

Achieving Mutual Growth through Data Centered Collaboration



Thank You!

CROSSMARK®

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Beyond here, there be monsters!



FMOT Survey

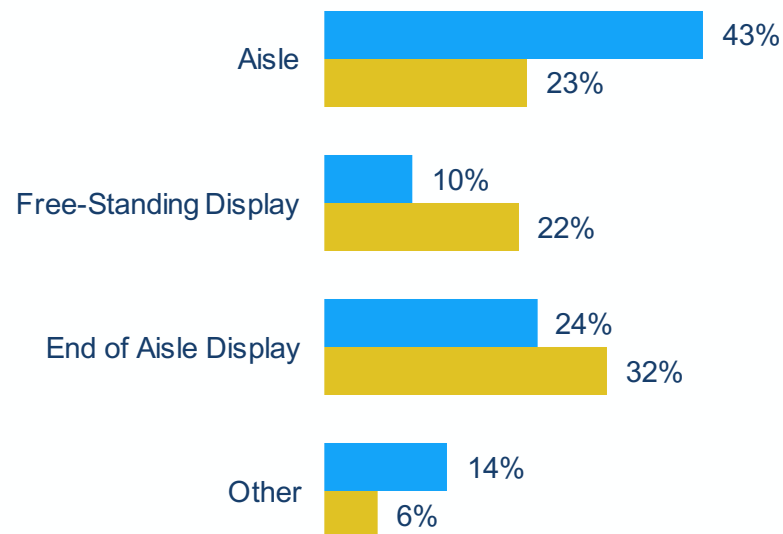
First Moment of Truth is the instant a person decides which brand they intend to buy. For 49% of grocery purchases, this happens in the store... at the shelf

- Did the shopper plan to purchase promoted item before the store visit?
- Was their choice made in-store?
- What factors drove the purchase decision?

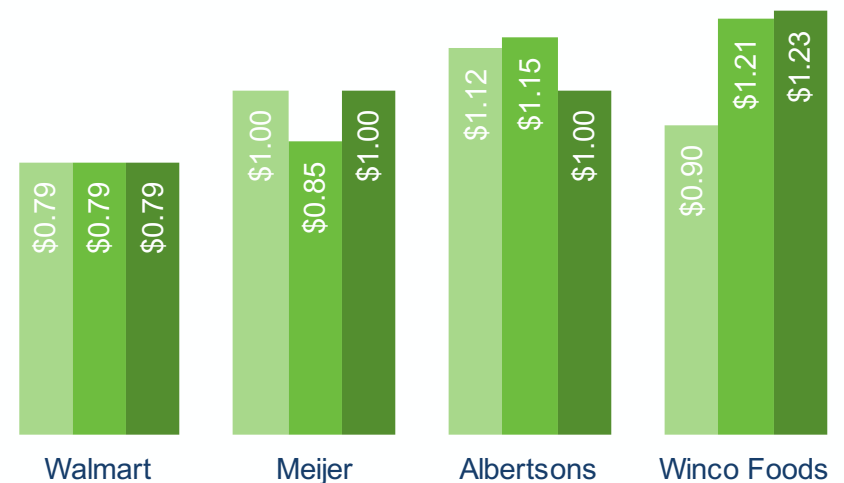
Retailer Promotion Success

- Did the promotion attract new shoppers to my store?
- Did the promotion grow the total basket?
- Did it effectively drive unplanned impulse purchases?
- Did promo buyers purchase more than they normally would have?
- How did my pricing compare to my competitors during the promotion timeframe?

Purchase Decision Location ■ Planned ■ Unplanned



Brand Price Per Unit ■ Pre ■ Promotion ■ Post



Promotion Success for the...

- ✓ Brand
- ✓ Retailer



Brand Promo Success

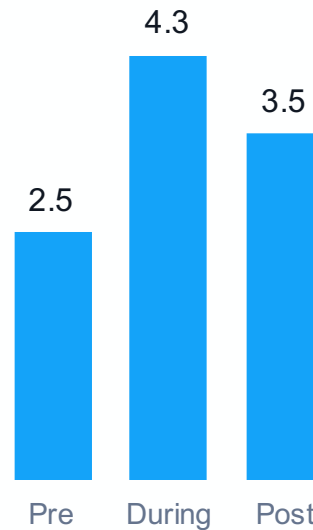
Did the brand receive a lift?
Which sales components drove sales lift?

Did the promotion draw in new brand buyers?

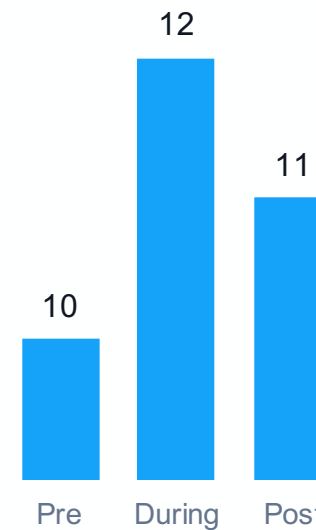
Or did I just subsidize loyal brand-buyers who stocked up?

Did I attract shoppers from my target demographic?

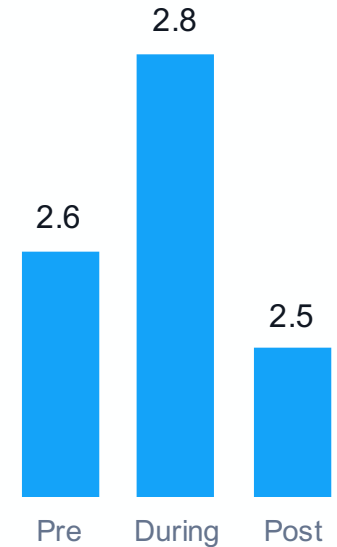
Penetration



Buying Rate



Purchase Freq



Promotion Buyers Skew...



AGE
21-34



EDUCATION
Advanced Degree



CHILDREN
No Children



ETHNICITY
Asian, Hispanic



INCOME
\$20k-\$40k, \$125k+



HOUSEHOLD SIZE
1-2 People

Promotion Success for the...

- ✓ Brand
- ✓ Retailer



Promo Effectiveness Measurement

- Trade spend promotions remain the 2nd highest spend at CPGs
- Traditional POS lift measurement does not account for shopper dynamics

• WHAT IT IS

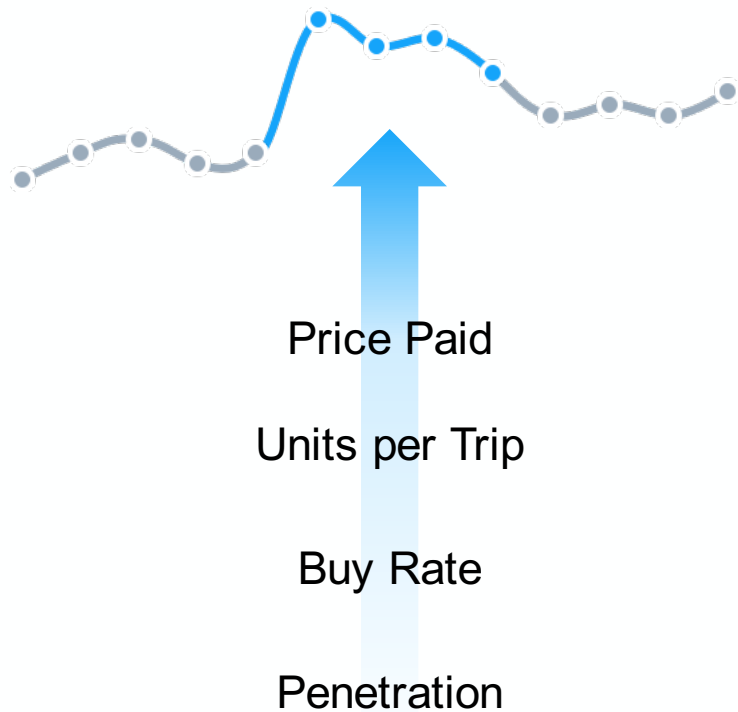
- Traditional POS lift measurement lacks depth
 - No understanding of the 'quality' of the buyers you attracted or 'why' behind the buy
- Legacy panel data is too slow and thin
 - Slow data results in old news, imagine CNN being updated every month
 - Thin data results in gaps, imagine CNN with one reporter covering the country
 - Only gets at "what" happened – missing "why" it happened, imagine CNN never interviewing newsmakers

• WHAT IT SHOULD

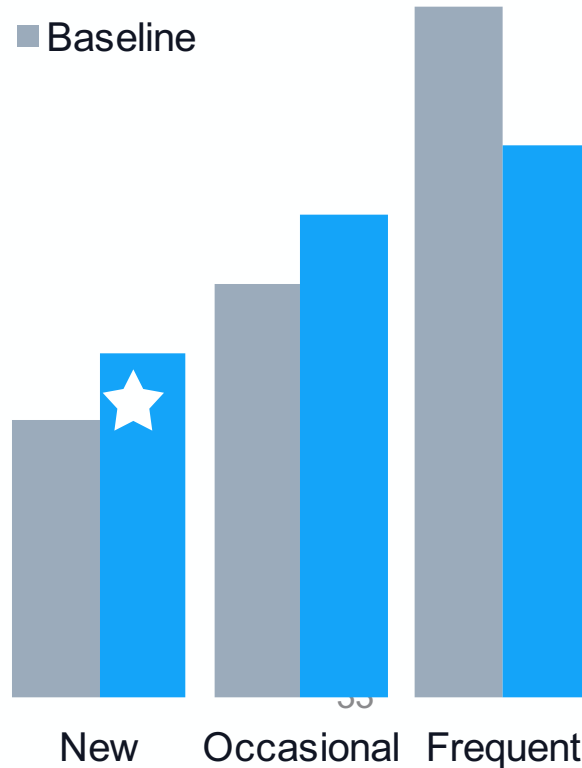
- **BE** Better Shopper Dynamics
 - Quantify how many new, occasional or loyal buyers you attracted
 - Measure stock-up activity
- Better Panel
 - Yesterday's behavior, today's insights
 - Largest panel, broader retailer coverage, most granular view of shopper's wallet
- Ask shoppers 'why' in the moment
 - Get true opinions by surveying shoppers at the moment the purchase is made

Identifying Promotion Influence

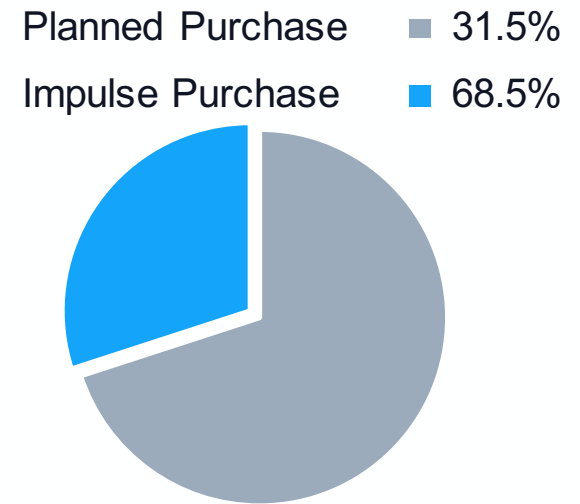
WHAT DROVE LIFT?



NEW BUYERS?

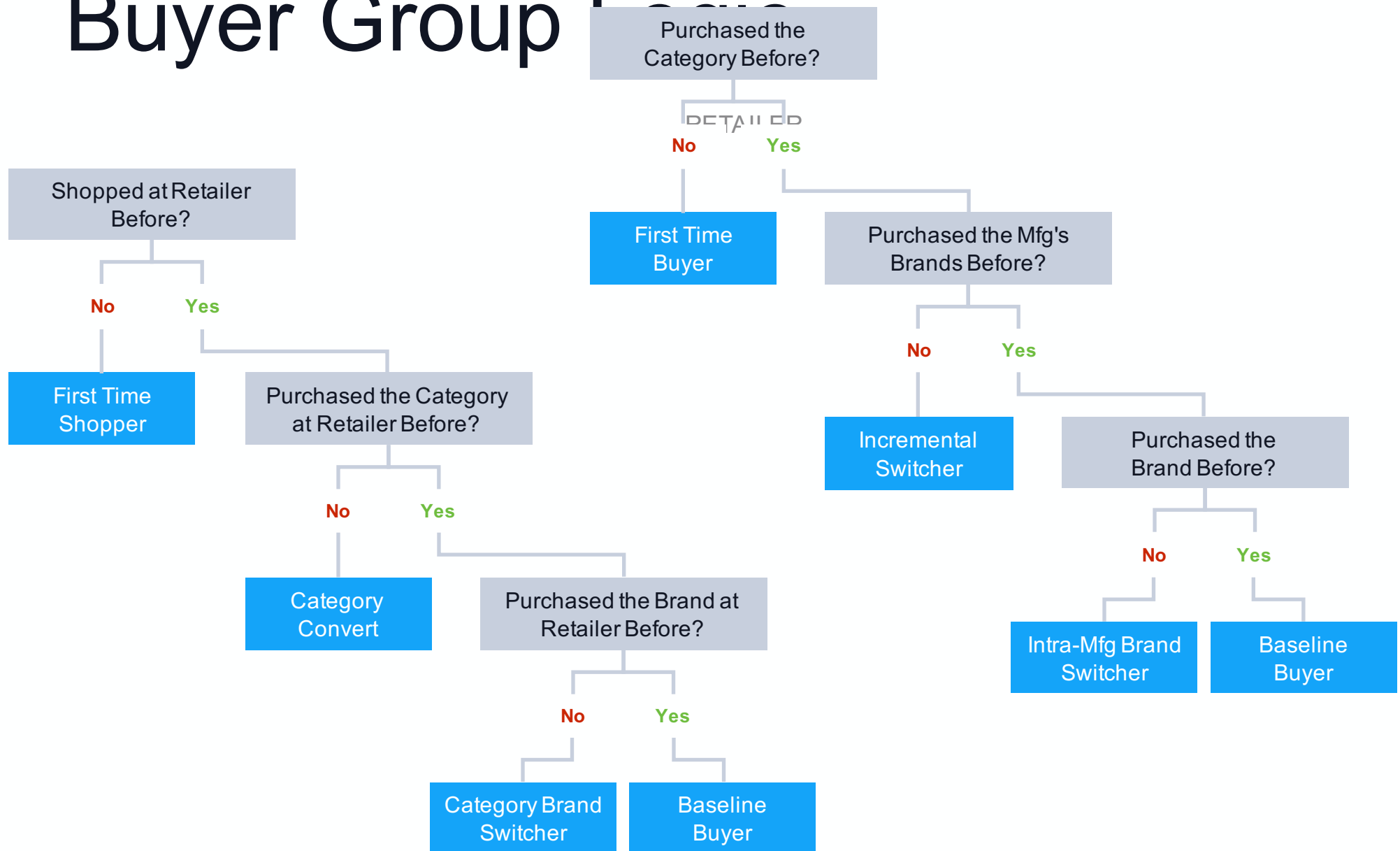


PLANNED/UNPLANNED?



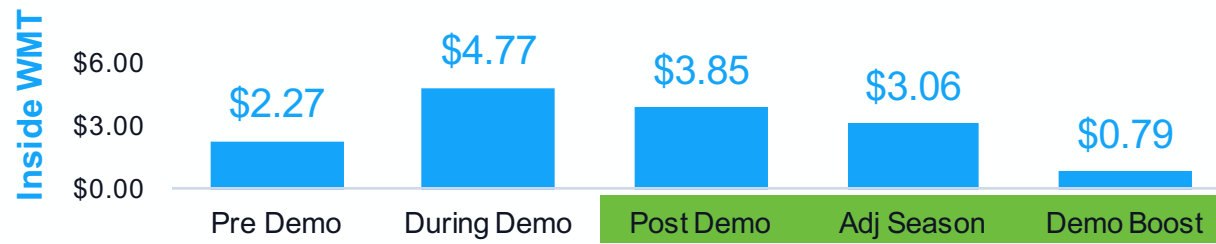
Buyer Group

• MANUFACTURER



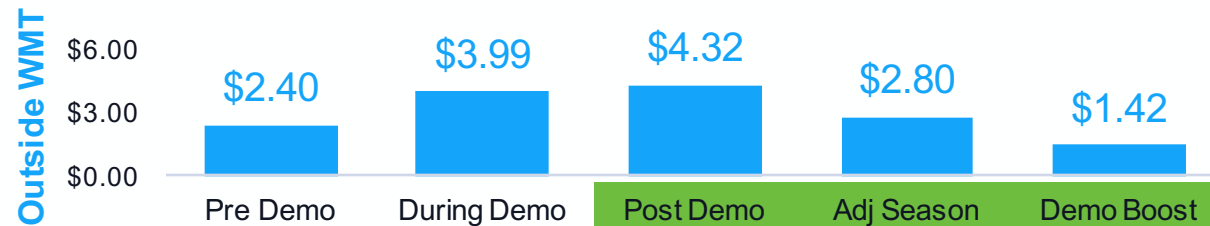
Value of Demo (Inside and outside Walmart)

Blue Bunny Ice Cream \$ per HH



Revenue = 274K HH
 * \$2.50
 \$685K

Revenue = 274K HH
 * \$.79
 \$217K



Revenue = \$902k
 Cost = \$300k
 Net = \$602k

Revenue = \$122k

Total Combined
 Net = \$724k

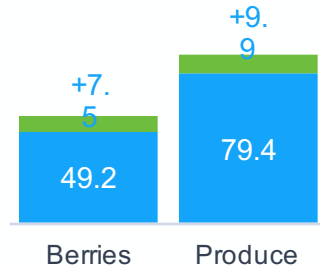
Source: Infoscout, 85k+ Shoppers bought Blue Bunny outside WMT

Loyalty of a Berry Buyer

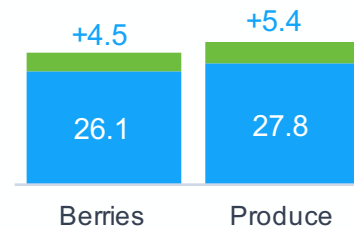
Demo berry buyers repeated their purchasing throughout the 53 demos, demonstrating wins for berries & produce at Walmart.



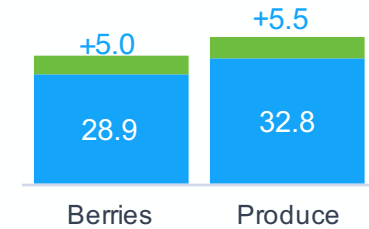
WMT % of Shoppers



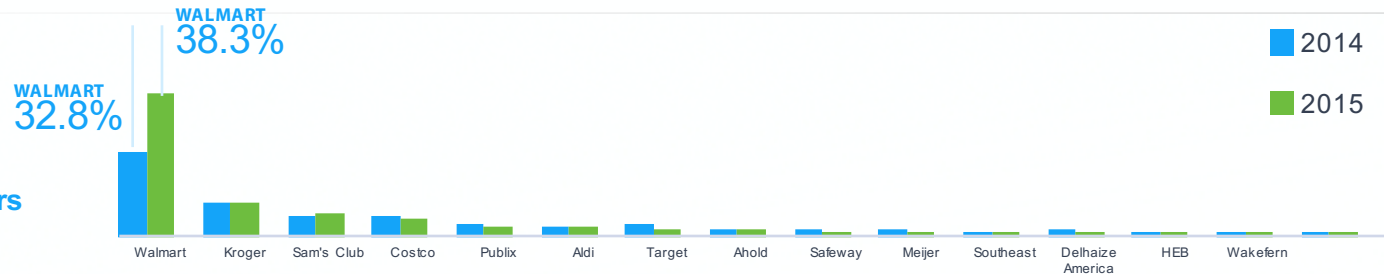
WMT % of Trips



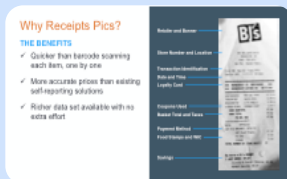
WMT % of \$ Sales



...with views
into impact
across all retailers
% of Berry Purchase Dollars



InfoScout is simply a significantly better panel than what is available in the market.



Larger –
10x the number of panelists, 5x the trips, 15k receipts in 1 day at 1 retailer

Richer –
New facts not before available (e.g. food stamp payment, produce)

Wider –
Covers many more channels (e.g. food service, convenience)

Faster –
Updated overnight for quicker insights, 45 day delay

Simpler –
Superior user interface for broader usage

Deeper –
Easy feedback to get to “Why did you buy?”

Walmart is Winning at Trial and Repeat

Shopper's repeat rates at other retailers marginalizes

ROI

Trial & Repeat Rates View Across Retailers

Do people who first buy a new product at a given retailer repeat purchase that product at the same retailer?



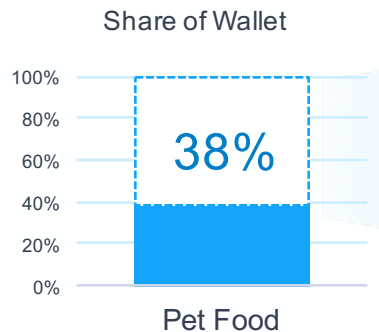
TRIAL RETAILER	% OF REPEATERS WON	% LOST TO WALMART	% LOST TO TARGET	% LOST TO KROGER	% LOST ELSEWHERE
Ahold	60%	16%	3%	1%	20%
Albertsons	66%	13%	4%	3%	14%
BI-LO	32%	43%	0%	2%	24%
BJ's	32%	18%	5%	14%	32%
Delhaize America	44%	28%	2%	8%	18%
Dollar General	23%	55%	2%	4%	15%
Giant Eagle	71%	12%	3%	3%	12%
HEB	65%	21%	4%	9%	2%
Kroger	66%	18%	1%	0%	15%
Meijer	69%	12%	1%	10%	8%
Publix	72%	17%	2%	3%	6%
Safeway	67%	9%	0%	7%	17%
Schnucks	63%	20%	7%	2%	9%
SuperValu	53%	11%	16%	3%	18%
Target	33%	24%	0%	6%	37%
Wakefem	73%	12%	1%	0%	13%
Walmart	73%	0%	1%	5%	21%
Wegmans	60%	13%	4%	4%	19%
Winco Foods	55%	17%	3%	14%	10%

Unmatched Shopper Analytics

Shopper Leakage – Brick & Mortar & Online to Store Specific

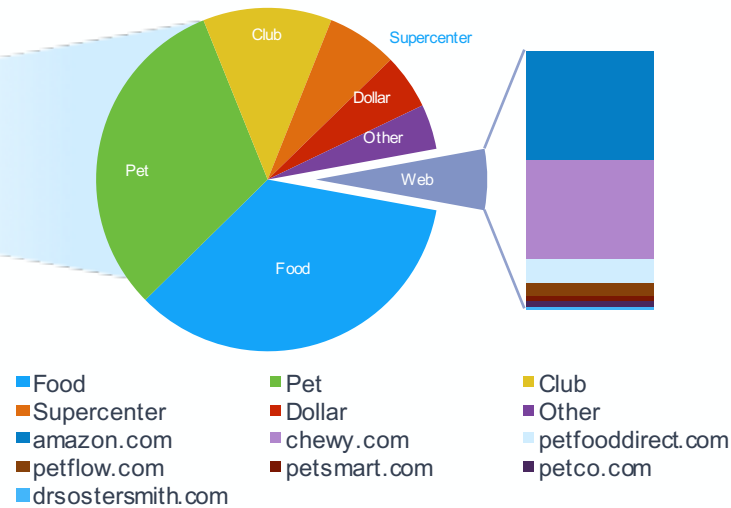
The only source to blend various data sources to report shopper leakage across bricks and mortar & e-commerce that is store specific.

Shopper Leakage



■ WARMART ■ Competitors

SOW Loss by Competitor



Stores Impacted by WEB

Zip Code	Category Sales (yr)	Lost Web Sales (yr)
95608	\$2.9MM	\$864K
98007	\$7.2MM	\$1.5MM
98087	\$7.6MM	\$260K
98226	\$17.4MM	\$1.6MM
99301	\$6.5MM	\$676k