



THE DIGITAL JOURNEY TRAIL

OBJECT OF THE GAME

Understand the online grocery shopper's path to purchase, also known as their digital journey.





DIRECTIONS

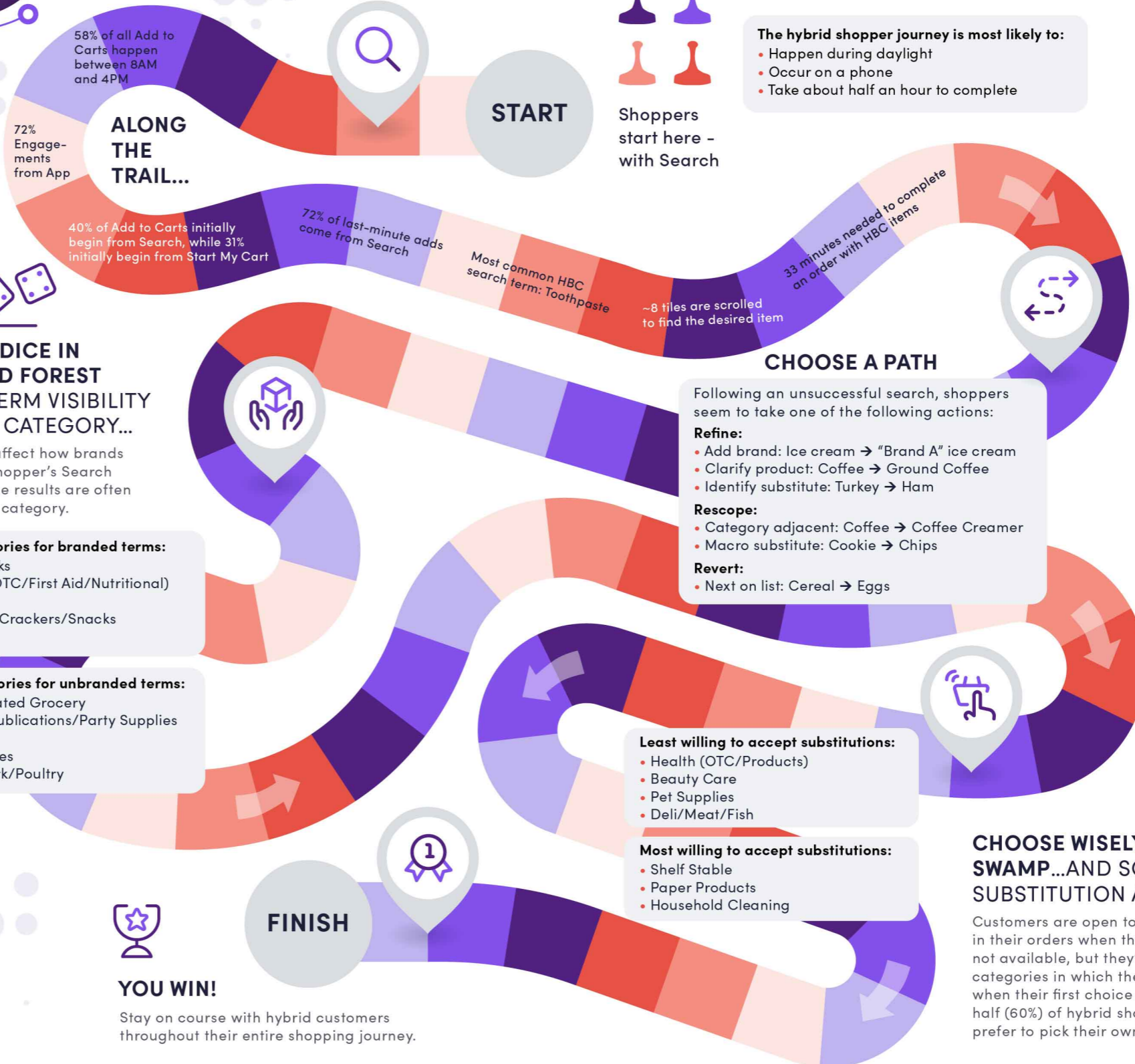
Hybrid shoppers follow a path of decision-making that relies heavily on search and can turn in many directions based on what they encounter. When building their online basket, they seek specific brands in certain categories, are more willing to accept substitutions in others, and tend to pivot in distinct directions after an unsuccessful search.

THE PLAYERS

Who are hybrid shoppers?

Hybrid shoppers have purchased both in-store and online compared to the in-store shopper, they are more likely to be:

-  **HIGHER CONVENIENCE FOCUS**
(HIGH CONVENIENCE 123i)
-  **MILLENNIAL OR GEN Z**
(MILLENNIAL 169i, GEN Z 123i)
-  **MORE LIKELY TO HAVE KIDS**
(HH W/ KIDS 148i)
-  **ENGAGED WITH NATURAL & ORGANIC**
(HIGH N&O ENGAGEMENT 130i)



The hybrid shopper journey is most likely to:

- Happen during daylight
- Occur on a phone
- Take about half an hour to complete



ROLL THE DICE IN THE BRAND FOREST SEARCH TERM VISIBILITY VARIES BY CATEGORY...

Search terms affect how brands show up in a shopper's Search journey, and the results are often determined by category.

Top categories for branded terms:

- Soft Drinks
- Health (OTC/First Aid/Nutritional)
- Baby
- Cookies/Crackers/Snacks
- Candy

Top categories for unbranded terms:

- Refrigerated Grocery
- Cards/Publications/Party Supplies
- Fruit
- Vegetables
- Beef/Pork/Poultry

CHOOSE A PATH

Following an unsuccessful search, shoppers seem to take one of the following actions:

- Refine:**
 - Add brand: Ice cream → "Brand A" ice cream
 - Clarify product: Coffee → Ground Coffee
 - Identify substitute: Turkey → Ham
- Rescope:**
 - Category adjacent: Coffee → Coffee Creamer
 - Macro substitute: Cookie → Chips
- Revert:**
 - Next on list: Cereal → Eggs



ALTERNATIVE ALLEY - PIVOTING FOR SEARCH SUCCESS

When their search does not display the item they're looking for, customers must change the direction of the shopper journey.

Go to CHOOSE A PATH to complete the purchase.



CHOOSE WISELY IN SUBSTITUTION SWAMP...AND SO DOES SUBSTITUTION ACCEPTANCE

Customers are open to receiving substitutions in their orders when their preferred items are not available, but they're particular about the categories in which they'll allow a swap. And when their first choice is not available, more than half (60%) of hybrid shoppers across categories prefer to pick their own substitutions.

Sources: 1) 84.51° Stratrum. Total Kroger Store. 52 weeks ending 2/3/2024. 104-week Continuous Panel. 2) 84.51° Real Time Insights Survey, February 2024. Base: n=400 who shopped Kroger online (pickup and/or delivery) and in-store in latest 52 weeks. 3) 84.51° Pickup Fill Rate Scorecard; Total Kroger Enterprise, All Households. 4) 84.51° Custom Insights - Digital Journey Analysis; Total Kroger Enterprise, All Households. NOTE: Insights from 84.51° use aggregated data.