THE FUTURE SHOPPERS WANT

Defining the new grocery standard

More at morgan's

In late 2025, in collaboration with *Inside Retail*, Morgan's Retail commissioned an online survey of grocery shoppers across America to answer a straightforward yet urgent question: What does the next decade of grocery shopping look like from the shopper's perspective?

The result is a detailed, nationally representative view of how Americans plan, shop for, and receive their groceries today, covering in-store, click-and-collect, rapid delivery, and emerging 'scan-and-go' journeys, and how those behaviors are sharply diverging by age, purpose and mindset.

This report consolidates that evidence into a single narrative about the future of grocery shopping. It traces how a familiar 30- to 40-minute weekly shop is being reshaped by hybrid missions, new expectations of automation, tighter delivery windows, and a more transactional approach to data and sustainability. The aim is not to overwhelm you with numbers but to highlight the signals that matter most for strategy: where friction gradually erodes loyalty, where 'shop-in-store, deliver-home' models could generate new value, and where trust, privacy, and price sensitivity will define the limits of innovation.

What follows is written from a retailer's perspective, but clearly on the customer's terms. It acts as a practical field guide for leaders ready to move beyond channel debates and begin designing a consistent grocery operating system focused on the people who use it weekly.

From big shop to scan-and-go

How Americans buy their groceries

Weekly grocery shopping remains a core part of Americans' routines, but how this task is done is quietly changing. The data show that this common household chore now involves both in-store and digital methods, with hybrid routines emerging, and moments of friction strong enough to steer shoppers towards new formats like scan-and-go and 'shop-in-store, delivery-to-home.'

The data confirm that the weekly 'Big Shop' still forms the core of the American grocery routine. Nearly three-quarters of shoppers (72.7%) choose a weekly or big shop as their main reason for shopping, which is much higher than top-up shops (19.8%), emergency trips (4.9%), or health-specific missions (2.5%). This trend stays consistent across all age groups, reinforcing the idea that although channels and tools change, the basic task of restocking the household weekly remains the same.

Generational differences are evident in secondary missions. Younger shoppers (18-24) are much more likely to describe their main trip as an urgent/emergency shop (13.9%), while older shoppers (55+) tend to focus on top-up missions, with young Boomers (55-64) and Seniors (75+) showing the highest top-up rates, at 24.4% and 27.1%, respectively.

Primary grocery shopping mission

Inside Retail x Morgan's Retail consumer survey 2025

Weekly/big shop
72.7%

Top-up shop
19.8%

Urgent/emergency
4.9%

Health
2.5%

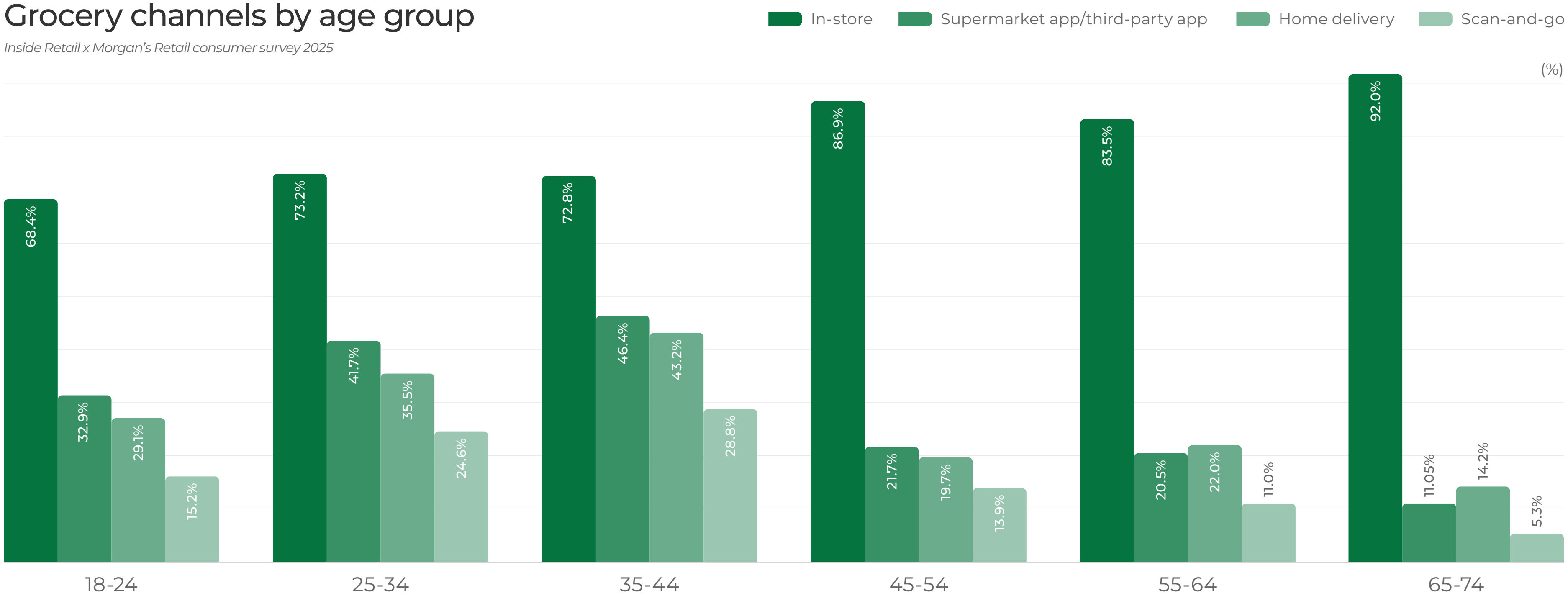
The digital middle vs. the store-loyal senior

We are not only identifying which channels shoppers use but also which ones they rely on most often. The data confirm that the physical store remains the default for most households, but it also reveals a significant shift: the most digitally dependent shoppers are not Gen Z, but the time-poor middle-aged group. For 74.3% of all shoppers, an in-store visit remains the main way they buy groceries. This channel tops every age group, highlighting the strength of the store as the primary grocery channel. However, the 35-44 age bracket stands out. Over 40% of people in this cohort now choose a non-store method as their main shopping option, with 19.2% mainly using supermarket apps and 12.8% relying on third-party delivery apps. For these households, the app is no longer just an extra; it becomes the store.

A new form of hybrid behavior is emerging among younger adults. About 10.1% of shoppers under 35 already see a mix of in-store and digital as their main approach, as they seamlessly switch between browsing in person and online purchasing. This suggests a future where channel labels matter less than how quickly a task can be done.

Grocery channels by age group

Inside Retail x Morgan's Retail consumer survey 2025



At the other end of the spectrum, the 55-74 demographic remains strongly committed to physical retail: 87.6% shop in-store as their main method, and only 1.8% rely on third-party apps as their primary channel. For seniors, technology has yet to replace the habits, control and routine of a traditional shop. The result is a divided reality. Retailers must continue to enhance the traditional, tactile experience for older shoppers, while also developing a grocery system for the 'digital middle,' who are increasingly engaging with the brand through an app-first, hybrid journey.

Channel behavior has clearly become hybrid, moving beyond a simple split between online and offline. The physical store remains the center of the ecosystem, with 80.5% of shoppers visiting in-store in the past month. However, a notable segment now uses digital convenience alongside these physical visits, employing supermarket apps (31.4%), home delivery (27.1%), and third-party apps (24.5%) to manage household needs. The data show that for the modern shopper, the journey is a fluid mix of touchpoints where digital tools enhance, rather than replace, the core bricks-and-mortar experience.

This digital-physical blend is most evident among the 35-44 age group, who use these tools to combat time poverty. In this group, digital adoption is high, with 48.0% using third-party delivery apps and 44.8% using supermarket apps, rates that are 10-20 percentage points above the average. Conversely, seniors (65-74) still largely adhere to traditional habits: while 92% shopped in-store, only 4.4% used third-party apps and 14.2% used home delivery. This clear contrast highlights a generational divide where the hybrid model is normal for families but has yet to offer a convincing value for older, store-first shoppers.

Beyond the basket: Solving the efficiency paradox

Overall, product discoverability remains the biggest challenge. Combining "Finding specific items" (34.8%) and "Not finding what I am looking for" (30.7%) shows that two-thirds of shoppers struggle to locate the products they want, surpassing concerns like crowds, self-checkout issues, or staff availability. This highlights that store layout, signage, and inventory accuracy are still essential for customer satisfaction.

Age layers various frustrations on top of this core issue. Younger shoppers (18-24) are especially sensitive to crowds, with 38.0% citing "Too busy/crowded" compared with just 10.4% of those 75+. Shoppers aged 55-64 report the highest level of self-checkout frustration (30.7%), indicating they are tech-capable but unimpressed by clunky interfaces, while people 45-54 are most likely to complain about lack of staff (self-checkout, 21.3%), aligning with their busy, task-focused profile.

Grocery trips generally fall within a consistent 15- to 45-minute Goldilocks window. Nearly 70% of shoppers complete their main shop during this period, with about equal portions taking 15-30 minutes (34.8%) and 30-45 minutes (34.6%). Only 6.9% finish in less than 15 minutes, while 7.0% take more than an hour. This suggests that store layouts and shopping habits are already tailored for roughly a 35-minute task.

The generational story is counterintuitive. Seniors (65-74) are the quickest, with 41.6% finishing in 15-30 minutes and an average shopping time of 33.4 minutes, reflecting frequent, well-rehearsed trips during quieter periods. The slowest groups are 18-24 and 45-54, both averaging 37.0 minutes; younger shoppers probably spend more time navigating and browsing, while those aged 45-54 tend to have larger baskets and longer checkouts, for peak-size households.

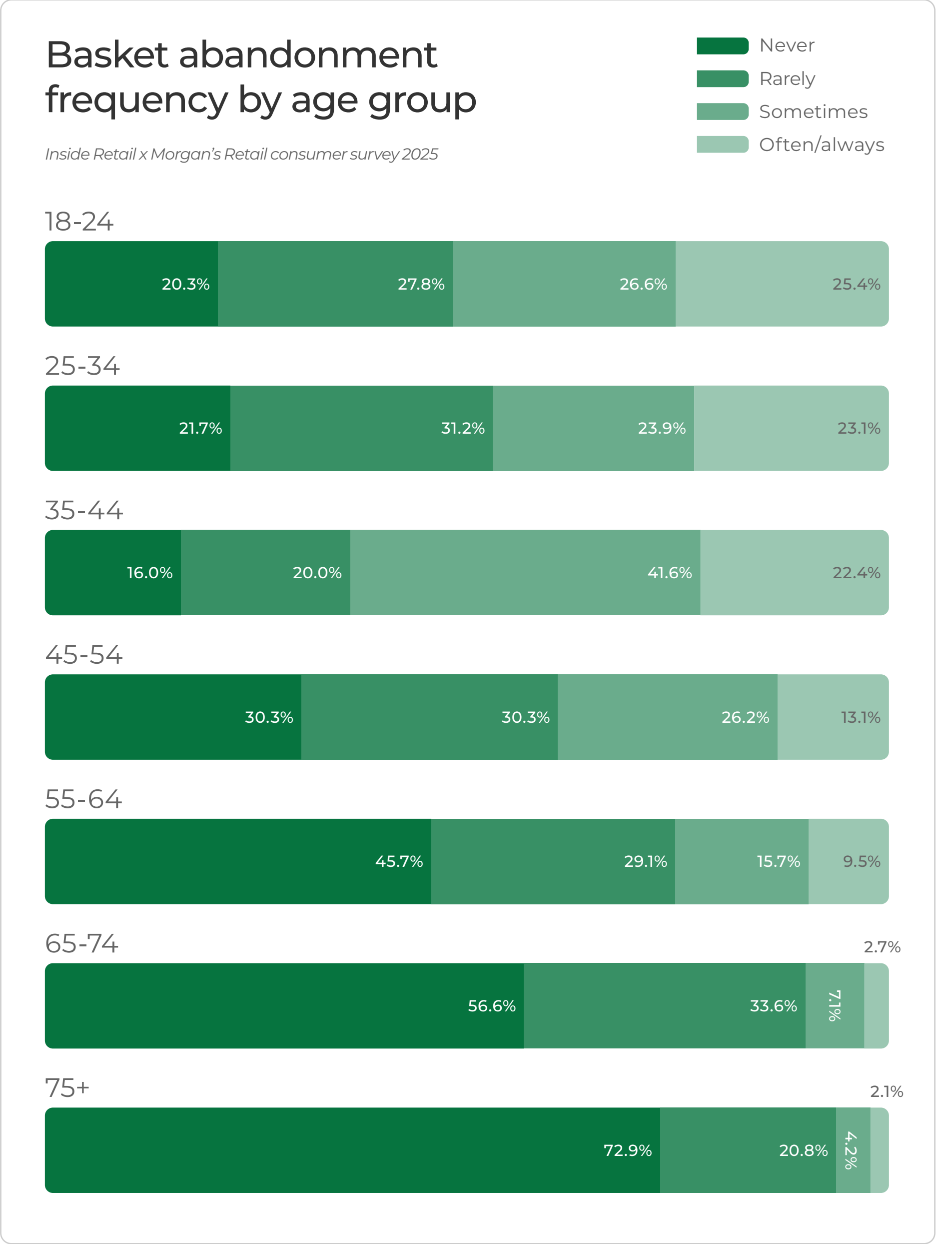
Top five frustrations by age group

Inside Retail x Morgan's Retail consumer survey 2025

The patience gap: Who stays and who abandons

Abandonment behavior shows a clear gap in patience across generations. Among Gen Z (18-24), 25.4% say they abandon their shop “often” or “always” due to friction, with similar rates for those 25-34 (23.1%) and 35-44 (22.4%). This means about one in four younger shoppers will walk away when the process gets too difficult. In these age groups, fewer than 22% say they never abandon a basket, highlighting how fragile loyalty becomes when convenience is lacking.

On the other end of the spectrum, seniors are extremely committed once they begin shopping. Among shoppers aged 75+, 72.9% report “Never” abandoning a basket, with only 2.1% in the Often/Always segment. The 35-44 age group stands out as the “swing” cohort: They have the lowest “Never” rate (16.0%) and the highest “Sometimes” rate (41.6%), indicating that small improvements like quicker queues, simpler apps, and clearer layouts could significantly boost retained revenue.



The hybrid store

15 minutes away, 45 minutes to your door

Convenience for most shoppers still starts with a nearby, full-range supermarket. What is changing is what happens after they fill their trolley. Instead of abandoning their local store, customers are redefining its role: they want a wide variety of goods close to home, modest but frequent weekly shopping, and a travel time limited to around 15 minutes. Increasingly, younger shoppers also prefer the option to hand their bags to a driver and go straight home, turning the store into both a neighborhood hub and a last-mile launchpad.

Preference for format is rooted in local, full-range stores where shoppers carry their own goods home. Over half of respondents (52.9%) prefer a local, full-range store with scan & carry as their ideal, and this rises to over 60% among shoppers aged 65 and older, who are the most loyal supporters of a traditional supermarket they can walk or drive to within 15 minutes. For these shoppers, proximity and the ability to leave the store with groceries in the car or trolley remain the core of "convenience."

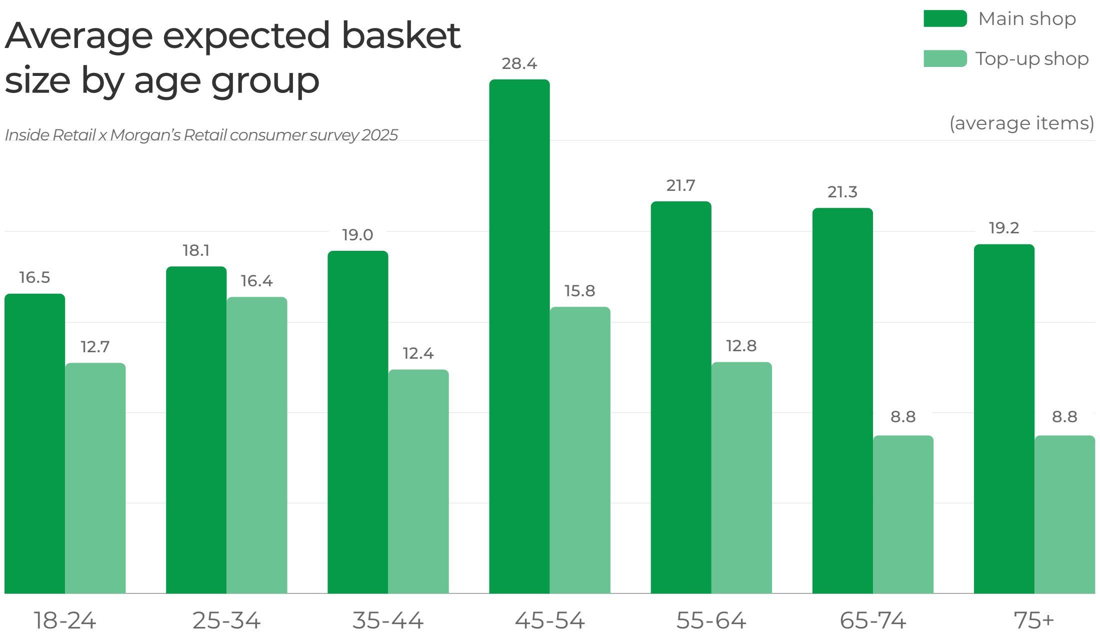
At the same time, there is a strong demand for a more modern hybrid shopping model. Nearly a third of shoppers (29.1%) favor a "local store with scan-and-go plus 45-minute home delivery" option, which allows them to pick items in person but leave the heavy lifting to a delivery driver. This "Shop & Drop" idea is particularly popular among younger shoppers, with 39.2% of those 18-24, 37.0% of those 25-34, and 35.2% of those 35-44 choosing it nearly as much as the traditional method. For these age groups, visiting the store remains important for fresh and discretionary items, but the final mile, carrying multiple bags, managing children, or navigating stairs and apartments, is seen as the part worth outsourcing.

The modern "main shop" is also leaner than the stereotype of an overflowing trolley. The most common expected basket sizes for the weekly shop fall within the 11-20 items (26.1%) and 21-50 items (26.2%) ranges, meaning that just over half of shoppers complete their weekly shop with fewer than 20 items. In contrast, top-up shops are very focused: 43.4% of these shoppers expect to buy only 1-5 items, confirming these trips are mainly for filling immediate gaps like milk, bread, or tonight's dinner.

Age underscores these differences. The 45-54 age group carries the heaviest primary shopping load, averaging 28.4 items, almost 50% more than the 16.5-item main basket of those aged 18-24. This reflects peak family sizes and

Average expected basket size by age group

Inside Retail x Morgan's Retail consumer survey 2025



increased household responsibilities, making this cohort especially receptive to anything that eases physical and time burdens. Seniors (65+) have the smallest top-up baskets, with around 8.8 items, but tend to shop more frequently, using the store as an "extended pantry" with small, regular restocks instead of large, infrequent trips.

Grocery shopping is primarily a local affair. Nearly two-thirds of shoppers (63.5%) are hesitant to travel more than 15 minutes for their weekly shop; 27.2% prefer less than 10 minutes, and another 36.3% are comfortable with 10-15 minutes. When travel time surpasses 20 minutes, the potential market drops to just 15.2%, highlighting that even with loyalty schemes and specialized ranges, proximity remains the key factor in choosing a store.

Within this, the 25-34 age group stands out as particularly mobile: 53.6% of this cohort are willing to travel more than 15 minutes, much higher than in any other age group. They will drive farther for bulk savings, specialist ranges, or destination retailers. Seniors (65-74) sit at the opposite end of the spectrum: Only 25.7% are happy to travel beyond 15 minutes, and nearly half (46.9%) fall into the 10- to 15-minute band, confirming that for them, the best store is almost always the nearest one.

Guaranteed quick delivery transforms what a local store can offer. Among 35- to 44-year-olds, only 5.6% say they would never use a 45-minute delivery service, while a majority (51.2%) would choose it "most of the time" or "always." Similarly, high-potential shares are observed in the 25-34

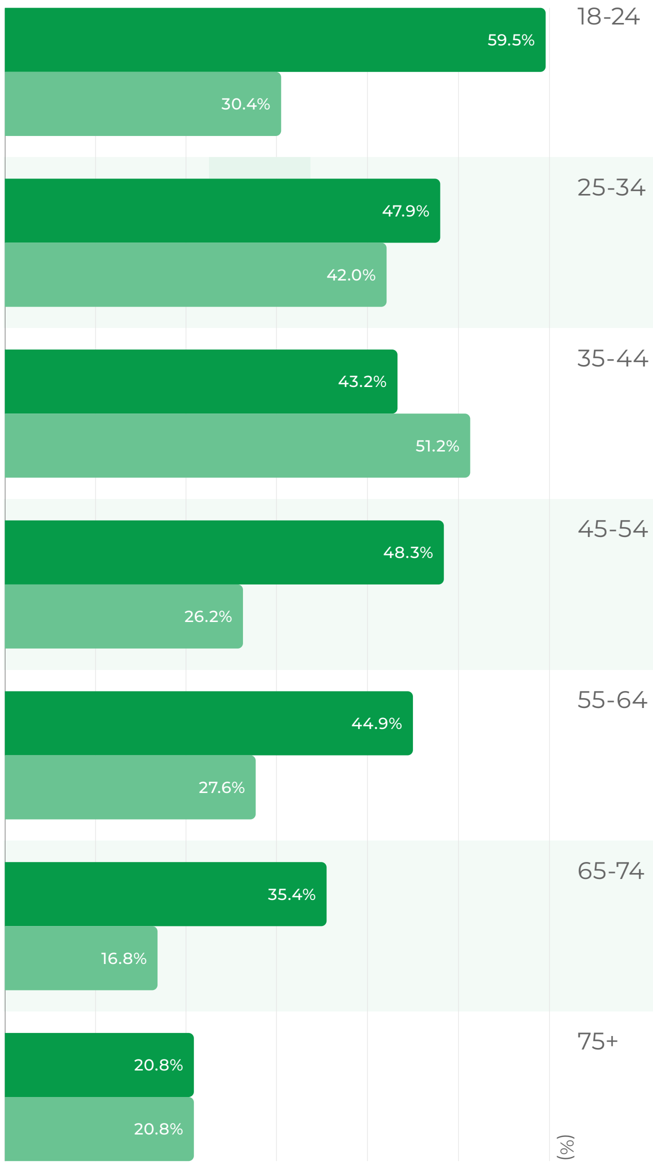
Maximum acceptable travel time for groceries

Inside Retail x Morgan's Retail consumer survey 2025

Under 5 minutes	5-10 minutes	10-15 minutes	15-20 minutes	Over 20 mins
4.7%	22.5%	36.3%	21.4%	15.2%

Willingness to switch to 45-minute delivery by age group

Inside Retail x Morgan's Retail consumer survey 2025



group (42.0%), highlighting 25- to 44-year-olds who are already managing larger baskets and heavier weekly tasks as the main audience for a 'shop in-store, deliver home' model. For these shoppers, shop & drop isn't just about speed; it removes the least appealing part of the trip: loading cars, carrying bags up stairs, and fitting bulky items around work and family schedules.

Older shoppers are much more resistant – 58.3% of those aged 75+ say they would never opt for 45-minute delivery, and only 20.8% are in the high-potential segment. For them, the physical act of shopping and carrying goods remains acceptable, even valued, as part of their weekly routine and sense of independence. Younger adults (18-24) and those aged 45-54 are in the "situational" middle, with about half choosing rapid delivery "occasionally" or "about half the time," using it selectively for heavy, urgent or weather-affected trips rather than as a regular option.

Overall, the data indicate that convenience is being redefined as "local plus optional logistics." Most shoppers still prefer a nearby, full-range store with modest basket sizes, but a growing younger segment now seeks a shop-and-drop experience where they browse in person and outsource the carry-home, especially when baskets are large or time is tight. The 15-minute travel rule and senior preference for traditional formats underscore that dense local networks and well-run stores remain essential; rapid delivery and hybrid formats complement, rather than replace, that physical proximity.

Automation with a safety net

Why shoppers still need people in the loop

This section examines what happens when the store itself becomes a piece of technology. It considers how comfortable shoppers truly are with staffless formats, what keeps them alert – whether it's broken scanners, overcharging, or feeling ignored – and which safeguards start to close the trust gap. Overall, the next section of our survey acts as a clear guide for retailers: Automation can enhance the shop's efficiency, but only if it is backed by visible staff, simple help options, and policies that ensure every mis-scan or outage feels manageable, rather than catastrophic.

Shoppers are curious yet cautious. While most say they are open to trying automated formats, 46.4% agree that a staff-lite or highly automated store makes them feel uneasy, and only 18.8% actively disagree, leaving a large neutral group (34.8%) that is cautious rather than enthusiastic. Discomfort is highest among older shoppers: More than 56% of those aged 65+ report feeling uneasy, suggesting that removing staff could alienate the most loyal in-store customers.

Unease with automated/ staff-lite stores

22.5% Uneasy	36.3% Comfortable or neutral

Gen Z is not as relaxed as stereotypes suggest. Among those aged 18-24, 46.8% also say automated formats make them uneasy, similar to seniors and higher than the 35-54 middle cohorts, reflecting heightened awareness of surveillance and digital risks, rather than a lack of technical skill.

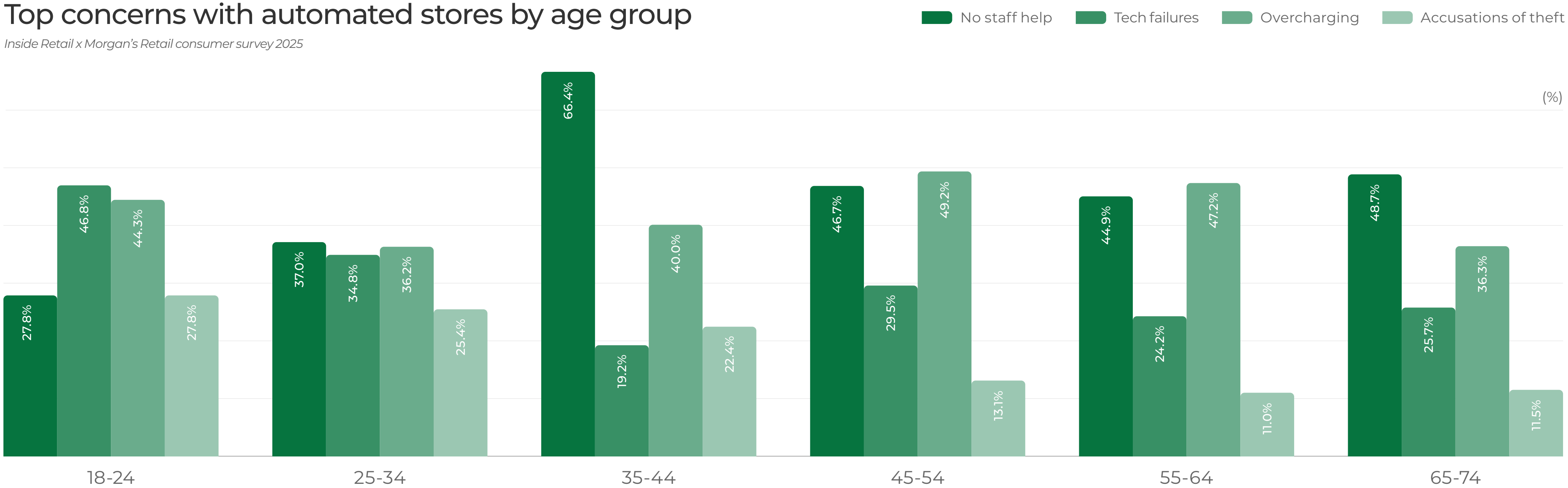
The main concern across the whole sample is “No staff help available” (41.4%), especially among shoppers aged 65-74, with nearly 48.7% citing this as their top worry. For these customers, staff are more than just transaction handlers; they provide a safety net when issues occur, so a staffless approach feels like abandonment.

Younger shoppers are concerned about different risks. Among those 18-24, the biggest worry is tech failures or store outages (46.8%), and the proportion is much higher than in any other group. Financial concerns such as overcharging (44.3%) and inaccurate billing (31.9% overall) affect all age groups but are most common among those aged 45-54 and 65-74. Privacy worries about the misuse of personal data are more noticeable among the 55-64 group than among Gen Z, challenging the usual idea that only younger people worry about data.

Trust can be established through clear safeguards. The most reassuring factors are visible staff presence and a simple escalation process: Nearly half of shoppers say just seeing staff in-store boosts their confidence, and about 42% value a visible “Help” button that quickly connects them to someone when needed. Seniors rely more on physical staff, while younger adults prefer digital safety features, such as in-app support.

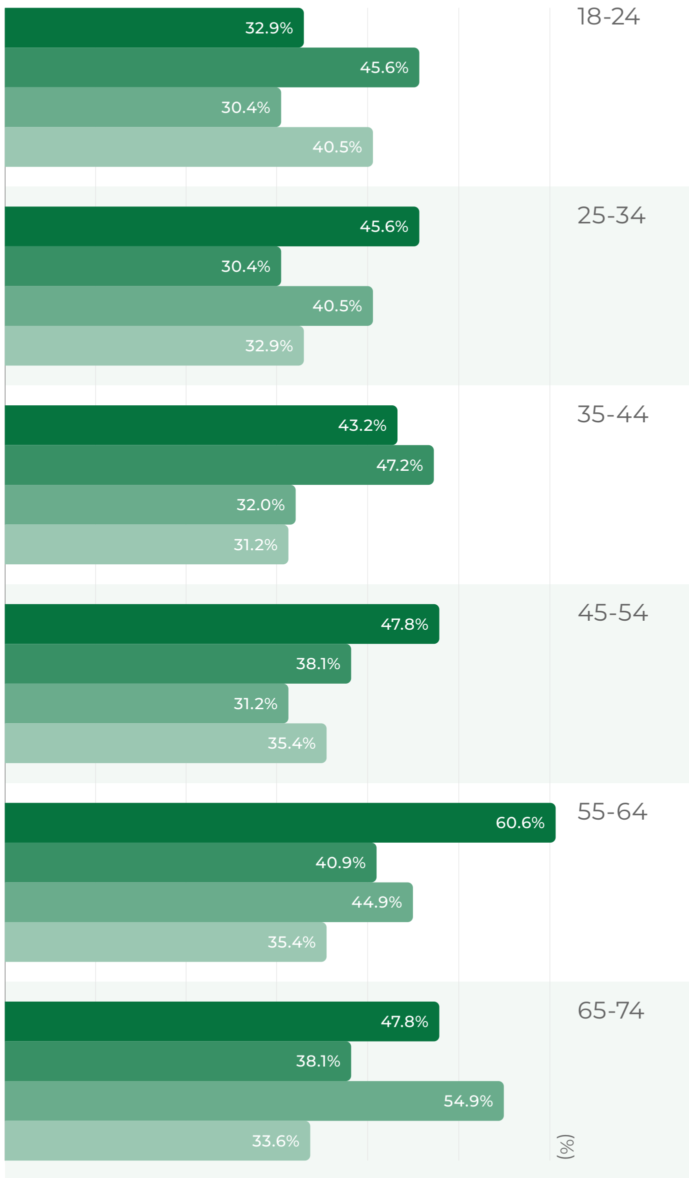
Top concerns with automated stores by age group

Inside Retail x Morgan’s Retail consumer survey 2025



Most reassuring features in automated stores by age group

Inside Retail x Morgan's Retail consumer survey 2025



Policy also plays an essential role. A "no-questions-asked refund within 24 hours" reassures many younger shoppers, easing worries about tech glitches or mis-scans by making errors seem reversible. These findings suggest that adopting new technology is less about showcasing advanced features and more about clearly explaining fallbacks and protections.

When problems occur, human help remains the default option. The favored choice is to speak directly with a staff member, especially among shoppers aged 55 and over, as in-store support is clearly valued more than any digital alternative. For these groups, sorting out issues in person is quicker, clearer, and more trustworthy than navigating menus or chats.

Younger and middle-aged shoppers are more receptive to hybrid support options, like an in-app chat, video link, or call button that quickly connects to a human, especially if it helps avoid queues. However, very few shoppers of any age opt for "no support" or fully automated troubleshooting as their preferred choice, emphasizing that automation should complement accessible human backup rather than replace it entirely.

The data show that shoppers are willing to use automation but not at the cost of feeling abandoned. Concerns revolve around the risks of having no assistance, system failures, or overcharging, and these worries increase with age. Therefore, the most successful automation approaches include visible staff, simple help options, and flexible error-handling policies, with digital reassurance for younger users and face-to-face support for older ones, making sure that 'staff-lite' doesn't feel like 'support-free.'

Click, scan, done

Designing a truly seamless grocery journey

Once basic operational elements are secure, shoppers start to envision a more integrated grocery routine. This results in a clear blueprint for 'seamless': reliable scanning, unified baskets across channels, and digital tools that reduce friction rather than add complexity. The opportunity lies not only in making scan-and-go work but also in recognizing that the 35-44 swing cohort is ready to adopt it if implemented properly.

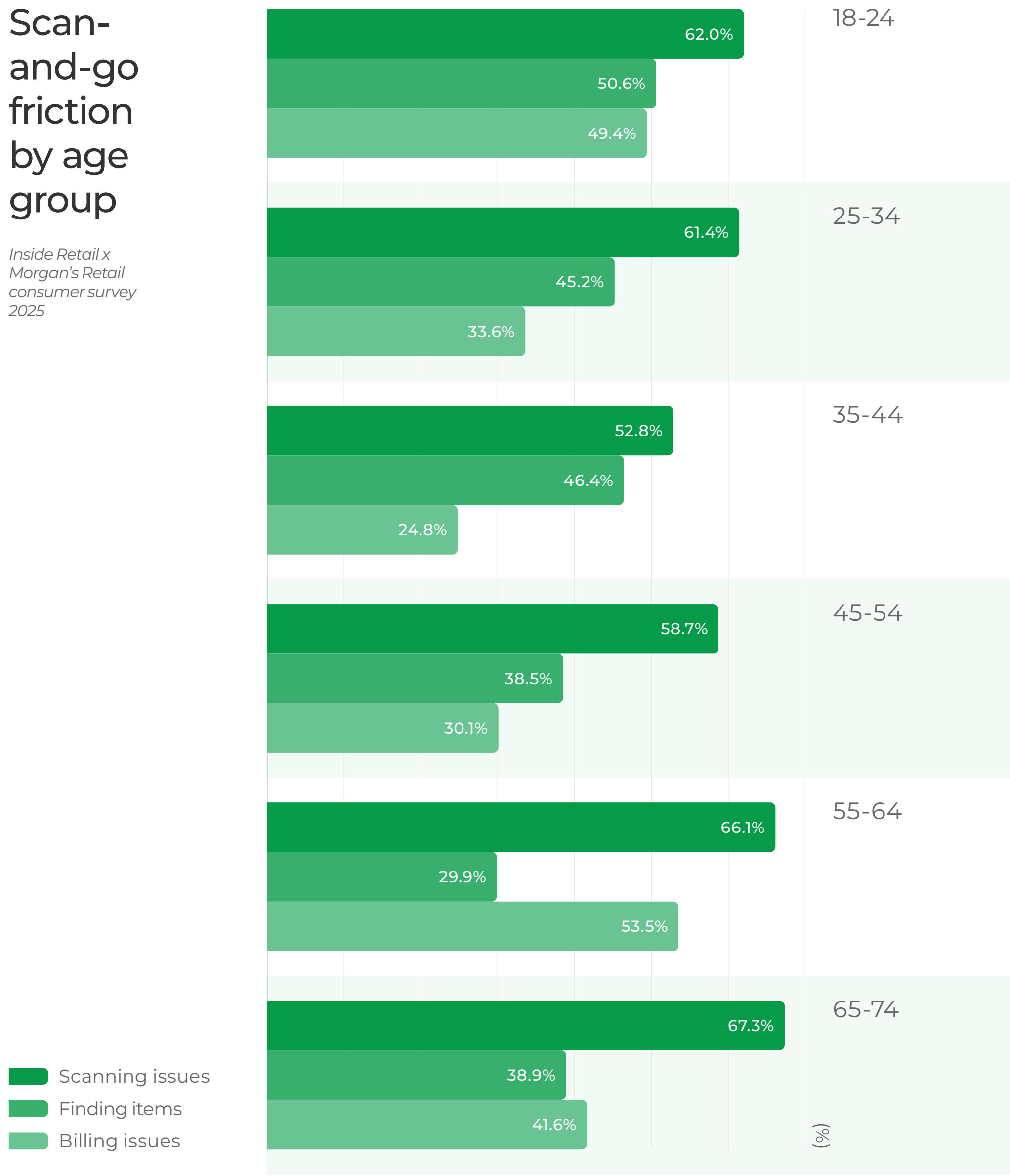
Shoppers are eager to use scan-and-go, yet 60% of respondents of all ages mention "scanning issues" as their main concern with this channel, far exceeding worries about payment security or queue delays. This widespread anxiety indicates that barcode and app reliability are the key weaknesses. Younger shoppers worry about frozen apps and unreadable barcodes; older shoppers fear being mid-shop with a full basket and no solution. Both groups share the fear of reaching the checkout and being unable to proceed.

For retailers, this indicates that scan-and-go success relies less on sleek front-end design and more on consistent performance, visible fallbacks, and clear escalation routes at key touchpoints.

Despite these concerns, shoppers recognize clear benefits: faster checkout, avoiding queues, and real-time spending updates. These advantages directly target the main frustrations identified earlier – waiting, lack of discoverability, and loss of control – and are especially appealing to shoppers under 55, who are already frequent users of digital tools.

Scan-and-go friction by age group

Inside Retail x Morgan's Retail consumer survey 2025



The 35-44 age group stands out as the main audience for this channel. As they balance work, family and shopping, they appreciate every efficiency benefit. For them, scan-and-go isn't new, it's a practical solution to time pressures. Older shoppers, though more cautious, value real-time price visibility (which guards against overcharging) and expect staffed checkouts to remain the usual option.

Shoppers envision an ideal journey where channels are interchangeable yet seamlessly connected. They want to plan and price their basket via the app, complete the main shop in-store using scan-and-go, and switch to delivery for heavier items. This expectation is especially strong among 25- to 44-year-olds, who already manage flexible hybrid routines and now seek technology to unify them. For this group, the store is no longer just a single channel but a part of a larger ecosystem. Loyalty accounts, shopping lists, and refunds should move with the shopper across every touchpoint. Omnichannel success is less about introducing new channels and more about reducing friction among the existing ones.

When asked to look ahead, shoppers focus on practical, low-friction upgrades rather than speculative innovations:

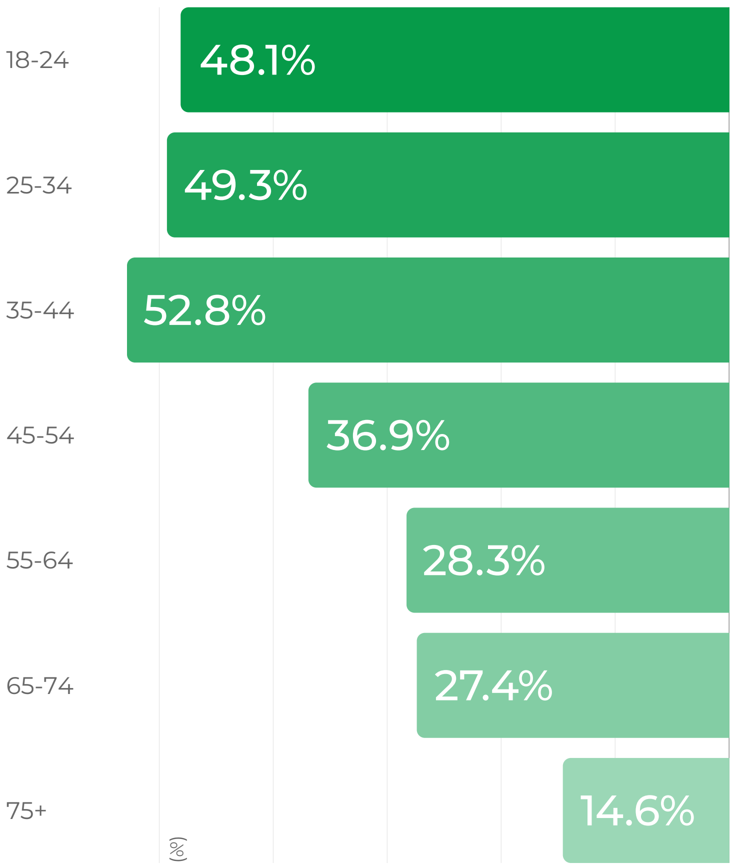
- Better in-app wayfinding to locate specific items
- Smarter substitution tools that seek approval before swapping products
- More predictable delivery and pick-up windows

Features that bring novelty without solving a particular problem attract less interest. This underscores a broader point: Consumers expect technology to reduce mental and physical effort, not add to it.

Generational priorities vary slightly. Shoppers under 45 prefer advanced digital tools like increased basket memory, personalized deals, and real-time stock updates. Older shoppers focus more on enhancing essential in-store features: clearer signage, reliable self-checkout, and human assistance. However, both groups share a key point: a desire for technology that simplifies familiar tasks, rather than technology for its own sake.

Interest in digital in-store guidance by age group

Inside Retail x Morgan's Retail consumer survey 2025



The 35-44 age group, however, emerges as the swing cohort for scan-and-go adoption. This group has the lowest "Never abandonment" rate (16.0%) and the highest "Sometimes" abandonment rate (41.6%), showing they are close to losing patience. Small improvements in checkout speed, app reliability, and clarity could tip the balance, turning potential abandoners into loyal repeat users.

This demographic has already demonstrated:

- Peak usage of supermarket apps (44.8%) and third-party delivery (48.0%)
- The highest average main-shop basket size (28.4 items), making speed and accuracy particularly valuable
- Strong interest in shop & drop delivery (35.2%), indicating a desire to outsource physical burden

For retailers, this age group is a highly valuable target. Enhancing scanning reliability, ensuring visible staffing during key moments, and achieving seamless omnichannel integration would directly address issues and probably turn passive users into active favorites. Given this cohort's basket size and frequency, boosting retention in this age group has a big impact on revenue.

The data show that shoppers would prefer a future grocery experience that feels more seamless, not radically different. Scan-and-go, omnichannel integration, and new features will be welcomed when they provide clear, tangible benefits in speed, control and reliability, combined with strong safeguards against the technical failures shoppers fear most. The path to adoption is not about innovation for its own sake but about reliability, clarity, and a commitment that no shopper will ever be left mid-transaction with nowhere to turn.

Helpful, not creepy

Writing the new data and AI rulebook

We now shift our focus from journeys to the unseen layer influencing them: data and in-store intelligence. It examines where shoppers draw the line between acceptable operational use of their data and intrusive profiling, which AI suggestions genuinely assist, and what kind of value exchange encourages shoppers to opt in. The findings again provide a clear brief for retailers: Use transaction and location data to enhance the shopping experience; treat lifestyle-level profiling and predictive AI as earned privileges; and make consent, control, and tangible benefits the foundation of any data strategy.

Shoppers clearly differentiate between operational data and personal profiling. Collecting transactional and in-store location data is generally accepted when used to enhance navigation or offers, but acceptance drops when retailers access external receipts or detailed household demographics, especially among older shoppers. Refusal rates increase steadily with age, from an average of 10.3% among 35- to 44-year-olds to 29.4% for 65- to 74-year-olds and 40.6% for those aged 75 and over, suggesting that many in the oldest groups see broad data use as an intrusion rather than a benefit.

Across all data types, the most popular position is "only with my explicit consent," which typically attracts about 35-45% of responses. Notably, the data reveal gender neutrality: Men and women show nearly identical comfort levels with data sharing across all categories, suggesting that attitudes towards privacy are more influenced by age and life stage than by gender. This challenges traditional assumptions that women are more privacy-conscious than men in retail contexts.

Data shoppers are concerned about sharing

Inside Retail x Morgan's Retail consumer survey 2025

Most concerned

28.1% Other receipts

23.1% Household size

Concerned

20.7% Store movement

20.7% Diet/ allergens

Least concerned

12.1% Purchase history

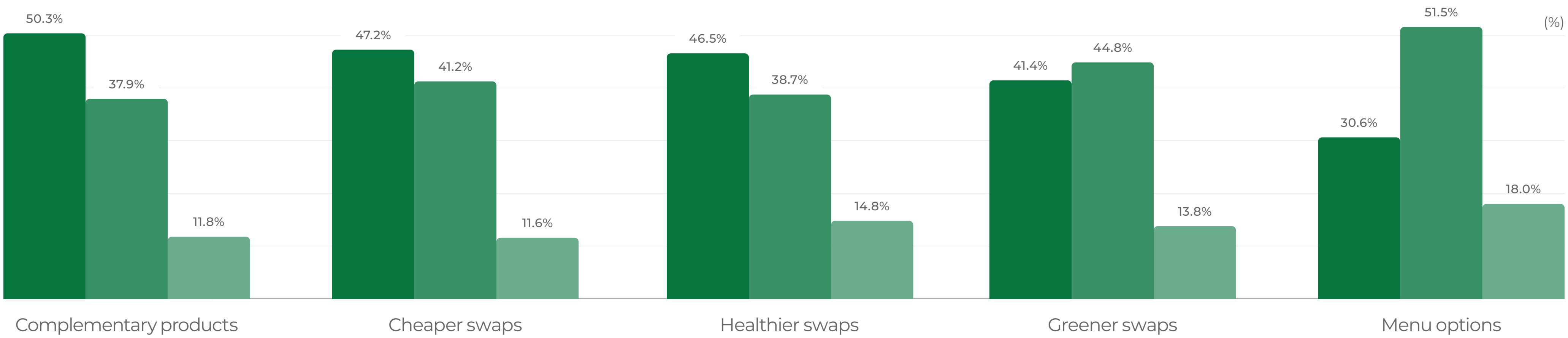
11.7% Location data

Acceptance depends on tangible, relevant value. The most celebrated feature is AI suggesting complementary products (“You bought pasta, do you also need sauce?”), which 50.3% of shoppers find useful and only 11.8% find creepy. Just behind are cheaper price swaps (47.2% useful) and healthier options (46.5% useful), where financial or nutritional benefits clearly outweigh any discomfort.

The line is crossed when AI begins to infer lifestyle or intentions. Menu planning suggestions are the least popular: only 30.6% find them useful, while they have the highest “creepy” score at 18.0%, followed by health nudging and green-swap features. Younger adults, especially those aged 25-34, are the most pragmatic, with 53.6% finding cheaper swaps useful, whereas only 22.9% of shoppers aged 75+ see these as helpful, revealing a clear generational divide in the acceptance of AI-led optimization.

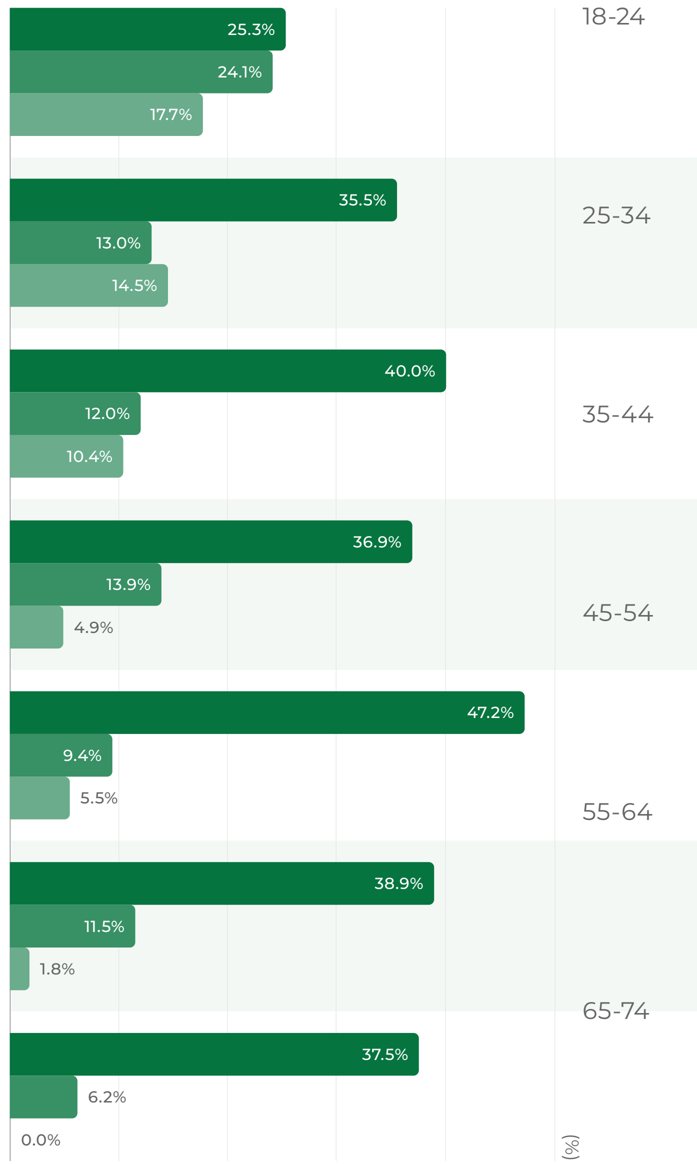
Perceived usefulness vs ‘creepiness’ of AI suggestions

Inside Retail x Morgan’s Retail consumer survey 2025



Preferred data sharing incentives by age group

Inside Retail x Morgan's Retail consumer survey 2025



The data highlight a negotiated value exchange rather than a simple yes/no. A significant proportion of shoppers are willing to share data when there is a clear, immediate benefit such as better discounts, quicker wayfinding, or genuinely useful product suggestions, but they want to control when and how that data is used. Younger and middle-aged groups, especially shoppers 35-44, who have the lowest average refusal rate (10.3%), are the most receptive when the advantages are obvious and reduce inconvenience.

This cohort, already recognized as digital power users with peak adoption of supermarket apps (44.8%) and delivery services (48.0%), represents the ideal target for data-driven personalization, as long as the value exchange is clear. Their low refusal rate and high digital fluency make them the natural early adopters of AI-enhanced shopping features.

Conversely, older shoppers regard privacy as the norm. For those age 75 or older, the average refusal rate rises to 40.6%, and "only if I explicitly opt in" becomes the standard expectation rather than an added reassurance. This indicates that overly aggressive data-collection tactics could unfairly turn away higher-value but privacy-conscious seniors.

The data show that shoppers are selectively receptive to data-driven and AI-enabled experiences. They appreciate these when they provide clear financial or time savings and are based on transparent consent. Retailers should focus on transactional and in-store data for practical improvements, while approaching broader profiling and predictive AI with particular caution, explicit opt-ins, and a clear, tangible value proposition, especially for older, privacy-conscious customers.

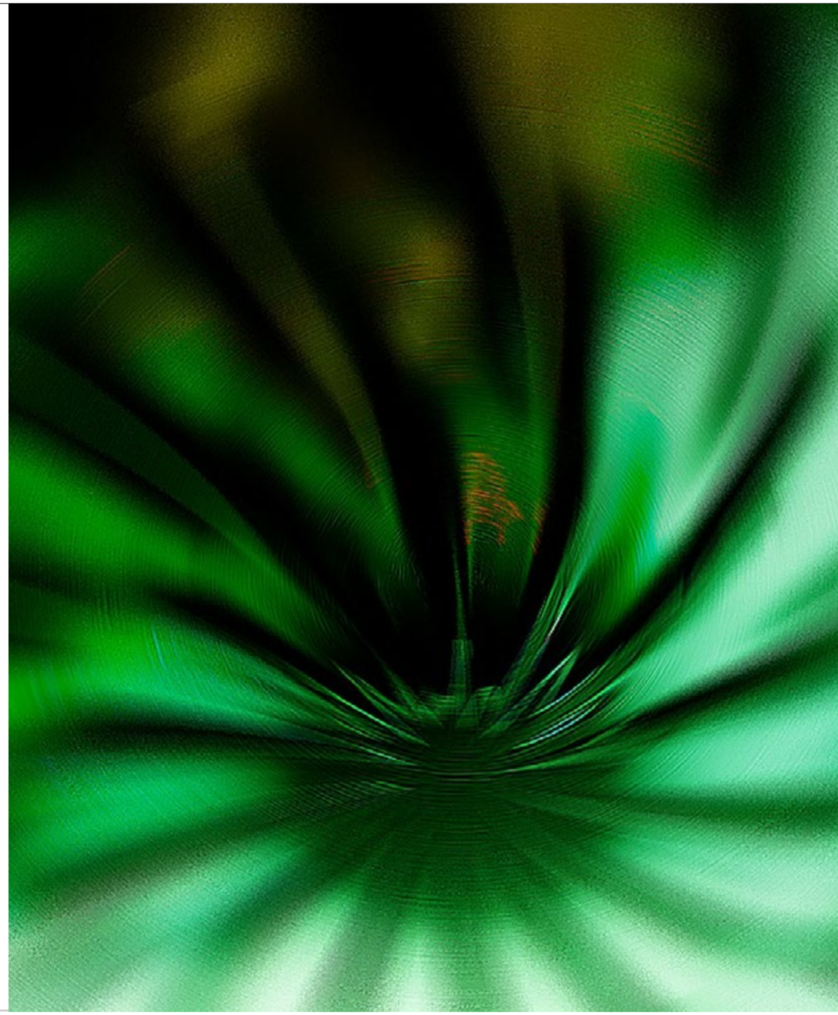
On the clock

What shoppers really expect from delivery

The final stage of the grocery experience depends on timing, accuracy and control. This section examines how quickly orders should arrive, what occurs if they don't, who has authority to approve swaps, and the specific failures that cause cancellations. The data show a clear trade-off: speed is most important to younger, busy households willing to pay for convenience, while older shoppers focus more on value and flexibility instead of strict delivery times.

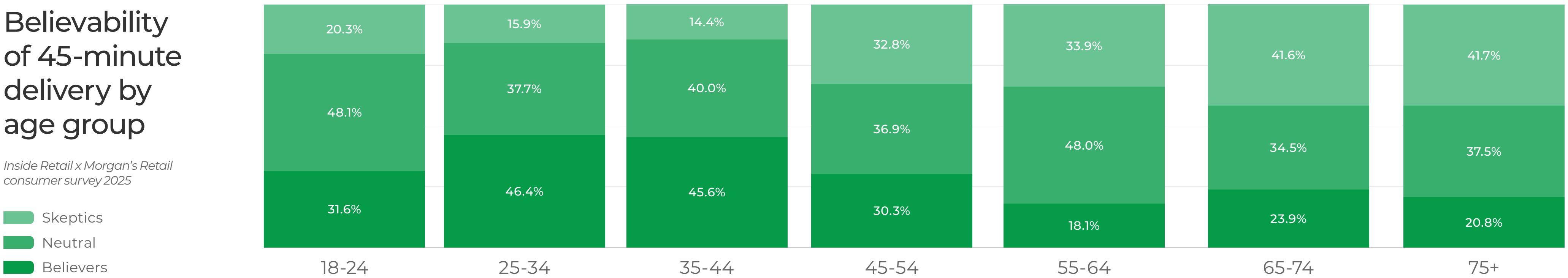
Belief that ultra-fast delivery works varies greatly with age. Younger and middle-aged shoppers, especially those aged 25-44, are most likely to find a 45-minute promise very or completely believable, reflecting their frequent use of delivery services and confidence in retailer capabilities. In contrast, skepticism steadily increases with age among those 55 and over, with many viewing it as only slightly or not at all believable.

This divide has strategic importance: The groups that shop using delivery most frequently are also the most confident in retailers' ability to meet ambitious timeframes, creating a virtuous cycle for early adopters of rapid delivery services.



Believability of 45-minute delivery by age group

Inside Retail x Morgan's Retail consumer survey 2025

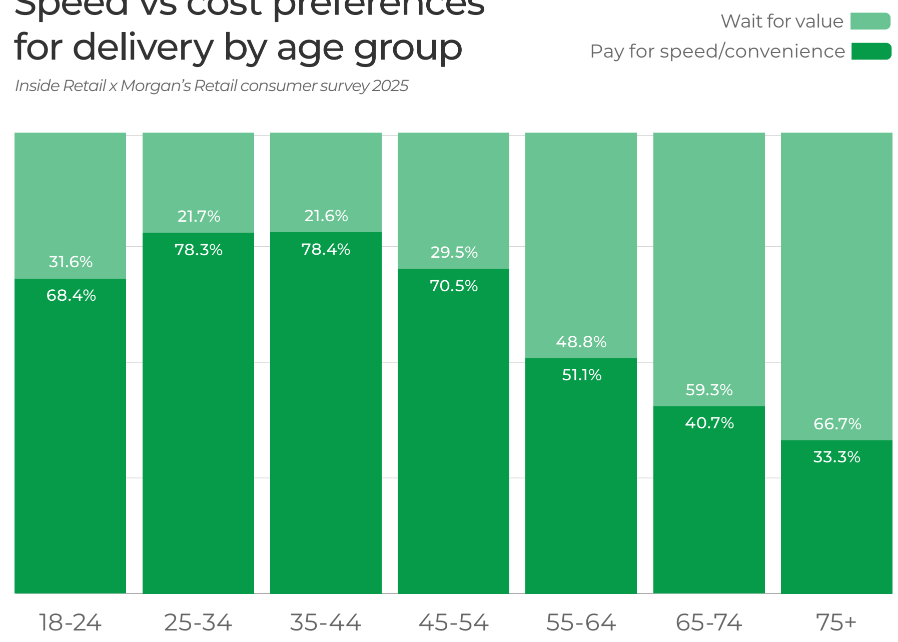


Across the sample, speed is clearly preferred over lower cost but not in every case. Shoppers under 55, especially those aged 25-44, show a strong preference for paying extra for faster or more convenient delivery windows, reflecting time-poor, schedule-driven households where people see delivery as a productivity tool. These shoppers view the time saved as worth the cost, especially those managing large baskets (28.4 items, on average, for those aged 45-54) and complex household logistics.

The picture flips for older shoppers. Shoppers aged 65+ tend to prefer waiting longer for cheaper delivery, prioritizing value for money over speed. Notably, among those 75 and over – the only group with a strong preference for slower, free delivery options – this choice is driven by cost constraints rather than environmental concerns, a distinction that challenges sustainability marketing often aimed at seniors. For this demographic, the "green/free" option appeals mainly because it is free, not because it is environmentally friendly.

Speed vs cost preferences for delivery by age group

Inside Retail x Morgan's Retail consumer survey 2025



The main cause of delivery churn is lateness. “Delivery more than 15 minutes late” ranks highest across most age groups, turning minor schedule delays into a major loyalty risk. This shift from the old “delivery within an hour” window marks a fundamental change; the new standard is ±15 minutes of the promised time.

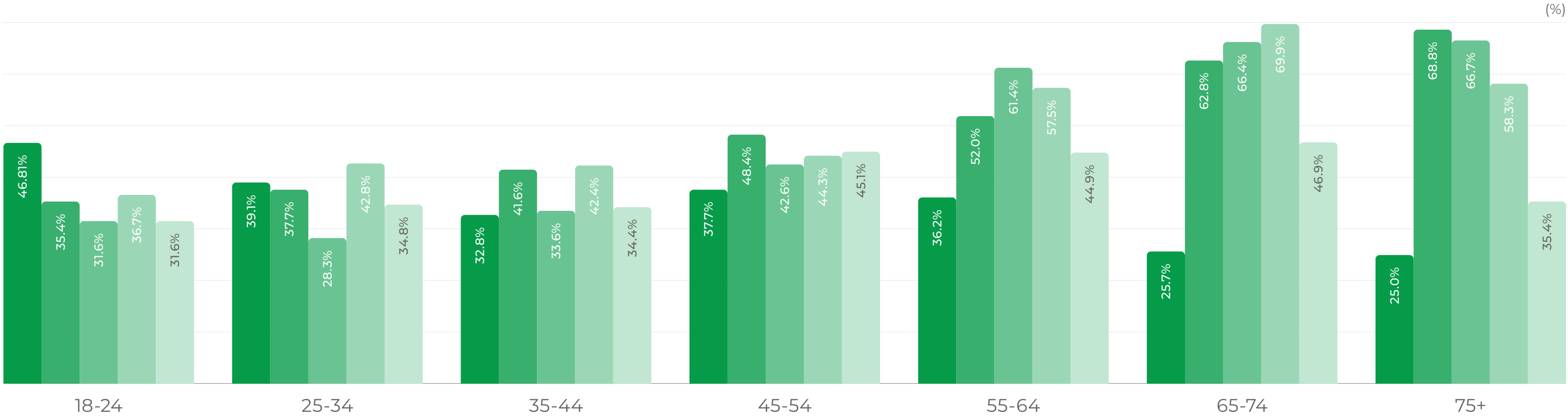
Accuracy is a key issue for shoppers. Missing items rank 1st, followed by partial orders at 2, and unapproved substitutions at 3. Shoppers judge delivery services on both timing and accuracy, and see them as equally important for a good experience.

There are clear differences between age groups. For shoppers aged 45–64, unapproved substitutions rank 1 as the main reason they stop using a service, showing they want more control over what they receive.

> Consumers want on-time delivery, delivered complete with approved substitutions

Top delivery churn drivers by age group

Inside Retail x Morgan’s Retail consumer survey 2025



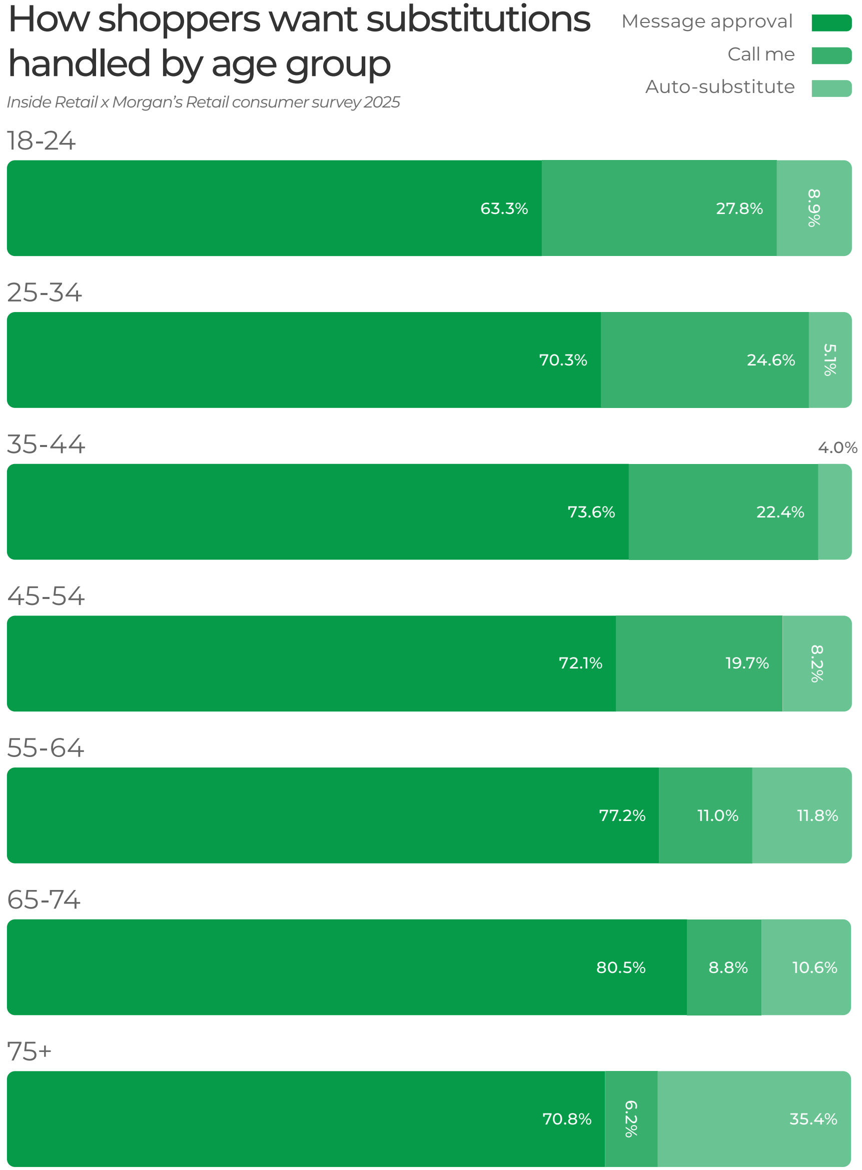
Also, shoppers want to stay in control of their decisions. Overall, 73.1% prefer to be messaged in-app for approval of substitutions, creating a digital, low-effort confirmation process that is the standard across all age groups. Simple 'allow substitutions' checkboxes or picker-led guesses no longer meet expectations for transparency and control.

Preferences differ by lifestage. People aged 18-24 are most likely to request a phone call (27.8%), indicating that for complex or urgent orders, a quick voice chat feels faster than messaging. Meanwhile, shoppers aged 75+ are the most comfortable with auto-substitution of a 'best match' (22.9%), trusting the retailer to choose a suitable alternative, which reflects their lower digital fluency and willingness to delegate when efficiency benefits are clear.

Delivery expectations are shaped by precision, control and transparent trade-offs. Younger and middle-aged shoppers value quick fulfillment, are willing to pay for it, and will readily switch if there are minor delays, making reliability a key competitive factor. Older shoppers prioritize value, accuracy, and simplicity, even if it means accepting slower delivery times. The key insight is not that one segment is better, but that retailers cannot apply a uniform delivery approach; operational design must reflect fundamentally different value hierarchies across age groups.

How shoppers want substitutions handled by age group

Inside Retail x Morgan's Retail consumer survey 2025

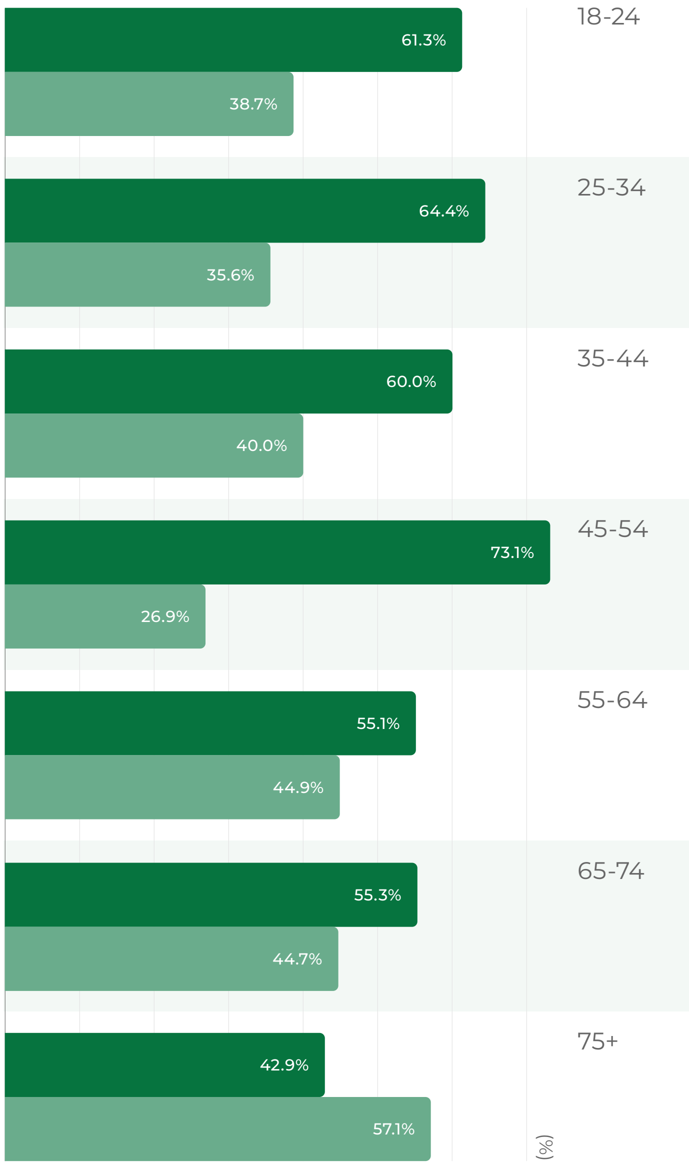


Speed, waste and responsibility

Writing the grocery sustainability contract

Preference for fast and paid vs. slow, green and free by age group

Inside Retail x Morgan's Retail consumer survey 2025



When shoppers choose between "Fast & Paid" and "Slow, Green & Free," interest in sustainability grows, but price and convenience still influence their choice. Overall, 60.5% prefer faster paid delivery, showing that even when a free, eco-friendly option exists, most people will still pay to get their groceries sooner. For many households, time remains the main factor in grocery e-commerce, with green seen as a bonus rather than a primary benefit. Age influences this trade-off.

The 75+ age group is the only cohort in which a majority (57.1%) opt for the slower green/free window, but broader data indicate this is about value and flexibility rather than eco-activism; seniors on fixed incomes can afford to wait and prefer not to pay extra. Conversely, those aged 45-54 are the most willing to pay for speed, with 73.1% rejecting the free/green slot, reflecting their peak earning capacity, combined with peak time-poverty.

Sustainability messages are everywhere, but trust remains fragile. The data reveal a clear 'cynicism curve' peaking in middle age. The 35-44s are the most skeptical group: 39.2% find "zero-waste" claims not at all or only slightly believable, showing that this key group has learned to spot greenwashing and now demands real proof, like verifiable supply chains, before believing bold promises. This skepticism is especially noteworthy because the 35-44 cohort are also heavy digital users and the main customers for delivery services, precisely the segment retailers target with sustainability claims.

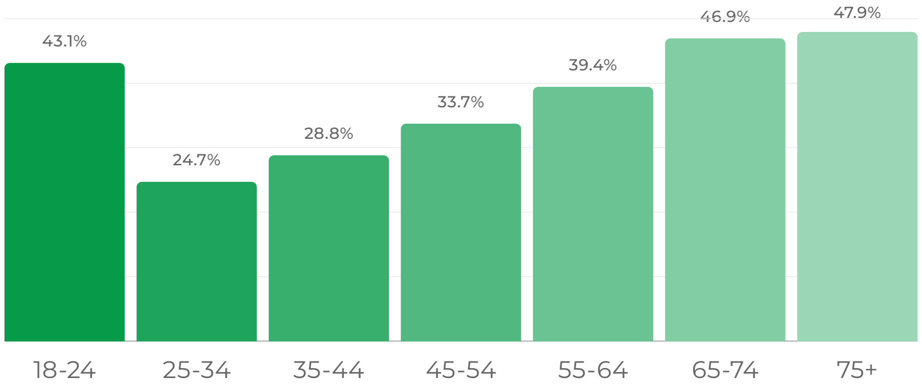
Trust levels are higher at both ends of the age spectrum. Only 21.5% of those 18-24 and 25.0% of those aged 75+ fall into the skeptic camp, though for different reasons: Younger shoppers are concerned about the climate but remain optimistic about solutions, while seniors tend to trust institutional messages more. Across all ages, the largest group, about one-third of shoppers, is in the "somewhat believable" category in the middle, adopting a 'trust but verify' approach rather than outright belief.

The desire for greener options doesn't always mean people are willing to pay more. If a sustainable store charges the same as a regular one, just over half of shoppers (50.1%) say they would switch, setting a clear but not universal "parity threshold" for green retail. However, raising prices by just 5% significantly drops this willingness. Switching falls to 27.4%, indicating that, for most shoppers, sustainability is a secondary consideration, rather than a benefit for which they are ready to pay extra.

The pattern switches when sustainability becomes more affordable. If the greener store is 5% cheaper, the willingness to switch rises to 64.1%, highlighting the combined appeal of value and ethics, although a third of shoppers still stay loyal due to location and habit. The willingness to pay a 'green premium' is mainly among those under 45, with about 41% of those 18-34 accepting a 5% increase; meanwhile, only 6.2% of shoppers aged 75 and over would do the same, making any price rise a clear dealbreaker for seniors.

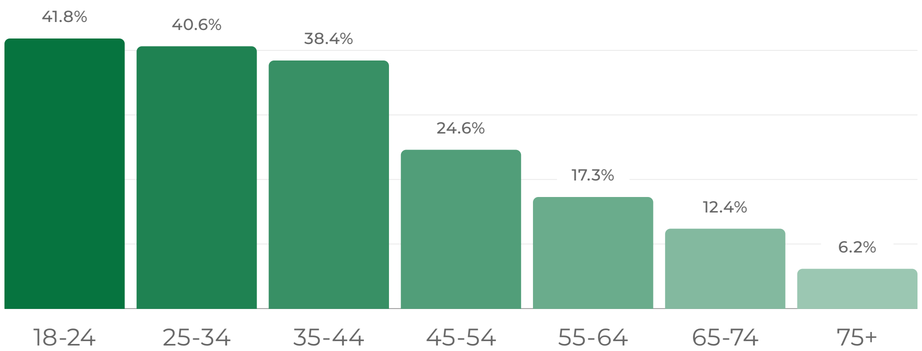
Belief in 'zero-waste' claims by age group

Inside Retail x Morgan's Retail consumer survey 2025



Willingness to switch to a sustainable store 5% premium by age group

Inside Retail x Morgan's Retail consumer survey 2025

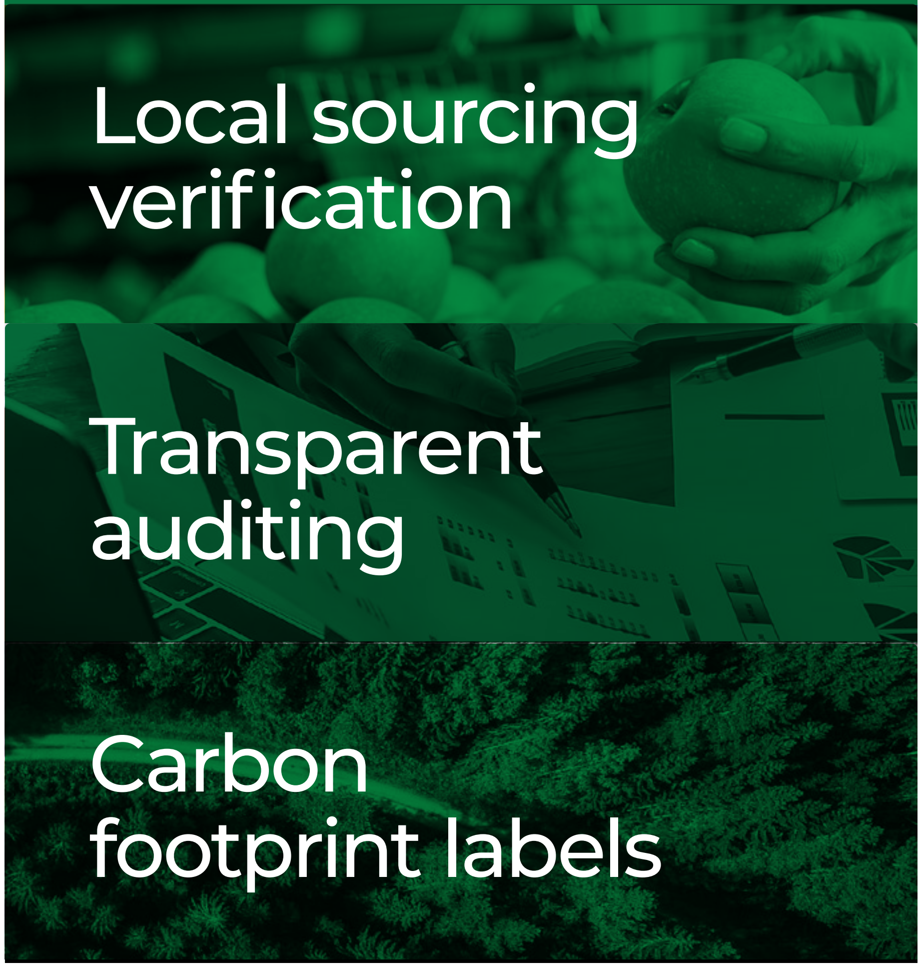


In a market filled with eco-logos and distant net-zero commitments, shoppers are turning to simpler proof points. Across the sample, 40.4% say "local sourcing verification" is the most important factor in judging whether a sustainability claim is credible, making proximity a stronger signal than complex carbon metrics or third-party seals. The appeal of "local" peaks among 75+ shoppers, with 58.8% naming it as their top credibility driver, reflecting a preference for impacts they can see and understand.

Younger age groups look for different cues. Among 18- to 24-year-olds, 31.3% focus on carbon footprint labels, showing their comfort with quantified information on packaging, while 25- to 34-year-olds have the highest demand for transparent supply-chain auditing (29.9%), wanting to "see the receipts" behind any claim. Traditional third-party certifications now rank lowest overall at 10.2%, indicating logo fatigue and a clear move towards more straightforward, visible indicators of impact.

Overall, the data show that sustainability influences purchase choices only when it aligns with value, convenience, and credible proof. Shoppers favor green offers that are cost-neutral or cheaper, described in clear, verifiable terms, especially through local sourcing. Conversely, premium pricing and vague 'zero-waste' claims are likely to appeal only to a small, younger demographic. For retailers, the best approach isn't greenwashing but offering transparent, local, and affordable sustainability that prioritizes the shopper's main concerns – time and budget.

Key drivers of sustainability credibility



Across missions, channels, automation, delivery and sustainability, shoppers consistently share a clear view of what a successful grocery "system" should be: It is quick but not hurried, digital but not cold, local but supported by logistics, and intelligent without feeling intrusive.

This last section distills these signals into a concise set of non-negotiables for retailers, offering practical steps that transform scan-and-go journeys, credible delivery promises, and trustworthy data use from small-scale experiments into the everyday backbone of the weekly shop.

Design for the hybrid, local mission

Shoppers still organise their behavior around a nearby weekly 'Big Shop,' but increasingly connect in-store, app and delivery touchpoints to complete it. Networks and formats need to reflect this by prioritizing local full-range stores within a 15-minute radius of population centers, supported by digital tools that allow customers to plan in the app, execute in-store, and decide whether to carry or get delivery at the end.

Build a click-and-go backbone

Across different age groups, the trend is clear: Shoppers prefer to scan, click, and go rather than queue, re-scan and wait. Scan-and-go features, in-app wayfinding, and guided-shop tools are widely valued, especially by the 25-44 age bracket, if scanning is highly reliable, exits are instant, and there's a visible safety net if technology fails. Retailers should view the store app as a navigation and transaction tool, not just a digital flyer.

Engineer delivery and fulfilment around precision and control

The last mile is no longer just an additional service; it becomes a crucial factor in building loyalty. Mid-life households are willing to pay for 45-minute or same-day promises but will quickly churn if orders are late, incomplete, or substituted without approval. This requires tightening delivery windows to ±15 minutes, establishing robust substitution approval processes (message-first, call if needed), and offering options like "shop-in-store, deliver-to-home" that separate the carry from the store experience while keeping it seamless.

Split the experience by lifestage, not channel

The data reveals two main types of shoppers under one roof: those under 45 who are digital power-users with low friction tolerance, and shoppers over 55 who are store-loyal and slower to adopt automation but highly valuable. Stores and services should explicitly cater to both, with fast, self-directed "speed lanes" (Scan-and-go, rapid delivery, digital guidance) for younger shoppers and well-staffed, reliable, low-tech options for seniors who value dependability and human assistance.[1]

Make automation and data feel safe, transparent and optional

Shoppers are willing to try staff-lite formats and AI-powered suggestions, but nearly half feel uneasy if they cannot see how to get help or how their data is used. The winning approach is having visible staff or a clear help button, transparent running totals to ease concerns about overcharging, explicit consent for broader data use, and AI focused on practical value (like suggesting complementary items or cheaper swaps), rather than lifestyle prediction that seems "creepy."

Bury friction and waste in the same move

The biggest everyday frustrations – finding products, dealing with out-of-stocks, managing substitutions, and carrying heavy loads – overlap with sustainability and waste concerns. Retailers can address both by improving product discoverability, reducing overbuying through list syncing and basket visibility, tightening inventory accuracy to prevent failed picks, and encouraging lower-waste options that do not add time or complexity to the shopping experience.

More at morgan's

Data used in this report was collated from a survey of 750 primary U.S. grocery shoppers. Respondent criteria were strictly limited to active household purchasers to ensure high data relevance and quality.

REPORT BY

InsideRetail®