SERVICE QUALITY REPORT

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1. HOW TO USE THIS REPORT

This report contains an extensive database that could, at least in theory, be read from cover to cover. Most people should not do that. Instead, use the table of contents to navigate directly to the sections that are relevant to your role or to the question you are trying to answer. Each section is self-contained and includes its own charts, tables, and interpretation.

If you have limited time: Read Section 2 (Executive Summary) and Section 3 (Category Analysis). These two sections provide the most important findings and the clearest picture of where we stand.

If you are a category manager: Go directly to the Category Analysis section for your category. Each category has its own subsection with trend charts, competitor comparisons, and specific recommendations.

If you are a data analyst or researcher: Section 4 (Methodology) describes how the data was collected, cleaned, and analyzed. Section 5 (Appendix) contains the full survey instrument and raw data tables.

If you are a senior executive: Read Section 2 (Executive Summary) and Section 6 (Recommendations). These sections are written in plain language and avoid technical jargon.

Glossary of terms:

- **Category Manager:** A staff member responsible for the assortment and buying decisions in a particular area of the store (e.g., beverages, snacks, household).
- **Trend Analysis:** Statistical analysis of how a metric has changed over time, including the direction, speed, and consistency of the change.
- **Statistical Significance:** A mathematical test that tells us whether an observed difference is likely to be real or could have occurred by chance. We use a threshold of 95% confidence.
- **Net Promoter Score (NPS):** A customer loyalty metric calculated by subtracting the percentage of detractors from the percentage of promoters. Scores can range from −100 to +100.
- **Share of Voice:** The percentage of total mentions in a category that belong to a particular brand, used to measure relative brand visibility.

2. EXECUTIVE SUMMARY

Between January 2019 and December 2023, the Hellenic Consumer Insights Observatory collected 184,320 valid responses from 12,400 panelists across 38 product categories. Fieldwork was carried out in 14 waves, with a mean wave size of 13,166 respondents. The panel is stratified by region, age, household size, and income, and is weighted to match the 2021 Hellenic Statistical Authority census. Unless otherwise noted, all figures in this report are weighted.

The headline finding is that overall satisfaction with grocery retailers has declined by 4.2 points on a 100-point scale since 2019, with the largest losses concentrated among respondents aged 25–44 and among those who shop online at least once a week. Price perceptions account for most of the decline, but delivery reliability and out-of-stock frequency also contribute. Loyalty-program members remain substantially more satisfied than non-members, and the gap has widened rather than narrowed.

Key improvement areas

- Delivery reliability and out-of-stock frequency
- Price perceptions among younger shoppers
- Loyalty-program engagement among non-members



3. CATEGORY ANALYSIS

3.1 BEVERAGES

The Beverages category is the largest in the panel, with 41,200 respondents reporting at least one purchase in the past 30 days. Within this category, bottled water and carbonated soft drinks account for the majority of volume, while specialty coffee and ready-to-drink tea are the fastest-growing segments. Brand loyalty is moderate: 58% of buyers report purchasing their usual brand on their last trip, but only 22% say they would refuse substitutes.

Key improvement areas

- Availability of low-sugin carbonated soft drinks
- Pack-size options for single-serve consumption
- Clarity of unit-price labeling on multi-packs



3.2 DAIRY & CHILLED – TRENDS

Dairy & Chilled is the second-largest category by panel penetration, with 36,800 respondents reporting at least one purchase in the past 30 days. Yogurt and fresh cheese account for the majority of volume, while plant-based alternatives are the fastest-growing segment. Brand loyalty is high: 64% of buyers report purchasing their usual brand on their last trip, but only 19% say they would refuse substitutes. Private-label penetration has increased steadily since 2019.

Key improvement areas

- Availability of low-sugar yogurt options
- Pack-size options for single-serve consumption
- Clarity of unit-price labeling on multi-packs





4. CATEGORY ANALYSIS

4.1 CONFECTIONERY

The Confectionery category is dominated by impulse purchases at the point of checkout, with chocolate bars and gummy products accounting for the majority of transactions. Seasonal peaks are pronounced: December and Easter together account for roughly 31% of annual volume. Brand loyalty is the lowest of any category in the panel, with 71% of buyers reporting that they switch brands on every trip.

Key improvement areas

- Availability of low-sugar yogurt options
- Pack-size options for single-serve consumption
- Clarity of unit-price labeling on multi-packs





4.2 CONFECTIONERY – TRENDS

Confectionery is the most impulse-driven category in the panel, with 68% of purchases made at the point of checkout rather than from a planned list. Chocolate bars and gummy products account for the majority of transactions. Seasonal peaks are pronounced: December and Easter together account for roughly 31% of annual volume. Brand loyalty is the lowest of any category in the panel, with 71% of buyers reporting that they switch brands on every trip.

Key improvement areas

- Availability of low-sugar yogurt options
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5. CATEGORY ANALYSIS

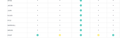
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6. CATEGORY ANALYSIS

6.1 PRODUCTS

The Products category is the core of the figure-skating calendar, hosting events for senior, junior, and adult skaters. Because it is the largest category by entry count, it has the most complex scheduling and the most volunteer judges. Participation has been relatively flat over the past five seasons, highlighting both the strengths and the limitations of our current development pathways.

Key improvement areas

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6.3 PRODUCTS – HEATMAP

The heatmap below summarizes the most recent quarter's results across all categories and regions. Darker cells indicate higher values. Empty cells mean that the category is not tracked in that region. Use this chart to spot regional outliers at a glance before drilling into the detailed tables.

7. CATEGORY ANALYSIS

7.1 HOUSEHOLD

The Household category, which includes cleaning products, laundry care, and paper goods, is the most stable segment in the panel. Volume has grown by a steady 2.1% per year since 2019, with little seasonal variation. Private-label penetration is the highest of any category at 34%, and price sensitivity is correspondingly high.

Key improvement areas

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