CT OF THE GAME

nd the online grocery
's path to purchase, also
s their clickstream journey.

CTIONS

hoppers follow a path of
-making that relies heavily
h and can turn in many
s based on what they
er. When building their online
hey seek specific brands in
ategories, are more willing
t substitutions in others, and
ivot in distinct directions
unsuccessful search.

LAYERS

re hybrid shoppers?

hoppers have purchased both
and online compared to the
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 CLICKSTREAM TRAIL

START

Shoppers start here - with Search

The hybrid shopper journey is most likely to:
- Happen during daylight
- Occur on a phone
- Take about half an hour to complete

ALONG THE TRAIL...

58% of all Add to Carts happen between 8AM and 4PM

72% Engagements from App

40% of Add to Carts initially begin from Search, while 31% initially begin from Start My Cart

72% of last-minute adds come from Search

Most common HBC search term: Toothpaste

~8 tiles are scrolled to find the desired item

33 minutes needed to complete an order with HBC items

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

Least willing to accept substitutions:
- Health (OTC/Products)
- Beauty Care
- Pet Supplies
- Deli/Meat/Fish

Most willing to accept substitutions:
- Shelf Stable
- Paper Products
- Household Cleaning

FINISH

YOU WIN!

Stay on course with hybrid customers throughout their entire shopping journey.

ALTERNATIVE AL
PIVOTING FOR SEARCH SUCCE

When their search does display the item they're for, customers must ch direction of the shoppe

Go to CHOOSE A PATH complete the purchase

CHOOSE WISELY IN SUBSTITUTI 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 th half (60%) of hybrid shoppers across categorie prefer to pick their own substitutions.

Sources: 1) 84.51° Stratum. 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° Custom Insights – Clickstream Analysis; Total Kroger Enterprise, All Households. NOTE: Insights from 84.51° use aggregated data.