



## EXECUTIVE INSIGHTS

# Mission Analysis: Turning Transaction Data Into Strategic Retail Advantage

### Key takeaways

- 1. Mission analysis reveals the why behind the basket.** By classifying each individual transaction into a set of defined missions based on the underlying shopping intention, retailers gain a behavioural lens that traditional demographic or loyalty segmentation cannot provide.
- 2. It is fast, repeatable and cost-efficient.** Because mission analysis leverages data — from tills, ecommerce and, where available, loyalty programmes — that most retailers already possess, it can be run quickly, refreshed regularly and scaled across the estate without major infrastructure investments.
- 3. It is actionable at the store level.** Coupling mission insight with catchment characteristics helps retailers understand how customers want to use their different locations, directly informing proposition and network optimisation decisions.
- 4. L.E.K. Consulting brings the full toolkit.** Our proprietary algorithms, consumer research design and commercial playbooks help retailers move from insight to measurable improvements in average transaction value, loyalty and estate productivity.

This *Executive Insights* is the second in our series on retail optimisation. In our [first instalment](#), we outlined four strategic levers that leading retailers are using to sharpen performance and strengthen differentiation: customer strategy, store and network optimisation, pricing and promotions, and omnichannel excellence.

Here, we explore one of the most powerful tools within the customer strategy lever — mission analysis — and examine how retailers can use it to turn transactional data into tangible commercial outcomes.

### Why a deeper customer understanding is critical for retailers

Personalisation and loyalty are now decisive battlegrounds in retail. Yet most retailers still rely on high-level customer segments built around demographics and occasional surveys, with more advanced retailers incorporating data from a loyalty programme.

Those approaches overlook a fundamental reality for most retailers: the same customer often shops with the same retailer for very different reasons.

In grocery, a quick food-to-go dash at lunchtime is not the same as a weekend cupboard restock; in health and beauty, an emergency purchase of painkillers is not the same as a new make-up trial. Fundamentally, it is the mission (the reason why your customer is in your store at that moment) that carries distinct expectations of range, price, speed and service.

Understanding these mission-based needs matters because it enables retailers to:

- **Match proposition to context.** Assortment, merchandising, staffing and services can be tailored to the missions most prevalent in each format and catchment.
- **Drive share of wallet and loyalty.** When shoppers feel a mission is flawlessly met, they are likely to buy more and return more often.
- **Accelerate decision-making.** Mission analytics translate vast transaction logs into intuitive, board-ready insights that cut through functional and category silos.

In short, mission analysis is a critical component of comprehensive customer understanding for multi-category retailers and underpins sustainable differentiation in an increasingly competitive market.

### What is mission analysis and why is it valuable?

Mission analysis is a data-driven technique that classifies every basket into an intuitive 'shopping mission' based on the underlying shopping intent such as a main shop, a meal for tonight, a cupboard restock, an emergency purchase or a beauty treat.

It augments existing customer insight and is particularly powerful for multichannel, multi-category retailers where missions are often more important than demographics when it comes to shoppers' expectations (see Figure 1).

**Figure 1**

Key benefits of mission analysis

| Benefits                                                                                                            | Why it matters                                                                                                   |
|---------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
|  <b>Grounded in real behaviour</b> | Uses what customers actually bought, not what they claim they might buy                                          |
|  <b>Quick to deploy</b>            | Works off existing POS/ecommerce data; loyalty data enriches but is not a prerequisite                           |
|  <b>Scalable and repeatable</b>    | Can be rerun monthly or seasonally to track shifts in mission mix                                                |
|  <b>Intuitive to shoppers</b>      | Mission labels resonate with how customers describe trips, enabling targeted qualitative research                |
|  <b>Direct commercial impact</b>   | Feeds into space, range, merchandising, customer service and network strategy, driving tangible P&L improvements |

Note: POS=point of sale; P&amp;L=profit and loss

Source: L.E.K. research and analysis

## How does mission analysis work?

The practical application of mission analysis involves four clear steps, each designed to unlock actionable insight from data most retailers already hold.

### Step 1. Define missions

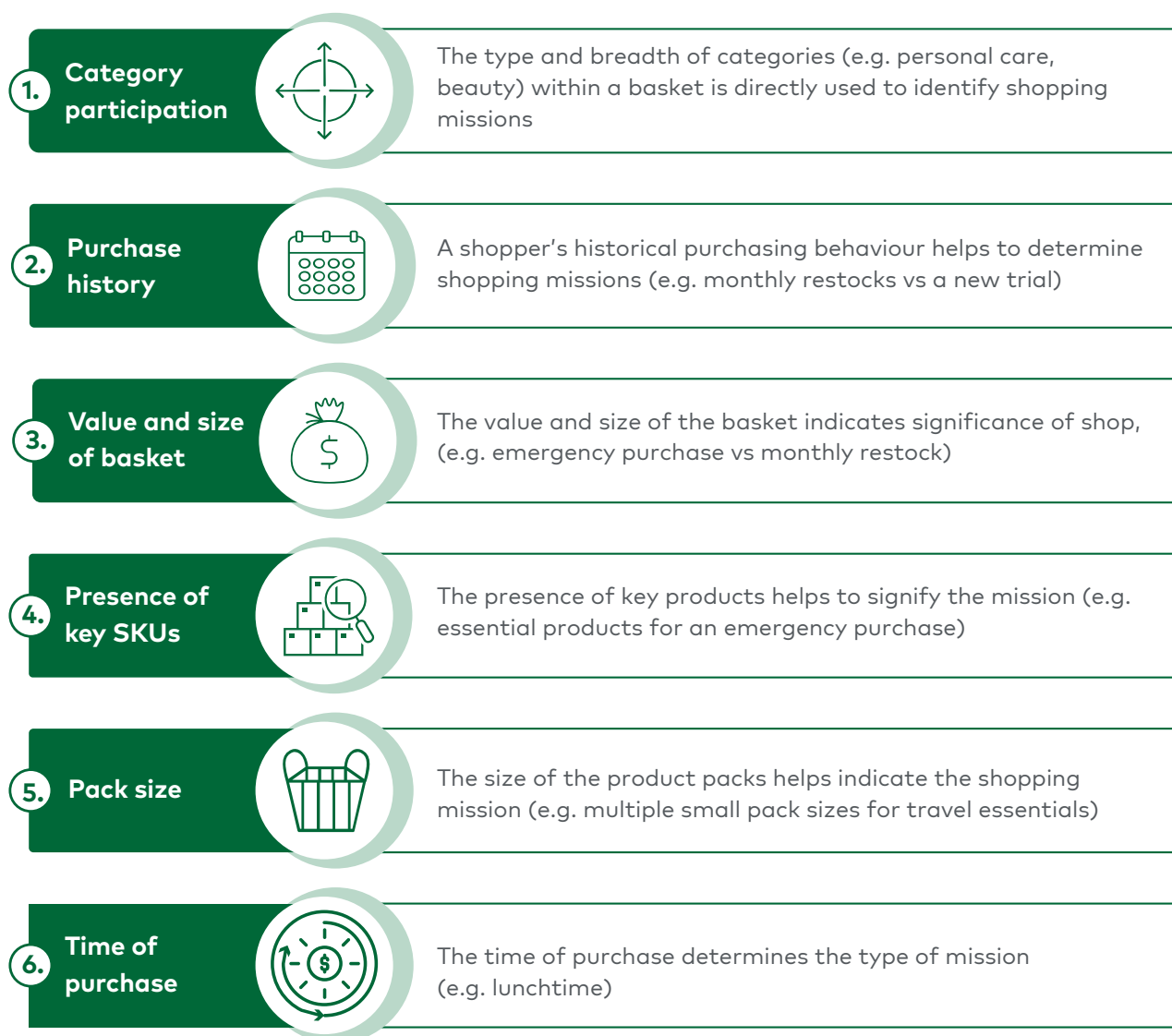
We start by combining qualitative research (e.g. from focus groups and shop-alongs) with expert input to draft an initial list of discrete shopping intents. This creates a comprehensive set of missions which is subsequently distilled to a mutually exclusive set of priority missions based on commercial relevance and data identifiability.

### Step 2. Map transactions to missions

Using transaction-level data, each basket is assessed across a range of relevant features (see Figure 2).

**Figure 2**

Mission identification cues



Source: L.E.K. research and analysis

Based on the selected set of features, each basket in your transaction database is mapped to key missions.

### Step 3. Overlay with catchment characteristics

We then evaluate how mission mix varies across your estate and identify key catchment characteristics (catchment demographics, location type, competition, etc.) that are linked to the relative prevalence of each mission. This enables a clear understanding of what missions customers are looking to fulfil without being too constrained by your current offering choices.

For the physical store network, this routinely reveals a significant number of locations that are currently underserving key customer missions because of existing choices, especially when it comes to allocation and ranging. For online orders, it has the ability to point towards gaps in range or proposition, where missions are likely to be better served by alternatives (e.g. rapid delivery, a local convenience store).

This estate-level view helps pinpoint mismatches between store format and mission demand — such as commuter locations underserving grab-and-go shoppers or suburban stores over-indexed on discretionary missions with limited space to deliver. It reframes estate evaluation through the eyes of the customer rather than operational key performance indicators alone.

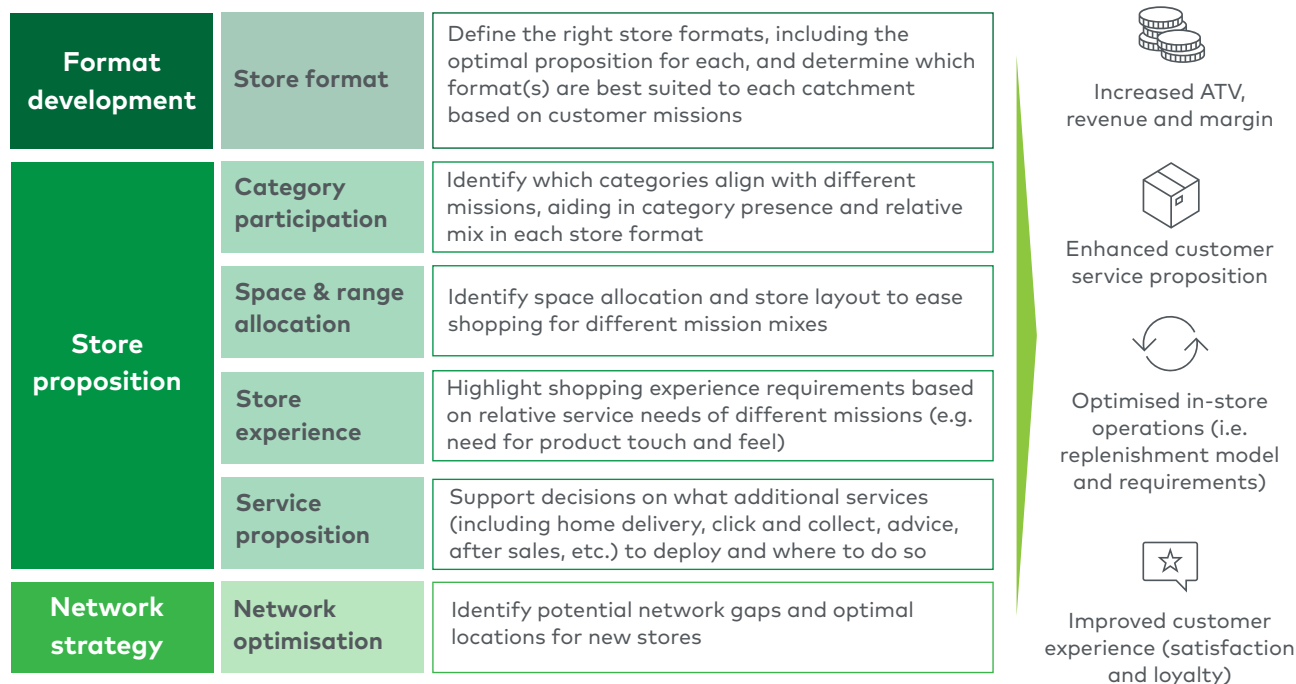
#### **Step 4. Translate into commercial levers**

The output is a rich set of detailed information on customer behaviour, including 'mission heatmaps' showing, for example, where food-to-go or beauty discovery missions over-index across the estate. These insights guide decisions on (see Figure 3):

- **Channel and format development and deployment.** Selecting the optimal concept(s) to serve each catchment.
- **Category participation and ranging.** Rightsizing categories and breadth/depth of SKUs to mission prevalence.
- **Service proposition.** Where to invest in in-store advice, click and collect, self-checkout, rapid delivery, etc.
- **Network strategy and space allocation.** Identifying white spots and relocation priorities at a macro estate level, and rebalancing deployment of space at a store level.

**Figure 3**

The impact of mission analysis on retail operations



Source: L.E.K. research and analysis

Crucially, mission analysis doesn't require starting from scratch. It integrates with existing data systems, supports agile decision cycles and can be piloted in priority regions before scaling. This makes it a low-risk, high-return initiative that can drive immediate value while feeding longer-term transformation roadmaps.

## Looking ahead

As cost-of-living pressures persist and shopper journeys fragment further across channels, mission analysis offers retailers a pragmatic, data-backed route to stay ahead of expectations without over-investing in blanket personalisation.

The methodology is proven, the data is already in-house and the commercial levers are squarely within management control.

## How L.E.K. can help

L.E.K. has extensive experience in developing mission-led customer strategies for retailers. Our approach integrates three capabilities:

- **Advanced analytics.** Proprietary mission-allocation tools built to handle billions of transactions at speed.
- **Consumer insight.** Targeted research that probes shopper motivations, key purchase criteria and pain points within each mission, turning data patterns into human truths.
- **Action-oriented strategy.** Cross-functional playbooks covering proposition, operations, channel and network, underpinned by robust financial modelling.

These types of engagements can generate more than 10% revenue uplift and over 20% uplift in operating profit from optimising retailer propositions to better match customer missions.

To discuss how mission analysis could unlock value for your business, please contact the L.E.K. retail team at [strategy@lek.com](mailto:strategy@lek.com).

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