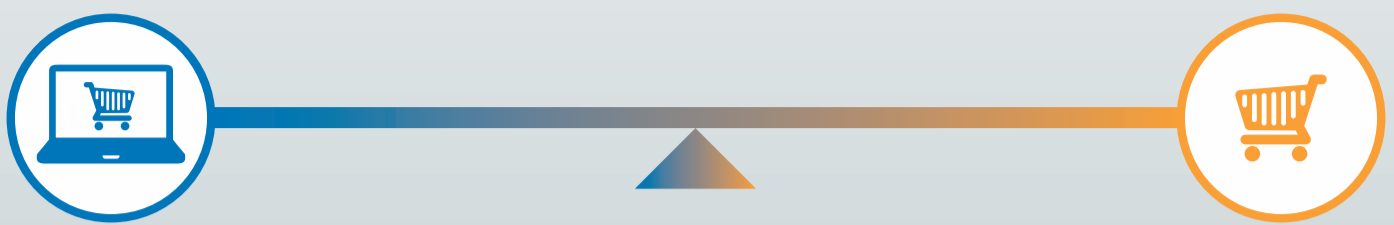


Is **online** driving even greater shopper promotional buying?

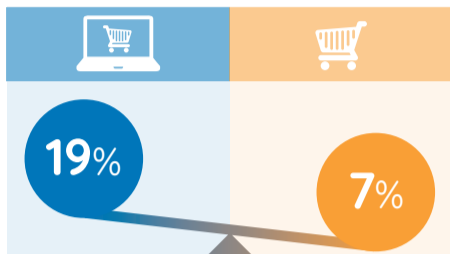
Comparing US in-store and online behaviors



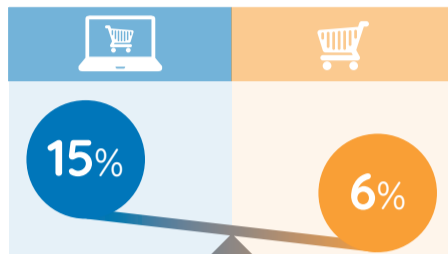
Profile

Online shoppers are biased towards **time-pressed families**

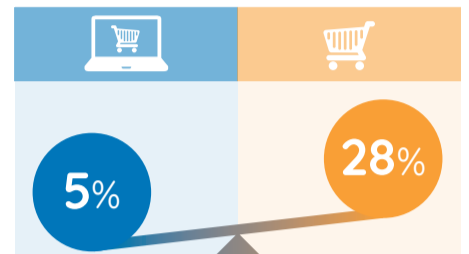
Young family



Middle family



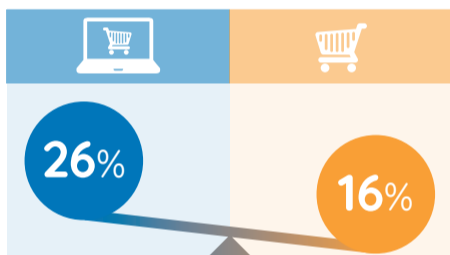
Mature couple
no children at home



Category DNA

Online shoppers are more willing to **spend time**

Willing to browse

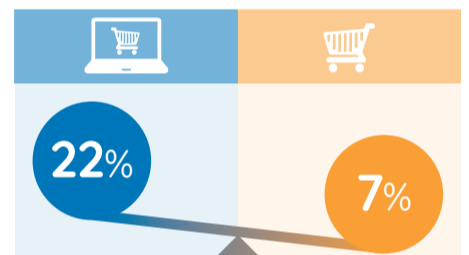


More time means willingness to **explore...**
...and it's easier to buy **add-on items**

Try New And Different



Because There Anyway



Path to Purchase

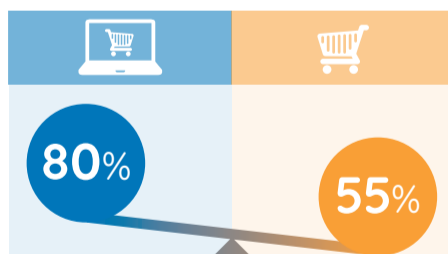
Far more online are buying on deal

Bought on a promotion



But much of this is **incremental**

Only bought because of promo



Pre-shop promotions play a bigger role for online

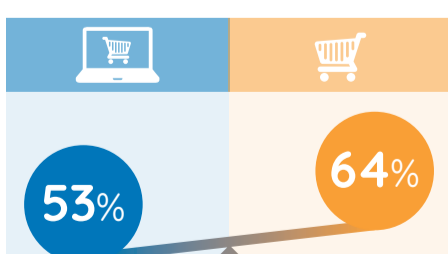
Promotions Encourage Shopping



Satisfaction

Online shoppers are **less satisfied** with assortment and execution

Assortment



Execution



Source: **Shopper Intelligence.**

post-shop online survey • USA Shoppers Feb – June 2018 • 15,000 online Amazon, Walmart 95,000 across 12 grocery banners • (Kroger, Safeway, etc)

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