

# Insights Portal

The Customer Insights Portal provides data and metrics on your brands' performance. Access sales and share data at the daily and universal product code (UPC) level from across more than 1,100 retailers and 80,000 stores in a syndicated hierarchy with thousands of categories and subcategories rooted in the Nielsen hierarchy. You can create, customize, save, and export reports subject to Instacart's data licensing terms.

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## Accessing your data

To access the Insights Portal—

1. Go to the navigation bar on the left-hand side in Ads Manager ([ads.instacart.com](https://ads.instacart.com)).
2. Click **Customer insights** (graph icon).
3. Select **Sales and market share** from the expanded menu, depending on what metrics you want to view for your brand(s)

From here, you can select the date range of data and metrics you want to review, filter the view, and change how you want your data broken down—by brand, category, department, and more.

**Note:** Agencies can only see your data if an admin or user manager gives them access. [Learn more about adding users to your account.](#)

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## Creating reports

There are several options you can use to define what data and metrics you want on your insights report. You can view your data in a Trend view or a Table view.

**NOTE:** This only applies to the **Sales & share** page.

### Trend view

You can select up to 2 metrics to view at 1 time and select as many breakdowns as available.

### Table view

You can select as many metrics and breakdowns as available.

## Select date range

On the **Sales and market share** page, we have more extensive and flexible date filtering capabilities. You can report on data from up to 2 years ago on a monthly, weekly, or daily basis.

On the **Customer and basket share** page, you can report on data from up to 2 years ago on a monthly or weekly basis. You can select a date range of up to 6 months.

For daily level data, you can select up to a 14-day range. Data is available at 12 pm ET 4 days after the end date. For example, if you pull data from December 28th - January 1st that data will be available on January 5th at 12 pm ET.

Saved reports with relative date ranges continually update for the specified range. For example, reports with the range of "Last month" always show data for the last month on the date of report view.

The reporting week starts on Sunday and ends the following Saturday. You can also choose for your week to run Monday through Sunday. To update these settings—

1. Click the **ellipsis** button in the top-right corner, then click **Settings**.
2. Next to **Start week on**, choose either Sunday or Monday from the drop-down menu.
3. Click **Save**.

Your selection applies to all your future visits. Each person with access to your account can select their own reporting view.

## Edit breakdowns & metrics

Insights reports can include a variety of metrics on your brands' performance. Your report breakdown can display metrics for individual reporting levels and categories. Each breakdown adds a column to your report, further categorizing your data.

You can view your report as a bar graph or line graph, depending on your preference. To select metrics—

1. Click **Edit metrics**.
2. Select the checkbox next to a metric to include it on your report.
3. Click **Save**.

### Bar graph view

### Line graph view

## Edit breakdowns

To edit the report breakdown—

1. Click **Edit Breakdowns**.
2. Select the checkbox next to a breakdown to include it in your report.

### 3. Click **Save**.

In your Customer and Basket share reports, **Department** and **Super category** are always displayed as columns.

Additionally, certain breakdowns will always be grouped together depending on their nested relationship. If you select the lowest level, then the higher levels will be included by default. For example, under the **Level** breakdown, selecting **UPC** will include **Brand** and **Reporting level 2** level breakdowns in your report. Under the **Category** breakdown, selecting **Sub category** will include the **Category** level breakdown in your report.

Your graph will reflect data based on the timeframe you selected. For example, if you view sales by **Month, Brand, Category, and Sub category** as breakdowns for your data table, the graph's default view will show the sum of sales by month.

Here's an example of the same report with different breakdowns selected. Without breakdowns, the example report only shows total sales.

Breakdown	Report view
None	
Brand	
Brand and department	

## Filter reports

Filters narrow your report's focus and remove data you don't need. Your report only includes data from the filter(s) you select. You can filter by the following attributes—

- Brand
- Department
- Super category
- Category
- Sub category
- UPC

Here's the example report from the previous section broken down by brand and department with different filters selected. Without selecting filters, the report shows data for all brands and departments within the selected time frame. Filtering by **brand = Brand C** and **department = dairy**, frozen shows Brand C's dairy and frozen departments' sales.

Filter(s)	Report view
None	
Brand = Brand C	

Brand = Brand C	
AND	
Department = Dairy, frozen	

If you filter based on the same attributes as the report breakdown, you see individual metrics for each filter selection. For example, when you break down by **brand** and **department** and filter by **department = dairy, frozen**, the report shows 2 rows for each brand: 1 for dairy and 1 for frozen (wherever the brands contain these selected departments).

Breakdown	Filter(s)	Report view
Brand and department	Department = dairy, frozen	

If you filter based on attributes not in the report breakdown, you can see the combined metrics for all filter selections. For example, when you break down by **brand** and filter by **Department = dairy, frozen**, the report shows 1 row for each brand. Each row shows the combined sales for both the dairy and frozen departments. **NOTE: This applies only to the Sales and market share page.**

Breakdown	Filter(s)	Report view
Brand	Department = dairy, frozen	

To filter your insights report—

1. Click **Add filter**.
2. Select the attribute you want to filter on from the first drop-down list.
3. In the second drop-down list, choose as many value(s) as you'd like to include in your report.
4. Click **Save**.
5. Repeat steps 1-4 to add more filters.

When adding multiple filters, you see options based on the filters you already added. For example, if you add a filter for the frozen department and then filter by super category, you only see super category options that fall under the frozen department.

**NOTE:**

- In order to view market share in a graph, you need to filter by **Category**.
- Multi-selection filtering only works in the data table view. For example, in the data table view you can filter **Category = paper towels AND napkins**. In the trends view you can only filter **Category = paper towels**.

## Save reports

Once you define your report settings, you can save it for future reference. The platform updates daily with fresh data so you can re-run saved reports against new date ranges without recreating the report.

To save your report—

1. Click **Save report**.
2. Type a name for the report.
3. Click **Save**.

## Export reports

You can download a CSV file of your insights report exactly as it displays online—including any filters and breakdowns you set—by clicking the **Export** button.

Please leave Ads Manager open until the file downloads.

## Download reports

To download uploaded and saved reports—

1. Go to the navigation bar on the left-hand side.
2. Click **Customer insights** (graph icon).
3. Click **Uploaded** or **Saved Reports**.
3. Click the download button in the **Actions** column next to the report you want to download.
4. Please leave Ads Manager open until the file downloads.

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## FAQs

### How does Instacart calculate market share?

Using a taxonomy breakdown rooted in the IRI and Nielsen hierarchies, we look at the category selections that apply to your selected time range, then divide the sales in your brand by the sales across all products under the same category within those dates.

For an example, see the first row below. The sales for Brand C's lactose reduced/free milk, whole, in the South Atlantic region for the week of July 11, 2021, divided by Instacart's total sales of lactose reduced/free milk, whole, in the same region for the same week equals Brand C's lactose reduced/free milk, whole, market share in the region for the week of July 11, 2021.

### How does Instacart calculate basket share and customer share?

Basket share is calculated as the percentage of unique deliveries (inclusive of pickups) that contained one of your products in the selected category breakdown within the selected date.

Customer share is calculated as the percentage of unique customers that purchased one of your products in the selected category breakdown within the selected date.

For an example, see the first row below. Brand C accounts for 9.86% of unique deliveries (inclusive of pickups) where an Ice Cream product was purchased in July 2022. In addition, out of all unique customers who purchased Ice Cream in this month, 10.42% of them purchased from Brand C.

#### **How soon can I see new data?**

- **At the daily level:** 4 days later at noon ET. (For example, data from January 1 is available on January 5). **NOTE: This applies only to the Sales and market share page.**
- **At the weekly level:** The following Sunday or Monday at noon ET, depending on which day your reporting week starts.
- **At the monthly level:** The first day of the following month at noon ET.

#### **How does Instacart define entity and category hierarchies?**

Instacart roots entity and category hierarchies in IRI and Nielsen data.

#### **What types of reports are available?**

Two types of reports are available: 1) Sales and market share and 2) Customer and basket share. Reports available and the categories of information within them are subject to change at any time at Instacart's sole discretion.

#### **Who can access the Insights Portal?**

All brands can access the Insights Portal on our platform. Qualifications are subject to change at any time in Instacart's sole discretion.

#### **How far back does the data go?**

The portal stores 2 years of data. When we add new data, we remove the oldest data. The storage timeline is subject to change at any time in Instacart's sole discretion.

#### **Why can I only see 14 days at a time at the daily level on the Sales and market share page?**

We limit data access to 14 days at a time to keep the portal fast and efficient. Over time, we allow for more data access through the API. Please reach out to your Sales or Insights Manager if you think your client might be a good fit for API access.

#### **Who do I reach out to with additional questions?**

Please reach out to your account team.