Quantitative & Qualitative Research

BRAND

YEAR TO DATE NOVEMBER 2024

Prepared by :

Global Loyalty Indonesia

Prepared for :

BRAND

Content

01. Research Objective

RESEARCH OBJECTIVE

- To analyze CATEGORY A and assess BRAND performance in the market
- Analyze BRAND member behaviour based on data transaction
- To understand CATEGORY A consumption behavior and their perception on BRAND.

02. Research Design

Research Design

Quantitative

Methodology
Purchase Tracking
(POS Data Analysis)

Data Period
YTD November 2024 compare to LY in performance

Scope
National Data
Category : CATEGORY A

Qualitative

Survey Method
Online Survey

Sample
N = 450

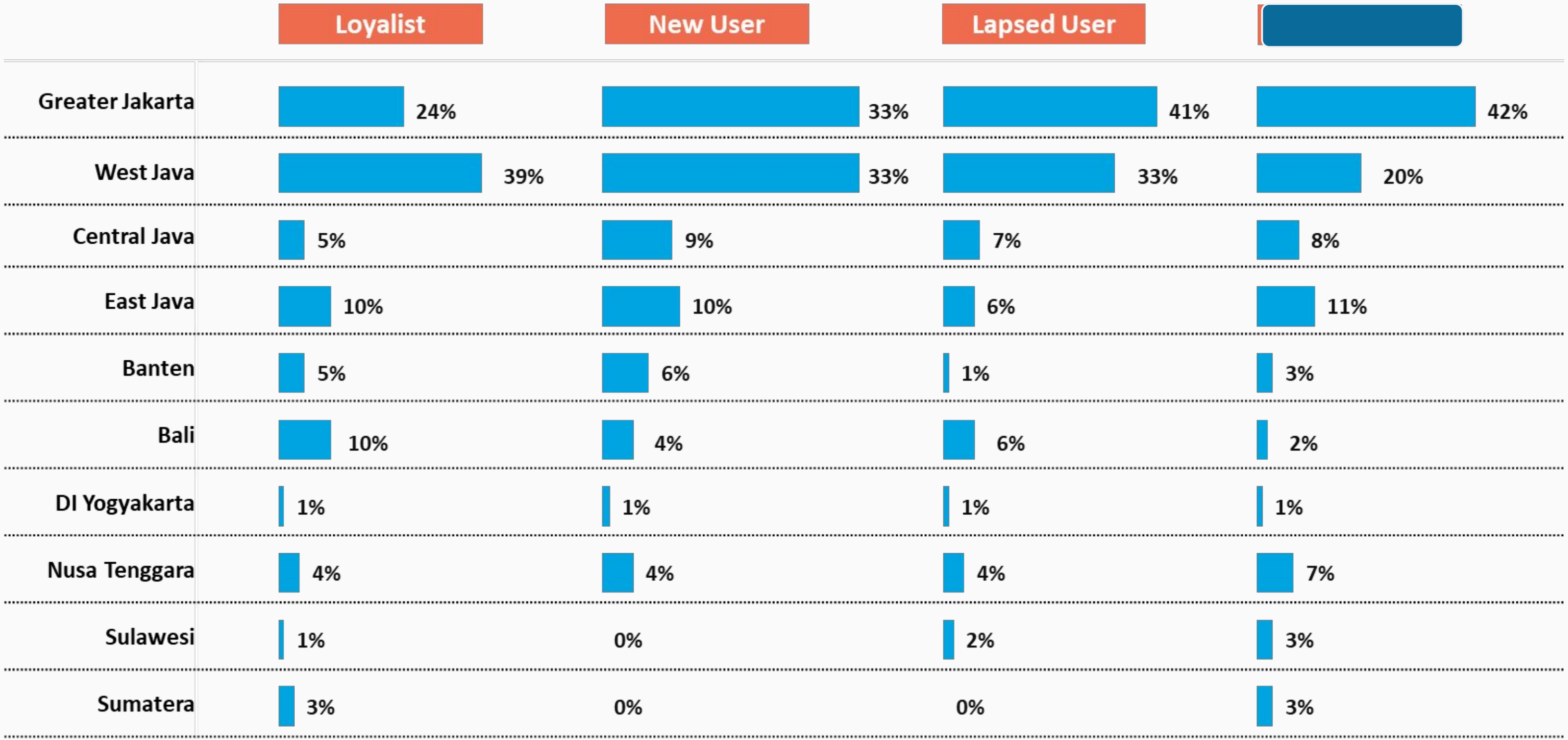
Demography
Male (30%)
Female (70%)

Early Adult
(20 - 40 years old)

Category Sample
1. **Loyalist -** Users who purchase only BRAND, in the last 3 months.
2. **New Users -** Users who has not purchased in last 1 year and started to purchase in Month observation
3. **Lapsed users** - Users who purchased BRAND at least once in last 2 months but stopped purchasing in next month

Category Sample	Loyalist	New User		Lapsed User			
		Totally New	New from Competitor	Totally Lapsed	Lapsed to Competitor	Ever bought (Dual User Puck)	Never bought (Competitor Loyal)
Category 1	70	60		60			
Category 2			13		13		
Category 3			13		13		
Category 4			13		13		
Category 5			13		13		
Category 6			13		13		
Category 7						14	14
Category 8						14	14
Category 9						14	14
Category 10						14	14
Category 11						9	9
TOTAL	**450**						

Sample Area



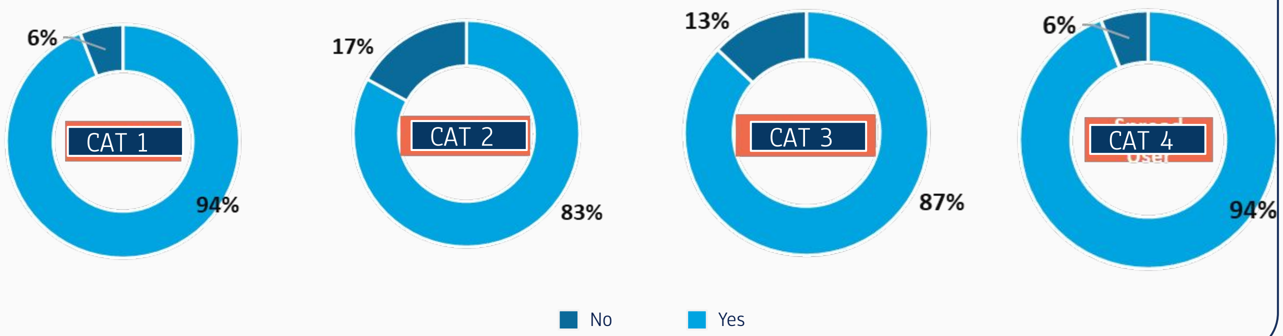
Source : Consumer Insights

03. Research Findings

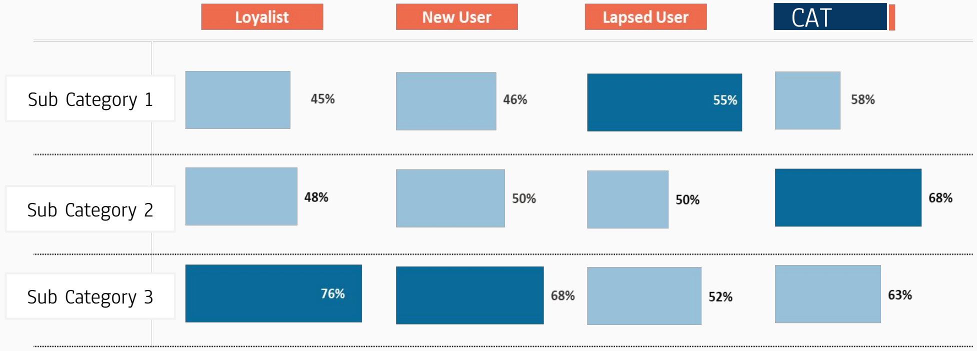
CATEGORY A USAGE BEHAVIOR

Usage CATEGORY in General

Do you often use cheese in your food?



Types Commonly Used

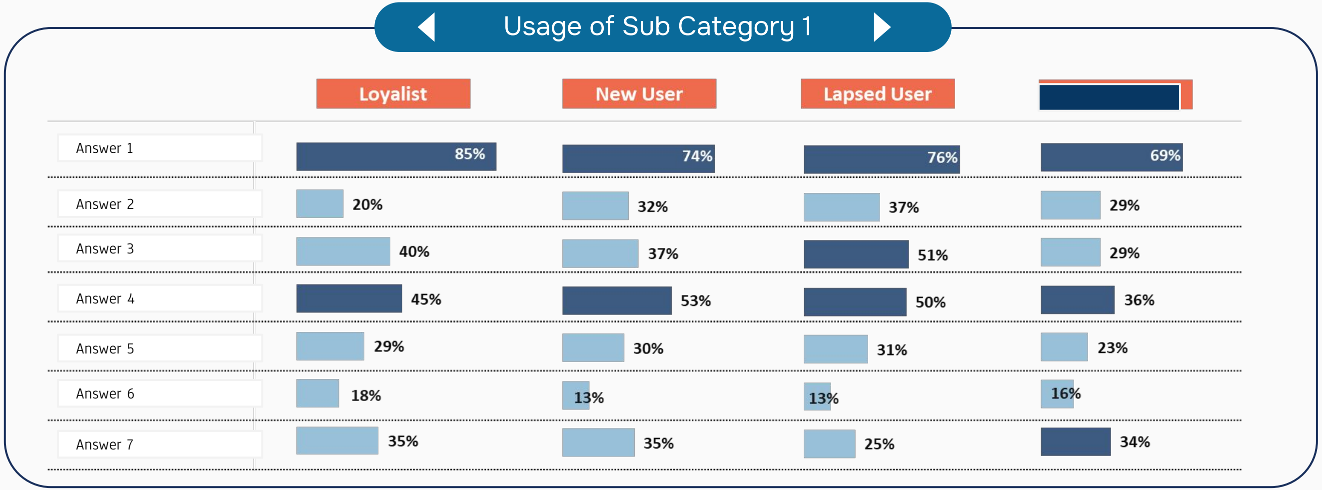


The majority use CATEGORY A in their daily meals.

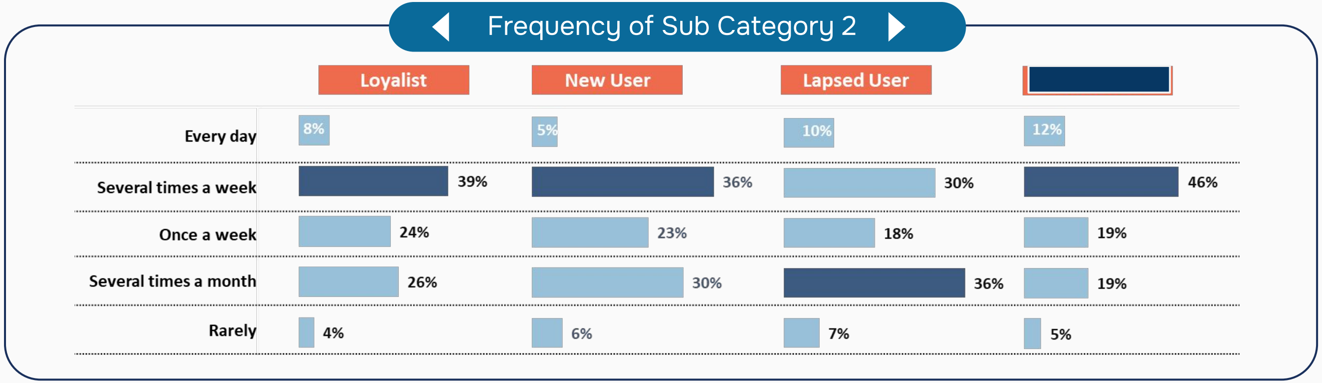
The most commonly used types are Sub Cat 1, Sub Cat 2, and Sub Cat 3.

Source : Consumer Insights

The Habit of Using Sub Category 1



Generally, consumers use Sub Category 1 as a topping for Answer 4 or other Answer x, or as a Answer 7.

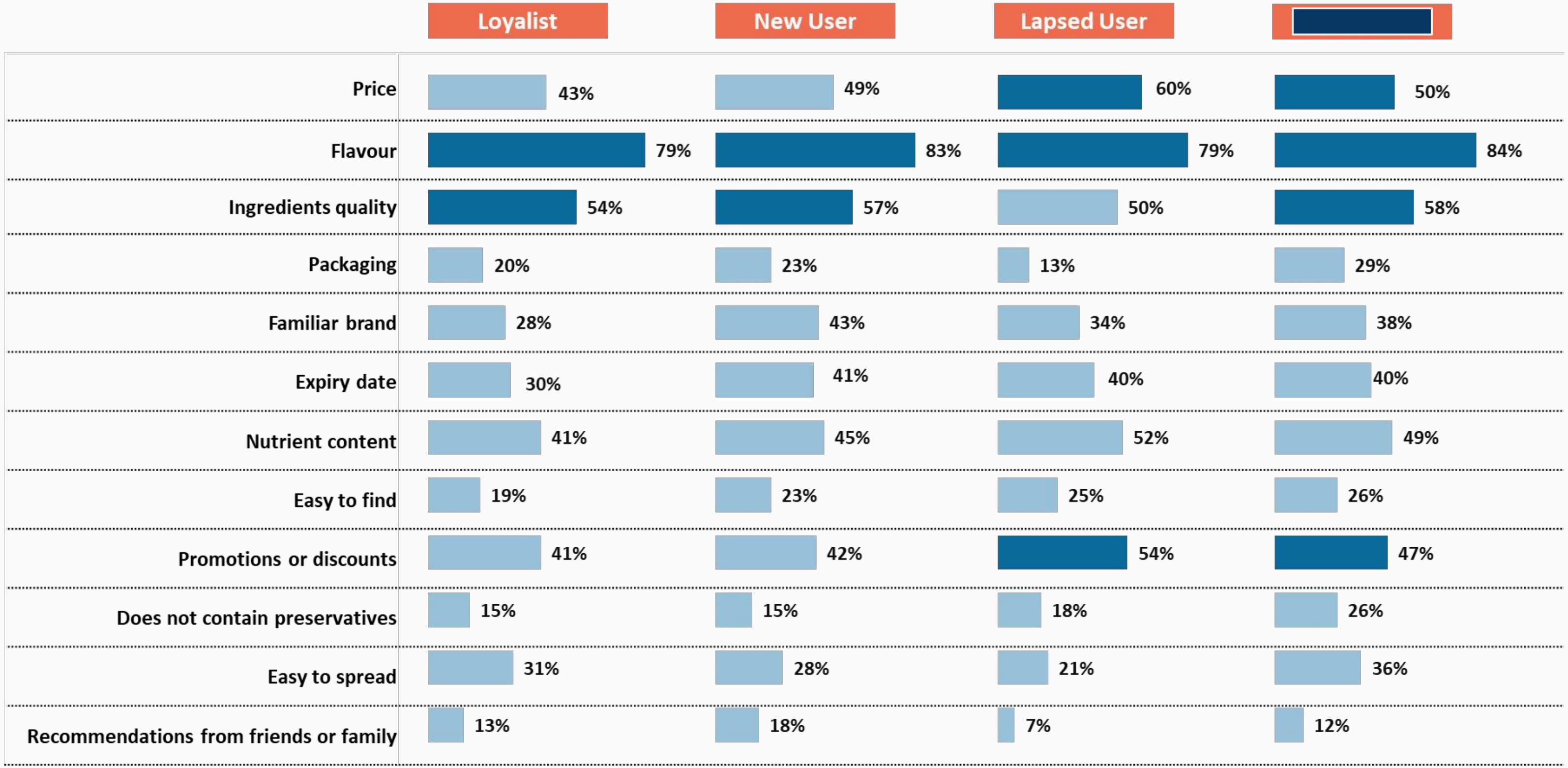


This is also reflected by the frequency of Sub Category 2, as most consumers, excluding lapsed users, consume bread several times a week.

Source : Consumer Insights

Considerations for Choosing a Sub Category 1 Brand.

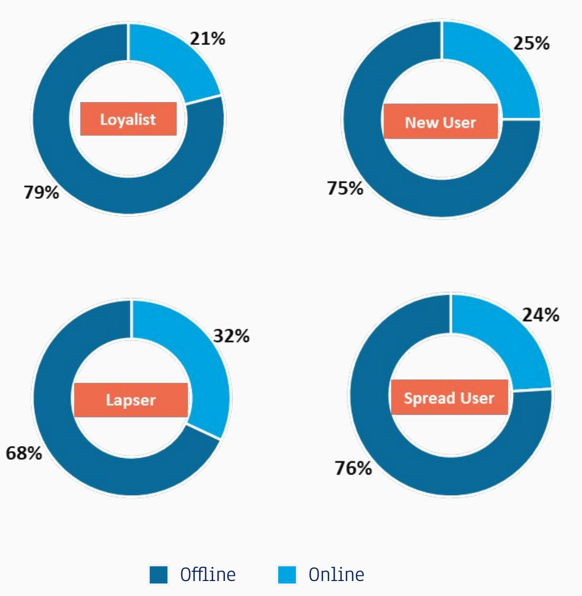
Flavor and ingredient quality are the most important factors in choosing a Sub Category 1.
Lapsed and Spread users also take price and promotions into account.



Source : Consumer Insights

Purchase Channel of Sub Category 1

Most consumers prefer to purchase Sub Category 1 in-store because they see the product displayed at the store. Promotions and discounts also influence their decision. This indicates that the availability of the product in-store helps increase brand awareness for Sub Category 1.



Reason of offline purchase

	Loyalist	New User	Lapsed User	[redacted]
Product displayed in-store	52%	55%	53%	54%
Nearby home	46%	34%	41%	47%
Easier way to reach the store	48%	19%	37%	37%
Also stop by the minimarket	25%	21%	16%	26%
Discount or promotion available	29%	25%	44%	53%
Product always in stock	29%	21%	25%	19%
Frequently visit	32%	30%	33%	42%
Lower price than other stores	16%	13%	18%	21%

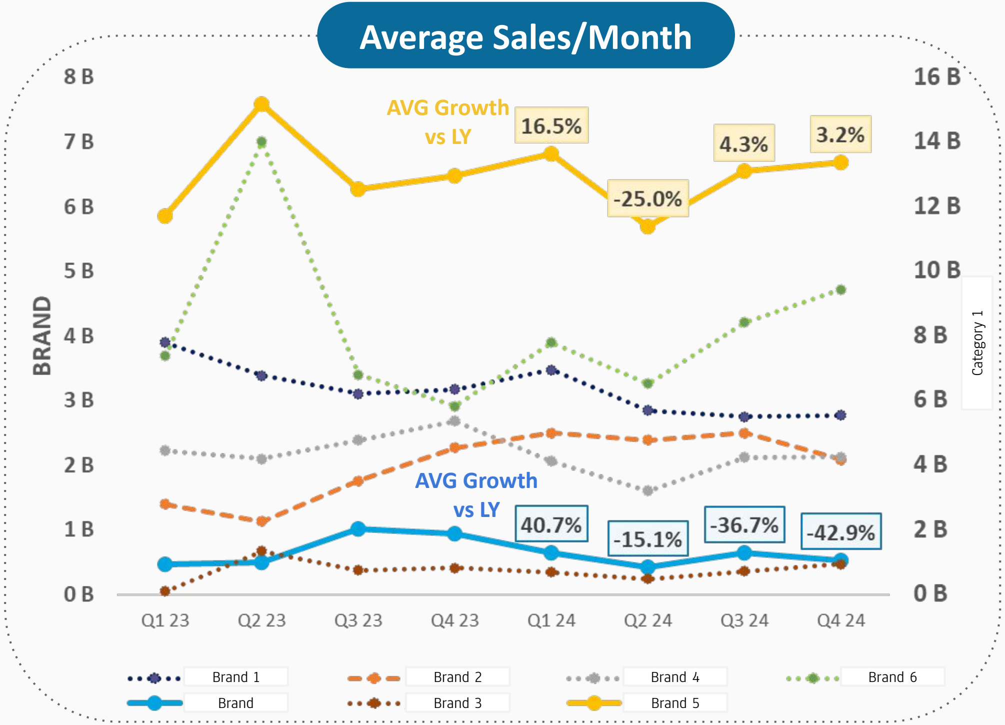
Reason of online purchase

	Loyalist	New User	Lapsed User	[redacted]
Convenience and comfort	71%	80%	65%	81%
More affordable prices	35%	37%	56%	45%
Practical delivery	53%	66%	47%	61%
No need to queue at the shop	29%	54%	35%	61%
Can compare prices easily	24%	31%	35%	52%
Reviews from other buyers	6%	3%	9%	19%
Door-to-door delivery	24%	14%	32%	29%

Source : Consumer Insights

SALES OVERVIEW

Market Overview



*Data Sales Member

Brand	Sales (B)	Growth	Contribution to Category Disgrowth	Market Share (%)	Gap Market Share VS LY (%)	Rank (VS LY)	
CHEESE (CATEGORY)	141.0	-2.3%	100%	100%	-	-	
Brand 6	43.5	-9.9%	143.6%	30.9%	-2.6%	1	-
Brand 1	32.8	-12.6%	141.9%	23.2%	-2.7%	2	-
Brand 2	26.3	55.3%	-280.6%	18.7%	6.9%	3	+1
Brand 4	21.6	-15.4%	118.0%	15.3%	-2.4%	3	-1
Brand 5	6.8	81.9%	-92.1%	4.8%	2.2%	5	+2
Brand	**6.2**	**-25.0%**	**62.1%**	**4.4%**	**-1.3%**	**6**	**-1**
Brand 3	3.7	-5.9%	7.1%	2.7%	-0.1%	7	-1

Member Sales Contribution to Retail

Brand	CATEGORY
66.0%	63.6%

Source : Data POS Member Alfamart 2024

Regional Share

SUMATERA			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-11.29%	33.42%	16.68%
Brand 1	-2.32%	23.63%	15.67%
Brand 2	67.47%	19.53%	16.12%
Brand 4	-19.34%	16.05%	16.13%
Brand 5	66.18%	4.72%	15.03%
Brand 3	-14.37%	2.64%	15.22%
Brand	-	-	-
TOTAL	0.65%	100.00%	15.40%

BATAM			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-5.20%	34.52%	0.68%
Brand 1	-7.53%	30.82%	0.81%
Brand 2	26.65%	15.36%	0.50%
Brand 4	-0.40%	12.13%	0.48%
Brand 5	35.52%	3.89%	0.49%
Brand 3	-20.52%	3.27%	0.75%
Brand	-	-	-
TOTAL	-1.03%	100.00%	0.61%

BANTEN			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-15.14%	32.58%	2.97%
Brand 1	-22.18%	21.55%	2.61%
Brand 2	41.49%	18.41%	2.78%
Brand 4	-20.01%	15.72%	2.89%
Brand 5	80.94%	4.89%	2.84%
Brand 3	-9.51%	2.20%	2.32%
Brand	-39.21%	4.64%	2.96%
TOTAL	-10.34%	100.00%	2.81%

WEST JAVA			
Brand	Growth	Share	Contr. to Nat.
Brand 6	1.59%	32.01%	17.42%
Brand 1	-11.73%	23.02%	16.66%
Brand 2	58.76%	17.33%	15.61%
Brand 4	-9.39%	12.97%	14.22%
Brand	-26.32%	7.08%	26.99%
Brand 5	86.84%	5.20%	18.04%
Brand 3	-6.21%	2.38%	14.98%
TOTAL	2.29%	100.00%	16.80%

KALIMANTAN			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-7.63%	30.81%	5.24%
Brand 4	-5.82%	21.06%	7.21%
Brand 1	0.55%	20.60%	4.66%
Brand 2	69.73%	20.45%	5.75%
Brand 5	107.74%	4.71%	5.11%
Brand 3	-0.64%	2.33%	4.58%
Brand	252.66%	0.04%	0.04%
TOTAL	7.67%	100.00%	5.25%

SULAWESI			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-17.90%	30.06%	6.74%
Brand 4	-16.69%	23.75%	10.73%
Brand 2	96.95%	20.66%	7.67%
Brand 1	0.00%	18.58%	5.54%
Brand 5	80.84%	5.22%	7.47%
Brand 3	-4.10%	1.73%	4.47%
Brand	-	-	-
TOTAL	1.13%	100.00%	6.92%

JABODETABEK			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-4.45%	28.78%	27.33%
Brand 1	-16.15%	25.60%	32.29%
Brand 2	46.45%	17.94%	28.18%
Brand 4	-13.52%	13.41%	25.64%
Brand	-27.79%	6.58%	43.74%
Brand 5	115.26%	4.48%	27.09%
Brand 3	4.72%	3.21%	35.19%
TOTAL	-2.60%	100.00%	29.30%

CENTRAL JAVA			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-13.21%	32.06%	10.05%
Brand 1	-18.05%	22.61%	9.42%
Brand 2	45.89%	19.04%	9.87%
Brand 4	-14.04%	14.37%	9.07%
Brand 5	56.94%	5.10%	10.19%
Brand	-36.66%	4.34%	9.52%
Brand 3	-20.80%	2.47%	8.92%
TOTAL	-7.00%	100.00%	9.67%

BALI NUSRA			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-12.16%	31.25%	4.88%
Brand 1	-9.07%	23.00%	4.77%
Brand 4	-11.96%	17.25%	5.42%
Brand 2	59.52%	15.33%	3.96%
Brand	-	6.02%	6.58%
Brand 5	95.56%	4.38%	4.36%
Brand 3	15.40%	2.77%	4.99%
TOTAL	5.58%	100.00%	4.82%

OUTSIDE JAVA			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-12.16%	32.00%	34.22%
Brand 1	-2.75%	22.13%	31.45%
Brand 2	71.84%	19.22%	34.01%
Brand 4	-15.27%	18.57%	39.98%
Brand 5	78.09%	4.76%	32.46%
Brand 3	-7.12%	2.43%	30.01%
Brand	4537.26%	0.88%	6.62%
TOTAL	2.48%	100.00%	33.01%

EAST JAVA			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-28.60%	29.43%	8.01%
Brand 2	40.16%	21.19%	9.55%
Brand 1	-23.40%	20.93%	7.57%
Brand 4	-28.85%	14.98%	8.21%
Brand 5	45.73%	5.40%	9.38%
Brand	-37.29%	5.34%	10.17%
Brand 3	-18.81%	2.73%	8.59%
TOTAL	-16.87%	100.00%	8.40%

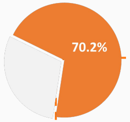
JAVA			
Brand	Growth	Share	Contr. to Nat.
Brand 6	-8.70%	30.31%	65.78%
Brand 1	-16.52%	23.76%	68.55%
Brand 2	47.90%	18.37%	65.99%
Brand 4	-15.51%	13.73%	60.02%
Brand	-29.96%	6.15%	93.38%
Brand 5	83.83%	4.88%	67.54%
Brand 3	-5.38%	2.79%	69.99%
TOTAL	-4.51%	100.00%	66.99%

Source : Data POS Member Alfamart 2024

National Growth (Category) : -2.3 % National Growth (PUCK) : -25.0 % National Share (Category) : 4.4%

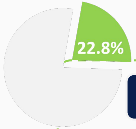
Market Share

CAT



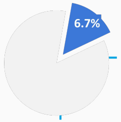
Sub Cat

Brand	Sales (B)	Growth (%)	Market Share (%)	Gap Market Share VS	Rank
Compe titor	27.6	-7.2%	27.8%	-0.1%	1
	23.6	-33.6%	23.8%	-9.6%	2
	20.5	63.9%	20.6%	8.9%	3
	17.0	-19.5%	17.1%	-2.7%	4
	6.8	81.9%	6.9%	3.4%	5
	3.8	-5.9%	3.8%	0.0%	6
TOTAL	**99.3**	**-6.9%**	**100.0%**	**0.0%**	



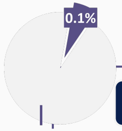
Sub Cat

Brand	Sales (B)	Growth (%)	Market Share (%)	Gap Market Share VS	Rank
Compe titor	16.6	30.6%	51.6%	6.0%	1
	5.8	41.9%	18.1%	3.4%	2
	5.2	-22.4%	16.1%	-7.8%	3
	4.6	3.8%	14.3%	-1.6%	4
TOTAL	**32.2**	**15.3%**	**100.0%**	**0.0%**	



Sub Cat

Brand	Sales (B)	Growth (%)	Market Share (%)	Gap Market Share VS	Rank
Compe titor	6.2	-25.0%	65.4%	-34.6%	1
	3.3	-	34.6%	34.6%	2
TOTAL	**9.5**	**14.6%**	**100.0%**	**0.0%**	



Sub Cat

Brand	Sales (B)	Growth (%)	Market Share (%)	Gap Market Share VS	Rank
Compe titor	0.01	-98.8%	99.9%	-34.6%	1
	0.00001	-100.0%	0.1%	34.6%	2
TOTAL	**0.01**	**-99.1%**	**100.0%**	**0.0%**	

Source : Data POS Member Alfamart 2024

Key Performance Indicators

The decline in sales for BRAND is primarily due to a reduction in the number of members. This indicates that BRAND performance is very dependent on the number of members, rather than on sales per member or basket size.

Sales (BIDR)

	CAT		Brand & Competitor					
Value	141.0	9.5	6.2	43.5	32.8	26.3	21.6	3.8
Growth	-2.3%	14.6%	-25.0%	-9.9%	-12.6%	55.3%	-15.4%	-5.9%
Impact to Sales Growth	100%	100%	100%	100%	100%	100%	100%	100%

Member (#Member)

	CAT		Brand & Competitor					
Total Member (K)	3605.6	301.1	159.8	1746.7	1176.4	1032.2	847.9	110.4
Growth	8.5%	37.8%	-26.9%	5.3%	-9.6%	33.2%	-9.9%	-6.9%
Impact to Sales Growth	-370%	259%	108%	-54%	76%	60%	64%	116%

Sales per member(KIDR)

	CAT		Brand & Competitor					
Value	39.1	31.6	38.9	24.9	27.8	25.5	25.5	34.2
Growth	-10.0%	-16.8%	2.6%	-14.5%	-3.3%	16.5%	-6.1%	1.0%
Impact to Sales Growth	470%	-159%	-8%	154%	24%	40%	36%	-16%

Trx per Member

	CAT		Brand & Competitor					
Value	2.2	1.4	1.3	1.7	1.5	1.6	1.5	1.3
Growth	-6.6%	6.7%	0.9%	-2.9%	-5.1%	10.9%	-5.1%	5.7%
Impact to Sales Growth	311%	63%	-3%	30%	37%	26%	30%	-90%

Basket Size (KIDR)

	CAT		Brand & Competitor					
Value	17.6	22.8	29.8	15.0	18.3	16.4	16.6	27.3
Growth	-3.6%	-22.1%	1.7%	-12.0%	1.9%	5.1%	-1.0%	-4.5%
Impact to Sales Growth	159%	-222%	-5%	124%	-13%	14%	6%	74%

Range Basket Size	% Transaction
> 15.000	17.76%
15.000 – 18.000	69.19%
< 18.000	13.05%

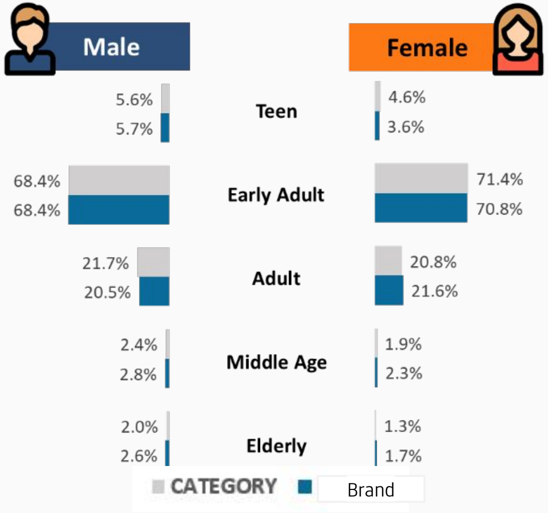
Source : Data POS Member Alfamart 2024

Member Profiling

	Member Proportion		Sales Contribution	
	Male	Female	Male	Female
Brand	25%	75%	24.8%	75.2%
CATEGORY	25%	75%	25.2%	74.8%

Member Proportion

Age Range	Sales Contribution		Sales Growth	
	Brand	CATEGORY	Brand	CATEGORY
TEEN	5.3%	5.6%	-42.8%	-37.1%
EARLY ADULT	66.1%	67.1%	-32.4%	-17.8%
ADULT	22.7%	22.8%	-28.1%	-5.8%
MIDDLE AGE	2.9%	2.5%	-26.6%	-5.8%
ELDERLY	2.9%	2.1%	-19.0%	-13.4%



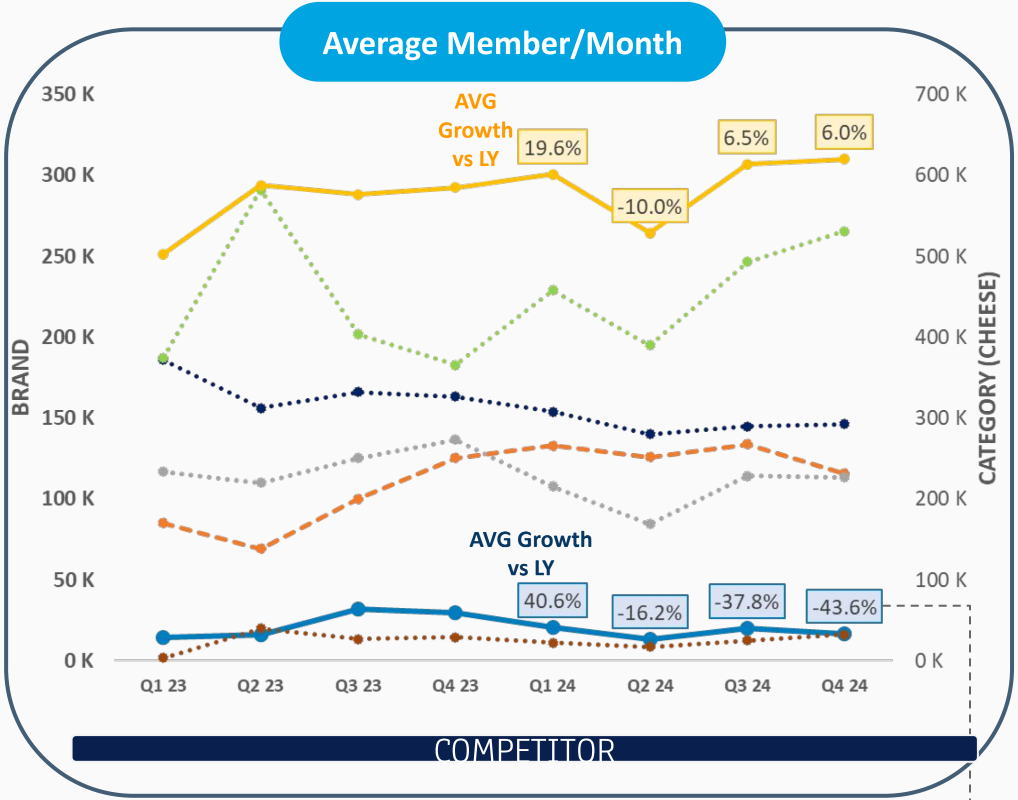
Age Range	Sales Contribution		Sales Growth	
	Brand	CATEGORY	Brand	CATEGORY
TEEN	3.5%	4.0%	-37.5%	-20.1%
EARLY ADULT	68.8%	69.1%	-23.6%	2.1%
ADULT	23.3%	23.4%	-24.5%	2.7%
MIDDLE AGE	2.5%	2.0%	-21.2%	5.5%
ELDERLY	1.9%	1.4%	-14.6%	1.9%

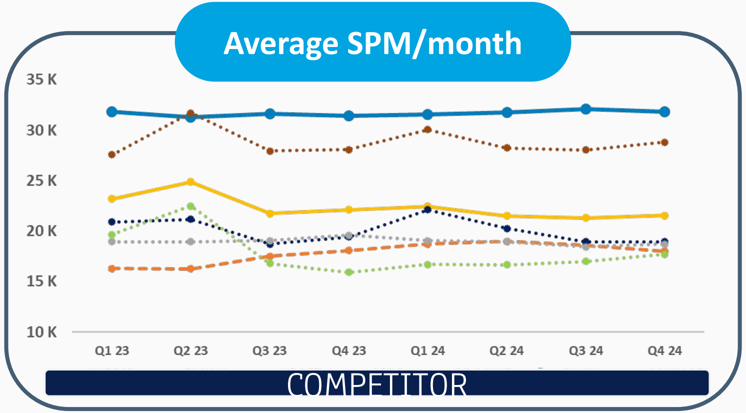
Teen: ≤ 19 y.o. **Early Adult:** 20-40 y.o. **Adult:** 41-54 y.o. **Middle-Age:** 55-59 y.o. **Elderly:** ≥ 60 y.o.

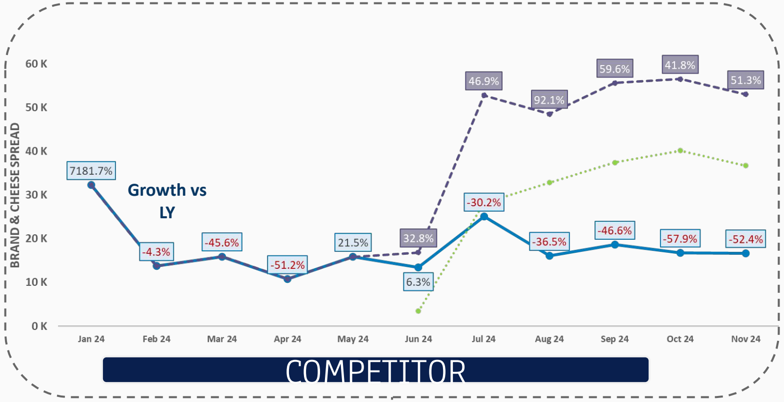
Source : Data POS Member Alfamart 2024

Member & Sales per Member Trend

The decrease in the number of members purchasing began in Q2 2024 and has steadily declined throughout the year, reaching its lowest point by the end of 2024.



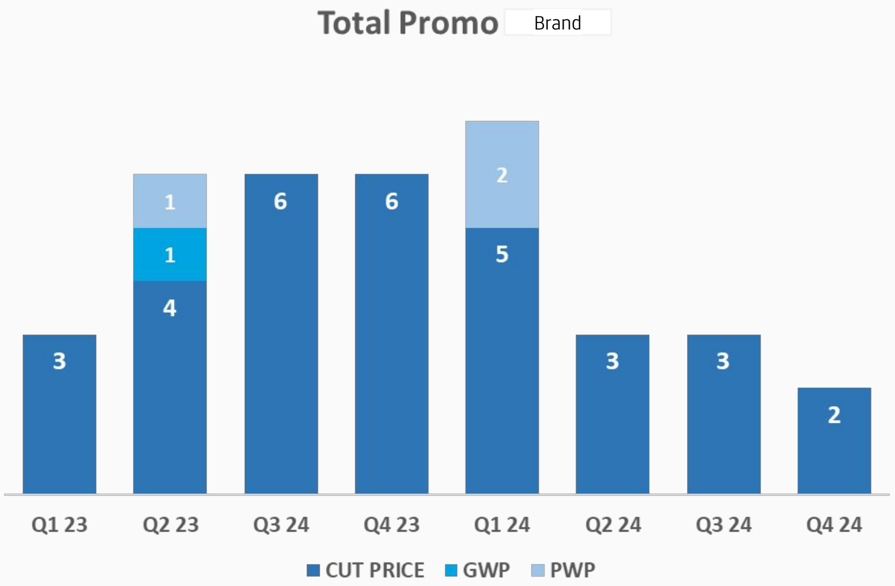


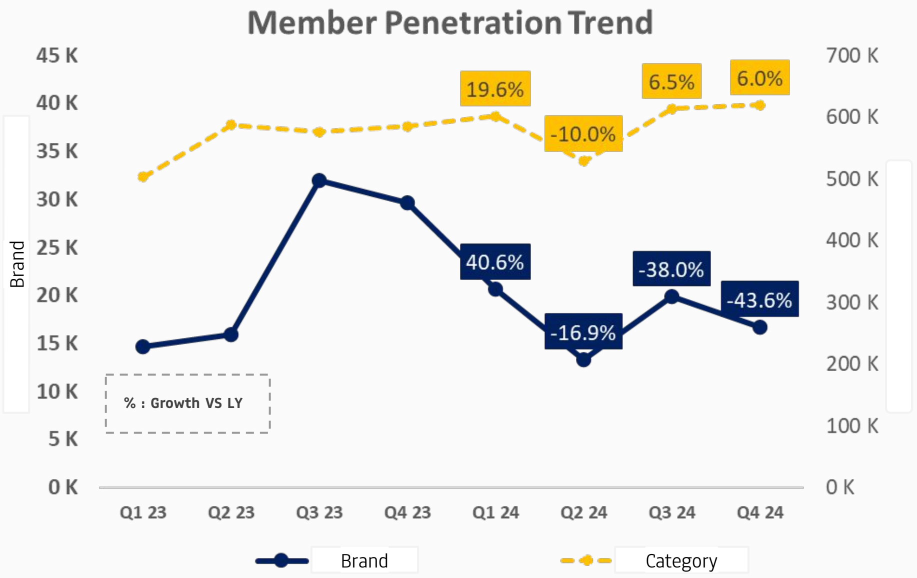


Source : Data POS Member Alfamart 2024

Promotion impact to Member Penetration

BRAND member growth is still highly dependent on the promotions carried out. This also indicates the low number of members in 2024, as the number of promotions was not as high as in 2023.





Cut Price : Consumer can buy products at prices below the standard price (Harga Coret)
GWP (Gift with Prize) : Consumer can buy products and get free another items (Beli Brand gratis item tertentu)
PWP (Purchase with Purchase) : Consumer can buy products and another item with reduced price (Tebus Murah)

Source : Data POS Member Alfamart 2024

Brand's Source of Awareness

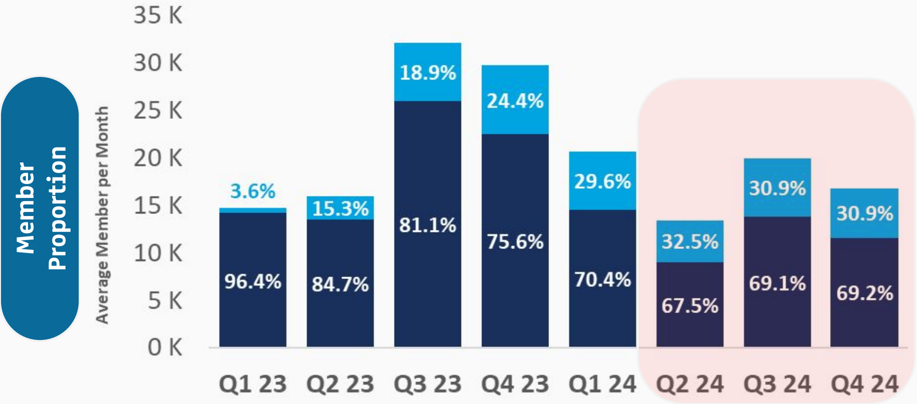
The most common sources of awareness are recommendations from family or friends and in-store product displays, indicating that personal recommendations and visibility at retail locations play a key role in driving consumer awareness.

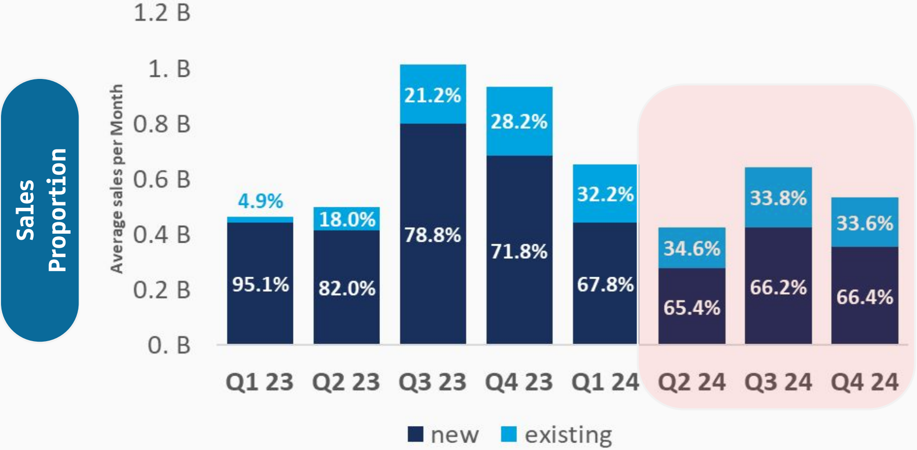
	Loyalist	New User	Lapsed User	
Ads on Television	6%	9%	11%	9%
Ads on YouTube	9%	9%	11%	8%
Saw ads on TikTok	15%	19%	10%	16%
Family/friends	39%	18%	24%	24%
See the product when browsing on the internet	5%	13%	12%	19%
Reviews on Facebook, Instagram	14%	16%	15%	8%
Reviews on Tiktok	8%	11%	8%	5%
Reviews on X, YouTube	1%	7%	0%	1%
Saw ads/product in marketplaces	8%	12%	13%	15%
Saw the products displayed at Alfamart	49%	50%	55%	47%
View promotional materials	11%	9%	10%	13%

Source : Consumer Insights

New Member & Existing Analysis

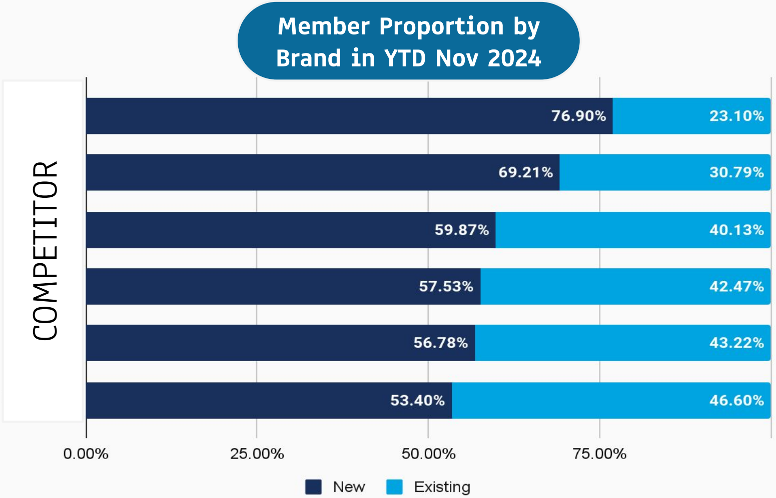
New & Existing Member





Almost 70% BRAND members and sales in 2024 still dominated from new members. However, starting from Q2 2024 through the end of the year, the number of new members acquisition has significantly decreased compared to the previous year.

Compared to top competitor, most of them tend to have a more balanced ratio of new and existing members

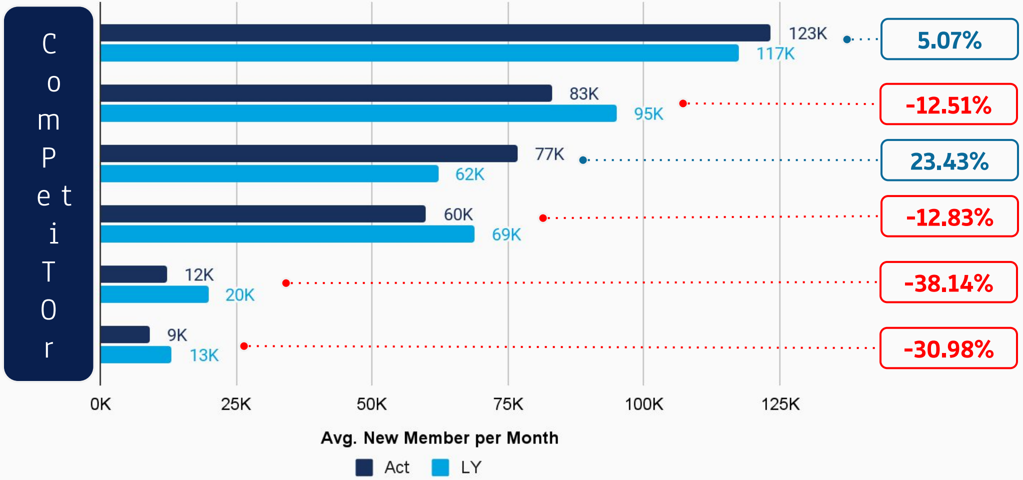


Source : Data POS Member Alfamart 2024

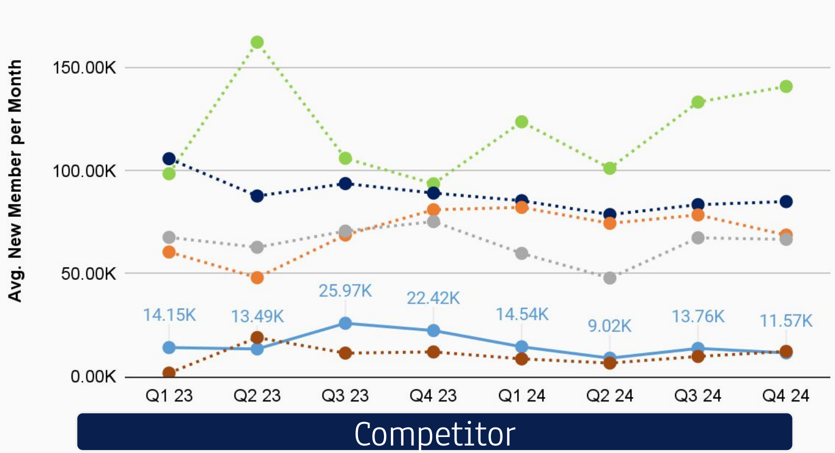
- **New Member in Month-i:** Member who has not purchased in last 1 year and started to purchase in Month-i
- **Existing Member in Month-i:** Member in Month-i who has purchased in last 1 year

New Member

New Member by Brand



New Member Trend



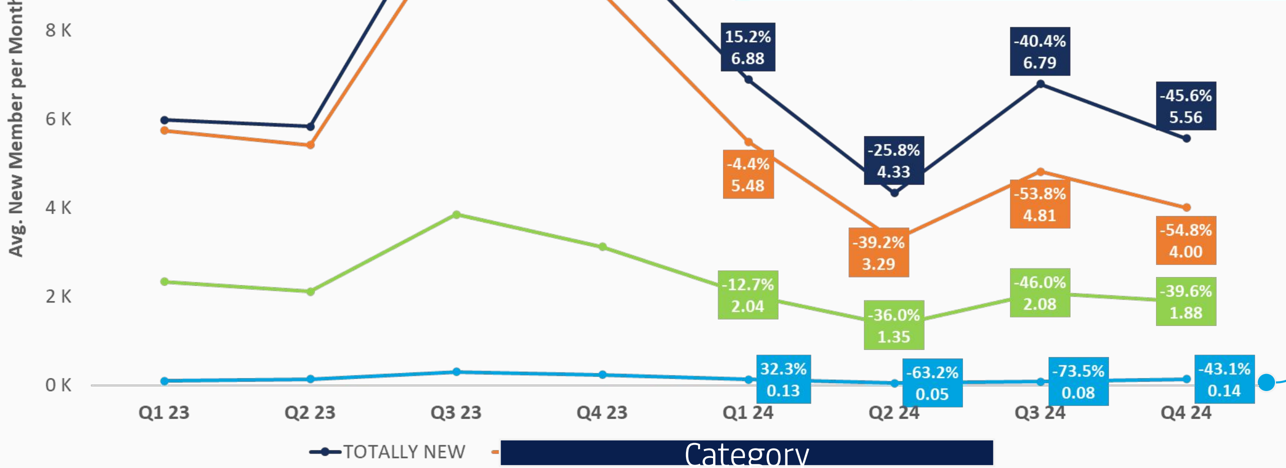
Source : Data POS Member Alfamart 2024

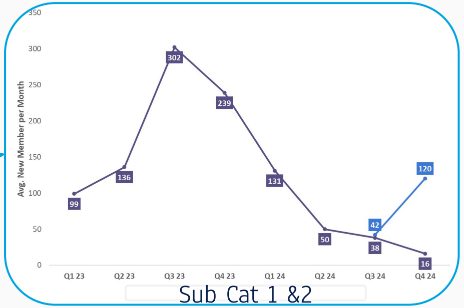
New Member Came From

Almost 50% BRAND new member are members who ***never bought other category*** at Alfamart. Half other came from *Sub Category 1, Sub Category 2 and others.*

New Member Came From

	Totally New in Cheese Category	New From Competitor			
		Sub Cat 1 - 4			
Act	48.04%	35.97%	14.88%	0.60%	0.51%
LY	43.90%	40.04%	15.05%		1.02%
Gap vs LY	4.14%	-4.06%	-0.16%	0.60%	-0.51%



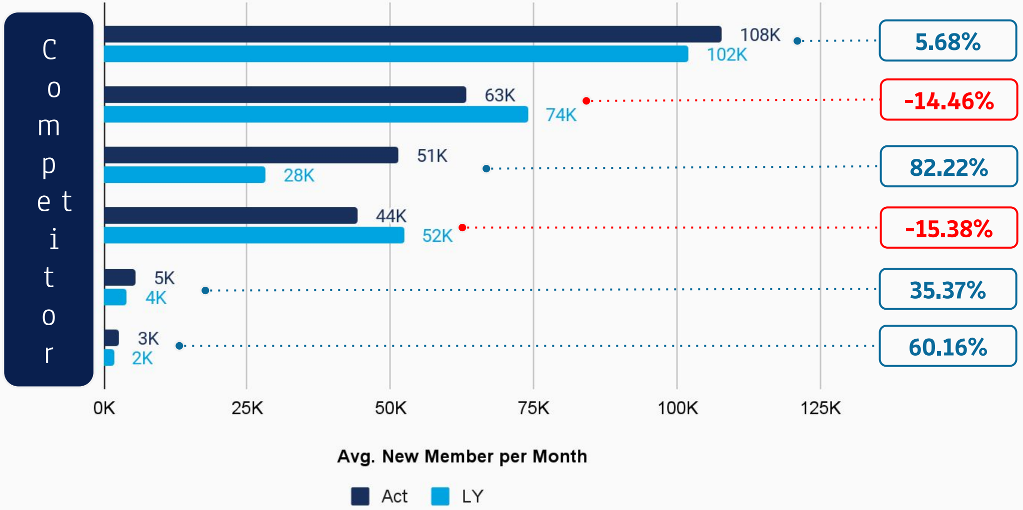


Source : Data POS Member Alfamart 2024

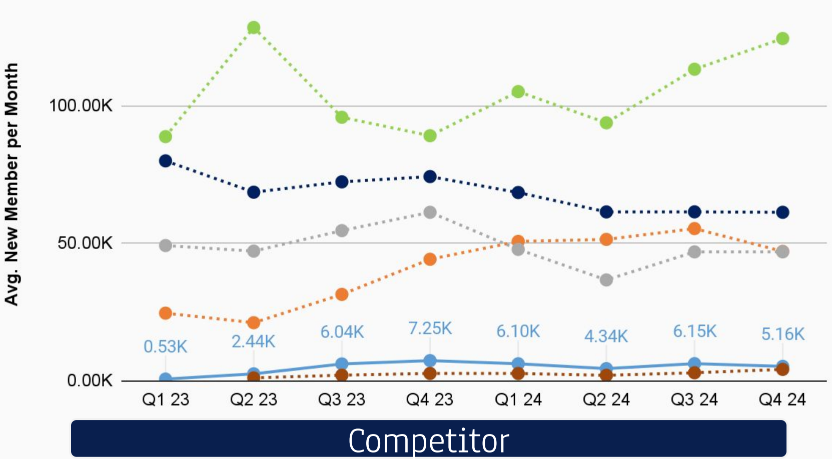
Existing Member

Although the existing members of BRAND shows positive growth, the number of existing members per month remains relatively small compared to competitor brands, BRAND need to increase the conversion of new members to existing members.

Existing Member by Brand



Existing Member Trend

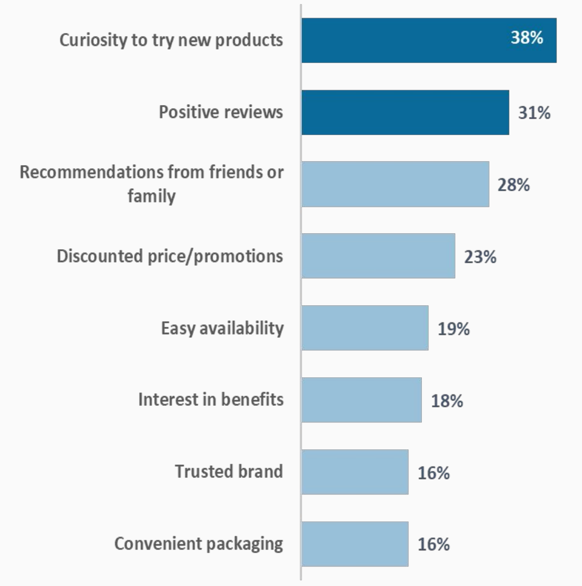


Source : Data POS Member Alfamart 2024

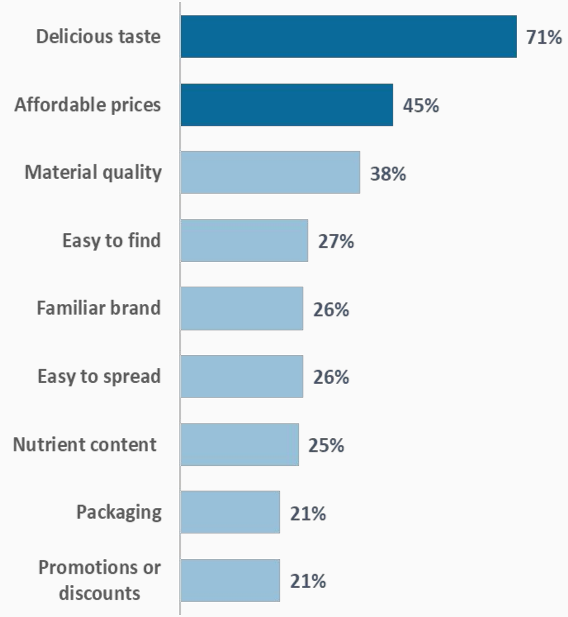
New Member Attitude towards BRAND

The novelty of BRAND is the main factor that encourages the new member to try it for the first time.
New members are drawn to BRAND because of its delicious taste and affordable price, making it an appealing option for them.

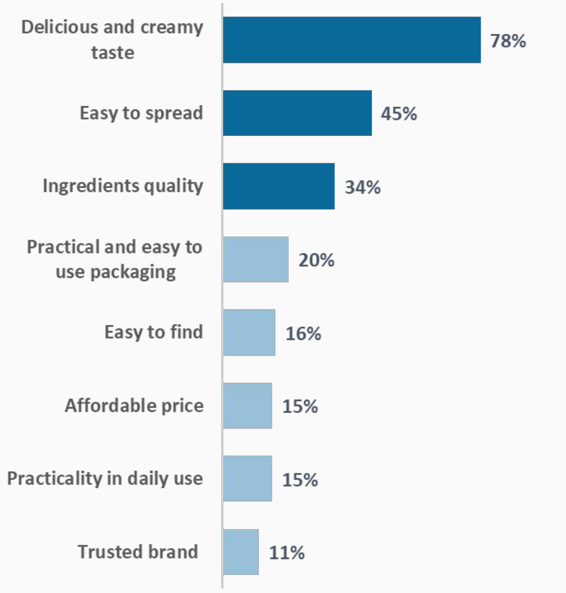
Trigger of Consumption



Reason to Choose BRAND



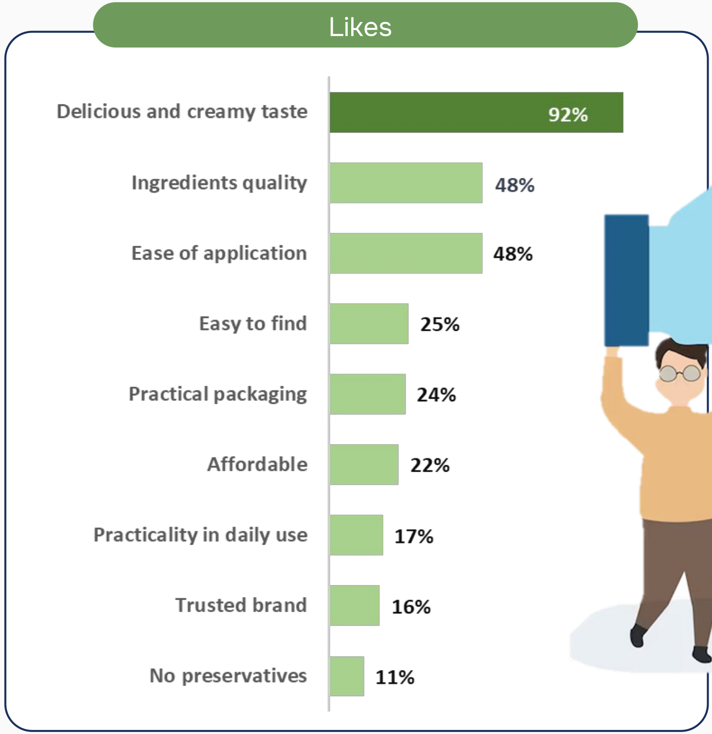
Key differentiators of BRAND

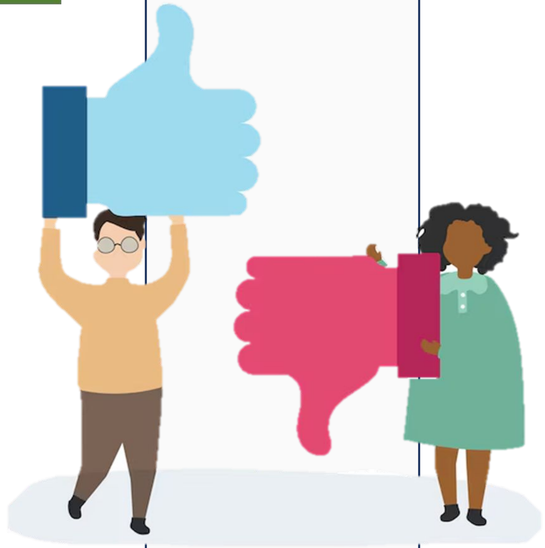


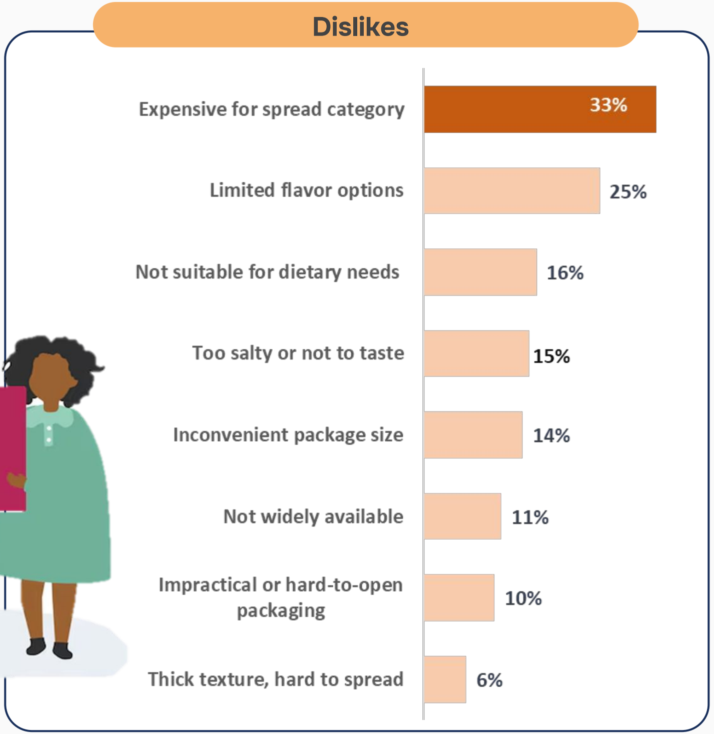
Source : Consumer Insights

What New Member Like and Dislike about Brand

Good taste, quality, and ease of use, thanks to its smooth texture, are key drivers of member satisfaction with BRAND. However, some members express concerns about the high price and limited flavor variations.

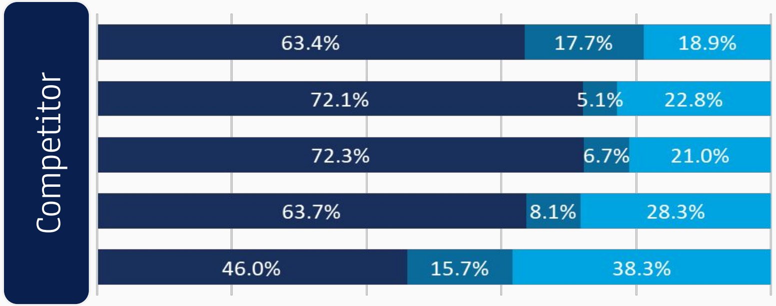




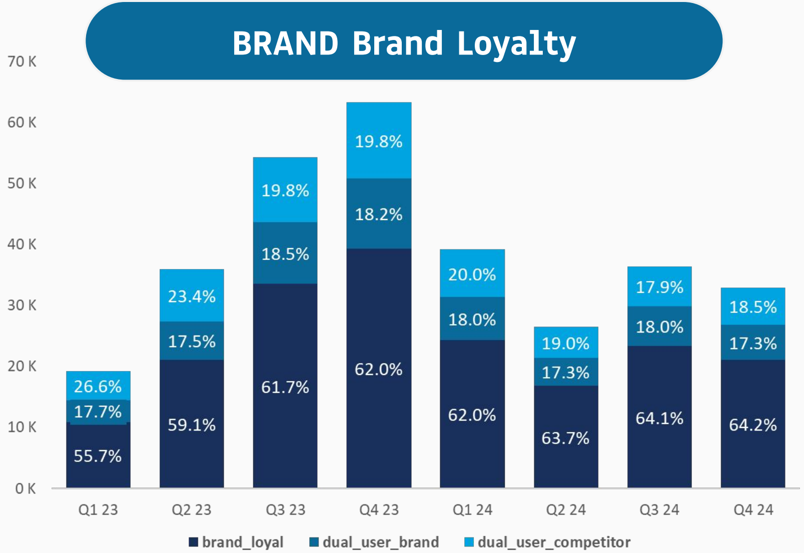


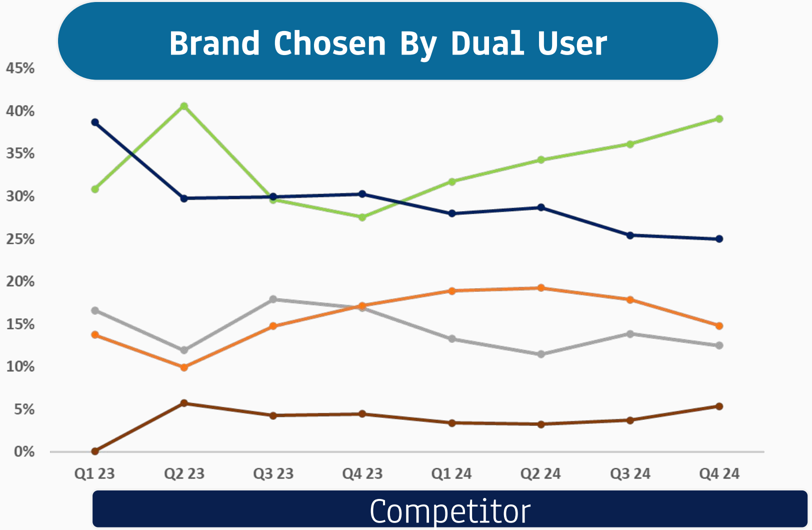
Source : Consumer Insights

Brand Loyalty



Compared to competitor, BRAND shows low (%) loyal users. Over 60% of members using BRAND are loyal to the brand, while around 30% of members are dual users purchases from other brands in the same category. However, trendwise shows an increase (%) BRAND 2 chosen as dual user brand.





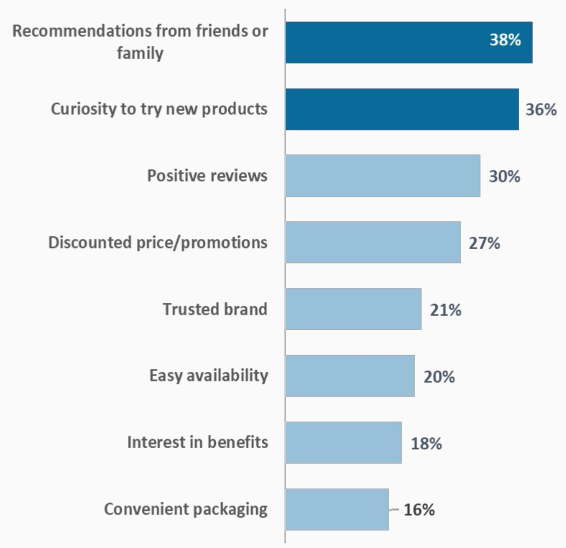
Brand Loyal : Member who spent 100% of their money on PUCK in rolling 2 months
Dual User Brand : Member who spent ≥ 60% (but <100%) of their money on PUCK in rolling 2 months.
Dual User Competitor: Member who spent <60% of their money on PUCK in rolling 2 months.

Source : Data POS Member Alfamart 2024

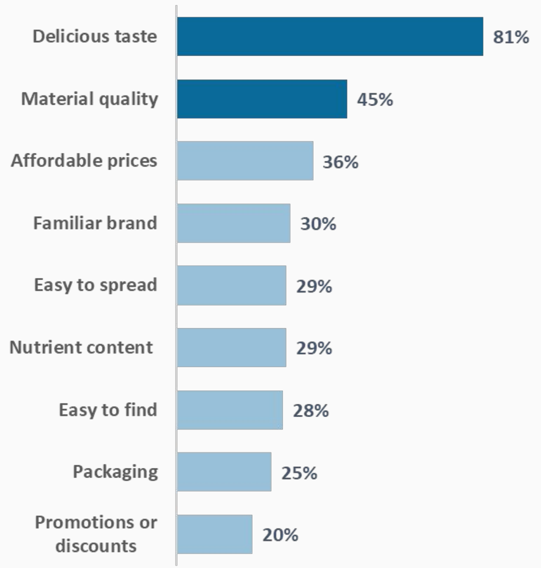
Loyalist Attitude towards BRAND

The novelty of BRAND and recommendation are the main factors that encourages the loyalist to try it for the first time. Loyalist value BRAND for its high-quality ingredients, which is a key factor in their continued preference for the brand.

Trigger of Consumption



Reason to Choose BRAND

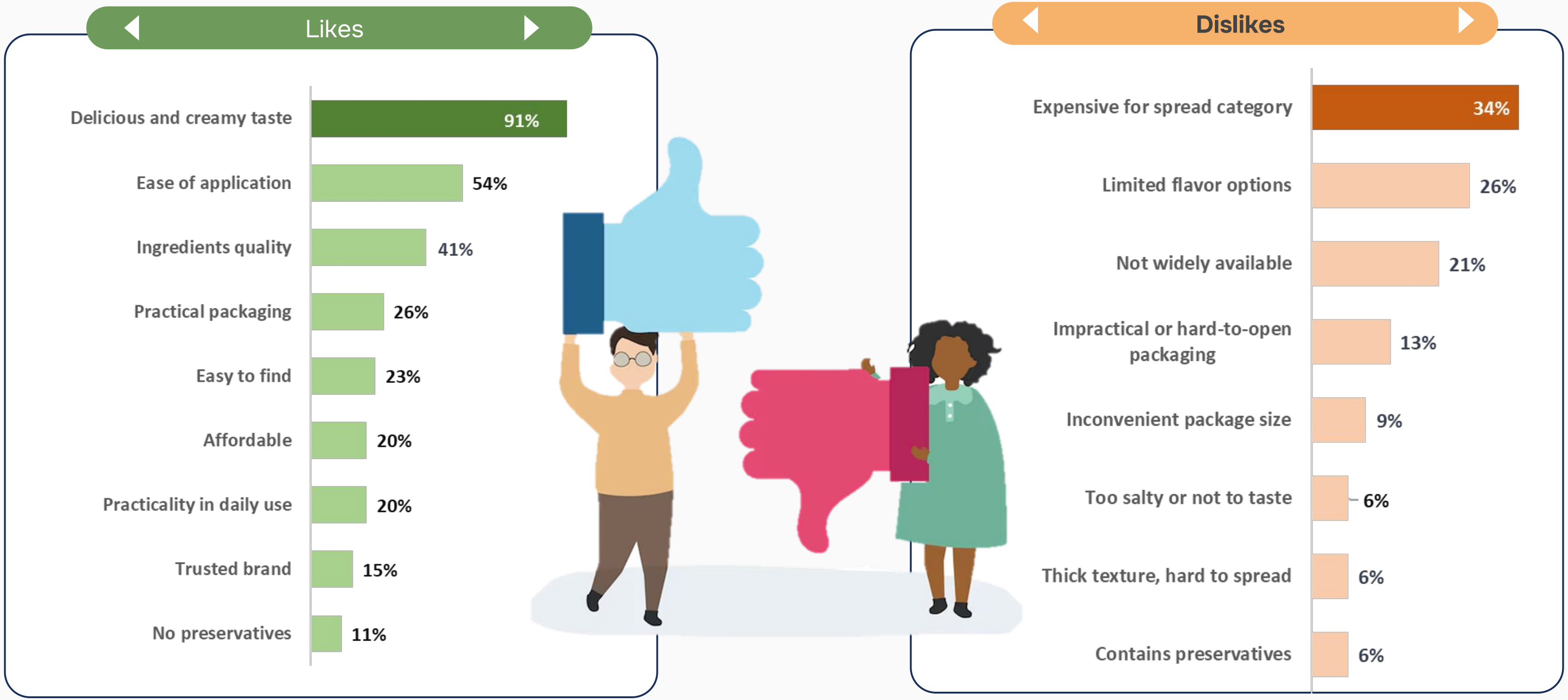


Key differentiators of BRAND.

Source : Consumer Insights

What Loyalist Like and Dislike about BRAND

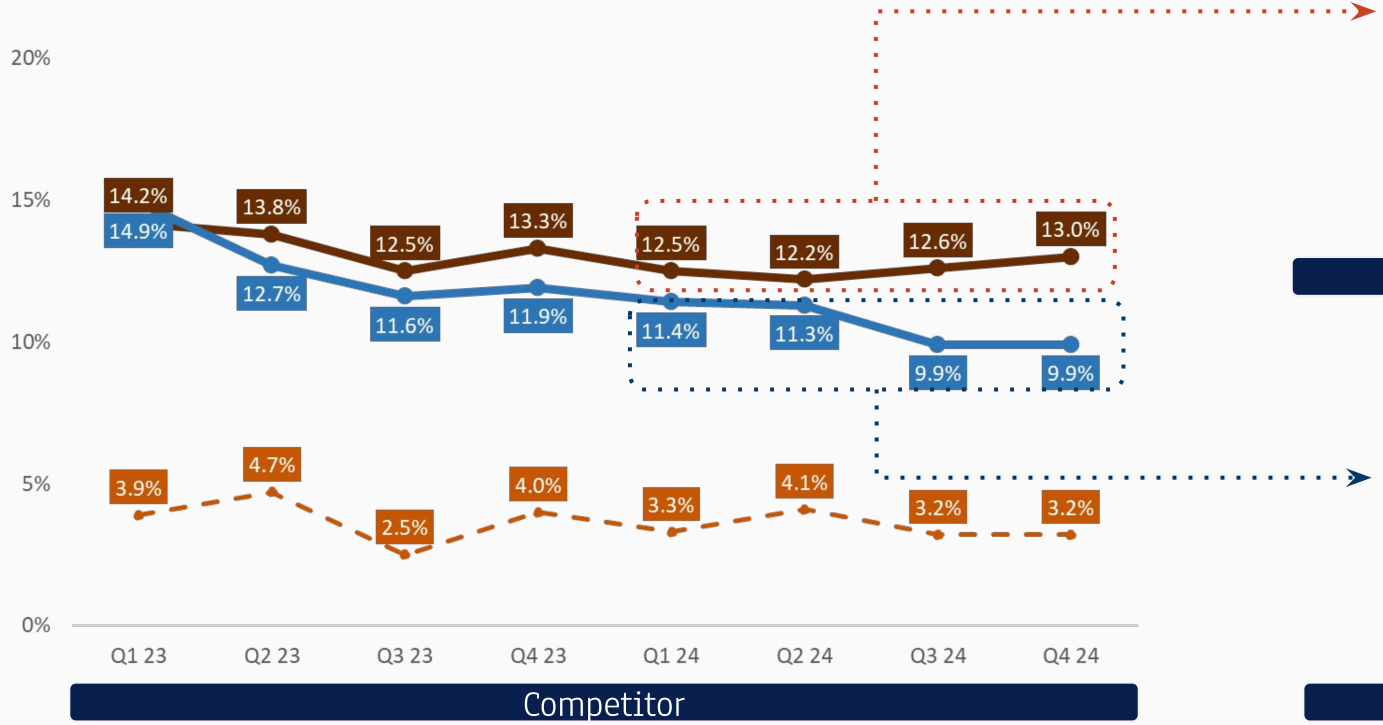
Despite its limitations in terms of high price and limited flavor variations, BRAND is appreciated by its members for its creamy & delicious taste, easy-to-spread texture, and high product quality.



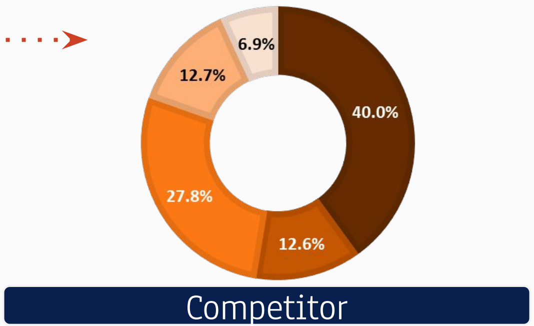
Source : Consumer Insights

BRAND User Consume Another Product in Cat

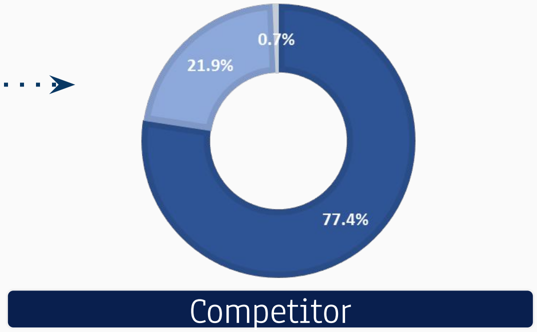
Less than 50% member consume BRAND along with choco spread or with jam. Additionally, in 2024, the trend of dual consumption is also gradually declining.



BRAND CHOSEN IN Other brand



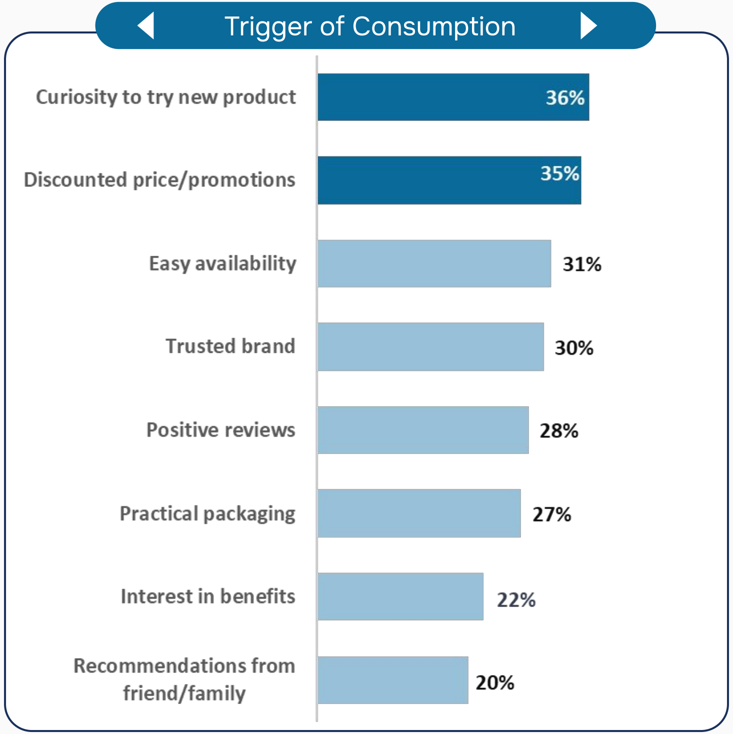
BRAND CHOSEN IN Other Categoy



Source : Data POS Member Alfamart 2024

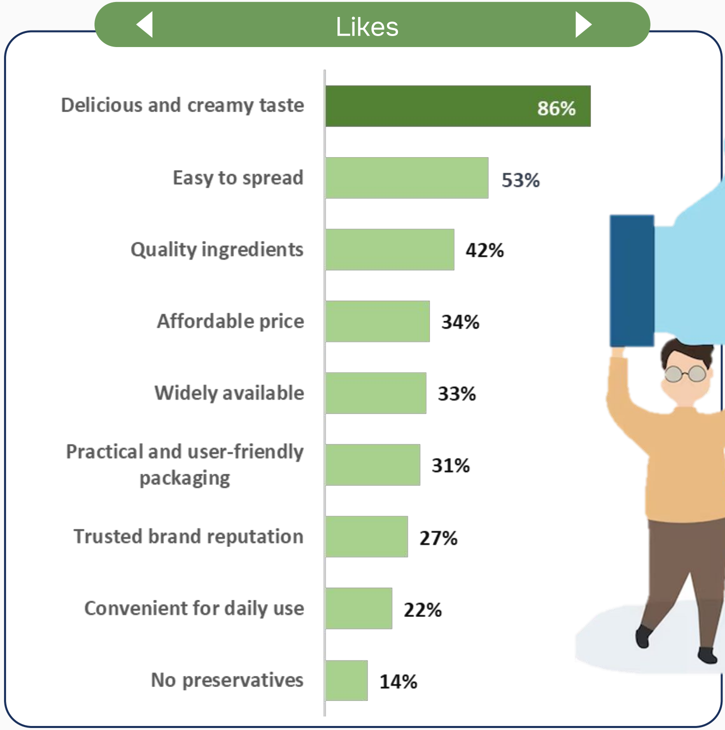
Attitude of Spread User who Ever Bought BRAND

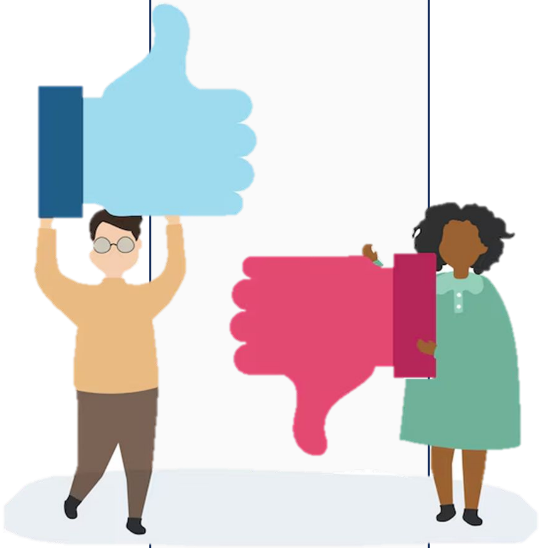
BRAND is known by some members as an expensive product, making discounts the primary trigger for the majority of dualist members to try it for the first time. BRAND is recognized for its delicious, creamy taste and easy-to-spread texture, which makes discounts particularly appealing.

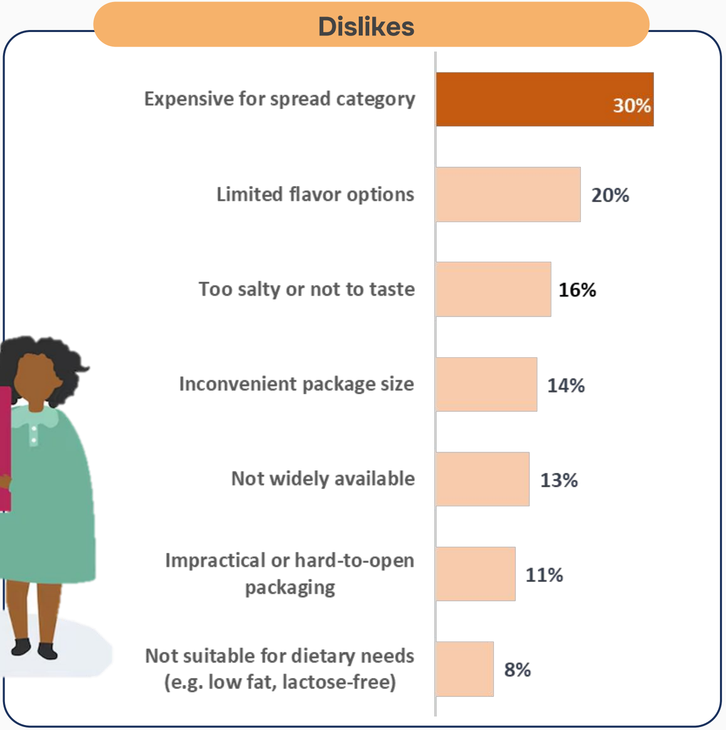


Source : Consumer Insights

What They Like and Dislike about Brand



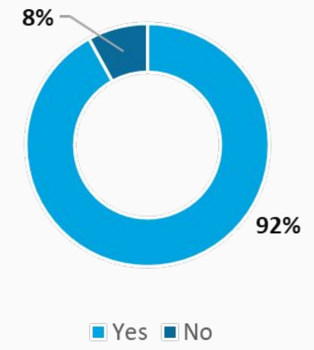




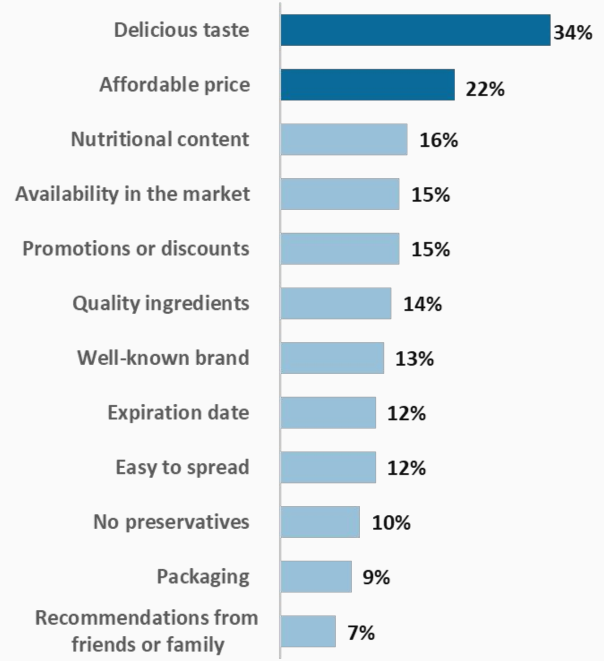
Source : Consumer Insights

Knowledge User who Never Bought

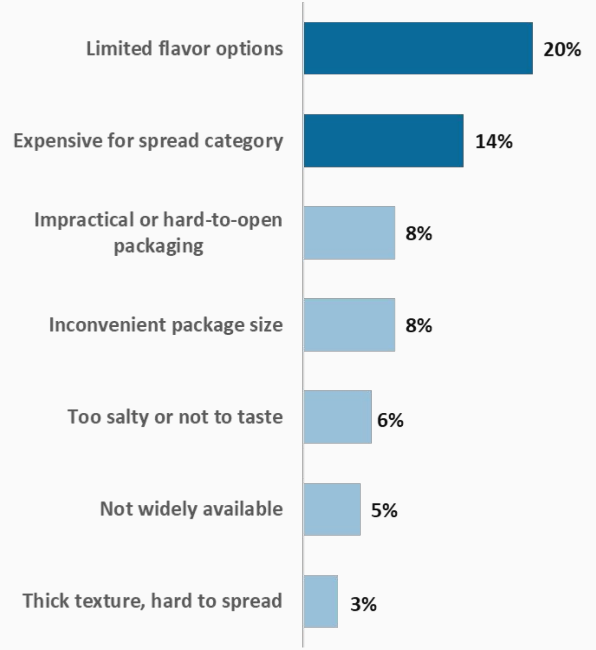
Do you know brand?



Why do you choose other?



Reasons for not purchasing yet



Source : Consumer Insights

Repetition and Lapse Analysis

Repetition

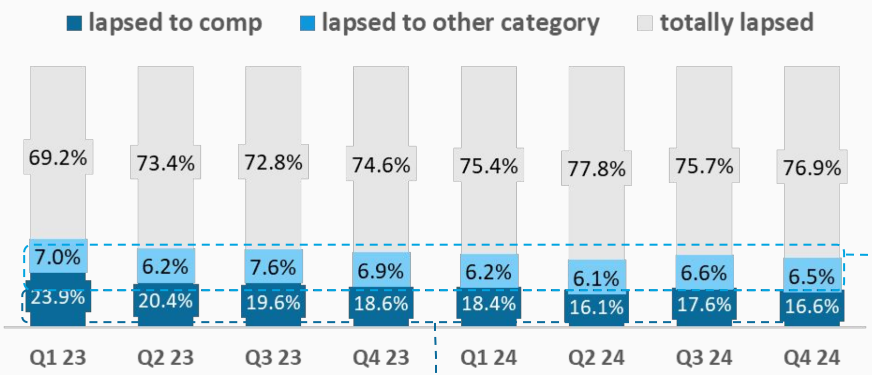
BRAND	ACTUAL											
	Member*	M0	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10
Jan-24	32,258	100%	6%	4%	3%	5%	3%	5%	3%	3%	3%	3%
Feb-24	11,940	100%	6%	4%	5%	4%	5%	3%	4%	3%	3%	
Mar-24	13,898	100%	5%	5%	3%	5%	3%	3%	3%	3%		
Apr-24	8,842	100%	6%	4%	5%	4%	3%	3%	3%			
May-24	12,571	100%	6%	7%	4%	4%	3%	3%				
Jun-24	10,399	100%	8%	4%	4%	3%	3%					
Jul-24	19,947	100%	5%	4%	4%	3%						
Aug-24	11,839	100%	6%	4%	3%							
Sep-24	14,029	100%	5%	4%								
Oct-24	12,111	100%	5%									
Nov-24	11,957	100%										
AVERAGE OVERALL		100%	6%	4%	4%	4%	3%	4%	3%	3%	3%	3%

	M0	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10
AVERAGE NEW MEMBER	100%	5%	4%	3%	3%	2%	2%	2%	2%	2%	1%
AVERAGE EXISTING MEMBER	100%	9%	8%	7%	8%	8%	8%	7%	6%	7%	6%

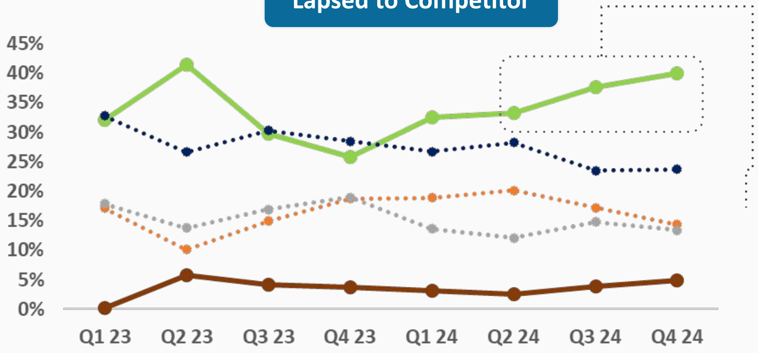
COMPETITOR	ACT										
	M0	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10
	100%	10%	9%	8%	8%	8%	8%	8%	8%	8%	8%
	100%	9%	7%	6%	6%	6%	6%	6%	6%	6%	7%
	100%	8%	7%	6%	6%	6%	6%	5%	5%	5%	7%
	100%	8%	7%	6%	6%	6%	6%	6%	6%	6%	7%
	100%	5%	4%	4%	3%	3%	3%	3%	4%	5%	5%

Source : Data POS Member Alfamart 2024

Lapse Member

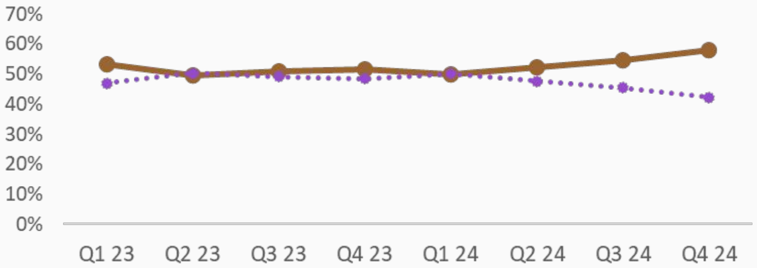


Lapsed to Competitor



Competitor

Lapsed to other Category

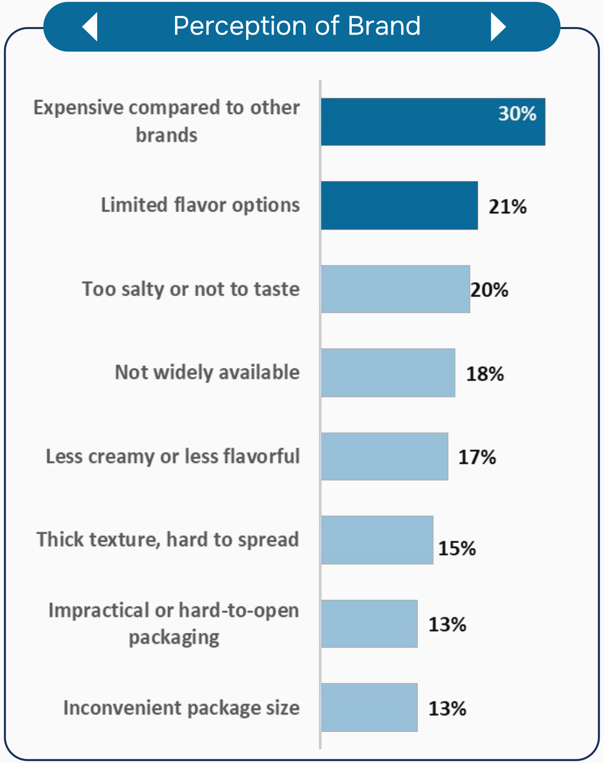


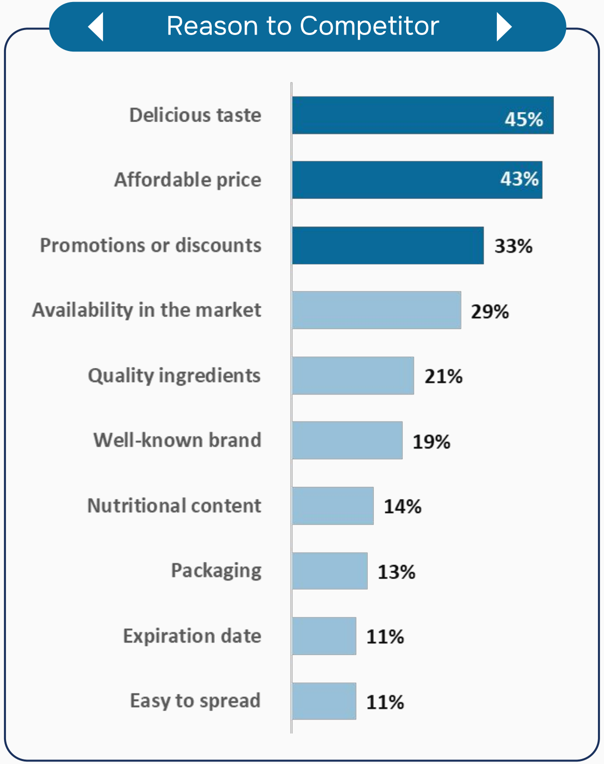
Cat

LAPSE TO	BRAND	%
Cat		43.4%
		25.1%
		11.5%
		16.9%
Cat		47.1%
		42.6%
		9.5%
		0.7%

Source : Data POS Member Alfamart 2024

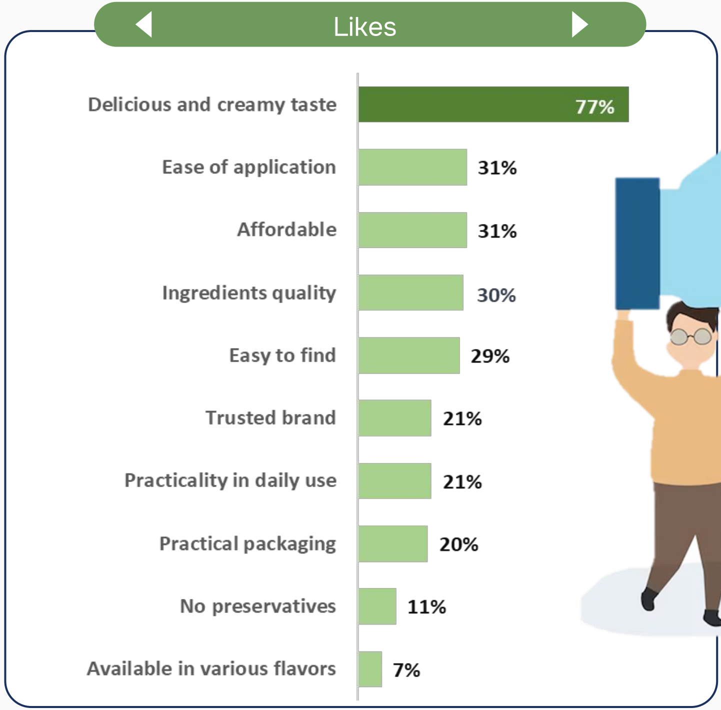
Lapse Member Attitude towards Brand

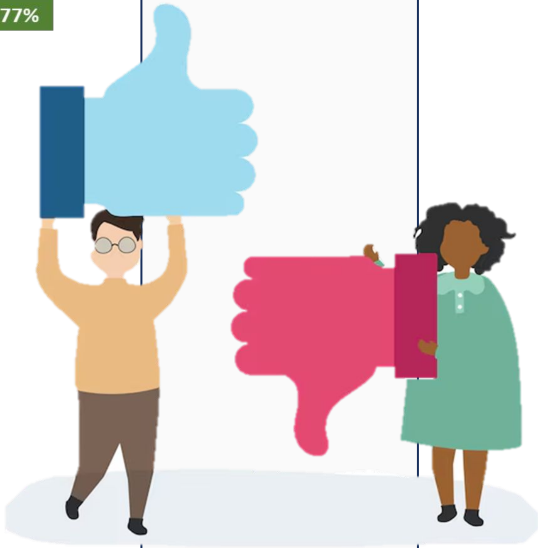


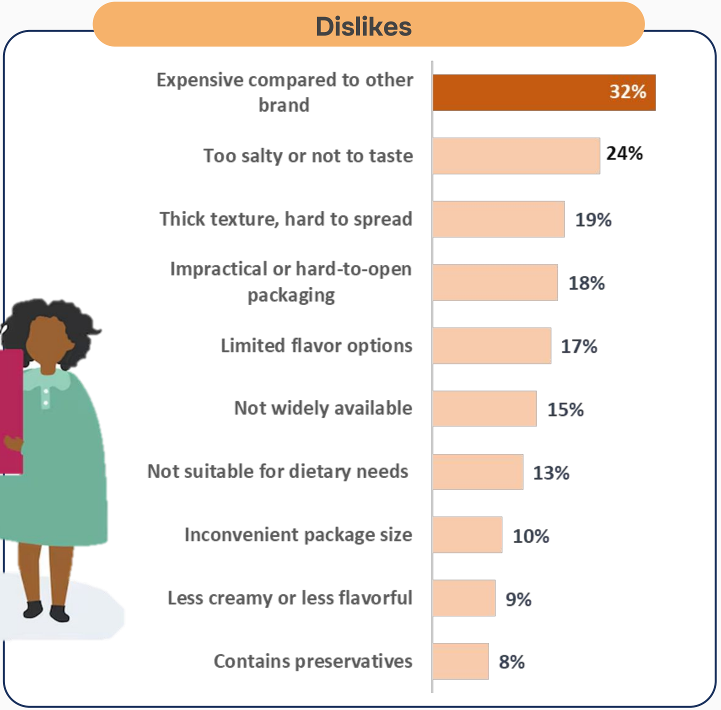


Source : Consumer Insights

What Lapsed Users Like and Dislike



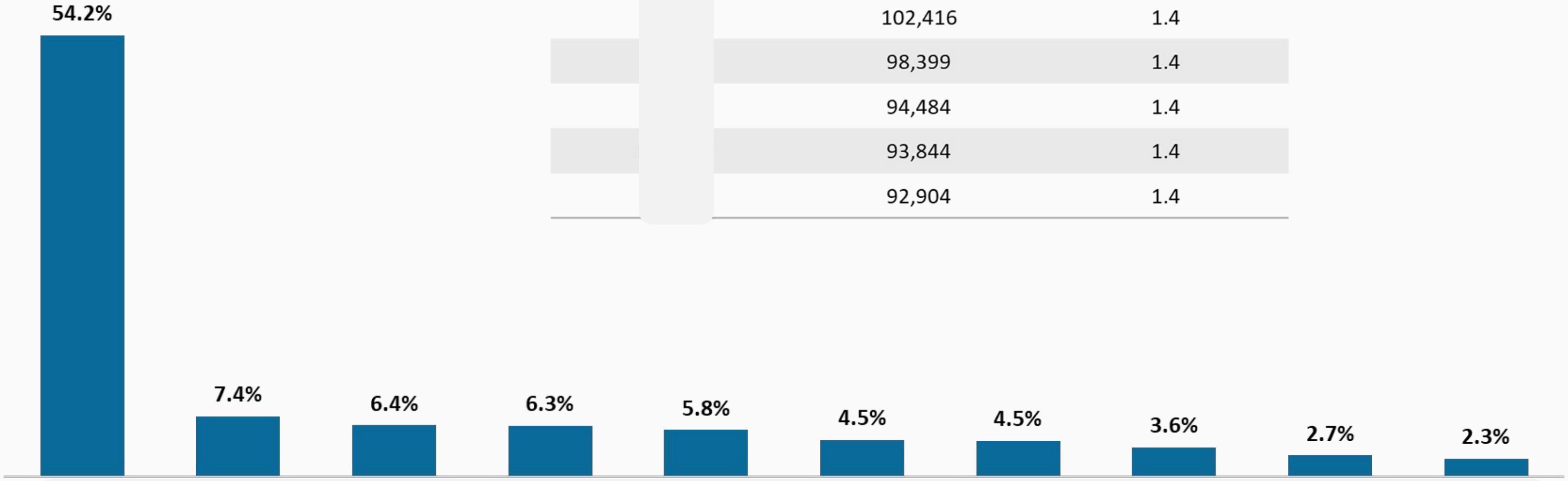




Source : Consumer Insights

Affinity

BRAND	BASKET SIZE (ALL ITEM)	WEEKLY TRX PER MEMBER
	111,219	1.4
	102,416	1.4
	98,399	1.4
	94,484	1.4
	93,844	1.4
	92,904	1.4



Source : Data POS Member Alfamart 2024

04. Summary & Recommendations

Thank You!