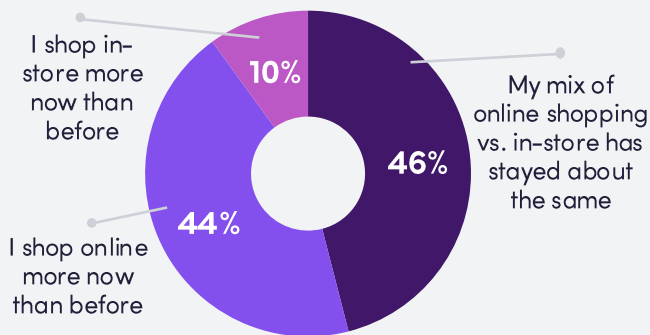


Consumer Digest

Issue 3: 2026

Welcome to this edition of the Consumer Digest, our periodic newsletter where we provide relevant, informative, and actionable insights around consumer trends. Consumers are balancing convenience and control by moving across digital and physical shopping channels. This digest uncovers how omnichannel shoppers are navigating in-store and online experiences, where habits are shifting, and what that means for opportunity in the weeks ahead.

SAY - Nearly half of omnichannel shoppers say they are shopping online more than last year.



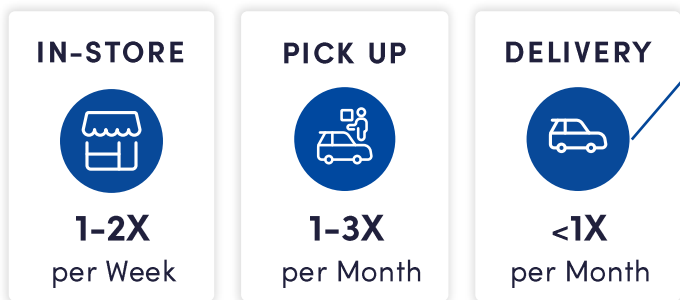
Q: How has your grocery shopping changed over the past 12 months? (n=400)

DO - The trip mix continues to shift toward online, though in-store still leads trips.

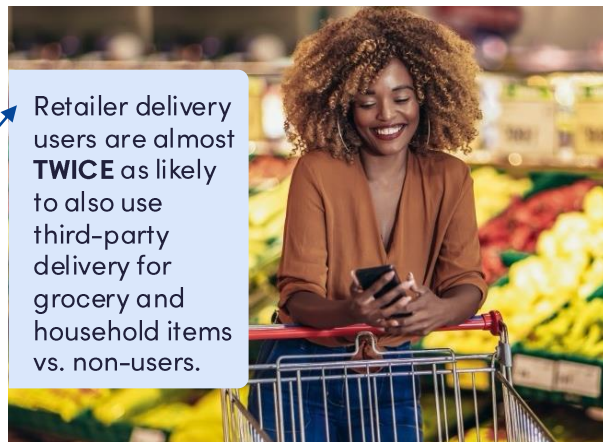


Source: 84.51° Stratum, 2025.

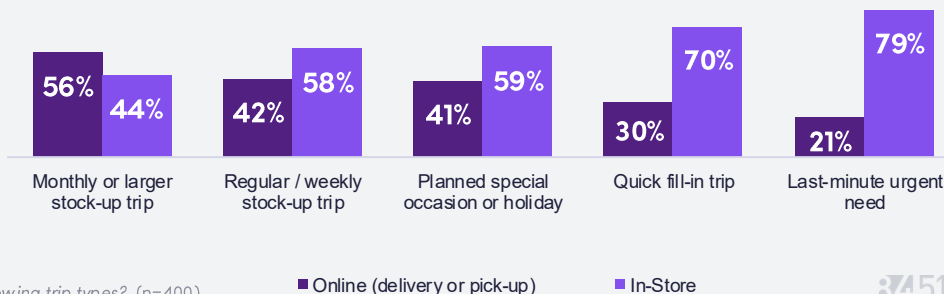
How often are Omnichannel Shoppers using each retailer modality?



Q: In a typical month, how often do you use each of the following methods for grocery and household shopping? n=400.



Shopping channel use varies by trip type: Online leads for planned stock-ups; in-store dominates urgent and quick trips.



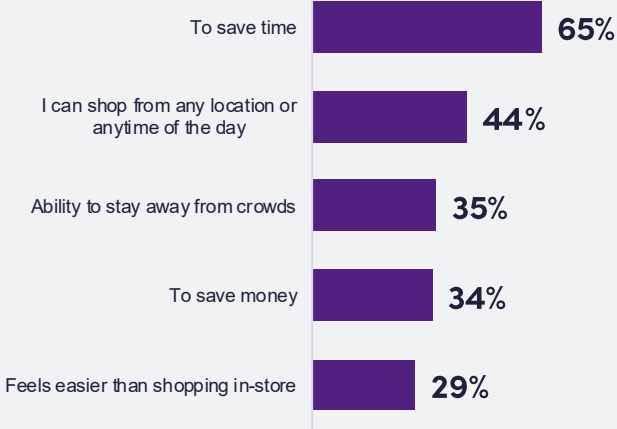
Q: How do you typically shop for each of the following trip types? (n=400)



Overwhelmingly, omnichannel shoppers purchase online for **convenience** and **simplicity**.

Why do they shop online?

● Online



Q: Why do you choose to shop online rather than in-store for your grocery and household items? n=400



Top 5 reasons omnichannel shoppers shop in-store are centered around **control** and **cost-avoidance**.

Why do they shop in-store?

● In-store



Q: Why do you choose to shop in-store rather than online for your grocery and household items? n=400



What we actually see online: basket building is mobile-first, multi-session, and consistent throughout the week.



The average online basket is built in **2.2 sessions** per order.



Add-to-carts are distributed **evenly throughout the week**.



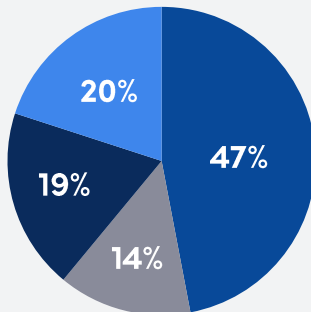
Mobile drives 82% of add-to-cart activity, though customers use an **average of 1.1 devices per order**, indicating some cross-device behavior.

84.51° Digital Journey Data, Q4 2025.

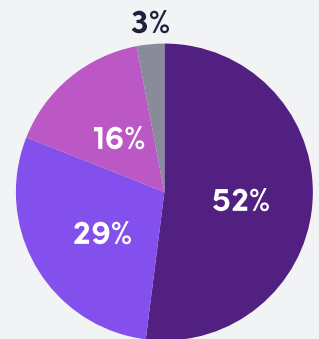


Omnichannel loyalty varies — sometimes shoppers stick with the same retailer, sometimes the same brands, and sometimes neither.

- I mostly use the same retailer both online and in-store
- I use the same retailer in-store but different retailers online
- I use different retailers in-store but usually the same retailer online
- I use different retailers for both online and in-store



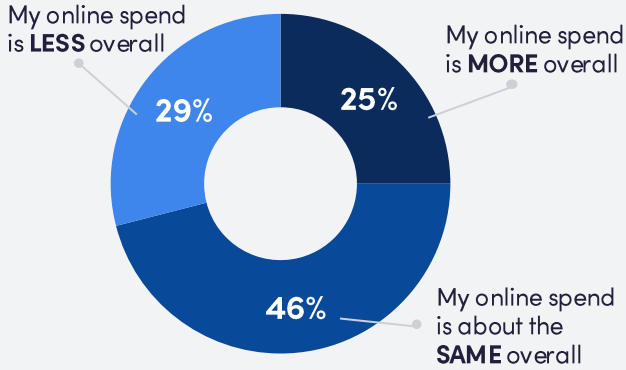
- I mostly buy the same brands both online and in-store
- I sometimes buy different brands online vs. in-store
- I always buy the same brands both online and in-store
- I always buy different brands online vs. in-store



[LEFT] Q: Thinking about the retailers you use for groceries and household items, which of the following best describes how you shop across channels? n=400
 [RIGHT] Q: Thinking about the brands you purchase for groceries and household items, which of the following best describes how you shop across online vs. in-store? n=400



SAY- 46% of omnichannel shoppers claim to spend the same online as in-store.



Q: Compared to shopping in-store, when you shop online for groceries and household items you typically... n=400

DO - Omnichannel shoppers spend 2X more per trip on average when using pickup or delivery compared with shopping in-store.



Source: 84.51° Stratum, 2025.



48% claim to spend less time ordering online, with an average of **29.3 minutes** spent per order.²

Q: How would you describe the time spent ordering groceries online compared to shopping in-store? n=400
² 84.51° Digital Journey Data, Q4 2025.

Top challenges omnichannel shoppers face when shopping online are centered on availability, substitutions, quality, and fees rather than the digital experience.

Top challenges:

1	Product availability
2	Substitution issues
3	Product quality concerns
4	Delivery fees
5	Minimum order requirements



But most shoppers still trust order completion and accuracy: **81% pickup, 78% delivery.**

Not an issue:

1	Inaccurate product descriptions
2	Technical issues with the website / app
3	Security concerns about personal / payment information
4	Payment or payment processing issues
5	Difficulty navigating the website or app

[CHARTS] Q: What are your biggest challenges when shopping online for groceries and household items? n=400

[CALLOUT] Q: How confident do you feel that your order will be correct and complete when you shop in each of the following ways? *based on a 5-point confidence scale, T3B% = confident, n=400.



80% of omnichannel shoppers are using their cell phones while shopping in-store.

51%
use their phone to search for digital coupons

41%
use their phone as a shopping list

37%
use their phones for in-store navigation

Q: How would you describe your grocery shopping habits while you're shopping in a physical grocery store? n=400

Shoppers are mixing channels as part of one connected retail journey.

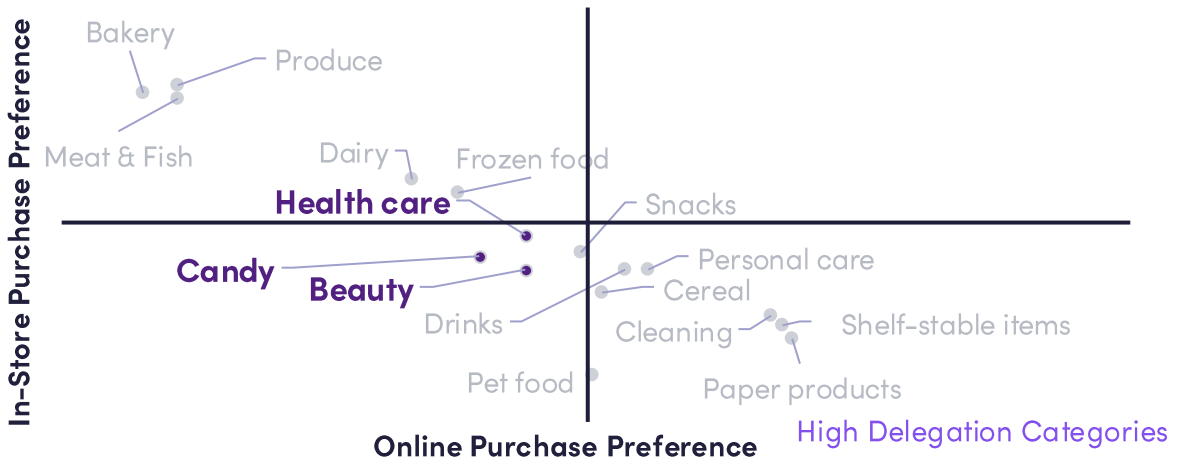


Q: In the past 3 months, which of the following have you done? n=400
² 84.51° Digital Journey Data, Q4 2025.



Some center-store categories, like candy, beauty, and healthcare, are treated more like fresh categories online, with shoppers wanting more control and confidence in what they buy.

High- Control Categories



Q: Thinking about different grocery and household items, please select which method you prefer to shop for each day. n=400



In high-control categories, shoppers prefer to shop in-store so they can stay hands-on—browsing, comparing, and choosing with confidence.



“Some items I may want to browse the shelves for, such as beauty items. These are products that I enjoy shopping for, and I like seeing the displays.”



“It’s easier to compare prices and pick specific flavors.”



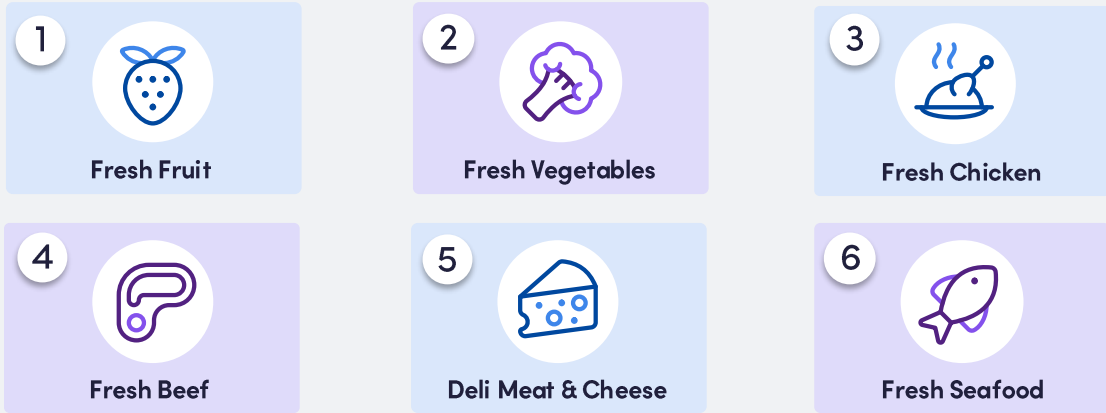
“I like to be able to compare products. Also, I might see something I had not considered.”

Q: You mentioned that you prefer to purchase certain categories in-store rather than online for delivery or pickup. For what reasons do you prefer to purchase them in-store? Households who purchase categories in-store, n=388.



Greater control drives online purchase confidence: **74% of omnichannel shoppers say improved fresh controls would increase their willingness to buy fresh items online.**

Where do fresh controls matter most?



[TEXT] Q: How would improved Fresh Control impact your willingness to purchase fresh items online in the categories you selected? T3B% based on 7-point willingness scale, households who have fresh control preferences when shopping online, n=324.

[BOXES] Q: Thinking about shopping for fresh items online, please select which categories are most important for being able to set detailed preferences (Fresh Control) such as ripeness, quantity, or thickness. n=400



Online out-of-stocks don't usually send shoppers to another online retailer — they send them to the store.



[CHART] Q: What would you typically do if an item you were looking to purchase online was out of stock? n=400.

[CALLOUT] Q: Which of the following best describes your substitution preference when you order products from the following categories online? n=400.

Key brand takeaways



Omnichannel behavior is steady — but highly trip-dependent. Shoppers report their online vs. in-store mix has stayed the same while still relying on online for planned stock-ups and turning to in-store for urgent or quick-fill needs. **Brands should: Align media with trip missions, reinforce in-store influence, and leverage trip-type insights for targeting.**



Convenience fuels online shopping while control and cost-avoidance keep shoppers in-store. Shoppers choose online for time savings, flexibility, and ease, but lean in-store to personally select items, avoid fees, and ensure quality—especially for fresh categories. **Brands should: address shopper hesitations digitally, use digital media to reduce friction, and mitigate cost barriers.**



The digital journey is mobile-first, multi-session, and deeply connected to in-store behavior. Most add-to-cart activity happens on mobile across 2.2 sessions, with shoppers frequently discovering items online before buying in-store and using their phones during physical shopping for navigation, coupons, and list-building. **Brands should: invest heavily in mobile-first media, support discovery early in the journey, and capture cross-channel conversion paths.**

Dig deeper with 84.51° Consumer Research & Digital Journey

84.51° Consumer Research

- Understand how consumers shop your category online to better optimize your product placement, product tile, and search optimization
- What are the drivers and barriers to shopping e-comm for a particular category?



Digital Journey

- Identify where shoppers start online (search, category pages, Digital Coupons, Start My Cart) and ensure brand presence in those high-impact components.
- Analyze basket-building patterns to find common Spring Cleaning companions (cleaners + paper goods) and use those insights to build stronger onsite placement and bundles

Connect with us at Insights@8451.com

Capture High-Intent Mobile Shoppers with Personalized Digital Coupons

Leverage Targeted Digital Coupons to create custom, tailored digital-only offers that utilize 84.51° personalization sciences to deliver your campaign specific objectives.



- Targeted Digital Coupons **appeal to key audiences**, driving trial of new products, recapturing lapsed households, and re-engaging repeat purchase
- **Recommended:** Campaign length 4-6 weeks, with a 2-week post-period redemption window.
- **Drive stronger sales uplift with media amplification** and 84.51° Collaborative Cloud: 6.64x aROAS, 0.94x iROAS, +18.31% Sales uplift.

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Reach shoppers seeking ideas, recipes & products with Pinterest Collection Ads

Pinterest Collection Ads are a premium shoppable media format that blends lifestyle inspiration with real-time product availability, creating a seamless path from discovery to purchase.

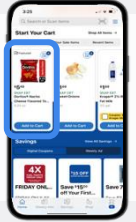


- More than 50M Kroger customers are actively shopping on Pinterest seeking ideas and inspiration from brands.
- Immersive new format showcasing a hero visual alongside complementary products to inspire action.
- YoY the number of pinners engaging with shopping content has increased by 44%

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Influence decisions at key shopping moments with onsite ads

Elevate brand visibility, Promote products, build baskets, Acquire and retain shoppers with our suite of onsite advertising, from **Product Listing Ads, Targeted Onsite Ads, Promoted Product Carousels, Premium Placements** and more.



- **Basket Builder:** Get your items in the basket via personalized, science-driven carousels across the site & app.
- **Search & Browse:** Boost your brands while users are actively shopping and adding items to their cart.
- **Savings:** Remove the high price perception barrier with sales or digital coupons.

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Influence shoppers & fuel awareness with digital in-store ads

Our network of digital screens builds brands near the point of conversion. Amplify brand presence and in-store promotions with high visibility, contextual and animated content.



- Ability to **opt into creative services** including concept development, storyboarding, short-form & animation for high-impact moments
- **Recommended:** 4-6 week campaign length

84.51° Consumer Research

Coming Soon: A collaborative exploration of third-party delivery and omnichannel behaviors across select Kroger departments. Relevant suppliers will be notified by their KPM team as the research plan is finalized.