

The 2026 Ecommerce Trends Report



New consumer data on the behaviors
reshaping ecommerce conversion right now.

The Moment of Intent Is Where Brands Win – or Lose



Retail didn't simply become more digital this year. It became more decisive.

Consumers have settled into hybrid behavior. The majority now combine online and in-store shopping as a baseline, not a preference. This is not a temporary shift. It's a stabilized middle.

But channel behavior is not the real story. The real story is what happens when intent forms. When a shopper adds to cart, scans a shelf, taps into a promotion, or prepares to check out, they are signaling commitment.

That moment carries more weight – and more risk – than many brands account for. Completion now hinges on two forces: value and availability.

Promotions are the top determinant of whether a purchase is finalized. In-stock status follows closely behind. At checkout, shoppers reassess cost, convenience, and whether the item is available where they want to buy it.



Inside This Report

1. Hybrid Shopping Is the New Baseline

Consumers now move fluidly between online and in-store environments.

2. Value Is Reshaping the Basket

Price pressure is changing brand choice, loyalty, and purchase behavior.

3. Discovery Happens Inside Commerce

Consumers most often discover products while actively shopping.

4. Online Grocery Is Now Routine

Digital grocery shopping has become a regular behavior for most consumers.

5. Discovery Doesn't Guarantee Purchase

Most shoppers save, research, or return later before deciding.

6. The Cart Is a Decision Layer

Carts are used to evaluate, plan, and organize purchases before checkout.

7. Checkout Is the Final Filter

Price, convenience, and availability determine whether purchases happen.

8. Out-of-Stocks Put Loyalty at Risk

When preferred products aren't available, shoppers switch quickly.

9. How Brands Win at the Moment of Intent

Strategies brands can use to capture demand and convert it into retail sales.

This report is based on a national survey of 600 U.S. consumers conducted on February 2, 2026.



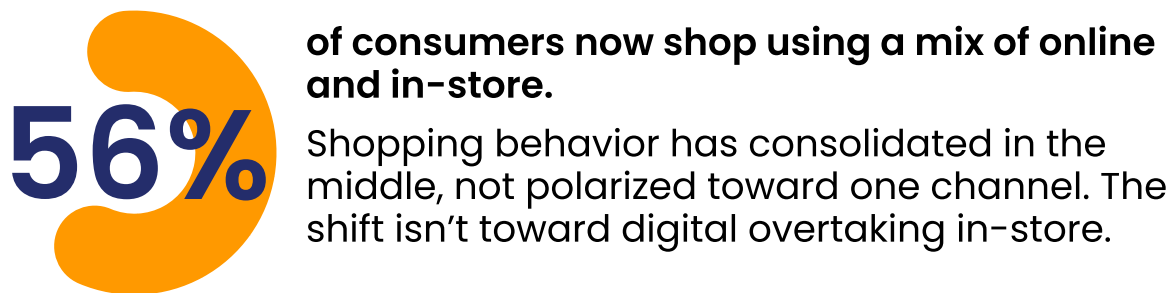


Trend

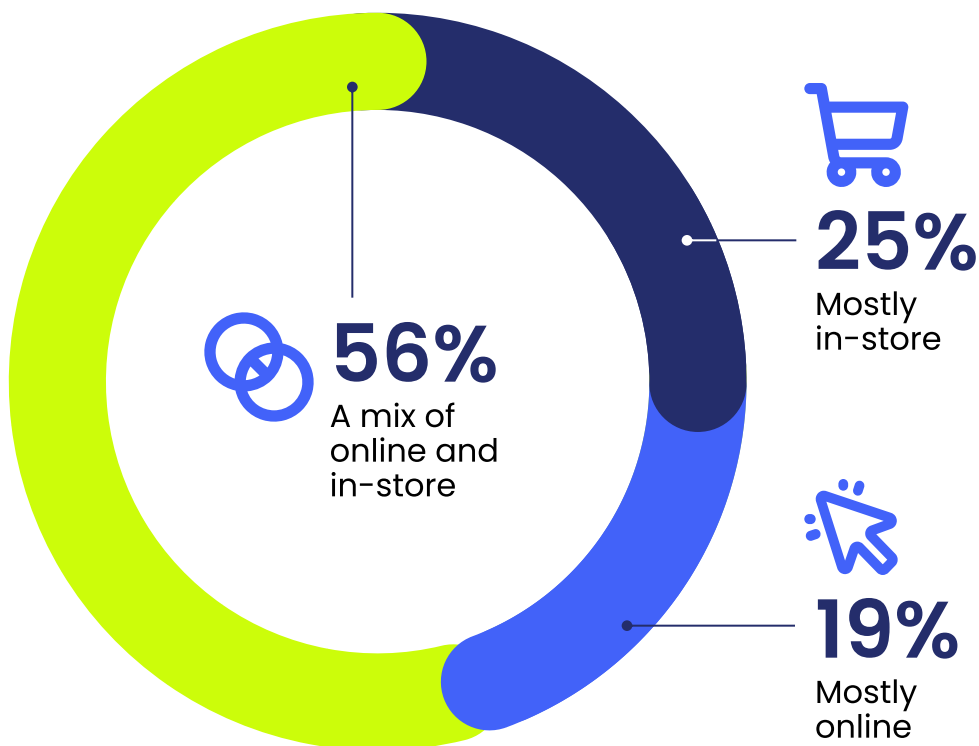
**Hybrid Shopping Is the
New Baseline**

Hybrid Is Locked In

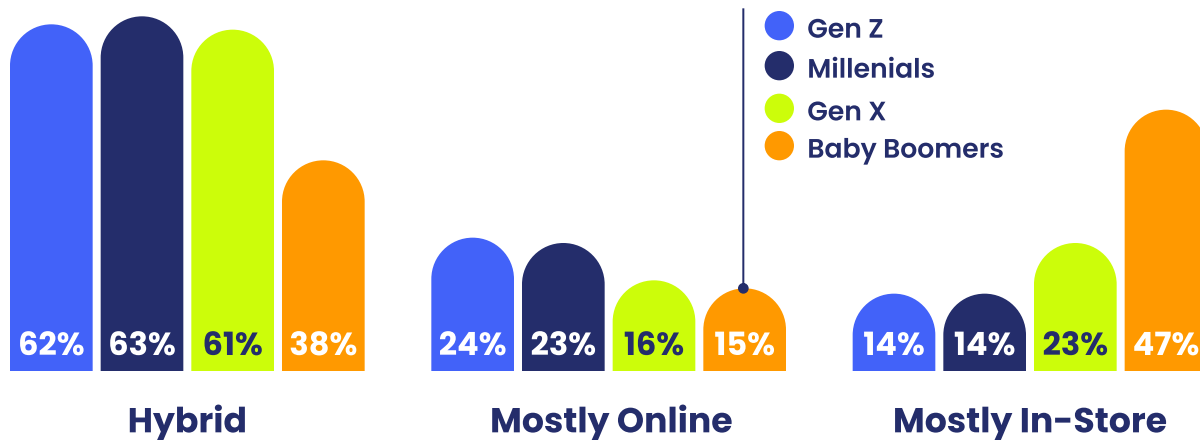
Hybrid is now the majority behavior. Online-only shopping remains a minority, and in-store-only is no longer dominant. Commerce has settled into a blended shopping model.



How Consumers Shop Today



Hybrid Spans Generations



For consumers under age 62, hybrid behavior consistently sits around 60% across all age groups. Among older shoppers, in-store still leads – but **hybrid adoption has risen meaningfully year-over-year, increasing from roughly 13% to 38%**. Even the most store-loyal generation is blending channels.



Be Everywhere

Consumers are no longer navigating retail in isolated environments. Discovery, comparison, carting, and fulfillment move fluidly between digital and physical spaces.

For brands, presence cannot be channel-specific. Performance must carry across both. Because hybrid isn't emerging, it's established.

Key Insights

- ◆ **Hybrid is structural, not transitional.**
Shopping has stabilized into a blended digital and physical model across generations.
- ◆ **The journey no longer belongs to one channel.**
Discovery, evaluation, carting, and fulfillment move fluidly between online and in-store environments.
- ◆ **When teams operate in silos, the shopper feels it.**
Media may generate demand, but inventory, retailer preference, and checkout experience determine whether that demand converts.
- ◆ **Intent is fragile across touchpoints.**
Each shift between social, retailer, and store creates a new decision point — and an opportunity to lose the sale.
- ◆ **Hybrid increases competitive exposure.**
The more fluid the journey, the more chances competitors have to intercept demand before it converts.



An abstract graphic featuring a large white semi-circle at the top. Below it, a blue shape curves from the left towards the center. A green shape follows this curve, extending from the left towards the bottom right. A bright yellow shape is at the bottom left, partially obscured by the green shape. The word "Trend" is written in white on the green shape.

Trend

Value Is Reshaping the Basket

Price Sensitivity Is Driving Action

40%

of consumers are using more promotions or digital coupons to manage spending.

Price pressure is not abstract. It is shaping how consumers shop and what they are willing to change.

How Consumers Are Managing Spending

40% Used more promotions or digital coupons

37% Bought bulk sizes / stocked up

34% Switched products or brands

19% Bought smaller sizes

16% Delayed purchases

Respondents could select multiple actions.

These are active adjustments, not minor shifts. Consumers are modifying brand choice, basket composition, and purchase timing in response to cost.

Promotion engagement is now mainstream. With **four in ten consumers using digital coupons or promotions**, value is no longer a secondary message – it is central to the purchase decision.



In this environment, clear and visible value increasingly determines which products stay in the basket and which are replaced. Price pressure isn't just changing what shoppers spend – it's reshaping how they shop.

Key Insights

- ✦ **Value is now a primary decision driver, not a secondary message.**
 Four in ten consumers are actively using promotions or digital coupons to manage spending.
- ✦ **Shoppers are adjusting behavior, not just budgets.**
 Switching brands, changing pack sizes, stocking up, and delaying purchases are becoming routine responses to cost pressure.
- ✦ **Brand loyalty is increasingly conditional.**
 When value shifts, shoppers are willing to shift with it.
- ✦ **Promotions influence what stays in the basket.**
 Clear, visible incentives often determine which products convert — and which are replaced.
- ✦ **Price pressure amplifies competitive substitution.**
 In a value-driven environment, small differences in cost or incentive can redirect demand quickly.

Make value visible at the moment of decision.

Attach digital incentives like cashback or coupons directly to purchase links.

[Learn how](#)

The background features large, flowing, organic shapes in shades of blue and green. A large blue shape occupies the upper left and center, while a large green shape occupies the lower left and center. The shapes overlap and flow together, creating a sense of movement and depth. The text is overlaid on these shapes.

Trend

**Discovery Is Embedded
in Commerce**

Retail Environments Drive Product Discovery

61%

of shoppers most often discover new products while actively shopping.

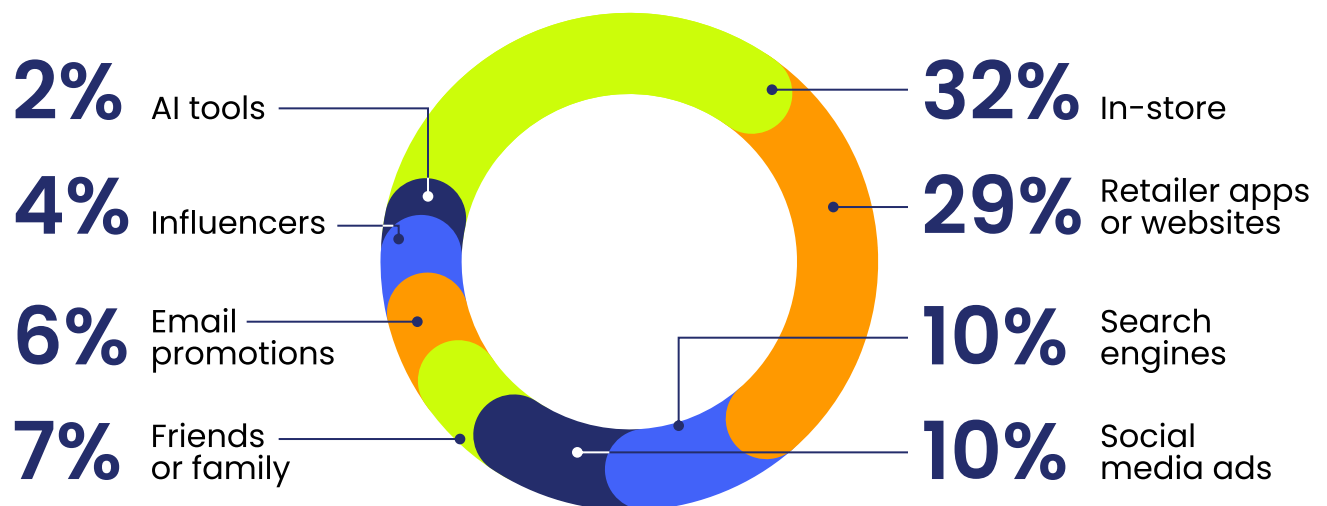
Consumers today feel constantly influenced – by social feeds, creators, and algorithms. But for most shoppers, discovery still happens inside the retail experience itself, both online and in-store..

“We've got to get it out of our heads that consumers don't want to buy when they see something”

— Jennifer Silverberg, Founder, SmartCommerce



Where Consumers Most Often Discover New Products



Retail environments are primary discovery engines. Whether shoppers are browsing store shelves or retailer apps, many of the products they encounter for the first time appear while they are already shopping. Search and social contribute to awareness, but remain secondary to the places where consumers are actively buying.

Despite growing attention around AI-driven shopping, only 2% say they most often discover new products through AI tools.

Key Insights

- ✦ **Discovery most often happens inside retail environments.**
Six in ten consumers say they most often discover new products while actively shopping – online or in-store.
- ✦ **Commerce is influencing introduction, not just conversion.**
Retailer websites, apps, and store shelves are primary discovery surfaces.
- ✦ **Social/search spark awareness – retail closes the loop.**
External channels play a role, but the retail ecosystem is where exposure most frequently becomes action.
- ✦ **Visibility inside retail environments shapes both trial and repeat.**
Introduction and conversion are increasingly happening in the same place.
- ✦ **AI-driven discovery remains minimal.**
Only 2% report most often discovering new products through AI tools.

Capture intent before shoppers disappear into retail.

Collect voluntary email or SMS opt-ins at the moment a shopper clicks to buy.

[Learn how](#)

The background features abstract geometric shapes. A large blue triangle points towards the top right. A green shape, resembling a stylized 'L' or a large triangle with a notch, is on the left. A smaller blue and green triangle is positioned in the center-right. A yellow rectangle is at the bottom.

Trend

Online Grocery Is Now Routine

Online Grocery Is an Eight-in-Ten Behavior



of consumers shop for groceries online with regularity.

Online grocery shopping is no longer a fringe behavior – it's part of the weekly routine for most consumers.

The Generational Shift

24% Gen Z

23% Millennials

16% Gen X

15% Baby Boomers

Buy online always or primarily

Younger shoppers are driving the shift toward online grocery as a primary purchasing channel.



Adoption is widespread – but intensity varies.

The difference lies in role. For younger generations especially, online grocery functions as a primary purchasing channel rather than an occasional complement.

Half of Gen Z and Millennials say they buy groceries online either always or primarily. Among Gen X and Baby Boomers, online remains more supplemental – but it is firmly part of the mix, with **52%** of Gen X and **45%** of Baby Boomers reporting that they shop online occasionally.

Key Insights

- ✦ **Online grocery is no longer occasional – it's embedded.**
Eight in ten consumers shop for groceries online with regularity.
- ✦ **For younger generations, online is a primary channel.**
Half of Gen Z and Millennials report buying groceries online always or primarily.
- ✦ **Even older shoppers have integrated online into the mix.**
Among Gen X and Baby Boomers, online may be supplemental, but it is firmly part of routine behavior.
- ✦ **Grocery purchasing is becoming increasingly hybrid.**
Consumers move between digital ordering and physical stores as part of weekly shopping habits.
- ✦ **Routine purchasing environments shape brand exposure.**
The platforms consumers use regularly influence what they see, consider, and ultimately buy.

Make routine purchases easier – and bigger

Bundle complementary products into a single add-to-cart action.

[Learn how](#)

An abstract graphic featuring a large white circle on a white background. A thick green horizontal bar crosses the circle, with a green circle at its right end. A blue horizontal bar is positioned above the green one, also crossing the white circle. On the left, a vertical bar with a blue-to-green gradient runs down the edge. The word "Trend" is written in white on the green bar.

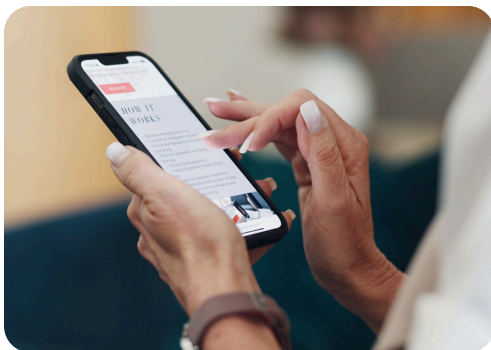
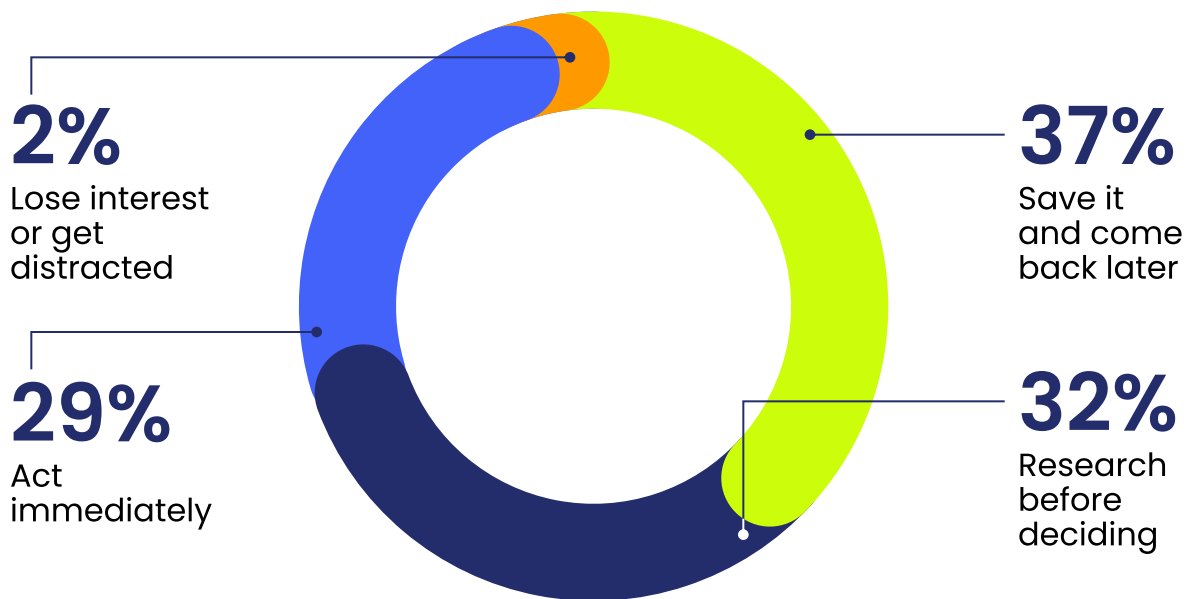
Trend

**Discovery Doesn't
Guarantee Purchase**

Discovery Doesn't Guarantee Conversion

Discovery starts the journey, but it rarely finishes it. After encountering a new product, most consumers do not purchase immediately. They pause. They save. They research. They come back later. Intent builds before it converts.

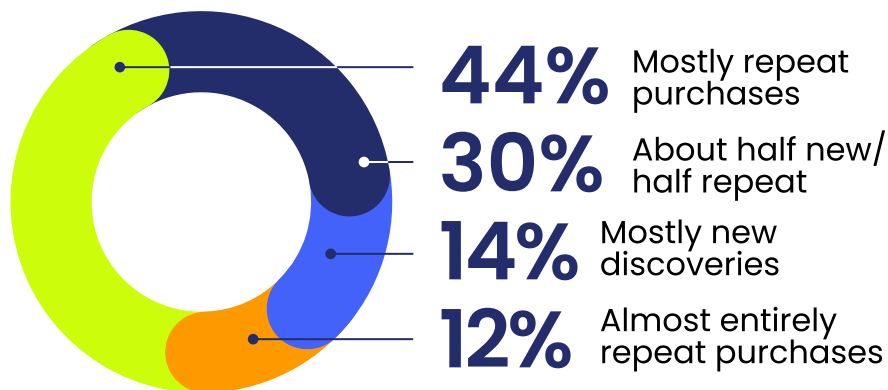
What Happens After Discovery



Discovery also operates within habit.

For most shoppers, encountering a new product begins a period of consideration rather than an immediate decision. Saving and researching help keep items in play until the purchase moment arrives.

New vs. Repeat Online Purchases



Most baskets are built on habit. Online purchasing is largely repeat-driven. New products must break into established routines.

Discovery matters, but visibility, reinforcement, and ease determine whether that discovery turns into sustained purchasing behavior.

Key Insights

- ✦ **Discovery rarely leads to immediate purchase.**
Most consumers save, research, or return later rather than buying in the moment.
- ✦ **Intent builds over time.**
Saving to cart and researching are part of the decision process – not signs of lost interest.
- ✦ **Online purchasing is largely habit-driven.**
The majority of shoppers report mostly repeat purchases, not constant new discovery.
- ✦ **Breaking into routine is the real challenge.**
New products must overcome established buying patterns to earn sustained placement in the basket.
- ✦ **Visibility alone does not secure conversion.**
Reinforcement, ease, and value determine whether initial interest becomes repeat behavior.



Trend

The Cart Is a Decision Layer

The Cart Is a Decision Layer

Online carts now serve two distinct functions in the purchase journey.

For some shoppers, the cart is immediate – **35%** say they primarily use their cart to check out right away. That's up from **27%** last year who said they built a cart and completed purchase in the same session.

For others, the cart is deliberate.

42%

use their cart to save items over time.

16%

use it as a shopping list for in-store trips.

58%

use the cart as a planning tool in some capacity.

For these shoppers, the cart functions more like a working list than a final checkout screen.

How Shoppers Use the Cart

Immediate Use

35% 2026

Check out immediately

27% 2025

Check out immediately

Planning Use

42% 2026

Save items over time

16% 2026

Use as an in-store shopping list

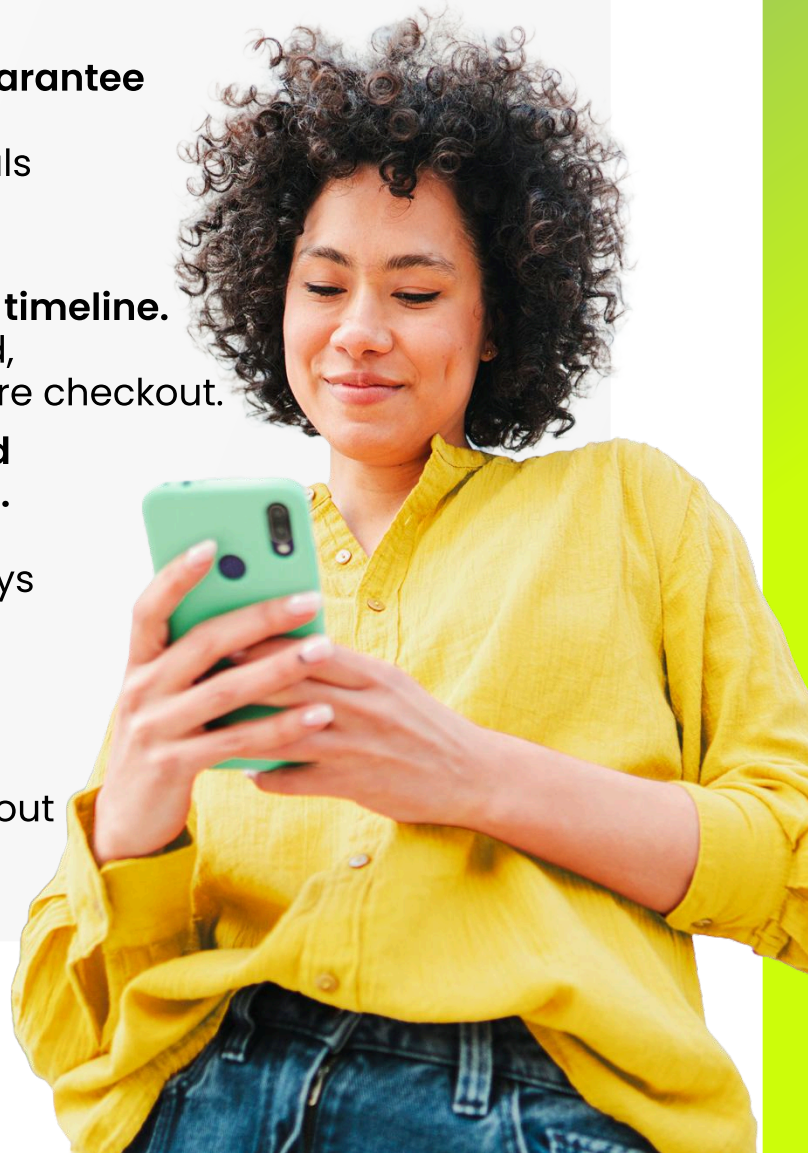
The cart reflects intent in motion. Sometimes that intent converts quickly. Sometimes it matures over time.

For brands, this shifts the focus from **“Did it convert right now?”** to **“How is intent being carried forward?”**

What happens next depends on value, availability, and ease.

Key Insights

- ✦ **The cart now serves two roles: transaction and planning.**
While some shoppers check out immediately, the majority use the cart to save items or organize future purchases.
- ✦ **Adding to cart does not guarantee immediate conversion.**
For many shoppers, it signals consideration rather than commitment.
- ✦ **Carts extend the purchase timeline.**
Items may sit, be evaluated, compared, or revisited before checkout.
- ✦ **The cart is where value and availability are reassessed.**
What enters the cart is only part of the story – what stays determines the outcome.
- ✦ **Intent is visible before purchase is complete.**
The cart reflects active demand, even when checkout hasn't yet occurred.





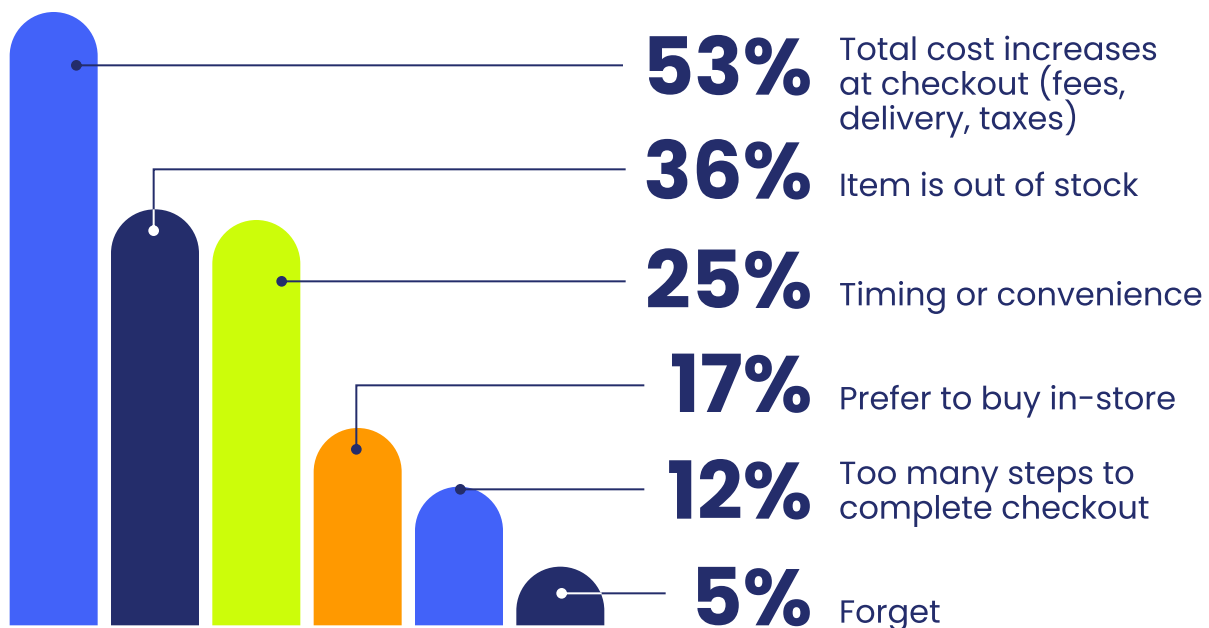
Trend

Checkout Is the Final Filter

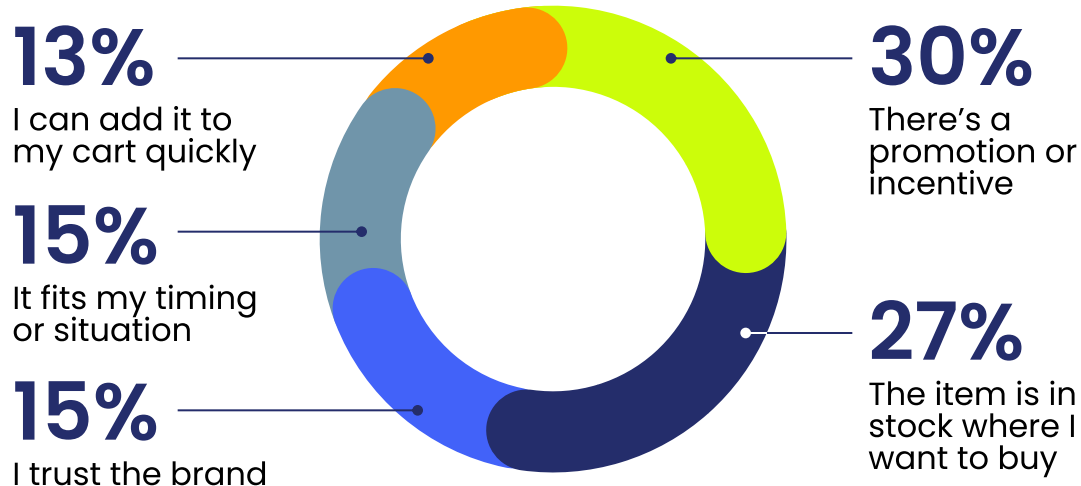
Checkout Is a Reality Check

Adding to cart signals intent. Checkout determines commitment. At the final step, consumers reassess value, availability, and convenience before completing purchase.

What Prevents Checkout?



The biggest barriers are not technical, they're economic and practical. Cost clarity matters. Inventory availability matters. Convenience still plays a role.



At the final moment, value edges out everything else. Promotions slightly outrank availability. Availability outranks brand trust. Speed matters but far less than price and stock.

For brands, earning a place in the cart is critical. But conversion depends on whether value and availability hold up under scrutiny. Checkout is where intention becomes commitment.

Key Insights

- ✦ **Checkout is where intent is tested.**
 Adding to cart signals interest, but final purchase depends on what happens at the last step.
- ✦ **Cost transparency has outsized influence.**
 Unexpected fees, delivery costs, and taxes are the leading cause of abandonment.
- ✦ **Availability can override brand preference.**
 If an item is out of stock at checkout, shoppers move on.
- ✦ **Promotions are the strongest completion lever.**
 Incentives slightly outrank availability as the top factor influencing final purchase.
- ✦ **Speed matters – but value matters more.**
 Convenience plays a role, yet price and stock ultimately determine commitment.



Trend

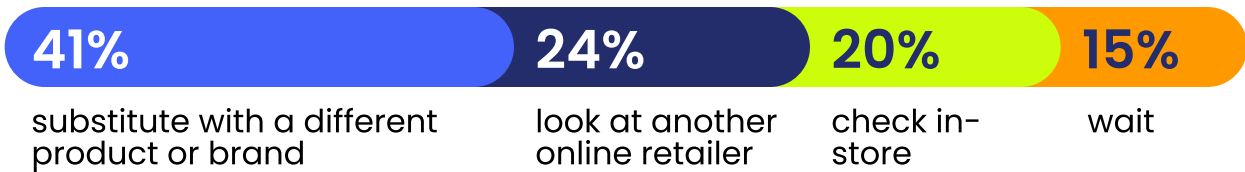
**Out-of-Stocks
Put Loyalty at Risk**

Out-of-Stocks Are a Major Brand Risk

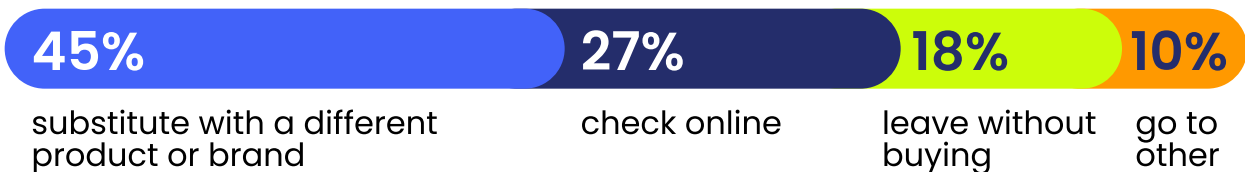
Out-of-stocks are not rare exceptions. They're routine. **67%** of shoppers encountered an out-of-stock online in the last 3 months. And when it happens, shoppers move.

What Happens When an Item Is Out of Stock?

Online:



In-store:



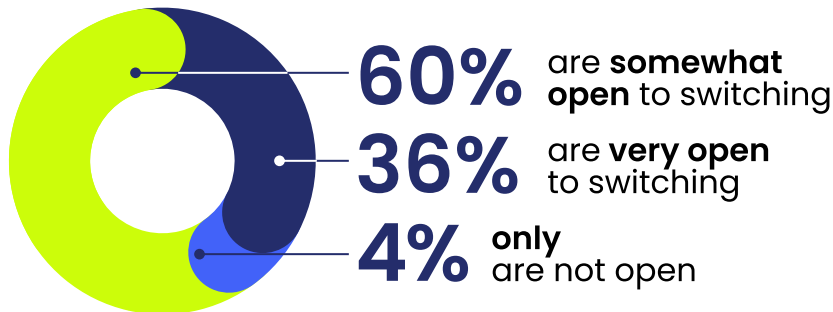
Waiting is the minority behavior, switching is the majority.



When shoppers can't find what they came for, they quickly pivot to alternatives within reach. Whether online or in store, the purchase decision often shifts in the moment rather than being delayed.

And Consumers Are Open to It

When their first choice isn't available:



That means 96% are at least somewhat willing to switch. Loyalty has limits.
Availability wins.



"Our mission has always been simple: eliminate friction between inspiration and purchase. We're proud to help brands improve performance, prove ROI, and create shopping experiences that turn engagement into measurable revenue for our clients."

Why This Matters More Than It Seems

69% of shoppers regularly shop at just **2–3 retailers** per month. If you're out of stock at one of them, you're not just losing a sale. You're inviting a substitution inside a highly concentrated shopping set. Out-of-stocks don't pause demand. They redistribute it.

What This Means for Brands

Presence isn't enough. Promotion isn't enough. If you are not available where shoppers expect you to be, someone else will be. Availability is performance.

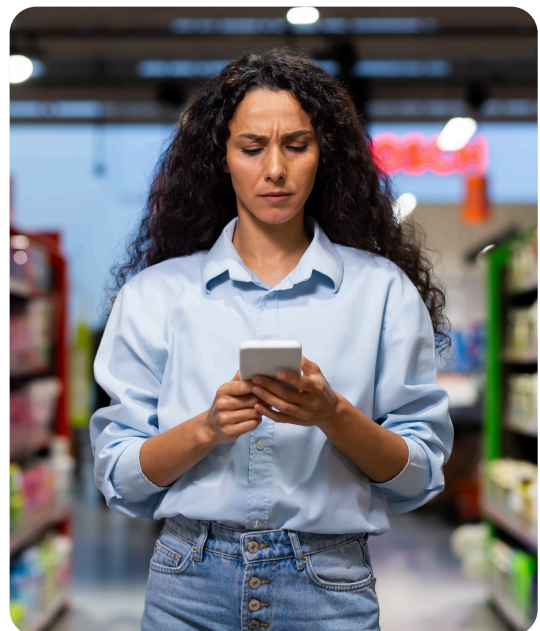
Key Insights

- ✦ **Out-of-stocks are the norm, not the exception.**
 Two-thirds of shoppers encountered one in the last three months.
- ✦ **Most shoppers won't wait.**
 They substitute, check another retailer, or abandon the purchase instead of delaying.
- ✦ **Brand preference weakens under pressure.**
 Ninety-six percent of consumers are at least somewhat open to choosing a different brand when their first choice isn't available.
- ✦ **Availability often outweighs loyalty.**
 Stock status can override established brand habits.
- ✦ **Out-of-stocks redirect revenue.**
 When availability breaks, sales shift quickly within a small group of regularly shopped retailers.

Protect Sales When Products Go Out of Stock

SmartCommerce helps brands reduce out-of-stock impact to just **0–2%** with **SmartSubstitution**, automatically replacing unavailable items with in-stock, in-brand alternatives so shoppers can still complete their purchase.

[See it in action](#)





From Insight to Action

What these behaviors mean for
brands — and what to do next.

Five Ways Brands Can Respond to These Trends

Across the findings in this report, a consistent pattern emerges: **conversion is decided at the moment of intent.**

Shoppers reassess value, availability, and convenience just before purchase. Promotions influence completion. Out-of-stocks redirect demand. And the cart itself has become a place where decisions evolve before checkout.

For marketers, the opportunity is not just generating demand — it's ensuring that demand converts when intent forms.

Below are five ways brands can operationalize these insights.

1. Protect Demand When Inventory Breaks

SmartSubstitution

Out-of-stocks are routine, and most shoppers will switch brands rather than wait.

SmartSubstitution helps brands defend demand by dynamically recommending an available alternative when a preferred product is out of stock. Instead of losing the sale to a competitor, shoppers can quickly add a comparable item to their cart from the same brand portfolio.



Impact:

- Protects conversion when inventory fluctuates
- Reduces lost demand from stock gaps
- Maintains brand presence in the cart

2. Capture First-Party Intent at the Moment It Forms

SmartCapture

Many shoppers discover products but delay purchase to research or return later.

SmartCapture allows brands to collect voluntary email or SMS opt-ins at the moment a shopper clicks to buy. This creates a direct connection with high-intent shoppers before they move into the retailer environment.

The data is passed directly into the brand's CRM system for remarketing and lifecycle engagement.

Impact:

- Builds first-party data from real shopping intent
- Enables remarketing to shoppers who didn't complete checkout
- Strengthens long-term customer relationships



3. Align Promotions to the Moment of Decision



SmartCommerce Promotions

Promotions are the single strongest factor influencing whether a shopper completes purchase.

Through SmartCommerce, brands can attach high-value incentives like cashback or digital coupons directly to retail purchase links. These promotions appear at the exact moment shoppers are choosing where to buy, incentivizing immediate action.

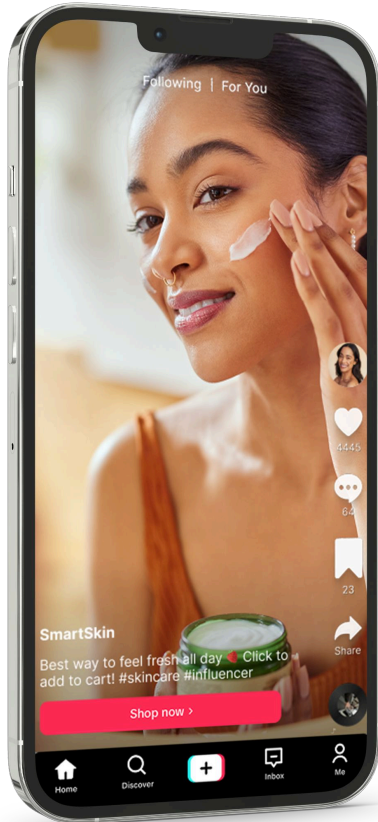
Impact:

- Increases conversion among price-sensitive shoppers
- Accelerates purchase timing
- Defends share in competitive categories

4. Convert Discovery Directly Inside Social

Social-First Commerce

While awareness often starts on social platforms, purchase frequently happens later inside retail environments.



Social-first commerce shortens that gap by allowing shoppers to add products to their cart directly from influencer content, paid social ads, or other social placements — without interrupting the scroll experience.

Impact:

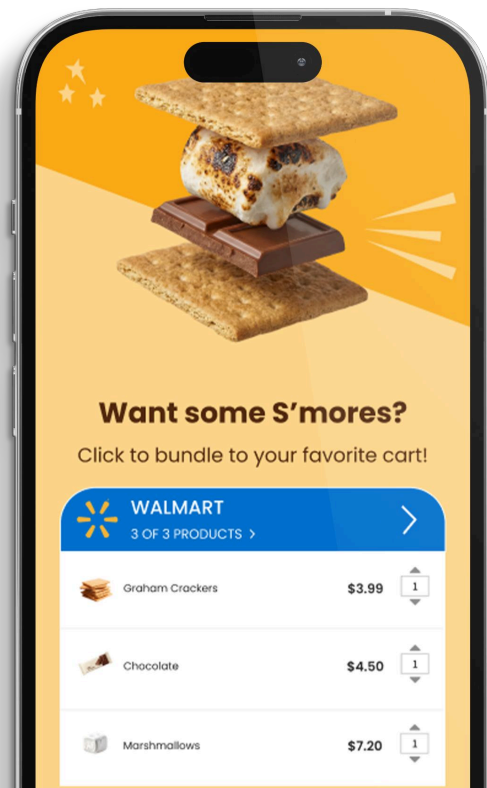
- Reduces friction between discovery and purchase
- Captures impulse intent from social engagement
- Drives measurable retail outcomes from social media

5. Increase Basket Size With Strategic Bundling

SmartBundles

Most online purchases are built around repeat buying habits rather than constant discovery.

SmartBundles allow brands to package complementary products into a single add-to-cart action. This makes it easier for shoppers to purchase routine combinations and increases overall cart value.



Impact:

- Increases average order value
- Simplifies repeat purchases
- Reinforces habitual buying patterns

The Opportunity Ahead

Discovery is widespread. Demand is real. But conversion is fragile.

Brands that succeed in today's commerce environment are not just those that generate attention – they are those that **protect and capture intent when it appears**.

The strategies above help ensure that when shoppers are ready to act, the path to purchase is **clear, valuable, and in stock**.

The Moment of Intent Determines the Outcome

Consumers are decisive.

Discovery happens in retail. Decisions happen at checkout. When price changes, products go out of stock, or friction appears, shoppers switch.

Across every trend in this report, one reality stands out: **performance hinges on what happens at the moment of intent.**

Brands that win don't just generate demand. They make sure it converts.

What Winning Brands Do Next

Brands succeeding in hybrid focus on three things:

1. **Capture intent** – Turn discovery into action.
2. **Ensure availability** – Keep shoppers on in-stock paths...
3. **Remove friction** – Make it easy to move to cart.

The brands that connect these moments convert demand into **measurable retail sales**.



Put These Trends Into Action

Explore how your brand can:

- Protect demand from out-of-stocks
- Align promotions to the moment of decision
- Strengthen conversion at the cart layer
- Measure real retail outcomes

[Get a walkthrough](#)



**Questions about
the report or your
brand's strategy?**

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