

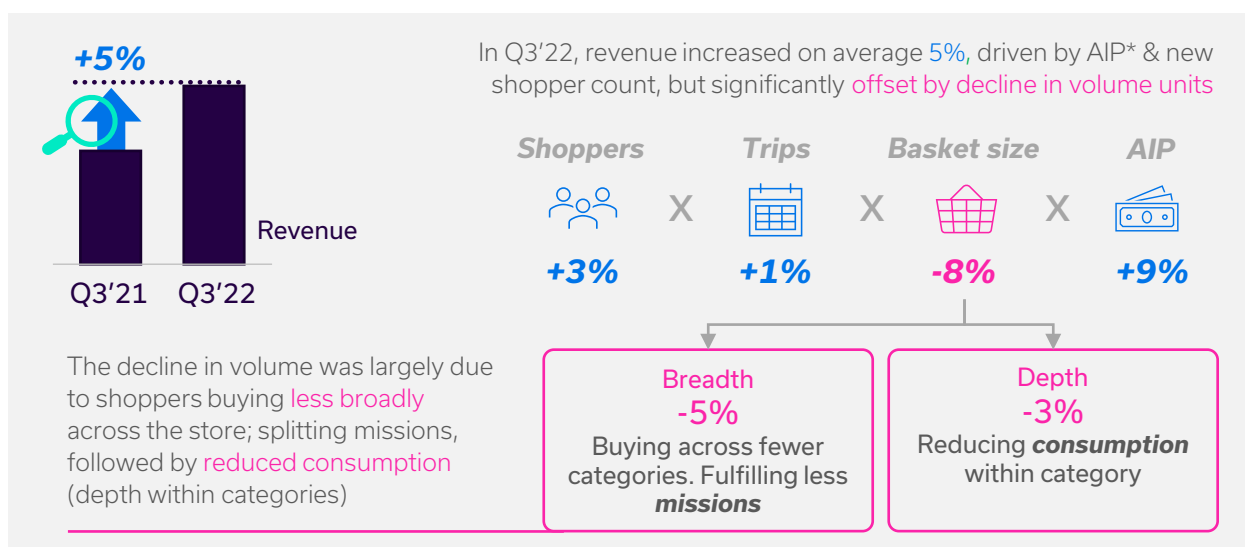
Understand your seasonal performance with sales driver analysis

3 things to know, to drive volume growth in 2023, while being more customer-centric



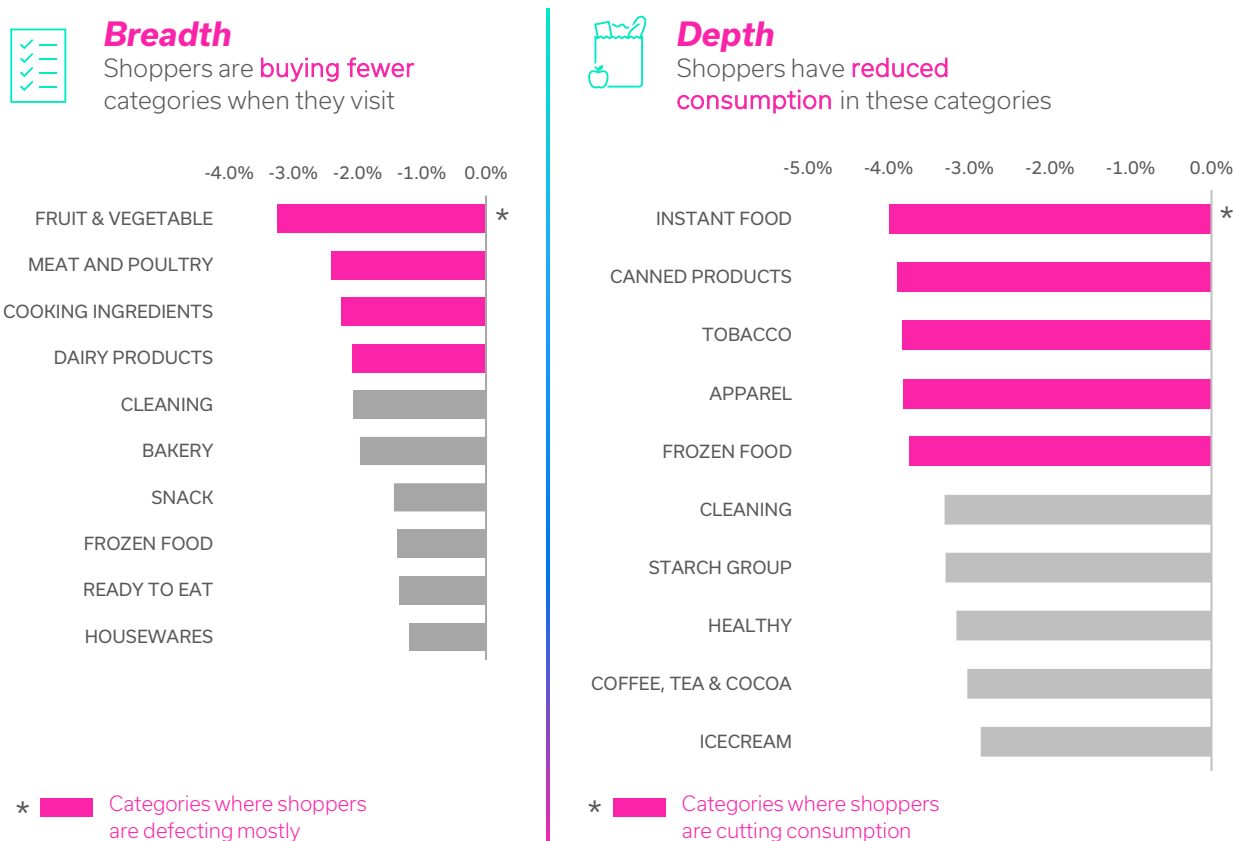
1 The latest analysis shows that reducing basket sizes per transaction is dragging down performance

Sales Driver Analysis is a must-have to understand customer specific KPIs responsible for driving your performance



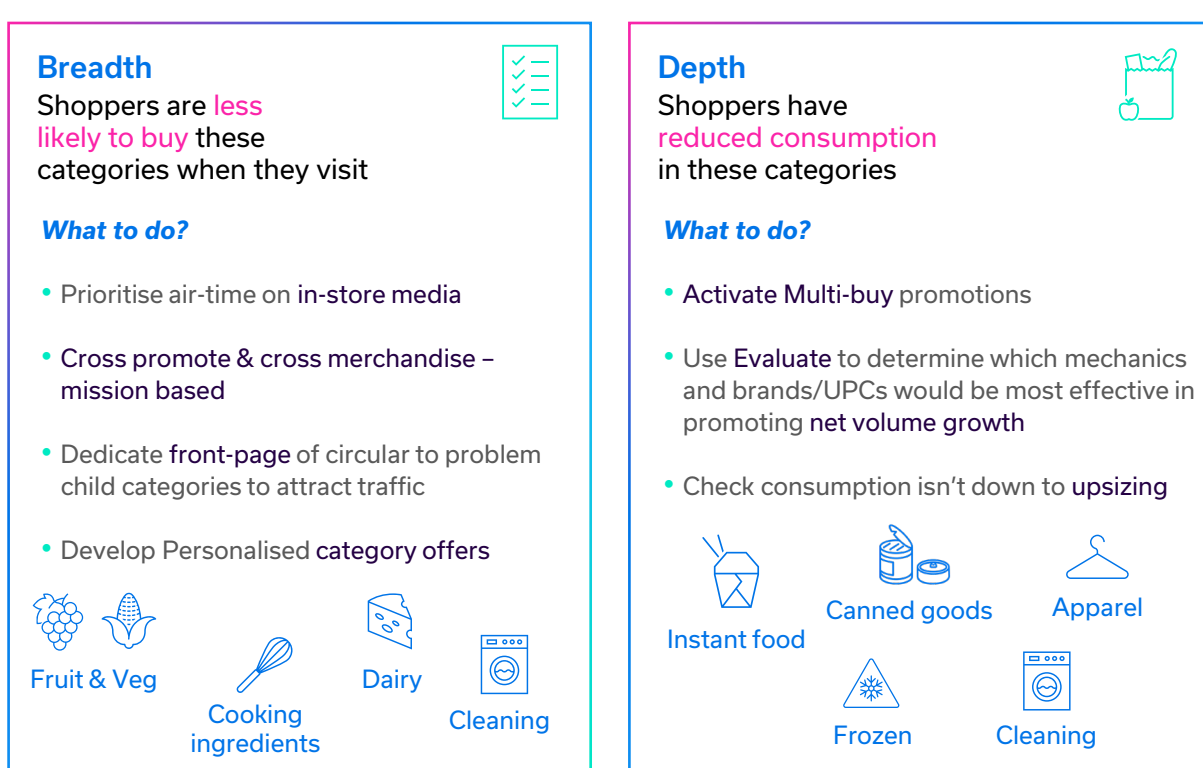
2 In the main, shoppers are buying fewer categories when they visit

Shopper analytics can pinpoint categories where the shopper has stopped buying or buying them less frequently vs categories where consumption has reduced

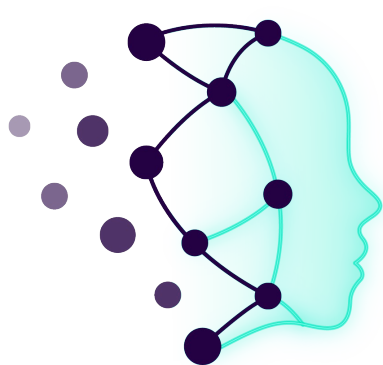


3 Category-specific action plans can be put in place depending on the reason for volume decline, either breadth or depth

Pulling back those lost missions (breadth) or reversing reduced consumption (depth) requires different approaches



Respond to the customer trends



CINDE INSIGHTS

Identifies & delivers immediate, actionable recommendations to solve real world problems and drive value

Save Time

- Understand in 2 clicks the drivers of your performance
- Less time spent hunting, focus on activation

Democratizing Insights

- Prescriptive insights powered by advanced AI model puts the power of the 'answers' with highest business outcome in everyone's hands

More efficient supplier collaboration

- Shared view of opportunities ensuring collaboration efforts are focused on joint opportunities for both retailer and CPG

SymphonyAI solutions help to deliver a relevant response

Q3'22 vs. last year, Europe, USA & Asia, Traditional grocery retailers, All retailers given equal weight.

*AIP – Average Item Price

65M households 650M baskets

Further reading
<https://www.symphonyretailai.com/revenue-growth/sales-and-customer-insights-suite/>

Contact us
info@symphonyretailai.com

Did you know?

Own Brand Sensitive customers are growing, with a 4.4% increase in the latest quarter



Who are Own Brand Sensitive customers?



Own Brand
Sales Share

28%

All Customers



Own Brand
Sales Share

40%

Own Brand Sensitive



Customers Growth

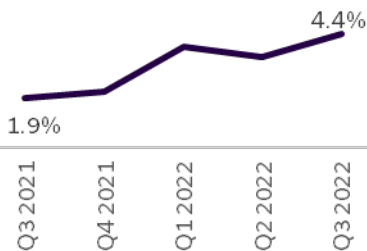


Own Brand Share

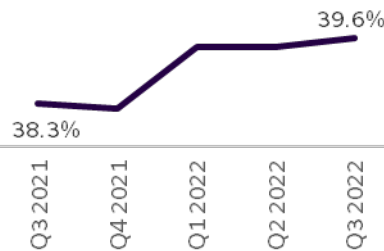


Frequency

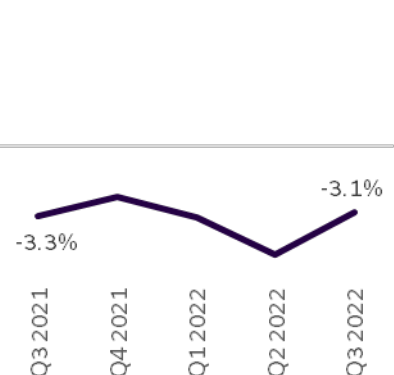
Own brand sensitive customers are growing by 4.4% as well as a 0.2% increase in penetration, highlighting the **broadening appeal for the own brand**



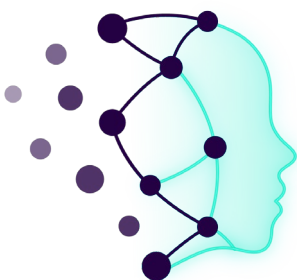
Own brand not only **gain share of spend** to 39.6% but also **expand the basket size** by 2.1% in the recent quarter



Despite the growing of customers and share of spend, **frequency of Own Brand Sensitive remains down**



Respond to the customer trends



Personalize offers on own brand products to drive the frequency using...

CINDE PERSONALIZATION

Know who are your Own Brand Sensitive customers

Understand the own brand products and the switching between own brand and national brand using...

CINDE INSIGHTS

SymphonyAI solutions help to deliver a relevant response



65M households



650M baskets

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Traditional grocery retailers Europe, USA & Asia. SymphonyAI "anonymously" tracks **200 global customer KPIs** every quarter to trend and identify emerging customer behaviors

Did you know?

Sales growth of Promotion Sensitive customers has dropped 10-15% over past several quarters



Who are Promotion Sensitive customers?



Promo Sales Share

25%



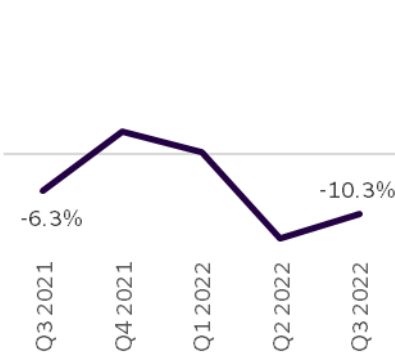
Promo Sales Share

39%



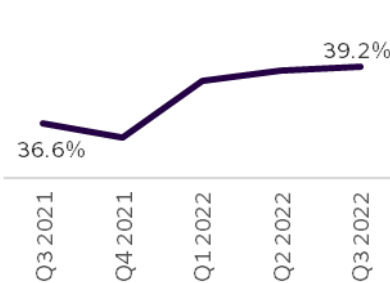
Sales Growth

Sales for Promotion Sensitive customers has **declined sharply over most recent quarters** -10 to -15%. **Loss of customers is the key driver** of performance



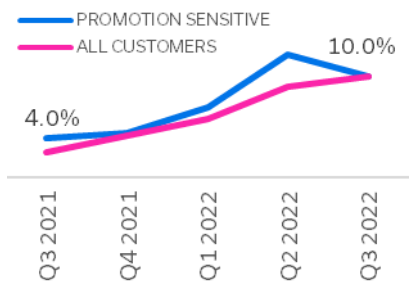
Promo Share

Promotion Sensitive customers are **increasingly deal seeking** to manage their spend, promo sales share is at an all time high of 39%



Average Item Price (AIP)

Despite the increase in deal seeking **Promotion Sensitive customers consistently experience higher AIP**, potentially driving customers out of the store



Respond to the customer trends



Know your Promotion Sensitive customers using customer segmentations

CINDE INSIGHTS

Review trip driving promotions to encourage Promotion Sensitives back to store

Remove inefficient promotions to ensure promotion spend is driving performance

CINDE PROMOTIONS

SymphonyAI solutions help to deliver a relevant response



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Did you know?

Best customers have declined by 5% over the most recent quarters



Who are Best (or Primary) customers?

Primary customers are your most valuable, accounting for more than half of all sales



16%

Customers



54%

Revenue



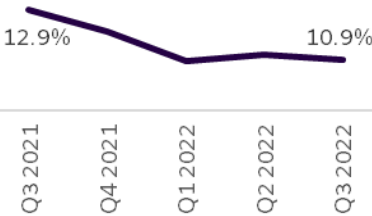
Customer Growth

Primary customer growth continues on a downward trend, down 5% over the latest three quarters. Retention of Primary customers is not the issue, being stable at 61%



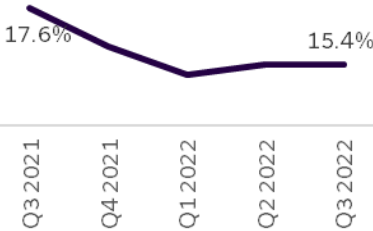
Secondary Upgrade

Fewer Secondary, or mid value, customers are being promoted up the loyalty ladder. Down from 13% to 11% being promoted into Primary



Tertiary Upgrade

Likewise fewer Tertiary, or low value, customers are being promoted up the loyalty ladder. Down from 18% to 15% being promoted into Primary



Respond to the customer trends



CINDE INSIGHTS

SymphonyAI solutions help to deliver a relevant response

Track customer loyalty and migration over time by doing a 'health check'

Deep dive loyalty segments to uncover opportunities for growth

Forecast future loyalty and proactively manage loyalty migration using our AI models



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Did you know?

With rising food prices, customers are adapting their shopping behaviour to *maintain their basket spend*



Average item value continues to rise



Basket Size

Shoppers continue to buy smaller baskets at -8%, **equivalent to 3 fewer items in a large basket**

Stable over the last 3 quarters, this KPI shows no signs of recovering



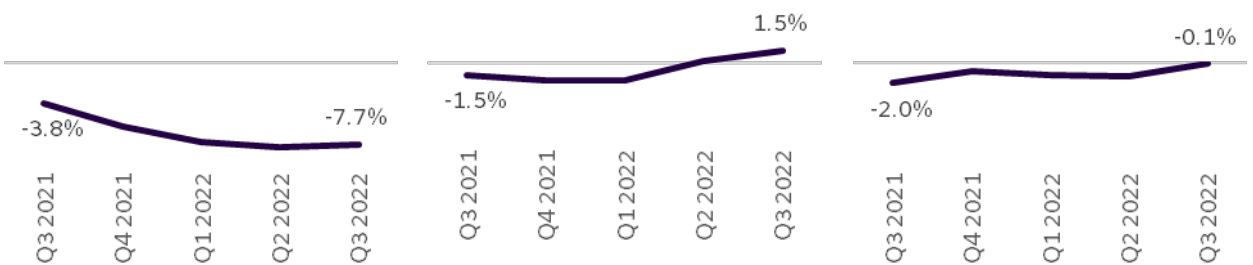
Basket Spend

Customers are striving to **maintain a consistent basket spend**. Basket spend is starting to rise as customers **struggle to cut back size any further** and prices continue to rise

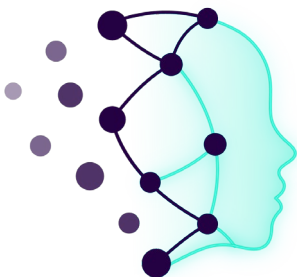


Frequency

Frequency remains largely flat. Despite reducing basket size, **customers are not yet moving trips to competitors**, but this may change if prices continue to climb



Respond to the customer trends



Overlay targeted offers to customers struggling the most

CINDE PERSONALIZATION

Direct price investment into the right products (Key Value Items)

Continue to monitor and respond to emerging customer trends

CINDE INSIGHTS

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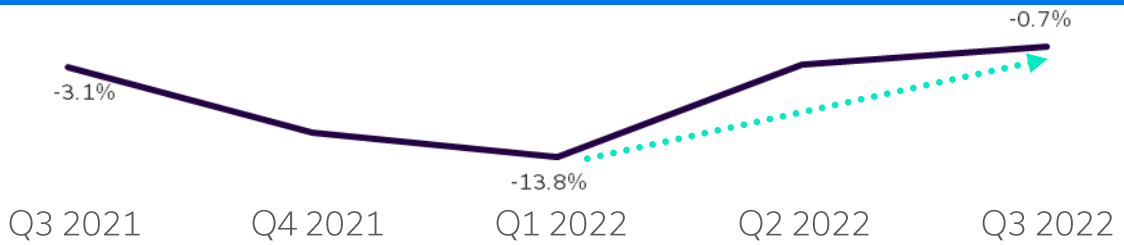
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Did you know?

Ecommerce is recovering from a challenging start to 2022

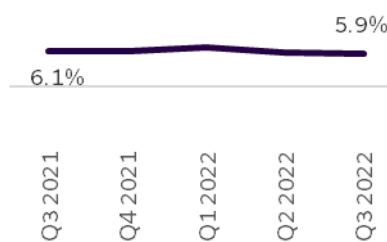


Online sales growth



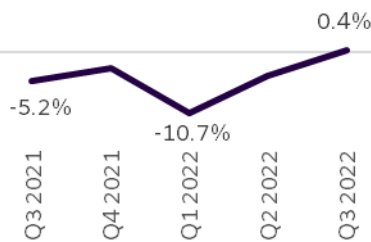
Customer Penetration

The **ecommerce channel** is holding its appeal during the period of rising **inflation**. Customer penetration in ecommerce has remained stable at 6%



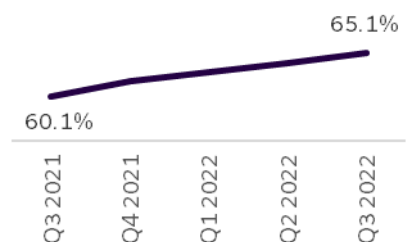
Frequency

Frequency of visit to the channel is a **key driver of performance**. Frequency has started to recover since the start of 2022



Omni Channel

The % of omni channel customers shopping ecommerce has been in consistent growth



Respond to the customer trends



Identify best prospects from in-store and incentivise online using our AI models

CINDE INSIGHTS

Reward long-term channel users for their loyalty and retain online

Encourage customers to repeat visits through targeted incentives

CINDE PERSONALIZATION

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