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The online grocery post-purchase experience: Deloitte's 2026 consumer insights survey

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Executive Summary: Where grocery companies should focus to engage their online shopper

Online ordering and delivery is a core channel for grocery shoppers across the industry and is used across all product categories. For consumers who frequently buy groceries online, convenience is their primary driver.

Deloitte conducted a survey of online grocery shoppers to understand how they shop for groceries, what their current experiences are like, which services they value most, and what additional tools they need. The goal was to identify how online grocery experiences can deliver the same benefits that have led these shoppers to go digital-first for other products they buy.

Our survey identified priority opportunities for grocery companies by comparing the capabilities consumers say have the greatest impact on their purchase decisions with the areas where they say their needs are not being adequately met today

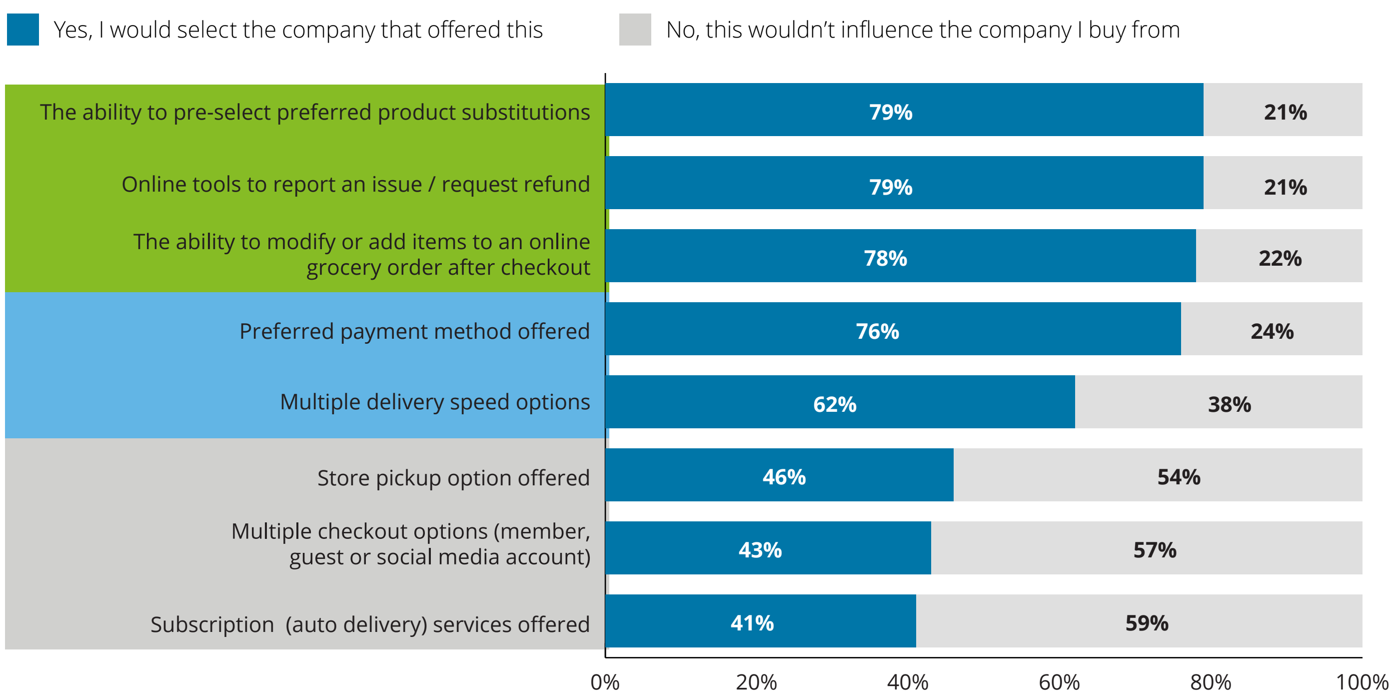
Grocery post-purchase services	**Selecting preferred substitution products**	**Online tools to resolve issues**	**Post checkout order updates**	**Subscriptions for auto-delivery**
Level of influence on purchase decisions	Basic purchase consideration	Basic purchase consideration	Considered when basics are met	Considered when basics are met
Current consumer sentiment	Needs moderately met	Needs not sufficiently met	Needs not sufficiently met	Needs not sufficiently met
What else to consider	• **More than 50%** of consumers want to set their own substitution preferences when items are out of stock • **Almost 80%** say the ability to pre-select substitutions would influence where they shop	• **75%** of consumers experience order accuracy or product issues with online grocery deliveries • **20% say they will shop elsewhere** rather than spend extra time reporting an issue when the process is difficult	• **Over 60%** of consumers currently continue to add items to an order after checkout • **Over 90%** indicate they would like the option to do this up until shopping begins	• **30%** of consumers don't use subscription services because subscriptions aren't offered for the products they buy repeatedly • This capability has **the highest potential** for increased adoption when offered

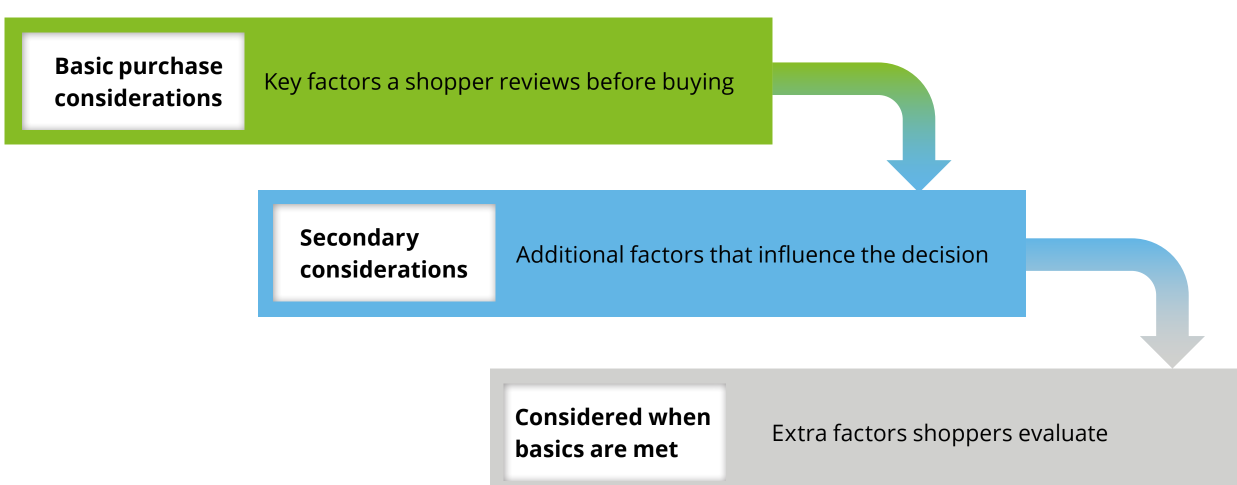
Beyond online services and tools that support a seamless post-purchase experience, grocery companies must also minimize product cancellations to preserve the value proposition of online grocery shopping for consumers

The post-purchase capabilities that drive grocery purchase decisions

When choosing where to shop for groceries, customers prioritize value-added services that help them get the products they want and quickly resolve any issues with online orders.

Would you be more likely to shop with a company that offered:





Consumer needs for online grocery shopping vs. current industry offerings

There is a significant gap between the capabilities and services grocery companies are offering and what online consumers say they need most—these are the priority gaps to address.

Overall, do you feel the capabilities currently available to you meet your online shopping needs?	% yes consumer responses	Current industry offerings benchmarks[1]
Subscription (auto delivery) services offered	80%	Less than 20% offer
Online tools to report an issue / request refund	87%	Less than 10% offer
Store pickup option offered	87%	80% offer
The ability to pre-select preferred product substitutions	87%	Less than 40% offer
The ability to modify or add items to an online grocery order after checkout	87%	60% offer
Multiple delivery speed options	91%	33% offer
Multiple checkout options (member, guest or social media account)	93%	40% offer
Preferred payment method offered	94%	Over 50% offer multiple payment options

Needs not sufficiently met (grey) · Needs moderately met (blue) · Needs adequately met (green)

Selecting preferred substitution products

Consumers experience product cancellations with online grocery orders almost 1.5x more frequently than with their other online shopping. As a result, product substitutions are critical to retain grocery sales and cart value when items are unavailable.

Enabling customers to pre-select preferred substitutions is critical to ensuring they are satisfied with the products they ultimately receive, yet less than 40% of grocery retailers offer this capability despite 79% of consumers saying this will influence who they shop with.

% of consumers that experienced product cancelations when shopping online

Online grocery shopping	95%
Online shopping outside of grocery[2]	76%

More than half of surveyed consumers say the best way to close this gap is to let them select their substitution preferences

Product not in stock when order is being filled

When your grocery order is being fulfilled, and the specific brands, product types, or sizes you requested are unavailable, how would you like us to manage product substitutions?

I pre-select my substitution preferences online during checkout	54%	*Sale is saved and customer receives a preferred replacement*
I let the company I'm shopping with select the best substitution option	22%	*Impacts picking efficiency & customer may not be satisfied with item selected*
I don't choose to have products I originally ordered substituted	25%	*Sale is lost and customer's net value declines considering delivery fees paid for a lower order value*

Online tools to resolve delivery issues

While digitally native consumers may be familiar with issues that can occur with online deliveries, they are also more likely to expect self-service tools to help resolve them. Deloitte research shows that more than 76% of non-grocery companies provide online portals to report issues and request returns; by contrast, fewer than 5% of grocery companies offer online services to resolve problems.

This gap could lead customers to switch to a grocery company with stronger digital resolution services.

Most common issues that consumers indicated they encounter with online grocery deliveries

Products are missing from my order	81%
Products or packaging are damaged	79%
I receive an incorrect product (something I didn't order)	79%
The quantity received doesn't match what I ordered (multiple number of a product ordered)	74%
Products are past or very close to their "Best By" or expiration dates	70%
Products are spoiled or not at the expected temperature (i.e., frozen items thawed)	65%

Most common methods consumers currently use to report issues and receive a refund or a replacement

I contact the company's customer service department via phone or message	47%	*Service contacts further erode online grocery margins and cost an average of $5 per contact*
I don't currently pursue reporting problems for my grocery deliveries. If problems are frequent, I just shop elsewhere	20%	*Silent defectors pose the greatest risks to brand loyalty and future sales*
I go to one of the company's stores to report the problem	9%	*Compounded inconvenience for customer*

More than 30% of silent defectors say they don't pursue a resolution because it is too difficult and time-consuming or because grocery companies don't provide online capabilities

Post checkout order updates

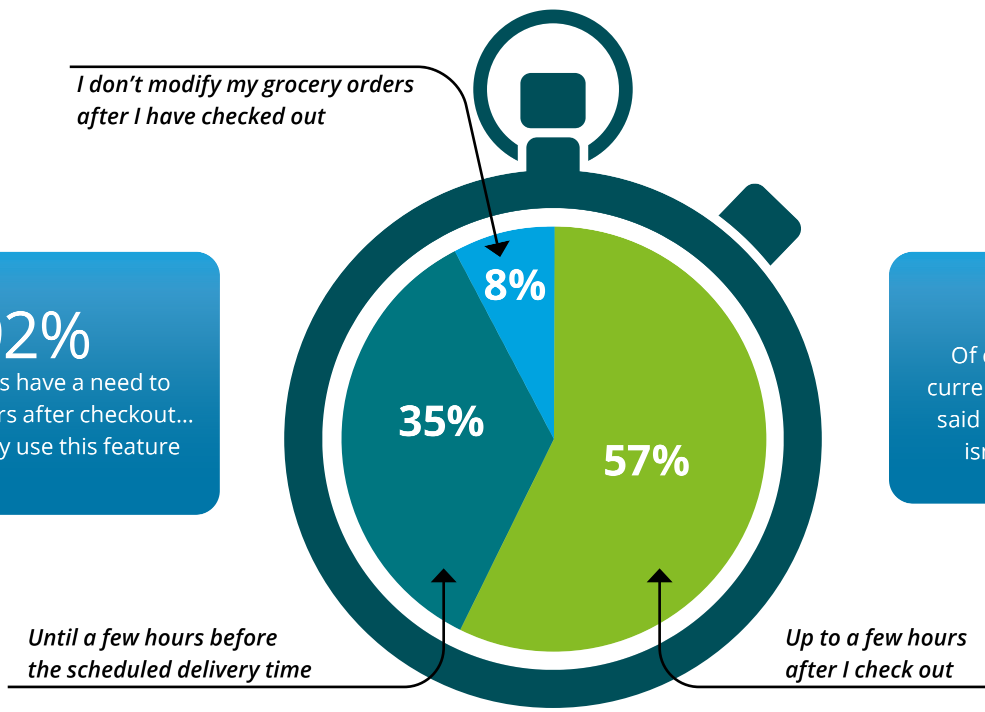
Enabling customers to add items or modify items after checkout is an opportunity for grocery companies to increase cart value and improve margin, while also addressing a key customer need that many feel is currently unmet. It is also an area where online grocery services can outperform non-grocery e-commerce experiences, because traditional warehouse management systems often do not support order changes once an order is integrated.

In our survey, 92% of online grocery shoppers said they needed to add to or modify their order after checkout. However,

40% of the grocery companies we researched are not capturing the internal and customer benefits that order modifications can provide.[3]

What would you consider a reasonable amount of time for a company to allow modifications to an online grocery order?

92%
Consumers have a need to modify orders after checkout...
63% actively use this feature



24%
Of consumers who don't currently modify their orders said it's because the option isn't available to them

Subscriptions for auto-delivery

Subscription services that automatically reorder and deliver grocery items also offer both internal and customer benefits for grocery companies. Subscriptions can provide insights into predictable future demand volume, while customers gain the convenience of not having to reorder products they buy repeatedly.

This service shows the strongest potential for adoption of all the services we asked consumers about, with

85% of consumers saying they would subscribe for products they purchase repeatedly if it were more widely available.

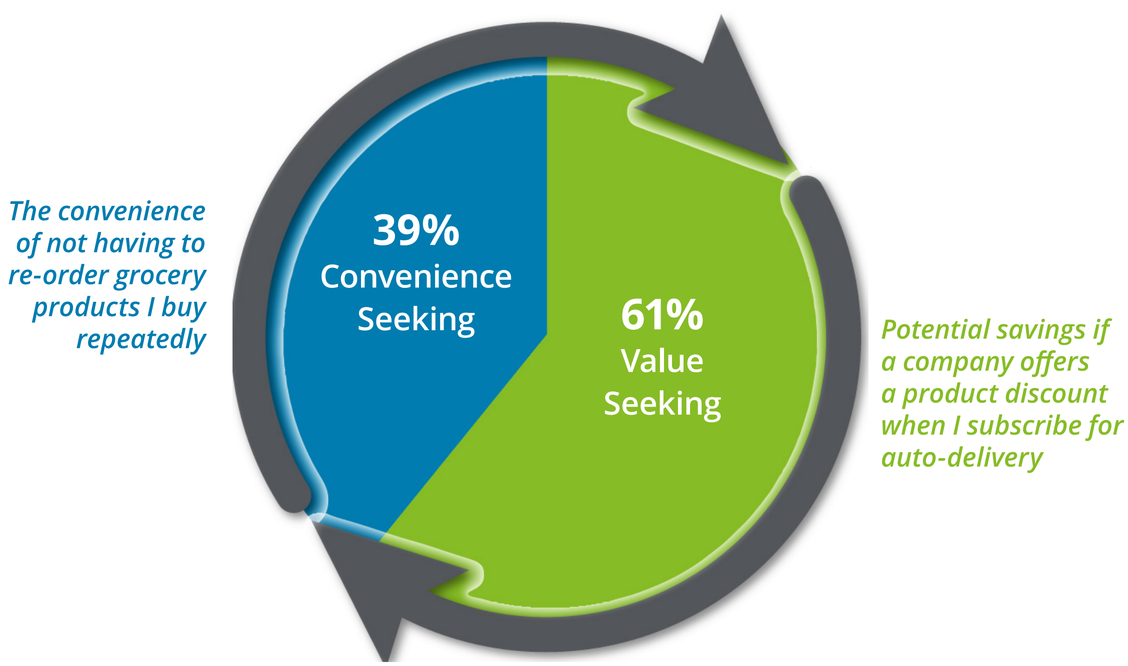
27% **of consumers surveyed have never used grocery subscription services; among them, *30% said it is due to a lack of availability***

The company's subscription services aren't available for the products I buy repeatedly	12%
Most grocery companies I shop with don't offer subscription services	11%
I'm not aware of subscription services for groceries	7%

85% **If subscription services were more widely offered by the companies you shop with, how often would you use them**

Frequently	19%
Sometimes	66%
Never	15%

Which would you say is the greater benefit of using a subscription service for online grocery shopping?



Online grocery out-of-stock experiences

Even if grocery companies provide all the digital services and capabilities online customers want, there is still a risk of losing sales and brand loyalty when items are cancelled due to being out of stock or cannot be replaced with a suitable substitution.

While customers seem to understand that most online grocery orders are fulfilled from dynamic in-store inventory rather than a controlled warehouse environment, consumers we surveyed said they experience out-of-stock conditions more often when ordering groceries online than when shopping in-store.

95% of consumers surveyed have experienced product cancelations with their online grocery orders

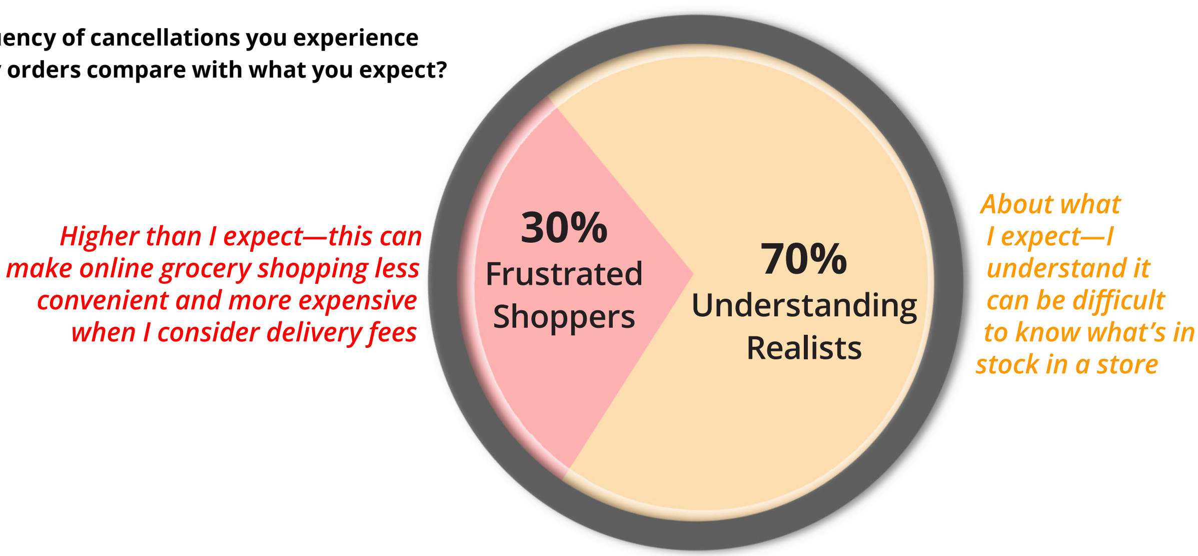
When you compare your in-store and online grocery shopping experiences, which happens more often for you?

Out of stock experiences / cancelation are about the same whether I shop for groceries in a store or online	37%
Items are canceled from online grocery orders more often than products being out of stock in physical stores	34%
Products are out of stock in physical stores more often than products are canceled from an online order	29%

When products in your online grocery order are often canceled because they are out of stock, how does this impact your perception of the company?

My overall opinion of the company remains the same, but I feel my time spent placing the order was wasted	56%
Worsens my perception: It makes me question the reliability of the company's inventory accuracy	37%
Significantly worsens my perception: I would hesitate to make additional purchases with the company in the future	7%

How does the frequency of cancellations you experience with online grocery orders compare with what you expect?

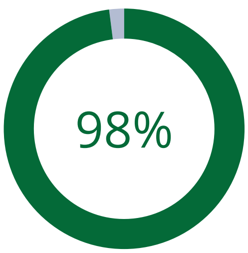


Speed opportunities in the grocery last mile

More than 80% of consumers Deloitte surveyed on non-grocery delivery said they would choose the lowest-cost option versus the fastest. Online grocery shoppers appear to place a higher value on speed; however, 58% still said lowest cost is their priority.

The best solution for grocery companies to accommodate customers with immediate needs—

while also capturing benefits from customers willing to wait is by offering multiple last-mile delivery options that serve their different customers' needs.



Consumers that actively use standard options for grocery delivery currently

Consumer expectations versus industry offerings for standard grocery delivery service

	What do you consider to be a reasonable cost for standard delivery service?
Consumer Expectations	$6.00
Current Industry Median Offerings*	$6.95

	How long do you expect the delivery time window to be?
Consumer Expectations	3 Hours
Current Industry Median Offerings*	1 Hour

	What do you consider a reasonable tip rate for the delivery person?
Consumer Expectations	10.0%
Current Industry Median Offerings*	12.5%

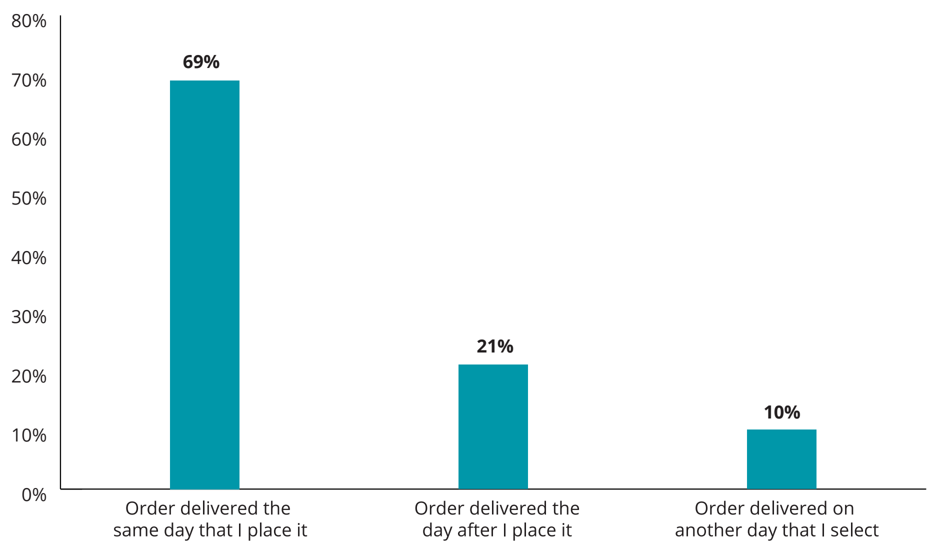
* Based on Deloitte grocery industry research

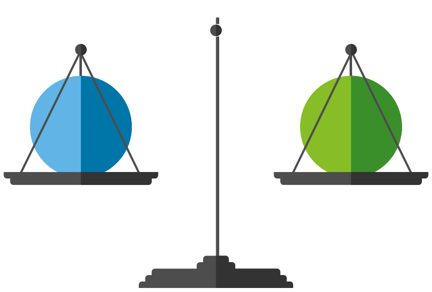
Speed opportunities in the grocery last mile

Insights on other delivery speed options currently used

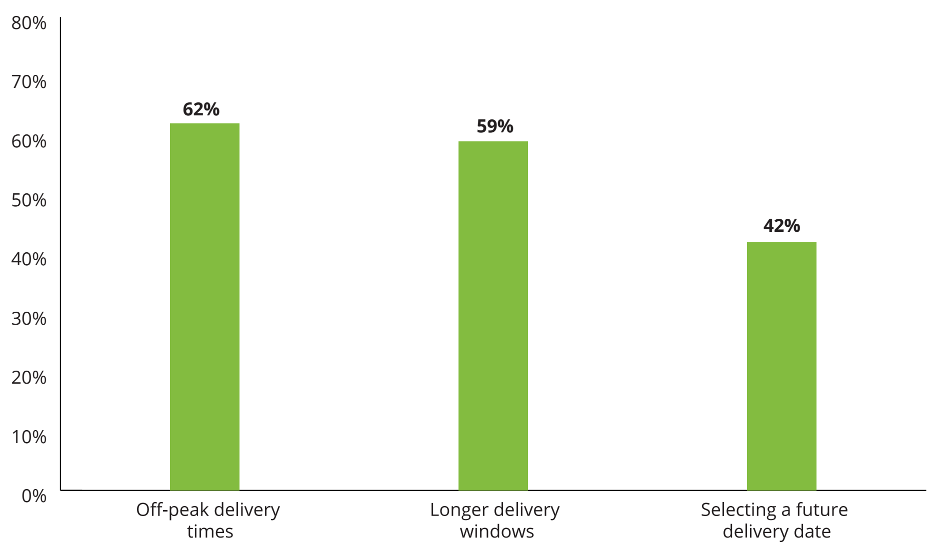
	Express service for an additional fee	Economy service for a lower fee
% consumers who indicated they frequently use other delivery speed options	18%	24%
Top reason not used more often	Cost of this option	Not offered or aware of this option
% who would use frequently if more widely available at a reasonable cost	27%	34%

When ordering groceries online, what delivery day timing do you prefer?





Conditions consumers would accept in exchange for a lower-fee Economy delivery option



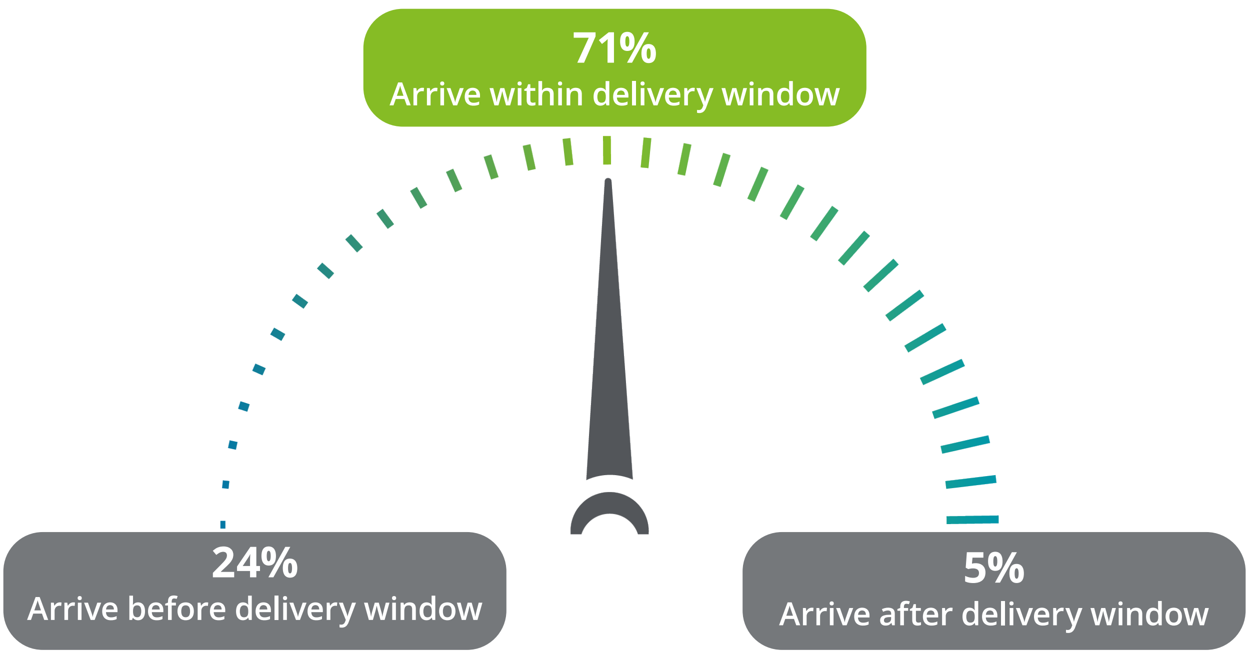
Consumer experiences with last mile performance accuracy

29% of consumers said their grocery orders are frequently delivered outside the delivery window shown at checkout. Late deliveries occur less often, but they can have a higher impact on how customers perceive the company and may raise concerns about food-handling safety.

Deliveries that arrive earlier than expected are not automatically a "surprise and delight" moment—

unexpected early arrivals can result in a failed delivery if the customer is not home to receive the order.

Based on most of your online grocery orders, how does the actual delivery timeframe compare to what you selected at checkout?



If an online grocery order is delivered BEFORE you expected it to, how does this affect your perception of the company

No change: Early delivery does not alter how I view the company	35%
Worsens my perception: It makes me question the reliability of their delivery service	7%
Significantly worsens my perception: I might not be available or prepared to receive an early delivery	5%

If an online grocery order is delivered LATER than you expected it to, how does this affect your perception of the company

No change: I understand delays can happen	43%
Worsens my perception: It makes me question the reliability of their delivery service	43%
Significantly worsens my perception: I worry about the condition of my groceries and would hesitate to order from the company again	14%

Leveraging the online grocery shopper that will opt to pick up their order

Only about half of the consumers we surveyed said they actively choose to pick up online grocery orders rather than have them delivered. Making pickup more widely available may not materially increase adoption, since 59% of surveyed consumers said they do not use pickup more often simply because they prefer not to make a trip to the store. For those who do use pickup, the primary motivation is to save on delivery costs—not speed or convenience.

That said, this is still an important customer segment to serve:

each pickup order carries a higher margin than an order that requires delivery and each pickup visit creates an opportunity to drive incremental in-store sales at the time of pickup

Insights on consumers that chose in-person pickup for their online grocery orders

Online grocery order pickup

Consumers that currently actively use pickup	53%
Would use more often if widely available for a reasonable cost	54%

What would you say the primary benefit is of store pickup for online grocery orders versus home delivery

Store pickup is usually free or costs less than home delivery	39%
I receive my items faster	17%
I can take care of my other shopping needs when I go to the store to pickup my order	17%
I prefer the in-person pickup experience	7%
I do not see a clear benefit in using store pickup for grocery orders	19%

62% Consumers indicated they would likely purchase additional items that they hadn't planned to buy at the time of pickup

What we learned about today's online grocery shopper

Considering your total grocery shopping, how would you compare the volume that you purchase in a store to what you purchase online for delivery?

I buy most of my groceries for delivery	36%
I buy most of my groceries in-store and use online delivery for additional items	32%
I split my grocery shopping about evenly between in-store and online for delivery	32%

Considering your total online grocery shopping over the past 6 months, about what percentage did you complete with each of the following company types?

Mass merchant's website (Costco, Walmart, Target)	37%
Large national grocery store chain's website (Kroger, Publix, Whole Foods, Albertson's, Aldi)	21%
Online only grocery seller website (Amazon Fresh/Grocery, Fresh Direct, Misfits Market)	18%
Third-party delivery service provider's website (Instacart, DoorDash, UberEATS)	15%
Smaller local grocery store's or chain's website	9%

Which of the following most encourages you to choose online grocery delivery versus shopping in-store?

Convenience of having someone else do the shopping for me	39%
Easier to search for products online than to locate them in a store	30%
Wider product selection online than in a physical store	17%
I avoid shopping in a physical stores whenever I can	15%

What we learned about today's online grocery shopper

In the past 6 months, which types of grocery products have you purchased online for delivery?

Food & beverage pantry items (canned/jar/boxed non-perishable items)	78%
Household items (paper, cleaning & laundry products)	73%
Dairy products (milk, cheese, eggs)	70%
Personal care products (oral care, shaving needs, hair/body/face wash, cosmetics)	69%
Fresh produce (fruits & vegetables)	69%
Frozen foods	67%
Bread & bakery products	66%
Fresh meat & seafood	56%
Health & wellness items (over-the-counter medications & first-aid)	54%
Pet supplies (food, snacks litter)	51%
Deli & prepared foods	50%
Other general merchandise or miscellaneous items	30%
Baby care (food, diapers, wipes)	18%

Survey methodology and respondent demographics

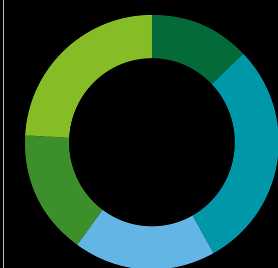
Survey methodology	The 2026 Consumer Insights Survey on the Online Grocery Post-Purchase Experience was developed by Deloitte and conducted online by an independent research company from April 1, 2026, through April 15, 2026
Who we surveyed	815 US consumers who make online purchases 5 or more times per month and have purchased online from 10 or more different companies in the past 6 months

Respondent demographics

Gender

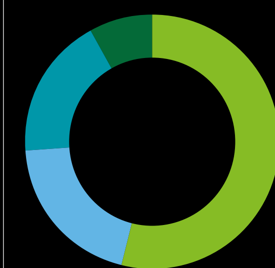
Male	48%
Female	52%

Age group



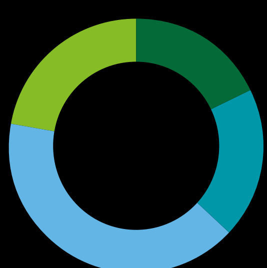
18-24	13%
25-34	29%
35-44	18%
45-54	16%
55+	24%

Race / ethnicity



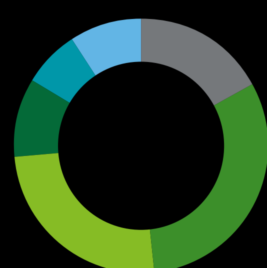
White	54%
Hispanic	20%
Black	18%
Other	8%

Geography (U.S. regions)



Northeast	18%
Midwest	19%
South	41%
West	22%

Annual household income



$49,999 or Less	17%
$50,000 - $99,999	31%
$100,000 - $149,999	25%
$150,000 - $199,999	10%
$200,000 - $249,999	7%
$250,000 or More	9%

Deloitte's omnichannel competitive landscape services

Deloitte's omnichannel competitive landscape research and assessment services can help companies quickly understand where they are leading or lagging key competitors across the end-to-end customer journey. We benchmark current capabilities, identify the gaps that matter most, and translate the findings into a practical set of priorities. We can also help you build the business case—linking improvements to customer experience and cost drivers—and support implementation of leading capabilities, from operating model and process changes to enabling technology and performance measurement.

Deloitte omnichannel competitive landscape research

We monitor and test the services retail companies offer across the post-purchase customer experience, including capabilities to transact and fill orders as well as services that retain ongoing loyalty

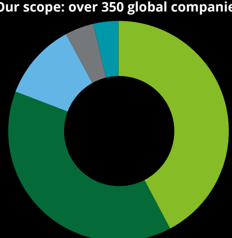
Research focus

Methods & outcomes

Research companies: Key statistics

We include companies of varying sizes, maturity, and operating models to capture the broadest spectrum of capabilities across the retail industry

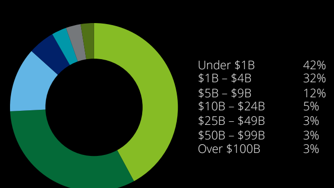
Our scope: over 350 global companies



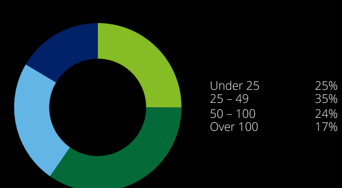
Wholesale/retail brands	42%
Specialty retailers	39%
Grocery and convenience stores	11%
Big box and department stores	4%
Discount/off-price & resale	4%

Research company statistics

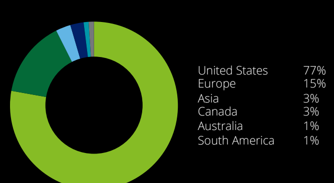
Annual revenue



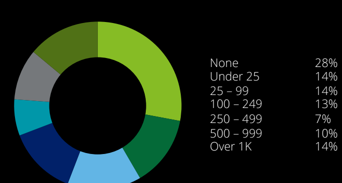
Years in business



Headquarters



Number of brick-and-mortar stores



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Endnotes

1. Deloitte Competitive Marketplace Research of 42 global grocery companies
2. Deloitte 2026 Omnichannel Post-Purchase Consumer Experience Survey
3. Deloitte Competitive Marketplace Research of 42 global grocery companies

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