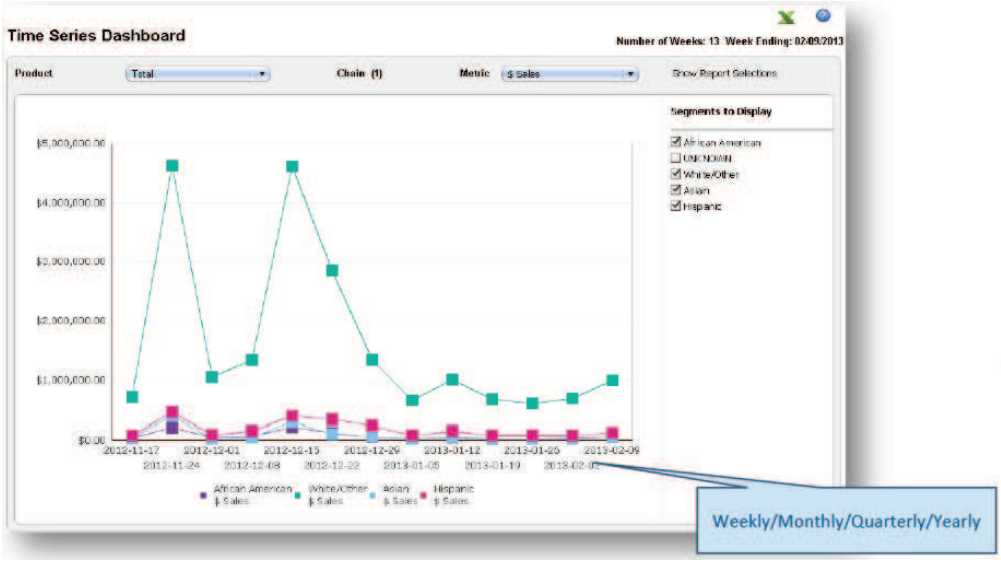
It is generally recommended that you select the same anchor items and product universe items. This will make your analysis more straightforward. If you have more than 10 anchor items, put the 9 that you are most interested in first and then create an "all others" bucket using product groups (because you can only select 10 anchor items). Also, at this time, you can export only the Net Switchers to Excel.

Time Series Dashboard

For retailers and vendor analysts, the Time Series dashboard is useful in identifying whether certain metrics, products, product attributes, or customer segment behaviors are changing over time.

The **Select a View Prompt** defines what is displayed in separate time series lines. You can select from four options:

- **By Segment**: Display each customer segment as a separate line for a given segmentation type, product, and metric.
- **By Product**: Displays each product as a separate line for a given customer segment, product, and metric.
- **By Product Attribute**: Displays each line as a product attribute time series such as brand, color or size.
- **By Metric**: Displays each line as a different metric.



The Time Series Dashboard uses the following metrics:

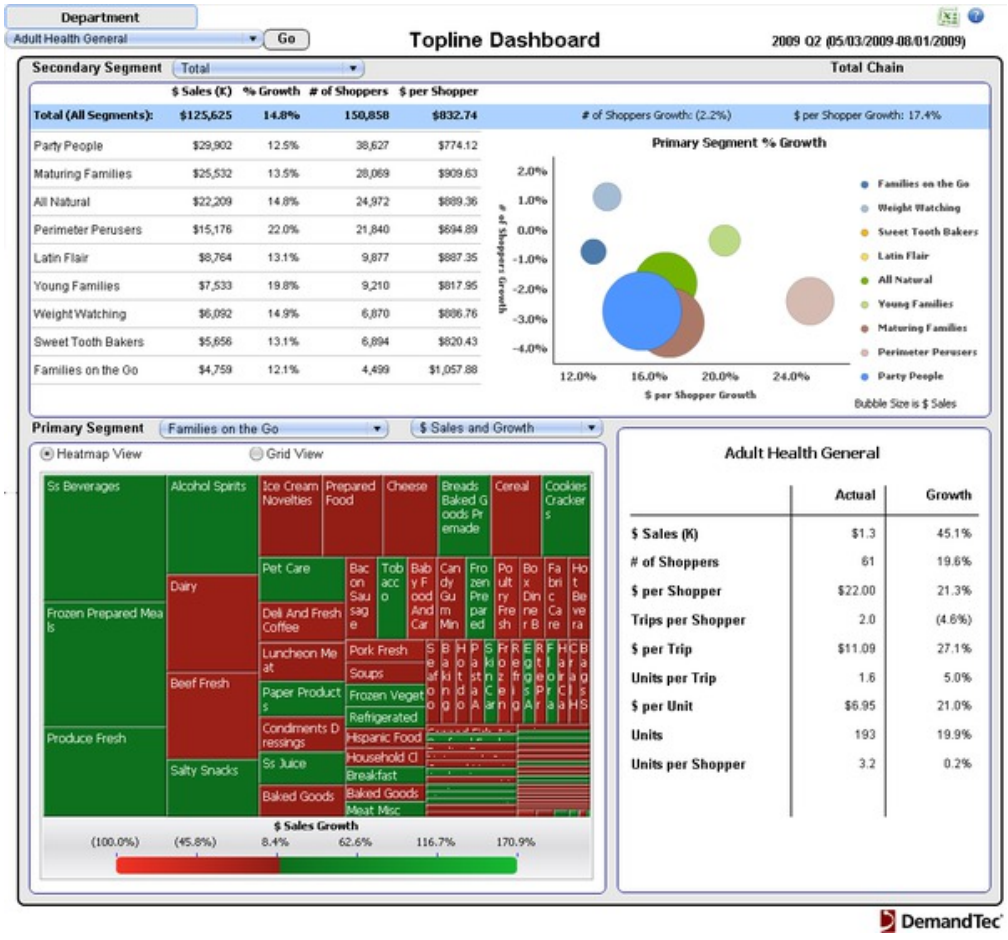
- "# of Shoppers" on page 70
- "$ per Shopper" on page 71
- $ per Txn
- "$ per Unit" on page 73
- "$ Sales" on page 74
- "% of Segment Shoppers" on page 78
- % of Total Txns
- Basket $ Sales with DPCI
- Exclusivity in Total Txns
- Transactions
- Txns per Shopper
- "Units" on page 88
- "Units per Shopper" on page 90
- Units per Txns

Topline Dashboard

The Topline Dashboard allows executives, category managers, analysts, and department managers to evaluate the entire chain by department and compare its category performance by shopper segment and division. By interacting with the heatmap and specifying segments, you can gain unique insight into your shoppers' behavior.

About this task

Note: This dashboard may not be available for all retailers.

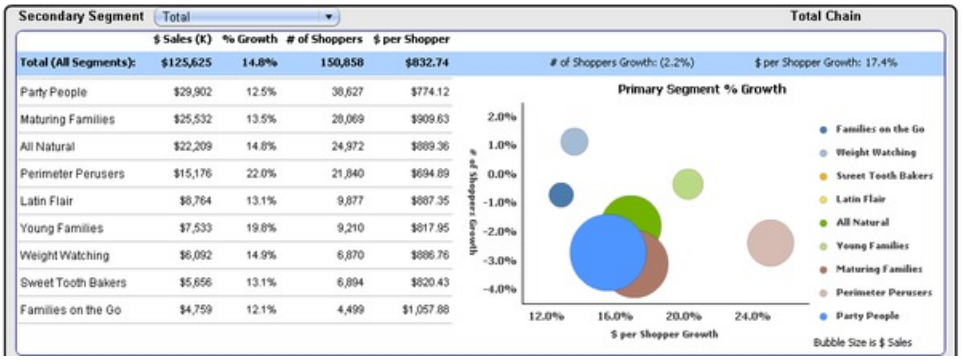


Note: Vendor users will not be able to view the Topline Dashboard.

The Topline Dashboard contains three sections:

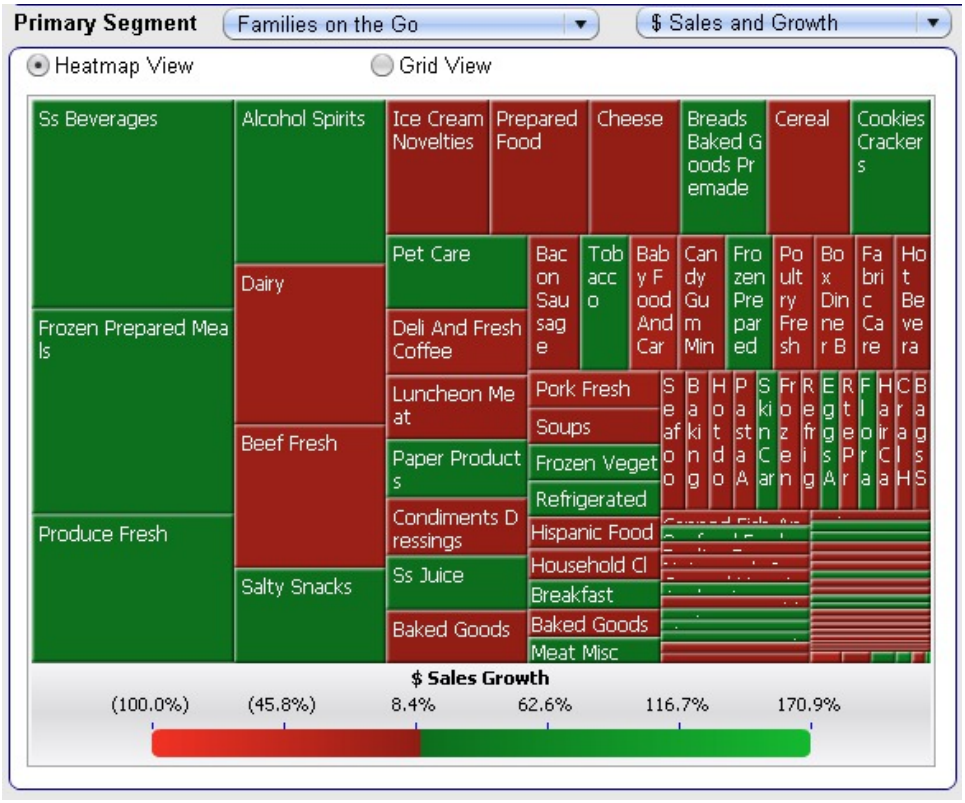
Procedure

1. A breakdown of the total store sales and growth by segment:

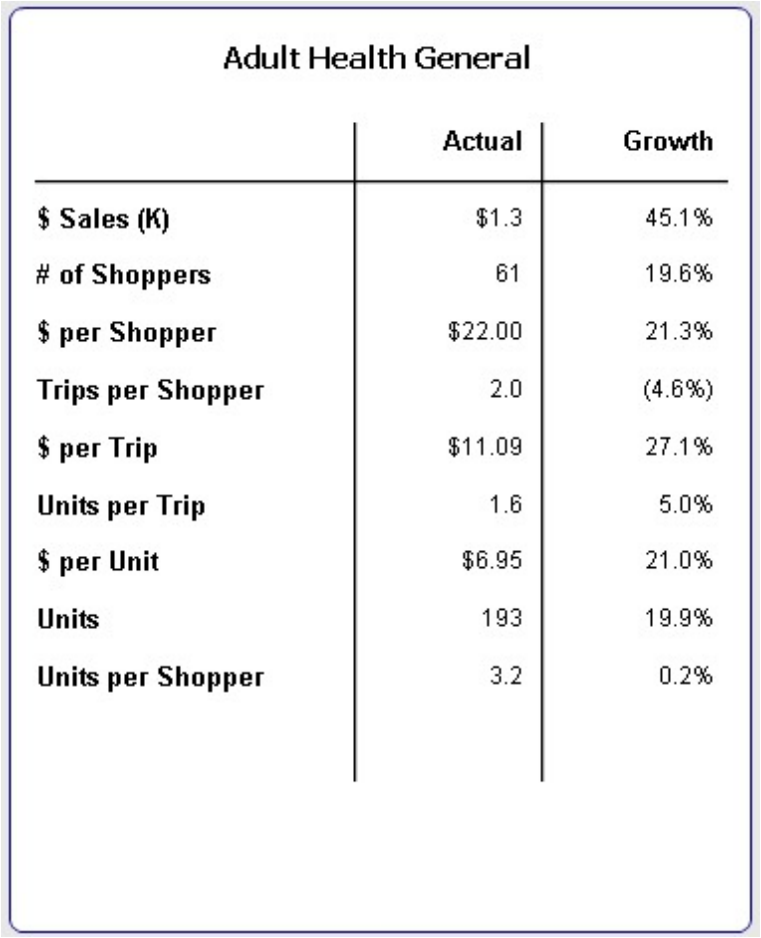


2. The **heatmap**, which shows sales performance of particular categories, as well as total category sales for the selected segment or total chain. The heatmap can

also be customized heavily, as described in "Topline Dashboard" on page 60.



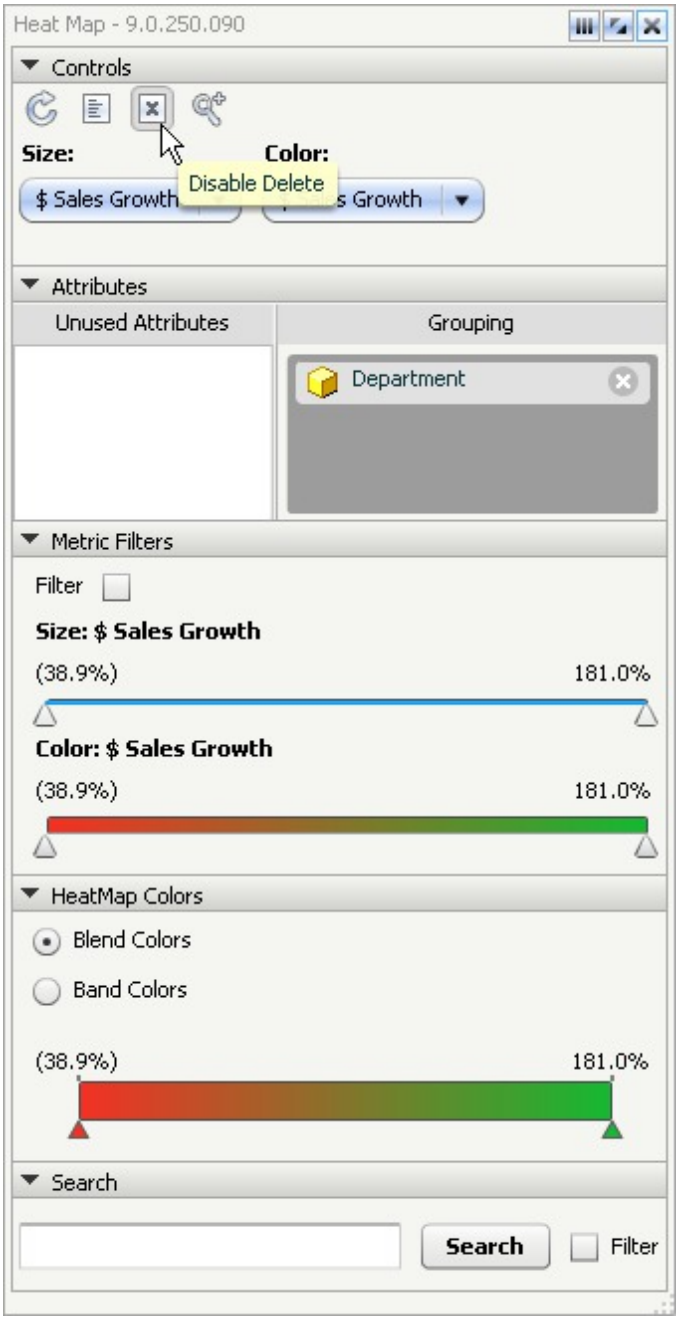
3. A full breakdown of the key sales driver metrics for the selected heatmap category. Simply click on a box in the heatmap to show the sales breakdown for the selected item:



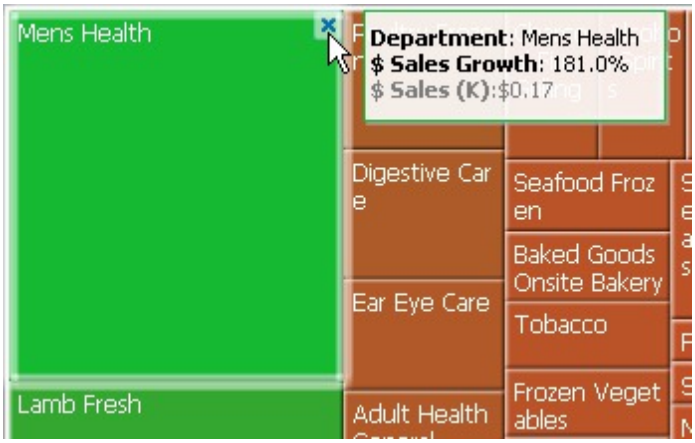
Using the Heatmap

The heatmap can be customized by segment using the Primary Segment drop-down menu. Select **Total** to view the totals for all segments. You can also customize the heatmap by entering interactive mode. To change the display characteristics of the heatmap, right-click anywhere on the heatmap and select **Interactive**:

This loads the interactive panel:



This panel can be used to change the colors of items in the heatmap to make them more representative of their dollar sales or sales growth. For example, you could set positive sales growth to green, and all declines to red. You can also use the interactive mode to delete particular items from the heatmap. To delete an item, click the **Enable Delete** button. When you do, each field in the heatmap can be deleted by clicking its **close** button, causing the heatmap to re-generate:



The Topline Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "$ per Shopper" on page 71
- "$ per Trip" on page 72
- "$ per Unit" on page 73
- $ Sales (K)
- "Trips per Shopper" on page 87
- "Units" on page 88
- "Units per Shopper" on page 90
- "Units per Trip" on page 90

Related Topics

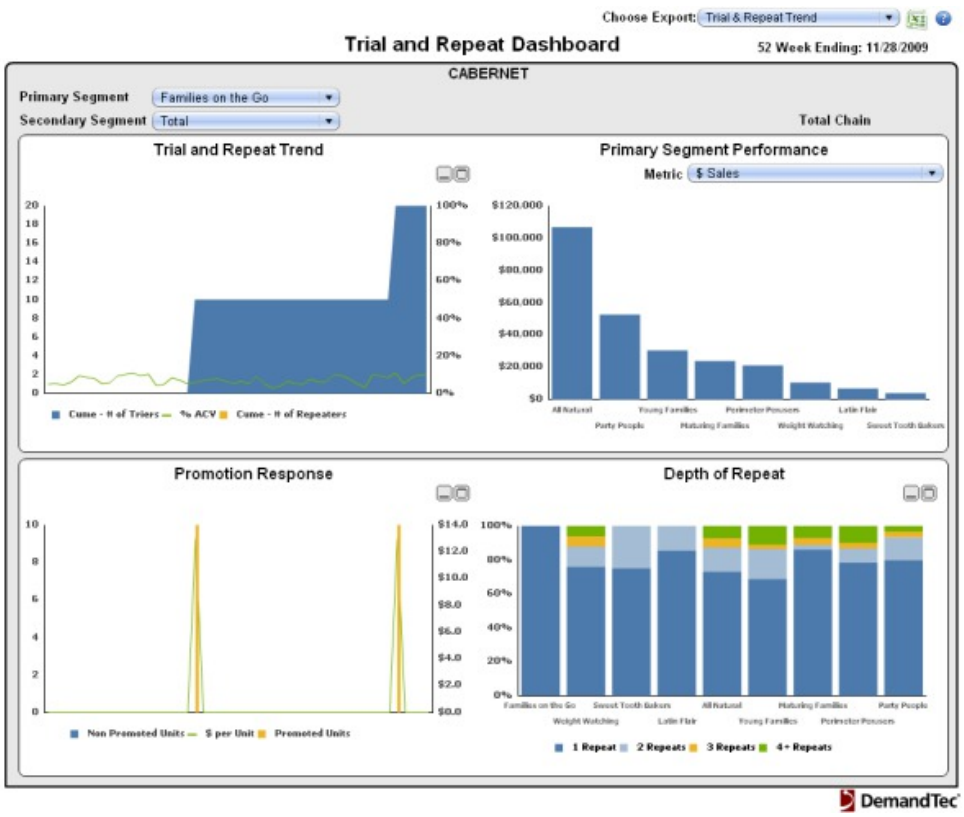
"Topline Dashboard" on page 60

Trial and Repeat Dashboard

The Trial and Repeat Dashboard (also called New Item Launch Dashboard by some retailers) can help you analyze a new item's trial and repeat performance over a selected geography and time period.

You can analyze a variety of factors, including:

- Depth of Repeat
- Promotion Response
- Purchasing Behavior by Segment



To focus the analysis on a particular segment, choose a segment from the **Primary Segment** drop-down menu. You can also choose a **Secondary Segment**, which varies by company, but may show particular groups of interest within the Primary Segment, such as high-loyalty shoppers. Segment performance for key metrics is shown in the **Primary Segment Performance** graph.

Interpreting Results

The **Promotion Response** graph in the lower left area of the dashboard shows how promotions affected trial and repeat behavior, showing promoted units, non-promoted units, and $ per unit over the selected time period. You can use this graph to determine promotion effectiveness and appropriately promote the new item.

In the **Trial and Repeat Trend** graph, you can see how the selected segment purchased the product over the selected time period, showing cumulative triers, compliance, and how often triers repeated.

The **Depth of Repeat** graph depicts each segment's repeat behavior, showing how often members of the segment repeated 1, 2, 3, or 4+ times. You can also click on the graph button to view the data underlying the bar chart, providing one-click access to precise repeat data.

The Trial and Repeat Dashboard uses the following metrics:

- # of 1st Repeat Shoppers
- # of 2nd Repeat Shoppers
- # of 3rd Repeat Shoppers
- # of 4+ Repeat Shoppers

Chapter 3. Metric Dictionary

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

of 4+ Repeat Shoppers

Number of shoppers who purchased the selected products only five or more times (trial purchase and at least 4 repeat purchases) during the selected time period

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: # of Shoppers who purchased a product more than four times in the selected time period

Additive: Not in most cases. Example: # of 4+ repeat shoppers can be additive across non-overlapping geographies. Example: # of 4+ repeat shoppers can be added to a comparably dimensioned # of first or # of second or # of third repeat buyers, and so on.

of Baskets

Number of distinct trips that contained the product

Also known as: Purchase Occasions, Trips

Used by dashboard: "Affinity Dashboard" on page 25

Calculation: Count of distinct baskets that contained the product

Additive: No

of First Repeat Shoppers

Number of shoppers who purchased the selected products only twice (trial purchase and 1 repeat purchase) during the selected time period

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: # of Shoppers who purchased a product only twice in the selected time period

Additive: Not in most cases. Example: # of first repeat shoppers can be additive across non-overlapping geographies. Example: # of first repeat shoppers can be added to a comparably dimensioned # of second repeat buyers, and so on.

of Second Repeat Shoppers

Number of shoppers who purchased the selected products only three times (trial purchase and 2 repeat purchases) during the selected time period

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: # of Shoppers who purchased a product only three times in the selected time period

Additive: Not in most cases. Example: # of second repeat shoppers can be additive across non-overlapping geographies. Example: # of second repeat shoppers can be added to a comparably dimensioned # of first repeat buyers, and so on.

of Shoppers

Number of identified shoppers who purchased the product at least once

Used by dashboards: "Event Compare Dashboard" on page 26, "New Lost Retained Dashboard" on page 38, Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50, "Sales Driver Dashboard" on page 54, "Time Series Dashboard" on page 59

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

Additive: Yes

of Shoppers (Actual)

Number of identified shoppers who purchased the product at least once

Used by dashboards: Sales Behavior (refer to "Sales Driver Dashboard" on page 54

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

Additive: Yes

of Shoppers (PDI)

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

Used by dashboard: "Segment Compare Dashboard" on page 55

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

of Shoppers (PDI) (Drillable Segment Compare)

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

Used by dashboard: Drillable "Segment Compare Dashboard" on page 55

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

Additive: No

of Shoppers (PDI) (Flexible Segment Compare)

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

Used by dashboard: Flexible "Segment Compare Dashboard" on page 55

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

of Shoppers Index

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

Used by dashboard: "Segment Compare Dashboard" on page 55

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

Additive: No

of Third Repeat Shoppers

Number of shoppers who purchased the selected products only four times (trial purchase and 3 repeat purchases) during the selected time period

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: # of Shoppers who purchased a product only four times in the selected time period

Additive: Not in most cases. Example: # of third repeat shoppers can be additive across non-overlapping geographies. Example: # of third repeat shoppers can be added to a comparably dimensioned # of first or second repeat buyers, and so on.

of Triers

Number of shoppers who purchased a product once

Used by dashboard: New Item Launch Dashboard (also called "Trial and Repeat Dashboard" on page 65)

Calculation: Count of distinct shoppers who purchased a product once

Additive: No

$ per Shopper

Dollars spent per shopper for a product

Also known as: Buy Rate

Used by dashboards: “Event Compare Dashboard” on page 26, “Item Importance Dashboard” on page 28, “New Lost Retained Dashboard” on page 38, Sales Behavior (refer to “Product Dashboard” on page 42), “Purchase Frequency Dashboard” on page 48, “Purchase Summary Dashboard” on page 50, “Segment Compare Dashboard” on page 55, “Time Series Dashboard” on page 59, New Item Launch Dashboard (also called “Trial and Repeat Dashboard” on page 65)

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

OR

Trips per Shopper * $ per Trip

Additive: No

$ per Shopper Index

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

Used by dashboard: “Segment Compare Dashboard” on page 55

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

Additive: No

$ per Trip

Dollars spent per trip on a product

Also known as: $ per Txn, Purchase Size

Used by dashboard: “Event Compare Dashboard” on page 26, “Multiples Per Trip Dashboard” on page 34, “New Lost Retained Dashboard” on page 38, Sales Behavior (refer to “Product Dashboard” on page 42), “Purchase Frequency Dashboard” on page 48, “Purchase Summary Dashboard” on page 50, “Sales Driver Dashboard” on page 54, “Segment Compare Dashboard” on page 55, New Item Launch (also called “Trial and Repeat Dashboard” on page 65)

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

OR

$ per Unit * Units per Shopper

Additive: No

$ per Trip Event

Dollars spent per trip on a product

Used by dashboard: “Event Compare Dashboard” on page 26

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

OR

$ per Unit * Units per Shopper

Additive: No

$ per Trip Index (Event Compare)

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

Also known as: $ per Txn Index

Used by dashboard: “Event Compare Dashboard” on page 26

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

$ per Trip Index (Segment Compare)

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

Also known as: $ per Txn Index

Used by dashboard: “Segment Compare Dashboard” on page 55

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

Average unit price for a product

Also known as: Average Retail Price (ARP)

Used by dashboards: “Event Compare Dashboard” on page 26, “Multiples Per Trip Dashboard” on page 34, Sales Behavior (refer to “Product Dashboard” on page 42), “Purchase Frequency Dashboard” on page 48, “Purchase Summary Dashboard” on page 50

page 50, “Sales Driver Dashboard” on page 54, “Segment Compare Dashboard” on page 55, “Time Series Dashboard” on page 59, New Item Launch (also called “Trial and Repeat Dashboard” on page 65)

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

Additive: No

$ per Unit Event

Average unit price for a product

Used by dashboard: “Event Compare Dashboard” on page 26

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

Additive: No

$ per Unit Index (Event Compare)

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

Used by dashboard: “Event Compare Dashboard” on page 26

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

$ per Unit Index (Segment Compare)

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

Used by dashboards: “Segment Compare Dashboard” on page 55

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

Dollars spent on a product

Used by dashboards: “Event Compare Dashboard” on page 26, “Item Importance Dashboard” on page 28, “Multiples Per Trip Dashboard” on page 34, “New Lost Retained Dashboard” on page 38, “Purchase Frequency Dashboard” on page 48, “Purchase Summary Dashboard” on page 50, “Sales Driver Dashboard” on page 54, “Time Series Dashboard” on page 59, New Item Launch (also called “Trial and Repeat Dashboard” on page 65), Sales Behavior (refer to “Product Dashboard” on page 42), “Segment Compare Dashboard” on page 55

Calculation: Sum of $ Sales for a product

Additive: No

$ Sales (PDI)

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

Used by dashboard: Drillable "Segment Compare Dashboard" on page 55

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

Additive: No

$ Sales (PDI) (Drillable Segment Compare)

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

Used by dashboard: Drillable "Segment Compare Dashboard" on page 55

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

Additive: No

$ Sales (PDI) (Flexible Segment Compare)

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

Used by dashboard: Flexible "Segment Compare Dashboard" on page 55

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

Additive: No

$ Sales Index

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

Used by dashboard: "Segment Compare Dashboard" on page 55

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

Additive: No

$ Sales per Week

$ Sales per shopper per week for a product

Used by dashboard: “Event Compare Dashboard” on page 26

Calculation: $ Sales / # of Weeks

Additive: No

$ Sales per Week Event

Dollars spent on a product

Used by dashboard: “Event Compare Dashboard” on page 26

Calculation: Sum of $ Sales for a product

Additive: No

$ Sales per Week Index

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

Used by dashboard: “Event Compare Dashboard” on page 26

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

% ACV

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

Used by dashboard: New Item Launch Dashboard (also called “Trial and Repeat Dashboard” on page 65)

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

Additive: No

% Overlap (Shopper)

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

Used by dashboard: “Overlap Dashboard” on page 39

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

Additive: No

% Overlap (Trip)

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

Used by dashboard: “Overlap Dashboard” on page 39

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

Additive: No

% of $ Sales

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

Used by dashboards: “Multiples Per Trip Dashboard” on page 34, “Purchase Frequency Dashboard” on page 48

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

Additive: No

% of Baskets

Percent of all baskets that contained a product

Also known as: % of Trips

Used by dashboard: “Affinity Dashboard” on page 25

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

Additive: No

% of Promoted Units

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

Used by dashboards: “Event Compare Dashboard” on page 26, “Multiples Per Trip Dashboard” on page 34, New Item Launch (also called “Trial and Repeat Dashboard” on page 65), “Purchase Frequency Dashboard” on page 48

Calculation: Units Sales on promotion / Unit Sales

Additive: No

% of Repeat

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

Used by dashboard: New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

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

Additive: No

% of Segment Shoppers

Percent of segment shoppers who purchased a product

Also known as: Segment Penetration,

Used by dashboards: Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Summary Dashboard" on page 50, "Time Series Dashboard" on page 59, New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

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

Additive: No

% of Segment Shoppers - Last Year

Percent of segment shoppers who purchased a product

Used by dashboards: Sales Behavior (refer to "Product Dashboard" on page 42)

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

Additive: No

% of Shoppers

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

Used by dashboard: "Overlap Dashboard" on page 39

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

Additive: No

% of Total Txns

Percent of trips that contained the selected products out of all trips of any product during the selected time period

Also known as: % of Total Trips, % of All Trips, % of All Transactions

Used by dashboard: "Time Series Dashboard" on page 59

Calculation: # of Trips that contained the selected product / # of Trips that contained any product during the selected time period.

Additive: No

% of Trips (Multiples)

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

Also known as: % of Baskets, % of Txns

Used by dashboard: "Multiples Per Trip Dashboard" on page 34

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

Additive: No

% of Trips (Overlap)

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

Also known as: % of Baskets, % of Txns

Used by dashboard: "Overlap Dashboard" on page 39

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

Additive: No

% of Txns

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

Also known as: % of Baskets, % of Trips

Used by dashboard: "Overlap Dashboard" on page 39

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

Additive: No

Basket $ Sales with DPCI

Average dollar value of the entire basket, for baskets that contain the selected DPCI (product)

Also known as: Avg Basket Size with DPCI, Avg Basket Size with Item

Used by dashboard: "Time Series Dashboard" on page 59

Calculation: $ Sales of all baskets that contained the DPCI (product) / # of baskets that contained the DPCI (product)

Additive: No

Basket $ Sales with Item

Average dollar value of baskets that contained a product

Used by dashboards: “Event Compare Dashboard” on page 26, “Multiples Per Trip Dashboard” on page 34, “Purchase Frequency Dashboard” on page 48

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

Additive: No

Basket $ Sales with Item Base Event

Average dollar value of baskets that contained a product

Used by dashboard: “Event Compare Dashboard” on page 26

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

Additive: No

Basket $ Sales with Item Index

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

Also known as: Total Basket Ring Index

Used by dashboard: “Event Compare Dashboard” on page 26

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

Additive: No

Basket Lift

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

Used by dashboard: “Affinity Dashboard” on page 25

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

Additive: No

Basket Unit Sales with Item

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

Percent of baskets that contained both products

Used by dashboard: "Affinity Dashboard" on page 25

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

Additive: No

Cum - # of Repeaters

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.

Used by dashboard: New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

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

Additive: No

Cum - # of Triers

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

Used by dashboard: New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: Count of baskets that contained a product

Additive: No

Cumulative Repeaters

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.

Used by dashboard: "Trial and Repeat Dashboard" on page 65

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

Additive: No

Cumulative Triers

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

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: Count of baskets that contained a product

Additive: No

DPCI Basket count

Number of baskets that contained both products

Used by dashboard: “Affinity Dashboard” on page 25

Calculation: Count of distinct baskets that contained both products

Additive: No

Exclusivity

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

Used by dashboard: “Overlap Dashboard” on page 39

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

Additive: No

Exclusivity (Trip)

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

Used by dashboard: “Overlap Dashboard” on page 39

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

Additive: No

Exclusivity in Total Txns

Percent of transactions that contained only the indicated product(s) and nothing else out of the total transactions.

Used by dashboard: “Time Series Dashboard” on page 59

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

Additive: No

Item $ per Basket

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

Number of baskets that contained both products

Used by dashboard: “Affinity Dashboard” on page 25

Calculation: Count of distinct baskets that contained both products

Additive: No

Item Profit per Basket

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

Number of units of a product per basket

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

Additive: No

Lift

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

Used by dashboard: “Affinity Dashboard” on page 25

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

Additive: No

Non Promoted Units

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

Used by dashboard: New Item Launch (also called “Trial and Repeat Dashboard” on page 65)

Calculation: # of non-promoted units of a product

Additive: Yes

POS $ Sales

Total dollars of a product based on all transactions

Used by dashboard: Sales Behavior (refer to “Product Dashboard” on page 42)

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

Additive: Yes

POS Units

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

Variance between $ Sales and Cost

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

Additive: Yes

Profit per Shopper

Profit per shopper for a product

Used by dashboard: Sales Behavior (refer to “Product Dashboard” on page 42)

Calculation: Profit / # of Shoppers

OR

Trips per Shopper * Profit per Trip

Additive: No

Profit per Trip

Profit per trip for a product

Also known as: Profit per Txn

Used by dashboard: Sales Behavior (refer to “Product Dashboard” on page 42)

Calculation: Profit / Trips

OR

Profit per Unit * Units per Shopper

Additive: No

Profit per Unit

Average profit for a product

Used by dashboard: Sales Behavior (refer to "Product Dashboard" on page 42)

Calculation: Profit / Units

Additive: No

Promoted Units

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

Used by dashboard: "New Lost Retained Dashboard" on page 38, New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: Count of promoted units

Additive: Yes

Rest of Basket $ Sales

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

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

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

Percent of $ Sales that a product represents out of a set of products shoppers have purchased

Also known as: Loyalty

Used by dashboard: "Item Importance Dashboard" on page 28

Calculation: ($ Sales of a product by a shopper segment / Total $ Sales of product(s) selected by user for the same shopper segment) * 100

Additive: No

Total Store ACV

Total of $ Sales of stores that sold a product out of $ Sales of all stores

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: $ Sales of stores that sold a product

Additive: No

Transactions

Number of transactions that contained the selected products.

Also known as: Trips

Used by dashboard: "Time Series Dashboard" on page 59

Calculation: Count of transactions that contained the selected product.

Additive: In some cases. Example: Transactions can be additive across non-overlapping geographies. Example: Transactions can be additive across non-overlapping time periods and shopper segments.

Transactions (PDI)

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

Also known as: Trips (PDI)

Used by dashboard: "Segment Compare Dashboard" on page 55

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

Trips

Number of trips that contained a product

Also known as: # of Baskets, Transactions, Txns

Used by dashboard: "Multiples Per Trip Dashboard" on page 34, "New Lost Retained Dashboard" on page 38, Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50, "Sales Driver Dashboard" on page 54

Calculation: Count of trips that contained a product

Additive: Yes

Trips (PDI) (Drillable Segment Compare)

Relative importance, based on # of Trips, of a product for a segment in comparison to the importance of the product's universe for the segment

Also known as: Txns (PDI)

Used by dashboard: Drillable "Segment Compare Dashboard" on page 55

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

Additive: No

Trips (PDI) (Flexible Segment Compare)

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

Also known as: Txns (PDI)

Used by dashboard: Flexible "Segment Compare Dashboard" on page 55

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

Trips Index

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

Also known as: Txns Index

Used by dashboard: "Segment Compare Dashboard" on page 55

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

Additive: No

Trips per Shopper

Number of Trips per shopper that contained a product

Also known as: Traffic, Frequency, Txns per Shopper

Used by dashboards: "Event Compare Dashboard" on page 26, "New Lost Retained Dashboard" on page 38, Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Summary Dashboard" on page 50, "Sales Driver Dashboard" on page 54, "Segment Compare Dashboard" on page 55, New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

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

Additive: No

Trips per Shopper Index

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

Also known as: Txns per Shopper Index

Used by dashboard: "Segment Compare Dashboard" on page 55

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

Txns (Actual)

Number of trips that contained a product

Used by dashboards: "Sales Driver Dashboard" on page 54

Calculation: Count of trips that contained a product

Additive: Yes

Txns Index

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

Used by dashboard: "Segment Compare Dashboard" on page 55

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

Additive: No

Txns per Shopper Index

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

Used by dashboard: "Segment Compare Dashboard" on page 55

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

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

Used by dashboards: “Event Compare Dashboard” on page 26, “Multiples Per Trip Dashboard” on page 34, “New Lost Retained Dashboard” on page 38, “Purchase Frequency Dashboard” on page 48, “Purchase Summary Dashboard” on page 50, “Time Series Dashboard” on page 59, New Item Launch (also called “Trial and Repeat Dashboard” on page 65), “Segment Compare Dashboard” on page 55, Sales Behavior (refer to “Product Dashboard” on page 42)

Calculation: Sum of units of a product across all transactions

Additive: Yes

Units (PDI)

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

Used by dashboard: “Segment Compare Dashboard” on page 55

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

Additive: No

Units (PDI) (Drillable Segment Compare)

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

Used by dashboard: Drillable “Segment Compare Dashboard” on page 55

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

Additive: No

Units (PDI) (Flexible Segment Compare)

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

Used by dashboard: Flexible “Segment Compare Dashboard” on page 55

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

Additive: No

Units Index

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

Used by dashboard: “Segment Compare Dashboard” on page 55

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

Additive: No

Units per Shopper

Number of units of a product per shopper

Also known as: Buy Rate

Used by dashboards: “Event Compare Dashboard” on page 26, “New Lost Retained Dashboard” on page 38, “Purchase Frequency Dashboard” on page 48, “Purchase Summary Dashboard” on page 50, “Time Series Dashboard” on page 59

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

OR

Trips per Shopper * Units per Trip

Additive: No

Units per Trip

Number of units of a product per trip

Also known as: Item Count, Units per Txn

Used by dashboards: “Event Compare Dashboard” on page 26, “Multiples Per Trip Dashboard” on page 34, “New Lost Retained Dashboard” on page 38, Sales Behavior (refer to “Product Dashboard” on page 42), “Purchase Frequency Dashboard” on page 48, “Purchase Summary Dashboard” on page 50, “Sales Driver Dashboard” on page 54, “Segment Compare Dashboard” on page 55, New Item Launch (also called “Trial and Repeat Dashboard” on page 65)

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

Additive: No

Units per Trip Event

Number of units of a product per trip

Used by dashboard: “Event Compare Dashboard” on page 26

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

Additive: No

Units per Trip Index (Event Compare)

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

Also known as: Units per Txn Index

Used by dashboard: “Event Compare Dashboard” on page 26

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

OR

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

Additive: No

Units per Trip Index (Segment Compare)

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

Also known as: Units per Txn Index

Used by dashboard: "Segment Compare Dashboard" on page 55

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

Units per Week

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

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: Event 2 Unit Sales / # of Weeks

Additive: No

Units per Week Base Event

$ Sales per shopper per week for a product

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: $ Sales / # of Weeks

Additive: No

Units per Week Event

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

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: Event 2 Unit Sales / # of Weeks

Additive: No

Units per Week Index

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

Used by dashboard: "Event Compare Dashboard" on page 26

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

Weekly $ Sales per Store Selling

$ 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

Profit of a product per week

Calculation: Profit / # of Weeks

Additive: No

Weekly Profit per Store Selling

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

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

Used by dashboard: "Affinity Dashboard" on page 25

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

Additive: No

Wkly $ per Shopper

Dollar sales per shopper per week for the selected products

Also known as: Wkly $ per Buyer, Avg Wkly $ per Shopper, Avg Wkly $ per Buyer

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: (Product $ Sales / Product Shoppers) / # of weeks

Additive: No

Wkly $ per Shopper Index

Weekly dollars per shopper for the selected product(s) during Event 2 in comparison to Event 1

Also known as: Wkly $ per Buyer Index, Avg Wkly $ per Shopper Index, Avg Wkly $ per Buyer Index

Used by dashboard: “Event Compare Dashboard” on page 26

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

Additive: No

Wkly $ per Trip

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

Also known as: Wkly $ per Txn

Used by dashboard: “Event Compare Dashboard” on page 26

Additive: No

Wkly Trips

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

Also known as: Wkly Txns

Used by dashboard: “Event Compare Dashboard” on page 26

Calculation: Event 2 # of trips / # of Weeks

Additive: No

Wkly Trips Event

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

Used by dashboard: “Event Compare Dashboard” on page 26

Calculation: Event 2 # of trips / # of Weeks

Additive: No

Wkly Trips Index

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

Also known as: Wkly Txns Index

Used by dashboard: “Event Compare Dashboard” on page 26

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

OR

(Event 2 Trips / Event 1 Trips)*100

Additive: No

Wkly Units per Trip

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

Also known as: Wkly Units per Txn

Used by dashboard: “Event Compare Dashboard” on page 26

Calculation: Event 2 # of Shoppers / # of Weeks

Additive: No

Wkly Units per Trip Index

Weekly units per trip containing the selected product(s) during Event 2 in comparison to Event 1

Also known as: Wkly Units per Transaction Index

Used by dashboard: “Event Compare Dashboard” on page 26

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

Additive: No

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