2026 RYDER E-COMMERCE CONSUMER STUDY

Beyond Price: What's Driving Consumer Shopping Behavior

Balancing Convenience, Value, and Experience

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Executive Summary

Retailers navigating the ever-evolving shopping landscape are facing a consumer mindset defined less by extremes and more by convergence. Today's shoppers are not choosing between retail channels or buying motives — they are balancing them.

The findings from Ryder's 12th annual e-commerce consumer study, *"Beyond Price: What's Driving Consumer Shopping Behavior,"* reveal several clear patterns: 1) online shoppers' broad adoption of AI tools is signaling a change in how retailers should engage consumers, 2) preferences across digital and physical channels are noticeably more even-keeled, and 3) while price remains a primary driver of behavior, other values gain ground.

AI: reshaping how consumers discover, evaluate, and decide

AI-powered tools are now embedded in the shopping journey, with nearly two-thirds of surveyed consumers leveraging them to search, compare, and evaluate products. From summarizing reviews to enabling visual search and personalized recommendations, these tools have quickly moved from novelty to mainstream behavior, accelerating decision-making and raising expectations for convenience and relevance. As adoption grows, retailers have an opportunity to differentiate through more intelligent, intuitive digital experiences.

Similarly, mobile devices are heavily leveraged as in-store shopping aids, used to compare prices with similar items at other retailers, find where an item is located in a store, and more. Technology is delivering more information to today's consumers than ever – remaining competitive requires providing the most comprehensive, real-time information possible.

Steve Sensing
President, Supply Chain & Dedicated Transportation Solutions, Ryder System, Inc.

The convergence of channels

Consumer expectations for seamless options across online and in-store environments have been evident for some time, but the gap is now smaller than ever, with neither channel holding a definitive advantage. Shoppers prefer the convenience of e-commerce but still value the option to engage physically, whether that means checking in-store availability, returning an order, or making a purchase. This leveling of preferences reinforces the importance of true omnichannel integration, where inventory visibility, fulfillment options, and customer experience are consistent across every touchpoint.

Delivery and fulfillment expectations further underscore this balance. While about a quarter of consumers express a preference to schedule their online delivery timing, the majority prioritize fast shipping, highlighting the importance of both speed and flexibility. At the same time, returns remain a critical component of the experience, with the existence, ease, and optionality of return policies playing significant roles in purchasing decisions and brand loyalty.

The evolving role of price

Price continues to shape consumer behavior, but it is not acting alone. Shoppers remain highly engaged in comparison shopping and cost-saving behaviors, particularly amid ongoing economic pressure. However, its relative influence has declined as consumers increasingly weigh additional factors such as ingredients and materials used in products and packaging for certain retail categories.

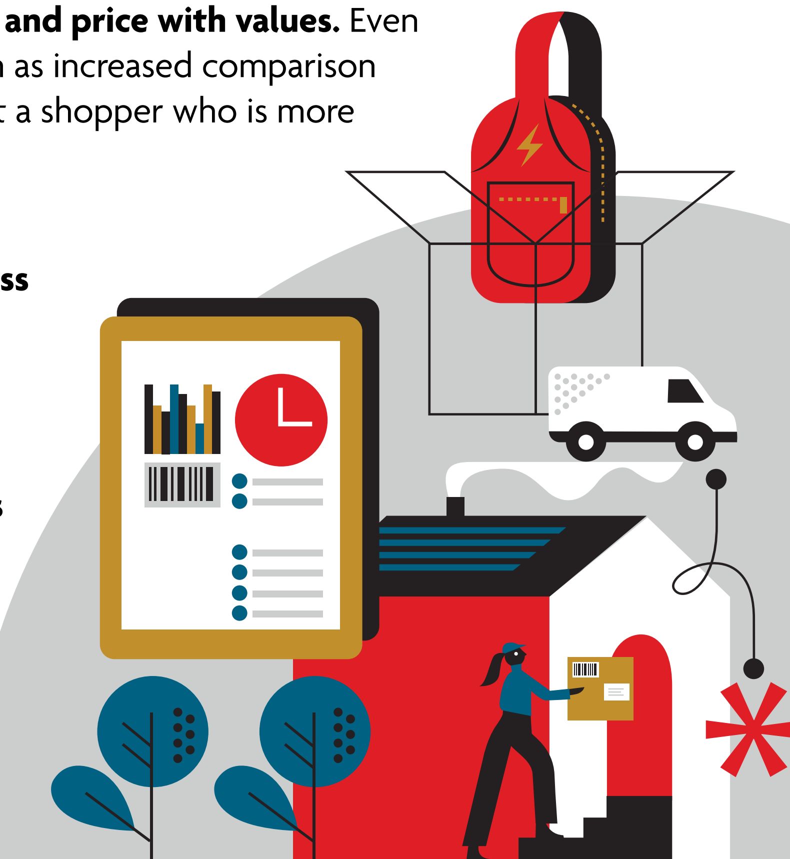
This shift is evident across the purchase journey. While incentives like free shipping and discounts still drive decisions, non-price factors such as sustainable packaging, premium unboxing experiences, and demonstrated brand values are reaching near parity in their ability to influence repeat business. Additionally, nearly half of shoppers report a willingness to pay more for environmentally responsible practices, signaling a growing openness to value beyond price.

These factors combined with an increased tendency to spend more to meet free-shipping thresholds suggest that consumers are making more intentional choices about where their money is going and the value they're getting in return.

A more deliberate, more discerning shopper

Looking at the full scope of this year's study, these trends point to a more intentional consumer. **Shoppers are researching more, comparing options, and making fewer but more deliberate purchases. They are balancing shipping speed with cost, digital convenience with physical reassurance, and price with values.** Even behaviors influenced by inflation — such as increased comparison shopping or delayed purchases — reflect a shopper who is more calculated in how and when they spend.

For retailers, this environment presents both complexity and opportunity. **Success will hinge on delivering a cohesive omnichannel experience, maintaining competitive pricing while elevating value beyond cost, and leveraging technology to meet rising expectations for personalization and ease.** Those that can strike this balance will be best positioned to capture demand, build loyalty, and adapt to the continued evolution of consumer behavior.



PURCHASE BEHAVIOR

PURCHASE BEHAVIOR: KEY TAKEAWAYS

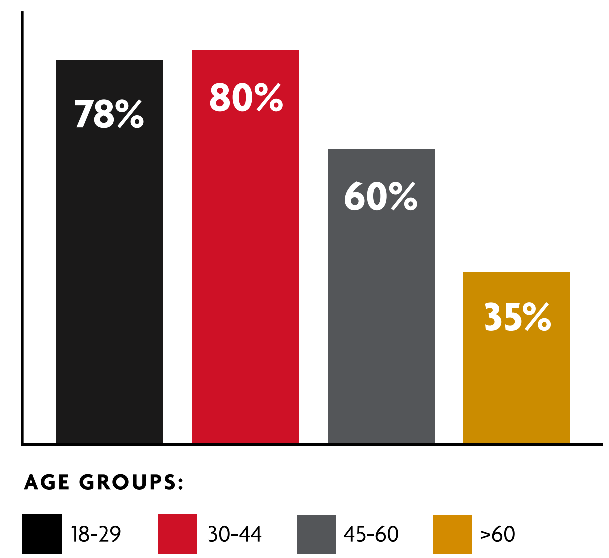
- Nearly two-thirds of shoppers use AI tools
- Comparisons, reviews, and policies drive online buying decisions
- Shoppers are proceeding with caution amid inflation
- Shoppers' use of Buy Now Pay Later (BNPL) has increased
- Clothing dominates online shopping

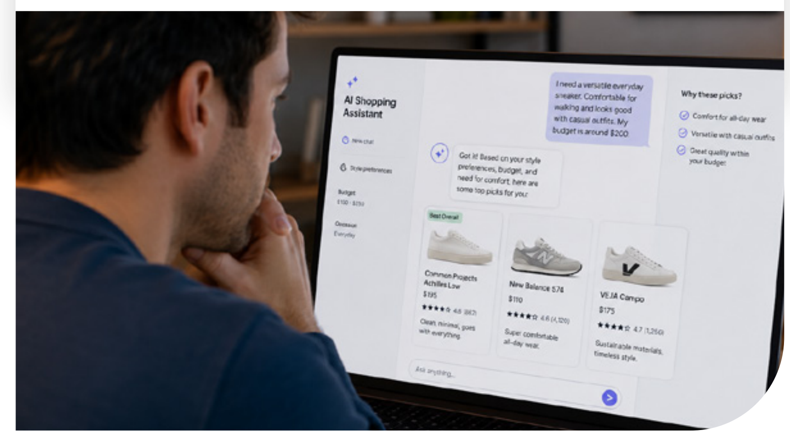
Nearly two-thirds of shoppers use AI tools

64% of shoppers use AI tools when shopping. **Of those…**

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Shoppers who use
AI shopping tools:

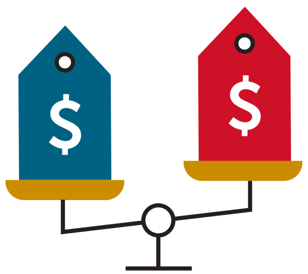




Comparisons, reviews, and policies drive online buying decisions

*"Which of the following do you typically do **before purchasing a product online?**"*

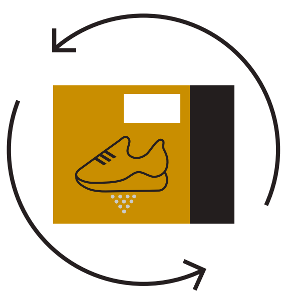
73%
Compare prices with other brands/stores
(-3% YOY)



66%
Read customer reviews of the product and/or brand
(+1% YOY)

48%
Research which sellers offer free/cheaper shipping
(+1% YOY)

33%
Check if the brand has a free-return policy
(-7% YOY)



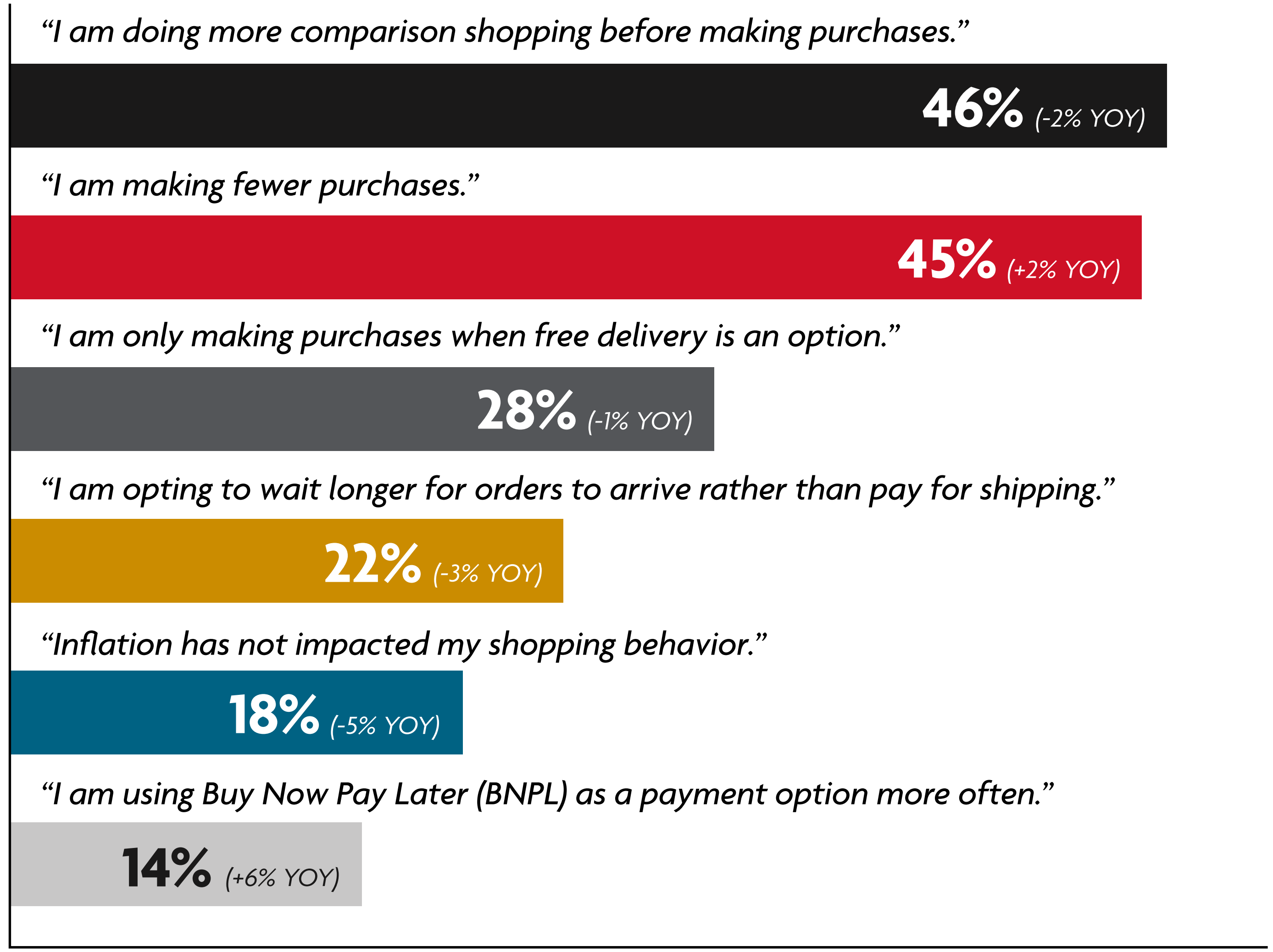
28%
Check if the item is available in-store near me
(-6% YOY)

23%
Find out where the product is manufactured
(+5% YOY)

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Shoppers are proceeding with caution amid inflation

"How is inflation impacting your ***non-essential online shopping*** *behavior?"*



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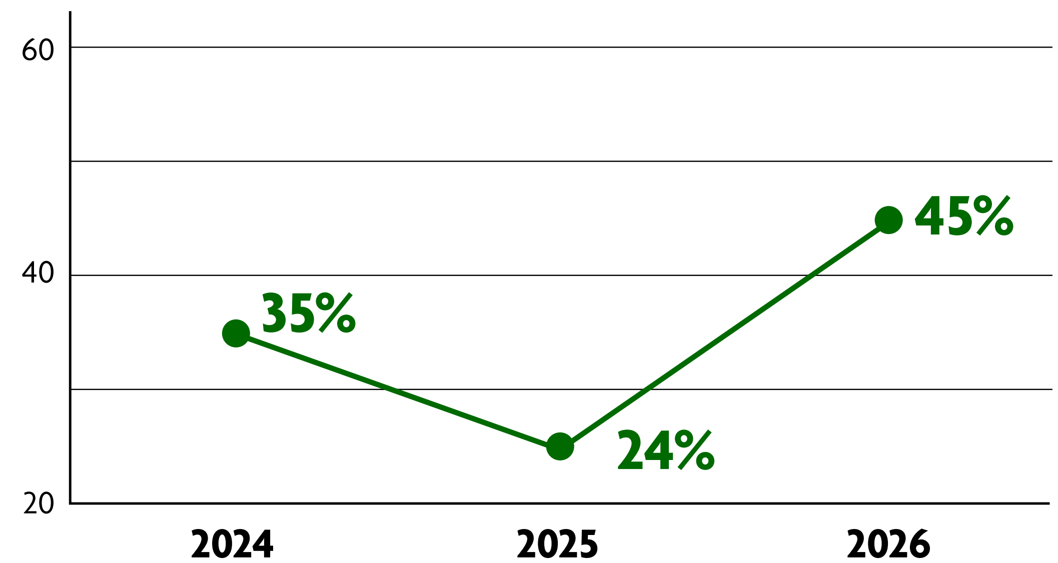
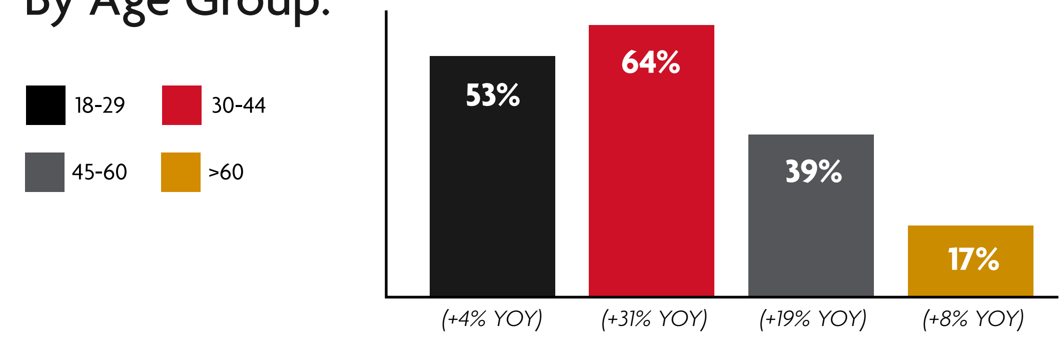
Shoppers' use of BNPL has increased

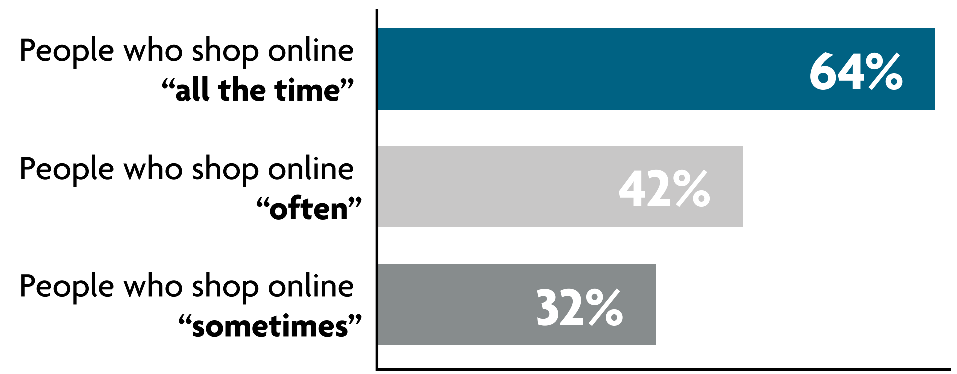
More shoppers reported using BNPL to shop online:

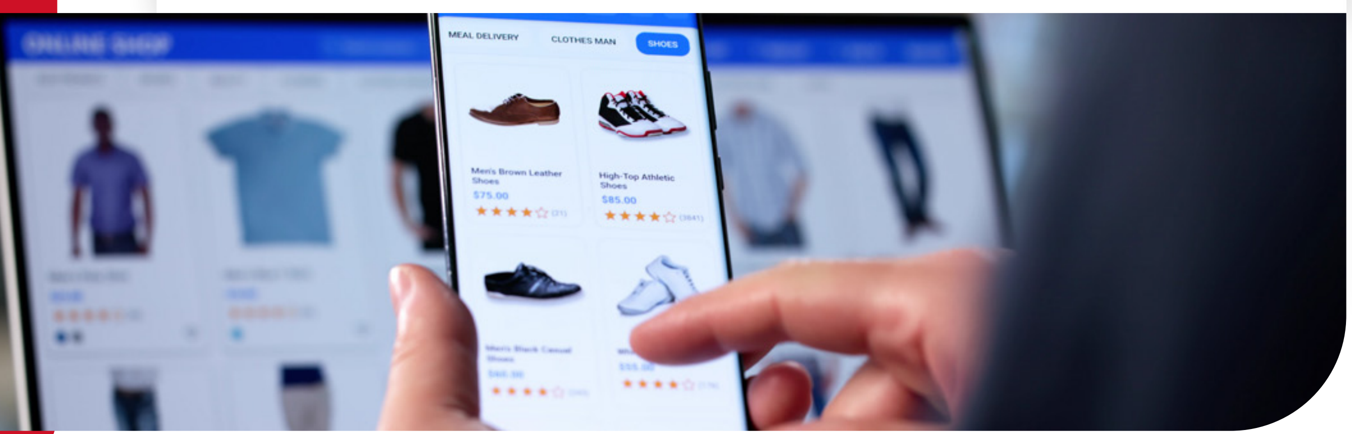


By Age Group:



By Shopping Frequency:





Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Clothing dominates online shopping

"Which of the following have you purchased online in the past year?"

TOP 5

82%	Clothing
63%	Vitamins/Supplements
56%	Cleaning Products
55%	Accessories
53%	Small Appliances

By Age Group:

18-29
- 77% Clothing
- 63% Accessories
- 51% Cleaning Products
- 50% Personal Electronics
- 49% Small Appliances

30-44
- 85% Clothing
- 68% Vitamins/Supplements
- 63% Cleaning Products
- 62% Small Appliances
- 61% Accessories

45-60
- 86% Clothing
- 66% Vitamins/Supplements
- 59% Pet Products
- 57% Cleaning Products
- 57% Accessories

>60
- 73% Clothing
- 58% Vitamins/Supplements
- 45% Cleaning Products
- 43% Small Appliances
- 42% Pet Products

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.


OMNICHANNEL
24 hr

OMNICHANNEL:
KEY TAKEAWAYS

- Experience, shipping costs, and urgency are main drivers of in-store shopping preference
- Evolving return preferences underscore need for flexible omnichannel offerings
- Remote pickup usage increased
- In-store pickups/returns generate sales activity
- Shoppers rely on mobile devices to aid in-store shopping

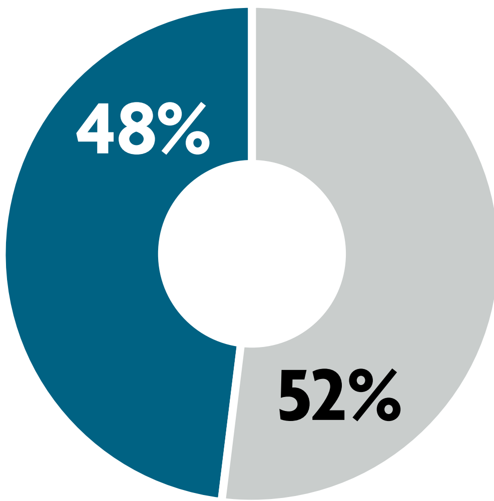
Experience, shipping costs, and urgency are main drivers of in-store shopping preference

"Why do you choose to ***shop in-store instead of online?****"*

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Evolving return preferences underscore need for flexible omnichannel offerings

Among all shoppers:



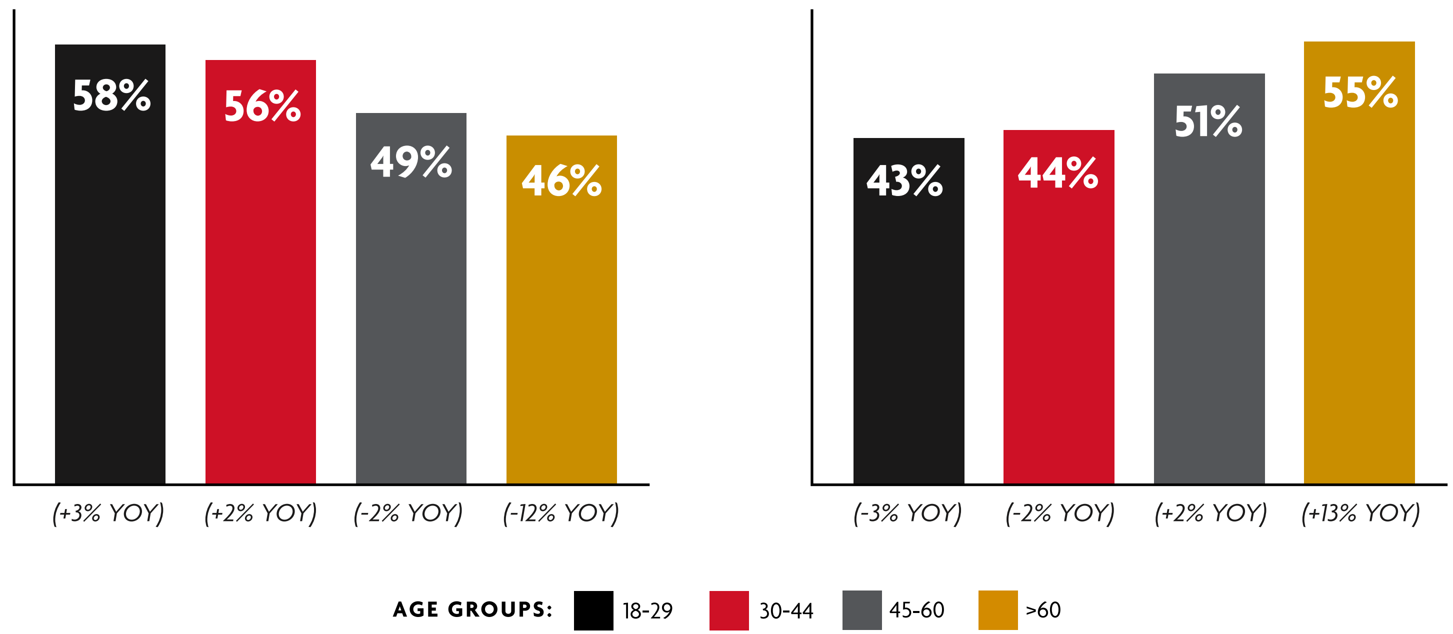
Prefer to return online purchases in-store *(-2% YOY)*

Prefer to return online purchases via mail/drop box *(+2% YOY)*

Preferred method of returning online orders varies by age group.

Prefer to return online purchases in-store:

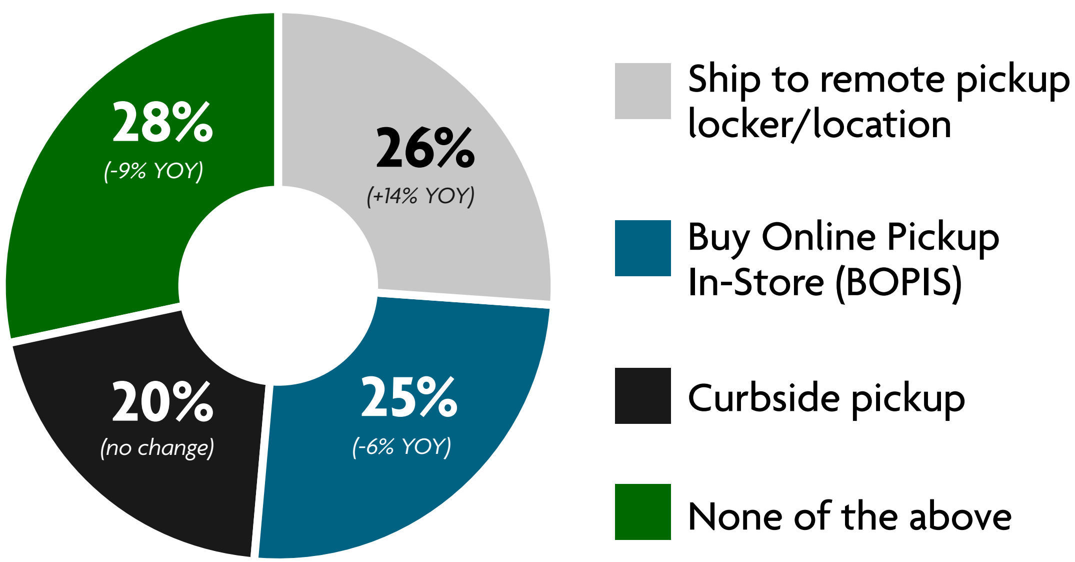
Prefer to return online purchases via mail/drop box:



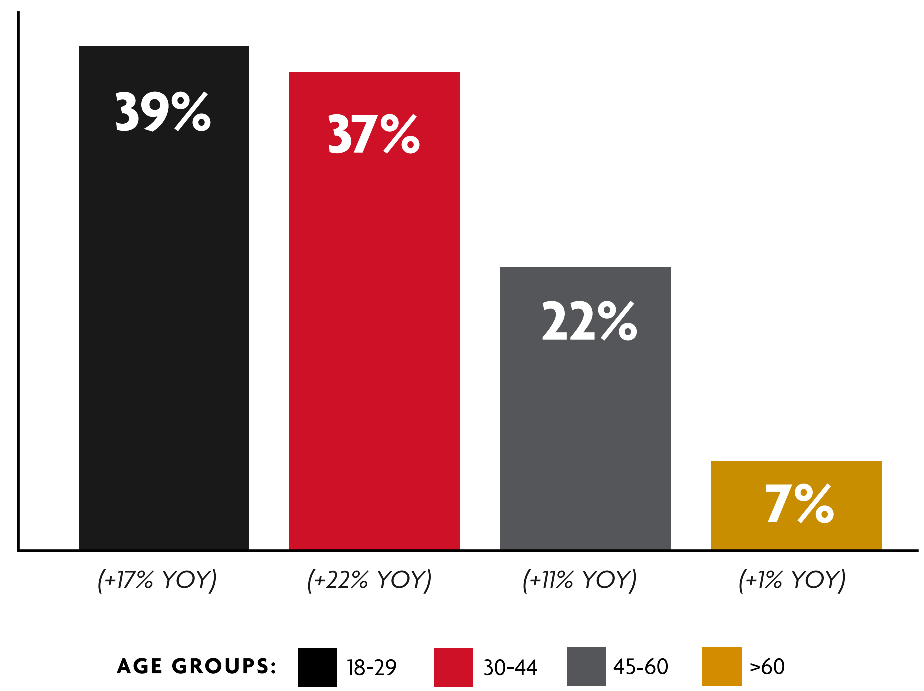
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Remote pickup usage increased

*"Other than the standard ship-to-home method, what alternate option do you **most often use** to receive online shopping orders?"*



Preference for remote pickup lockers/locations varies by age group:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

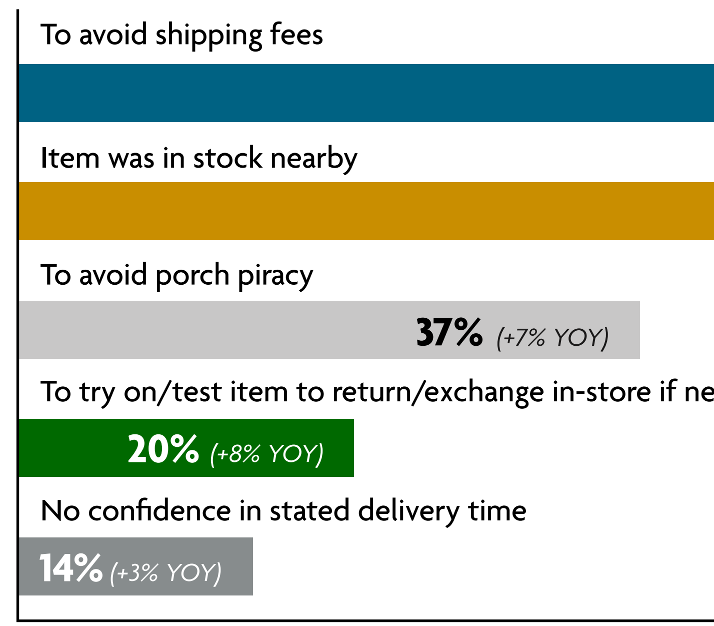
In-store pickups/returns generate sales activity

86% **have picked up/returned online purchases in-store.** *(+3% YOY)*

Of those, **52% often make additional in-store purchases when doing so.** *(+17% YOY)*

The more frequent the shopper, the more likely they are to **make additional purchases when picking up/returning online purchases in-store:**

Why shoppers elect to **Buy Online and Pickup In-Store:**

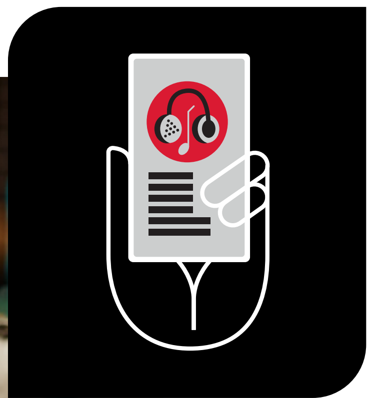


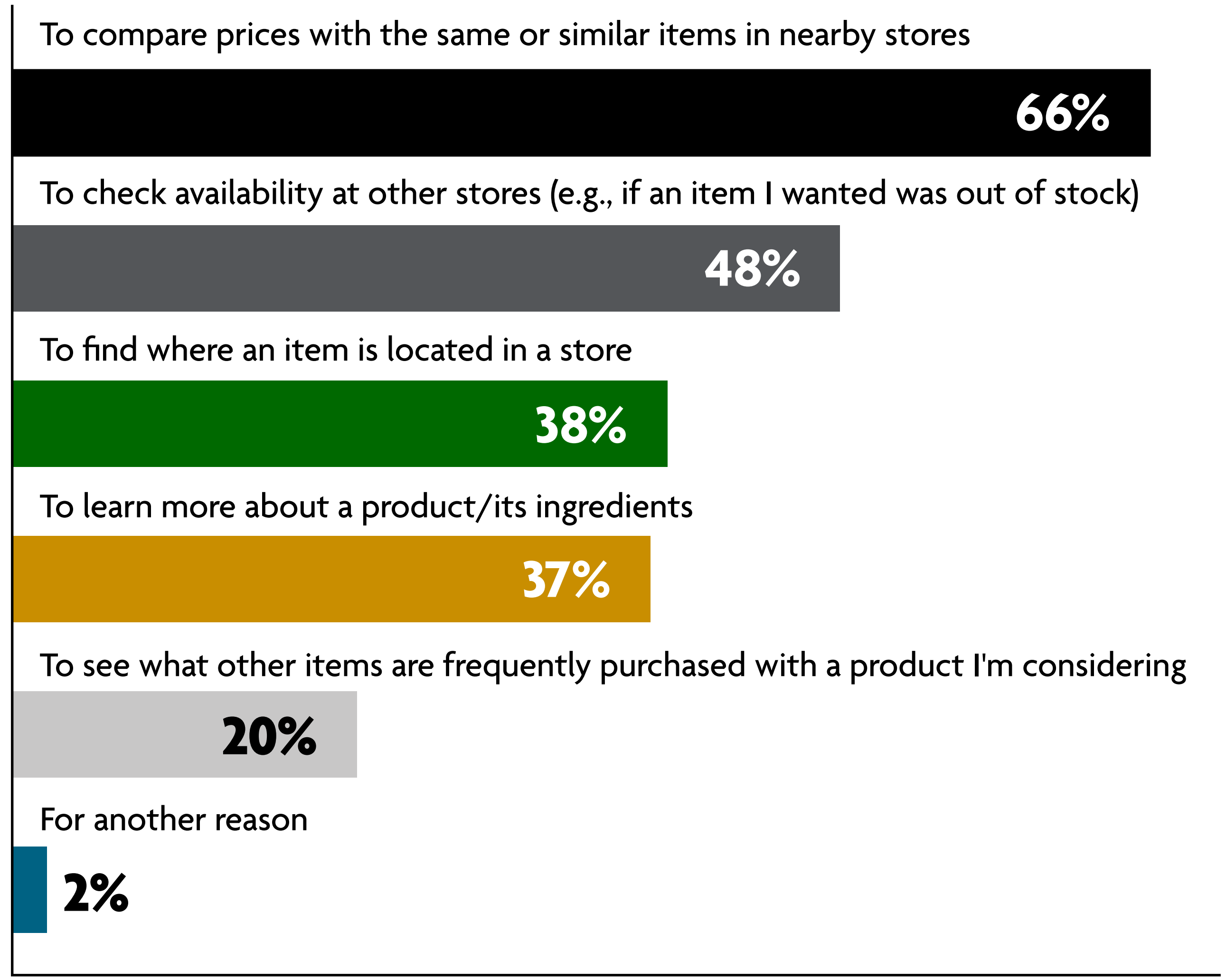
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Shoppers rely on mobile devices to aid in-store shopping

77%

of shoppers use mobile devices to search for items while in stores. ***Why?***





Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

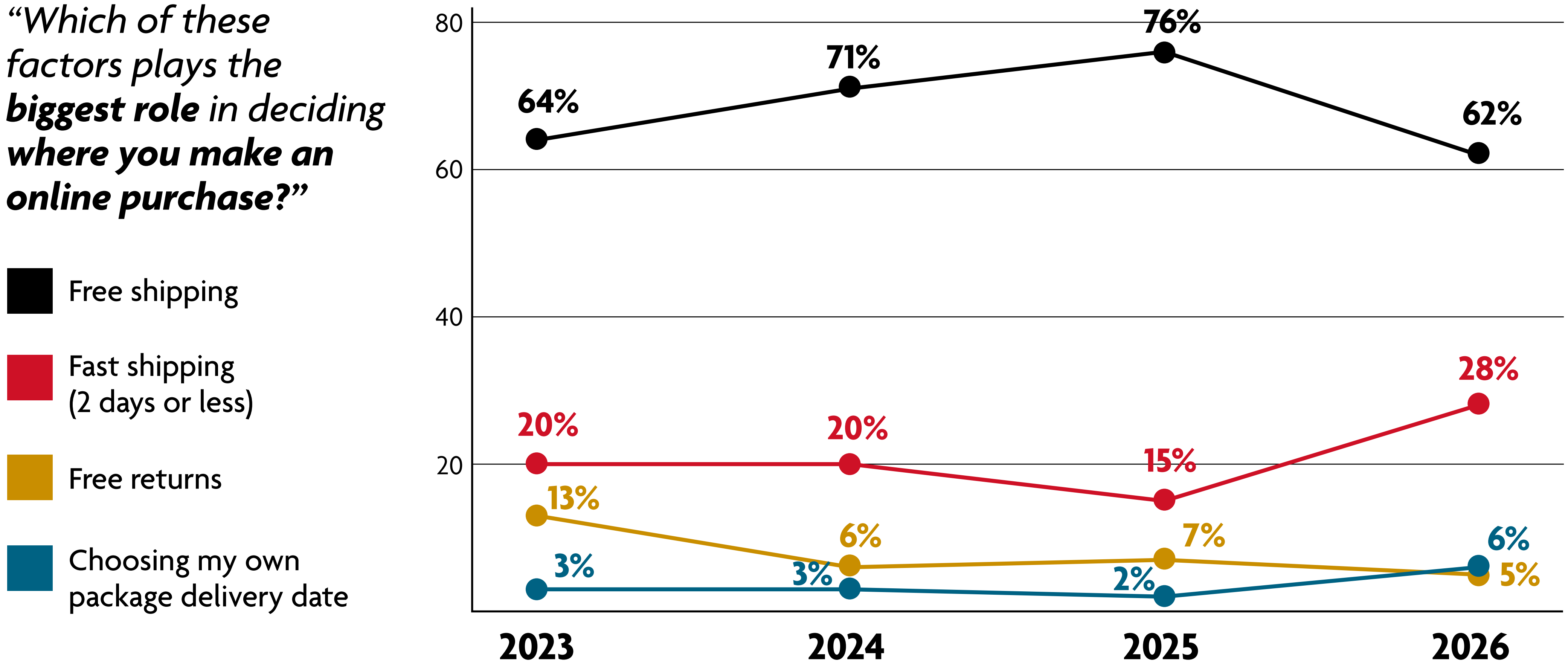
SHIPPING

SHIPPING:
KEY TAKEAWAYS

- Influence of free shipping decreases in favor of other delivery preferences
- Expectations for quicker delivery resume
- Delivery speed strengthens its lead over optionality
- Consumers' shopping frequency plays a role in their response to shipping fees
- Free shipping thresholds yield results
- When it comes to shipping fees, shoppers have conditions
- Delivery patience surfaces when the stakes are economical or environmental

Influence of free shipping decreases in favor of other delivery preferences

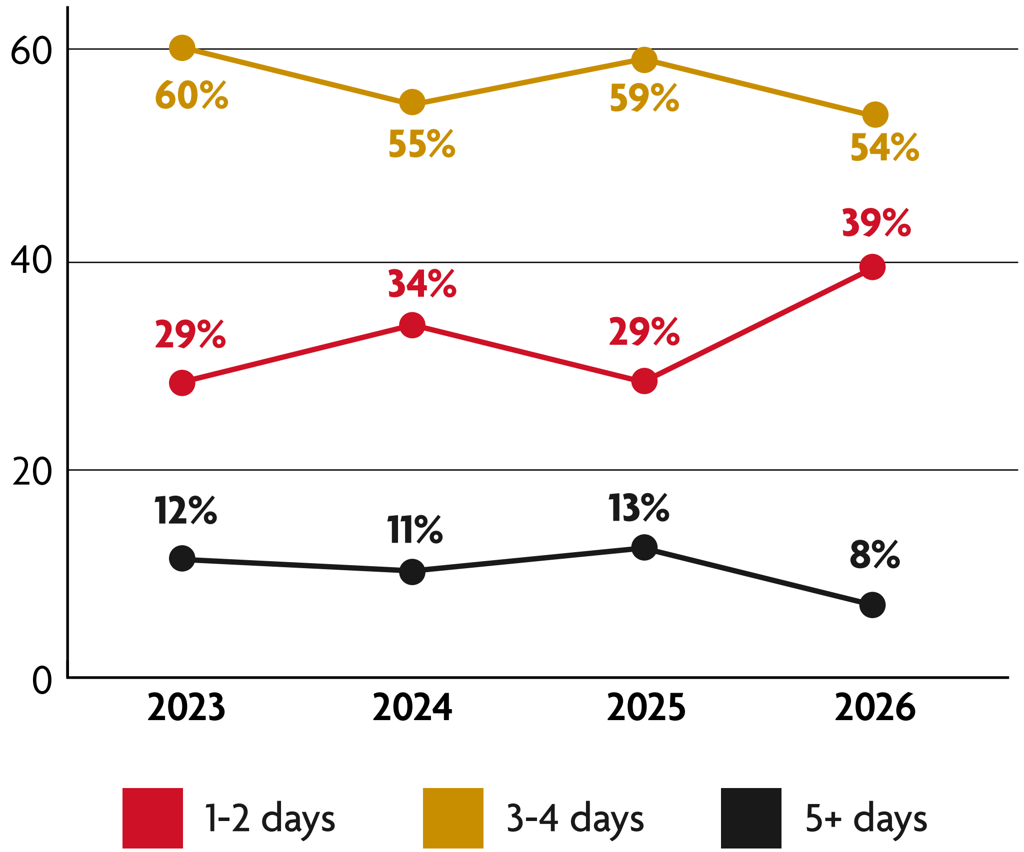
*"Which of these factors plays the **biggest role** in deciding **where you make an online purchase?**"*



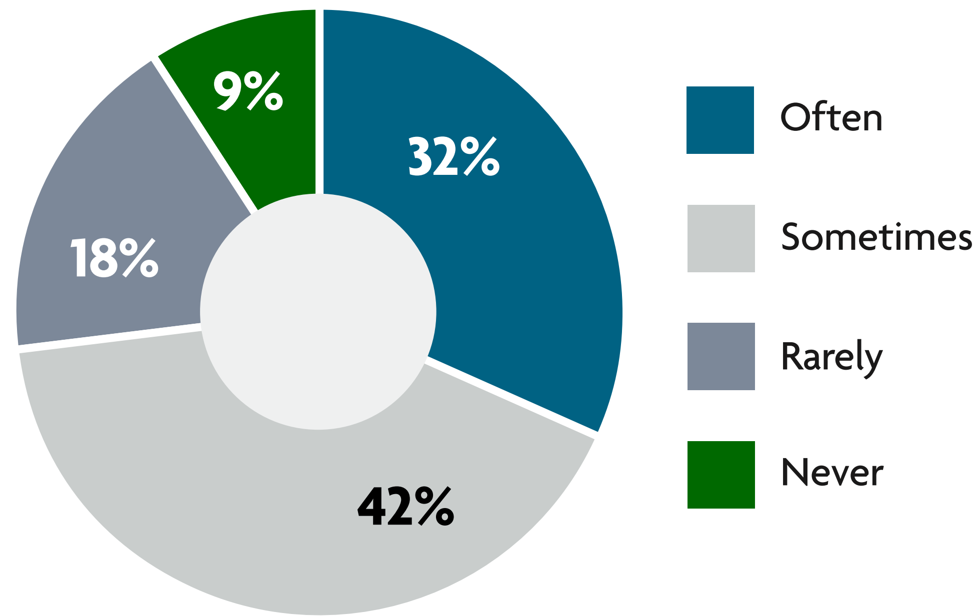
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Expectations for quicker delivery resume

Consumer expectations for 1-2-day delivery reach four-year high:



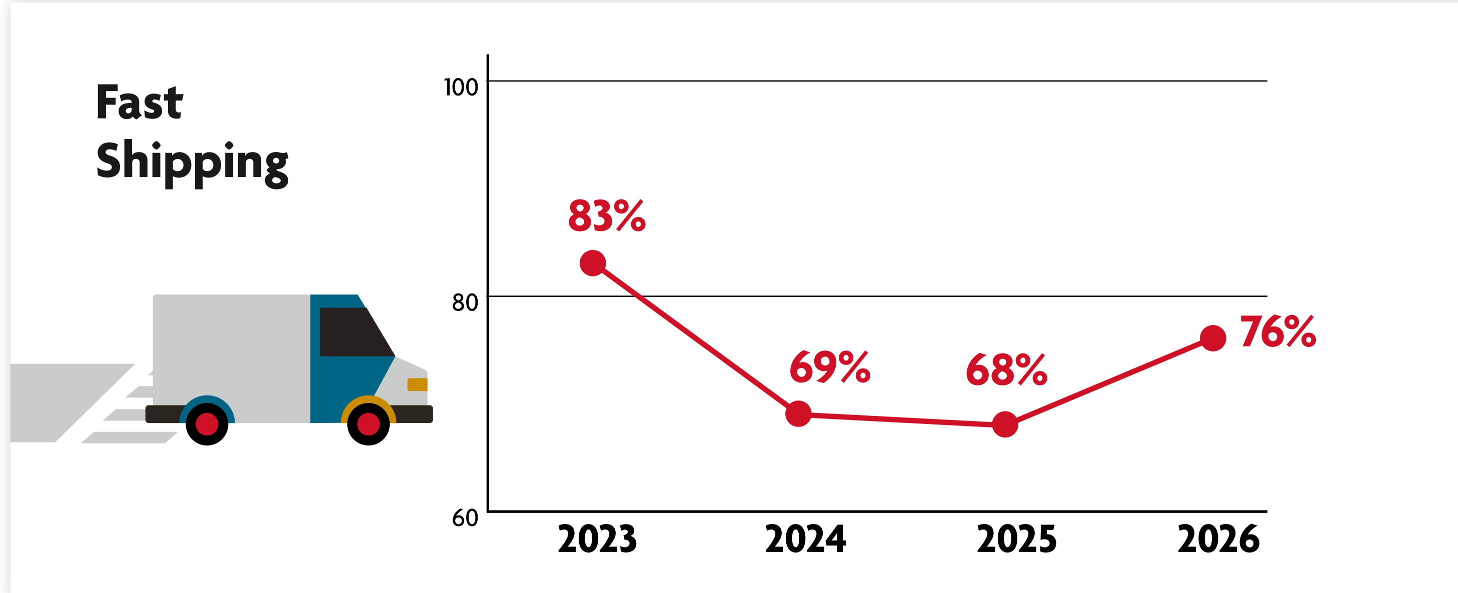
"How often do you make an online purchase with a company ***specifically because you know they offer same-day delivery?"***

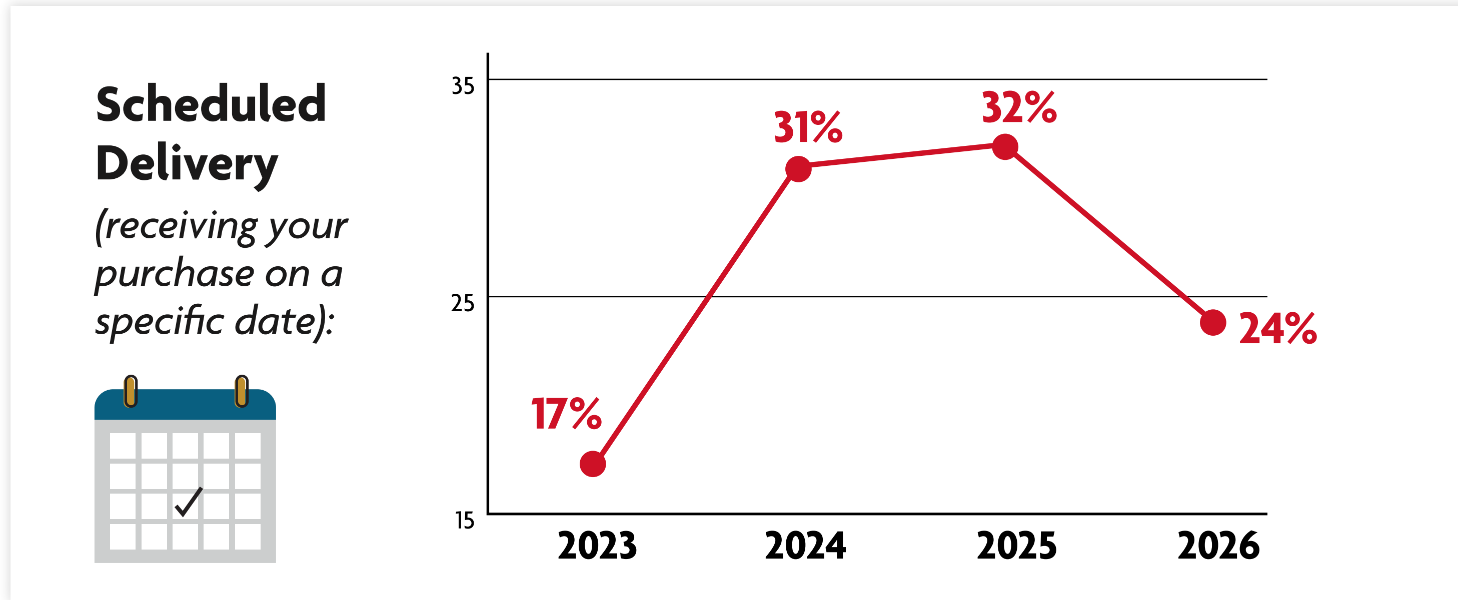


Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Delivery speed strengthens its lead over optionality

"What is more important to you?"





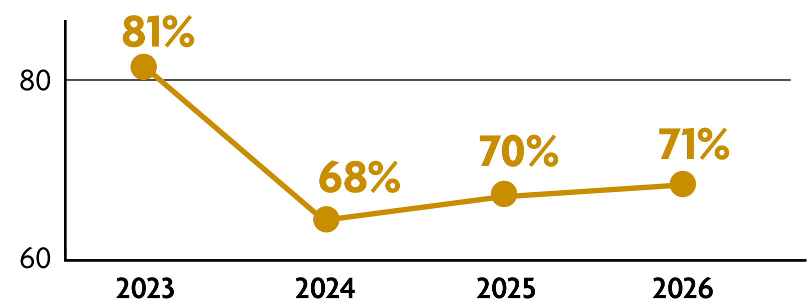
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Consumers' shopping frequency plays a role in their response to shipping fees

48% of shoppers research which sellers **offer free/cheaper shipping** before buying a product online. *(+1% YOY)*

By Shopping Frequency:

Shoppers who have **abandoned items** in their online carts upon seeing **unanticipated shipping costs:**

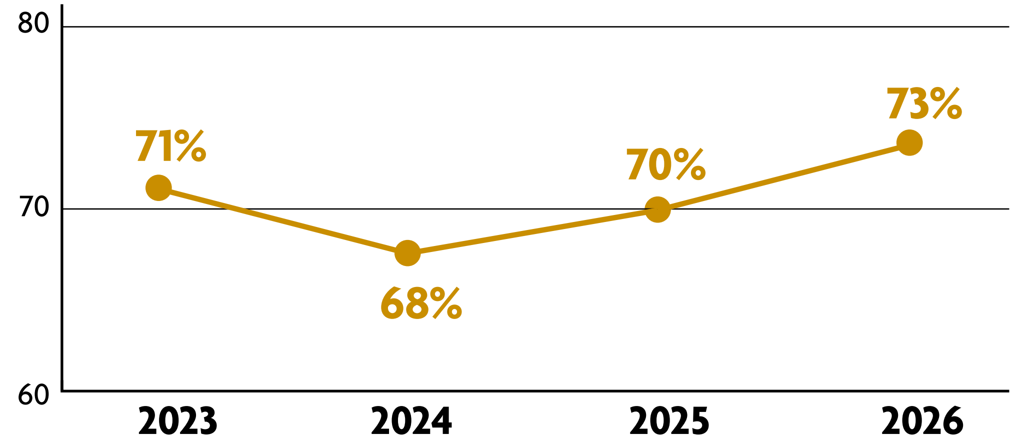


By Shopping Frequency:

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Free shipping thresholds yield results

Nearly three quarters of consumers have **added items** to their online shopping carts **to qualify for free shipping:**



By Shopping Frequency:

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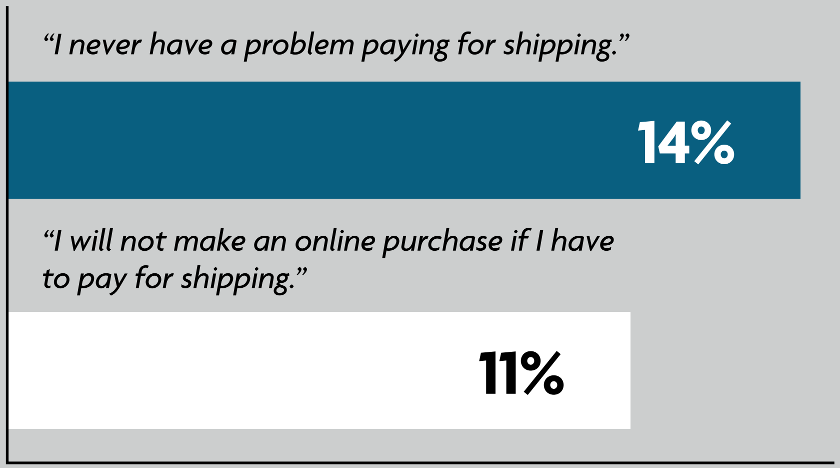
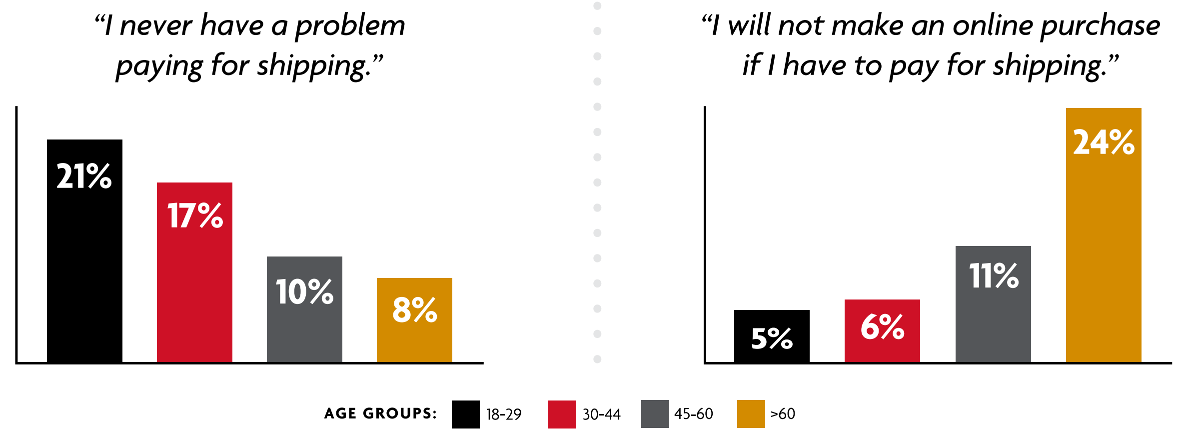
When it comes to shipping fees, shoppers have conditions



Attitudes toward shipping fees vary by age group.



Instances when shoppers have **no problem paying for shipping:**

37% If the item is very large, heavy, or otherwise cumbersome

34% If the item needs to be rushed/expedited

20% If the order is being shipped internationally

Item(s) shoppers are **willing to pay shipping fees** in order to receive:

58% Large Appliances

53% Furniture

40% Large Exercise Equipment

40% Large Electronics

46% *“I will not make an online purchase if the shipping fees cost more than the item(s).”*

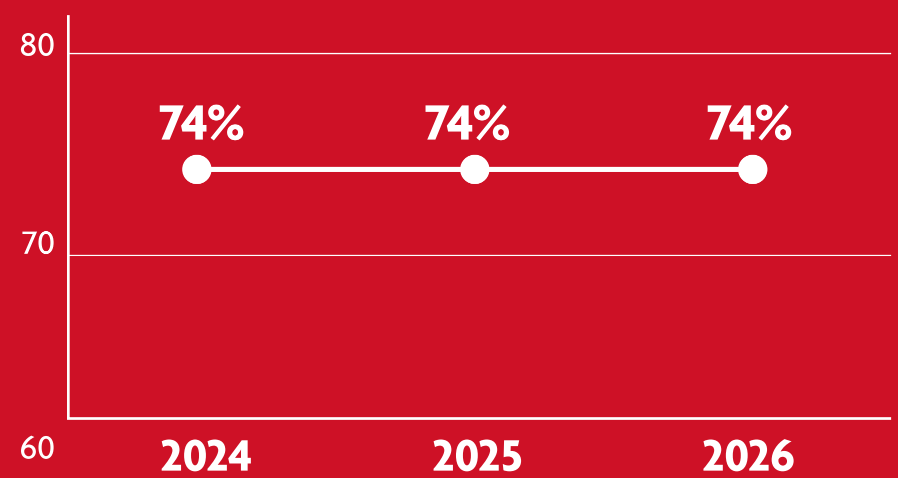
13% *“I will not pay for shipping if the order will take longer than 2 days to arrive.”*

6% *“I will not pay for shipping if I cannot choose the delivery date.”*

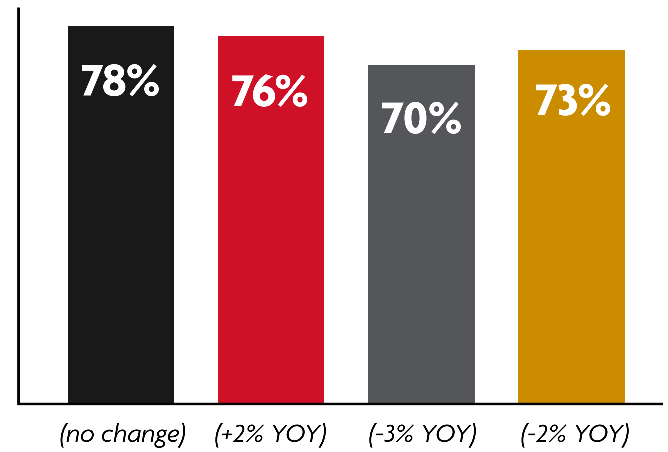
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Delivery patience surfaces when the stakes are economical or environmental

Shoppers who would **wait longer** for an online order to arrive **if it means reducing environmental impact:**



This remains consistent among all age groups:



In response to inflation, **22% of shoppers are waiting longer for orders to arrive to save on shipping fees.**

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

RETURNS

RETURNS:
KEY TAKEAWAYS

- Return policies can win customers as easily as they can lose them
- Fit, quality, and damage issues drive returns
- Return fees are leading reason of customer attrition
- Returnless refunds increasingly attract repeat customers

Return policies can win customers as easily as they can lose them

52%	of shoppers won't make an online purchase without a free-return policy *(-5% YOY)*
33%	of shoppers check if a brand has a free-return policy before making an online purchase *(-7% YOY)*
5%	of shoppers said free returns play the biggest role in deciding where they make an online purchase *(-1% YOY)*

32% of shoppers said they didn't return any online purchases in the past year. Still, **23%** of those check if a brand has a free-return policy before making a purchase, and **55%** won't make an online purchase without a free-return policy.

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Fit, quality, and damage issues drive returns

Top 3 most returned online purchases:

1. **45%** Clothing

2. **18%** Accessories

3. **15%** Small Appliances

Top 3 reasons for returns:

1. **54%** Items did not fit as expected

2. **39%** Items were lower quality than expected

3. **36%** Items were damaged or defective

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Return fees are leading reason of customer attrition

79% of online shoppers had at least one experience when returning online orders that prevented them from continuing to shop with a company.

Of those...

55% had to pay shipping fees

40% were only provided with the option for an exchange or store credit rather than a full refund via cash/credit card

33% were given a return window that was too small

28% were not provided the option to return an online purchase in-store

28% were not provided the option to return an online purchase via mail

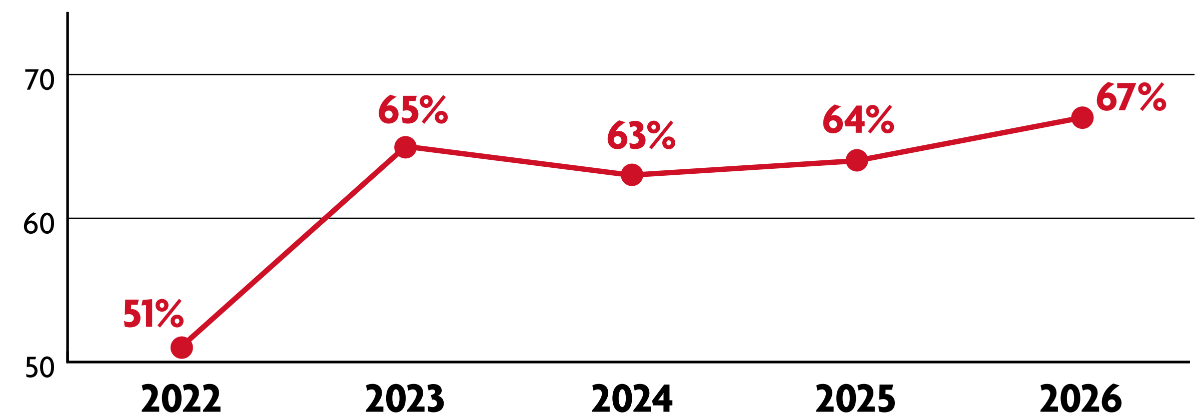
26% had to print their own return label

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Returnless refunds increasingly attract repeat customers

Consumer perceptions of returnless refund policies:

Shoppers who are encouraged to shop with a brand again:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

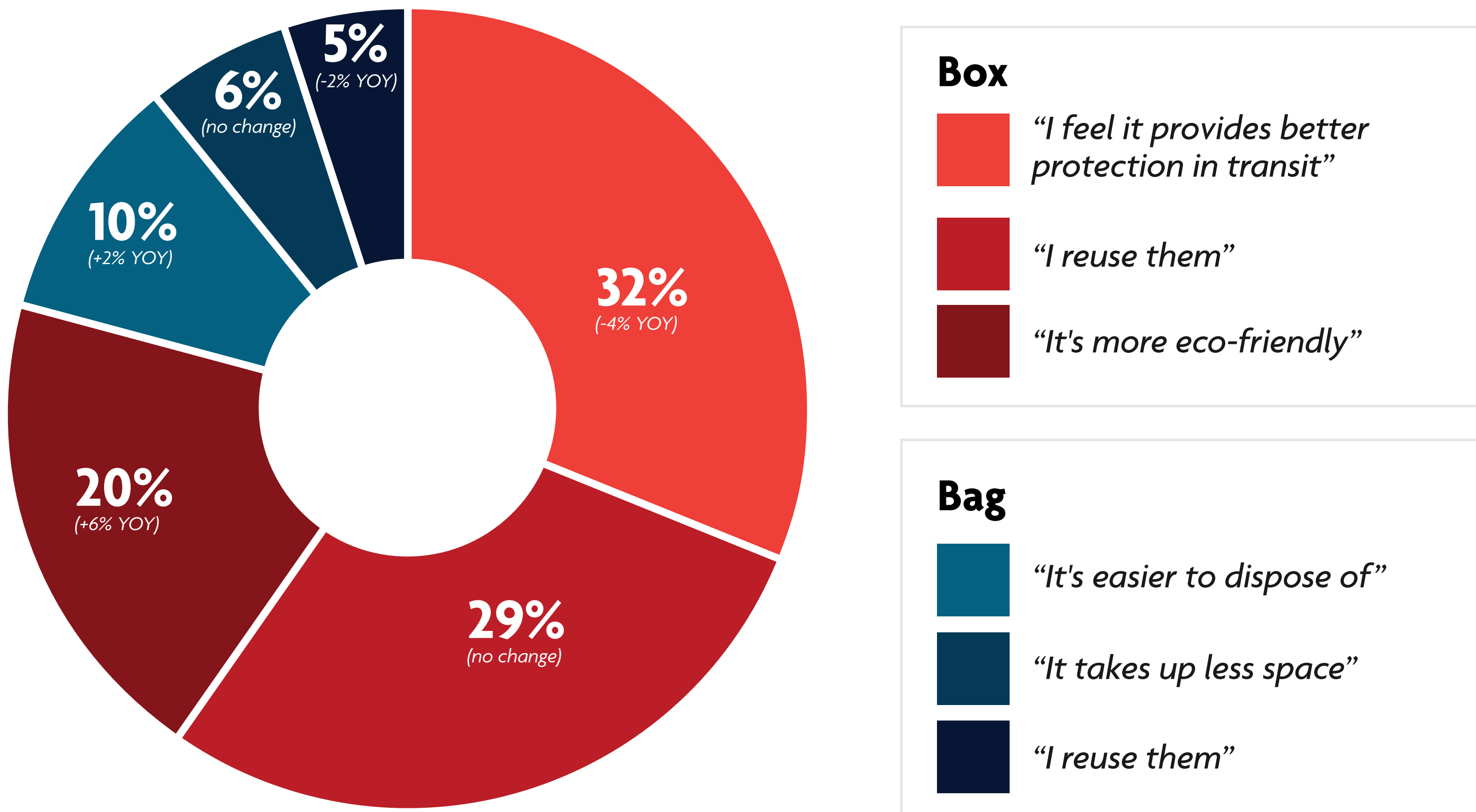
PACKAGING

PACKAGING:
KEY TAKEAWAYS

- Eco-friendly consumer mindset strengthens preference for boxes
- Unboxing experience makes headway in bringing customers back
- Planet-friendly efforts drive purchase interest from the environmentally conscious consumer

Eco-friendly consumer mindset strengthens preference for boxes

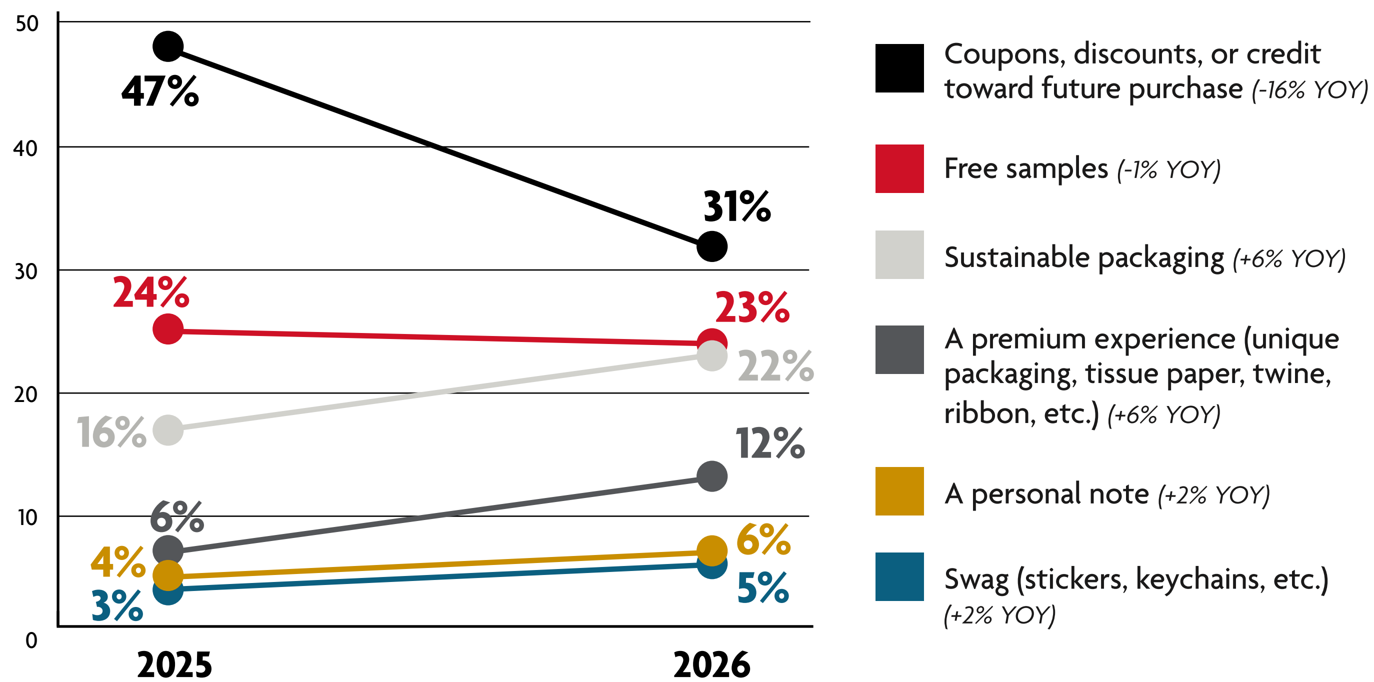
Shoppers' justifications for online order **packaging material preference:**



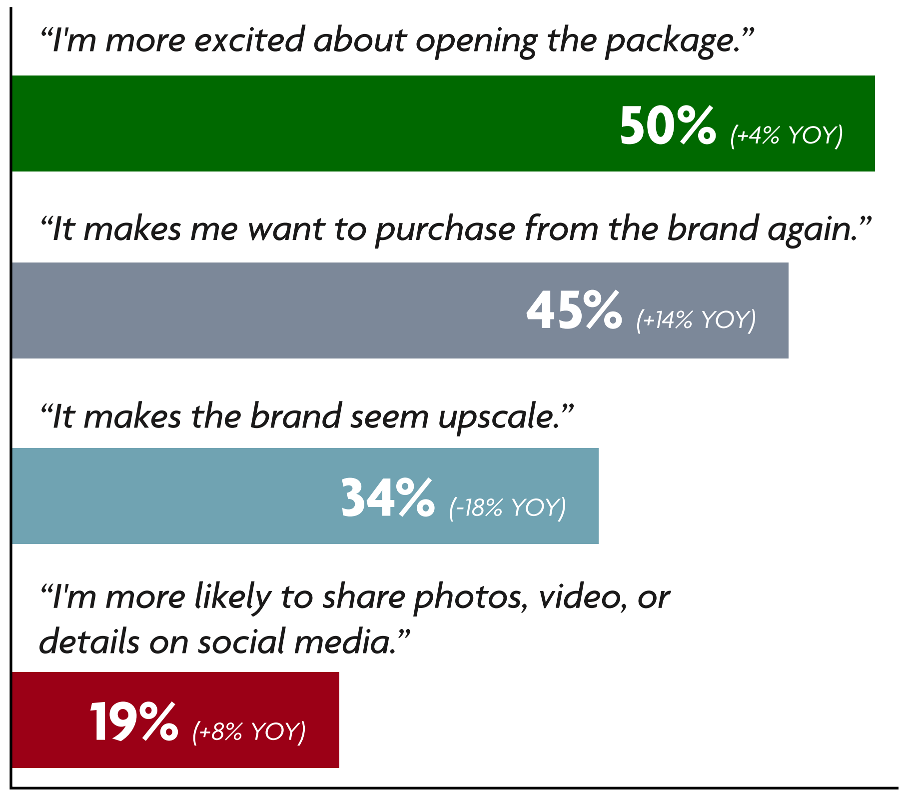
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Unboxing experience makes headway in bringing customers back

*"When thinking about the experience of unboxing an online order, what factor is **MOST likely to make you want to shop with the same brand again in the future?"***



What did shoppers say about a **premium unboxing experience?**



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

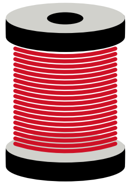
Planet-friendly efforts drive purchase interest from the environmentally conscious consumer

More than half of shoppers (57%) would be **willing to pay a higher price** to buy from a brand that makes at least one of the following efforts to **reduce the environmental impact of e-commerce:**

36%
Eco-friendly packaging

30%
Fuel-efficient transportation methods

26%
Ethically sourced materials



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

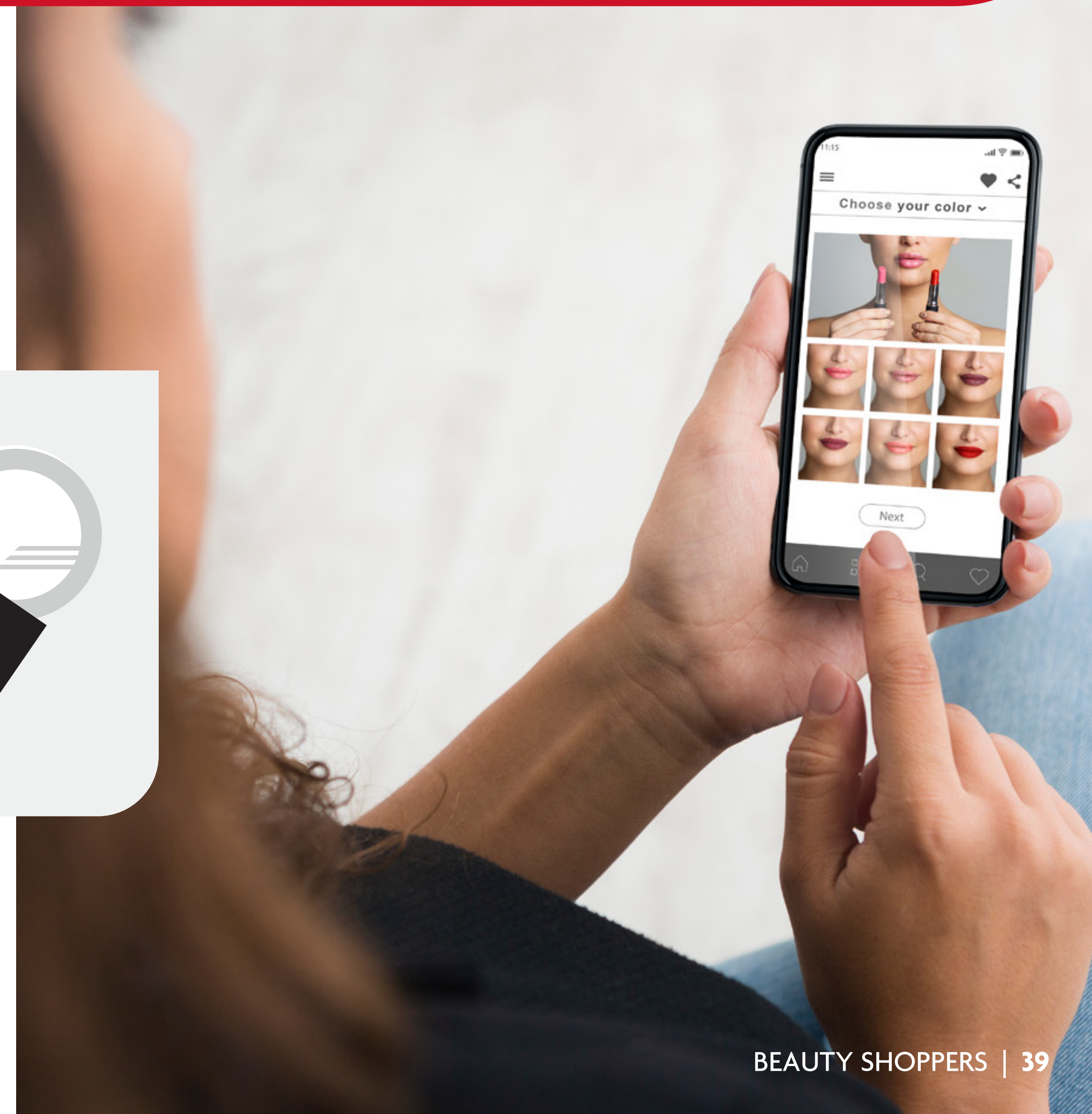

BEAUTY
SHOPPERS

BEAUTY SHOPPERS:
KEY TAKEAWAYS

- Beauty shoppers embrace AI for product discovery and comparison
- Beauty category notices increased buying; skincare maintains lead
- Product ingredients become most important factor in cosmetics purchases
- Beauty shoppers have a digital-first mindset but value in-store options
- Perks drive customer loyalty, but thoughtful packaging choices matter

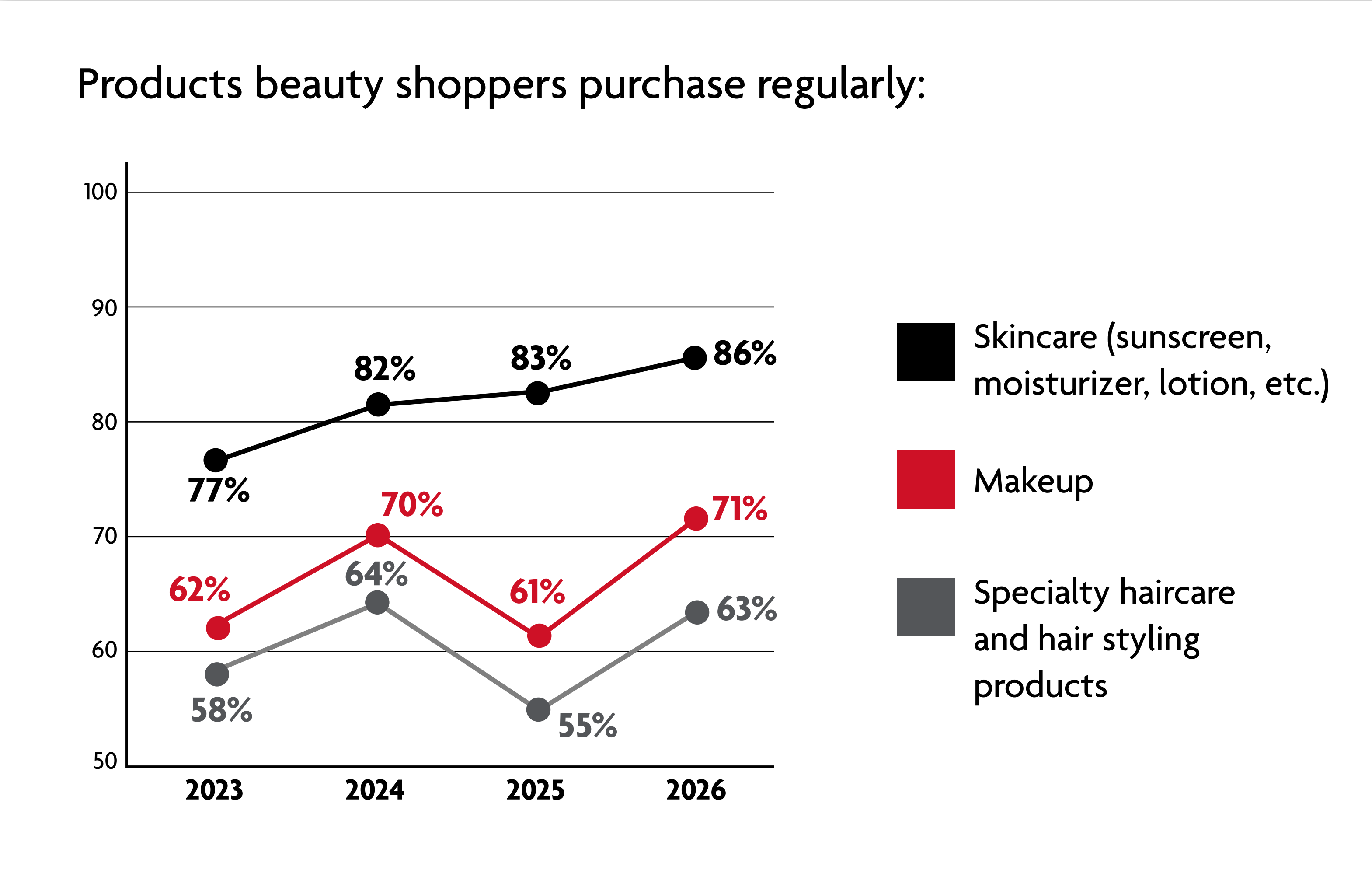
Beauty shoppers embrace AI for product discovery and comparison

Shoppers who reported using AI-powered search or shopping assistants (e.g., tools that help you search for or compare products):



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Beauty category notices increased buying; skincare maintains lead



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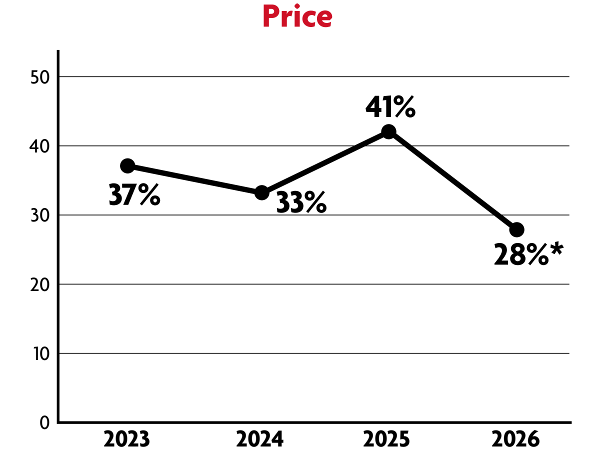
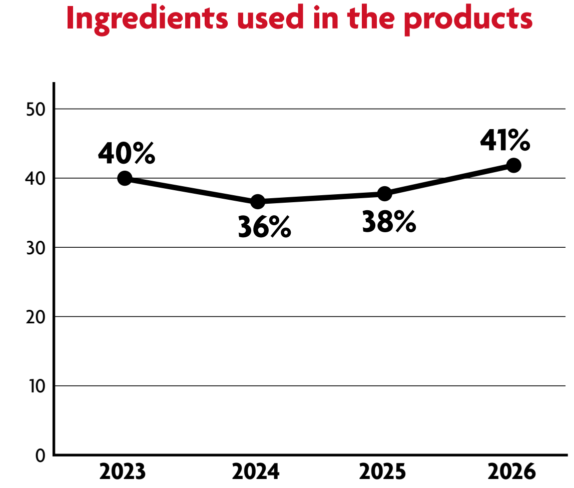
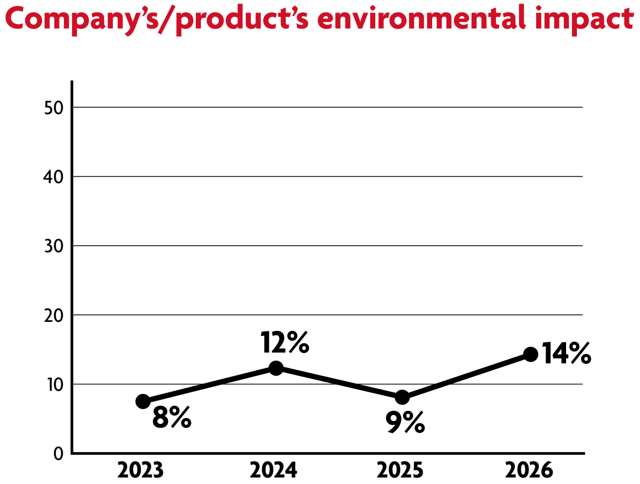
Product ingredients become most important factor in cosmetics purchases

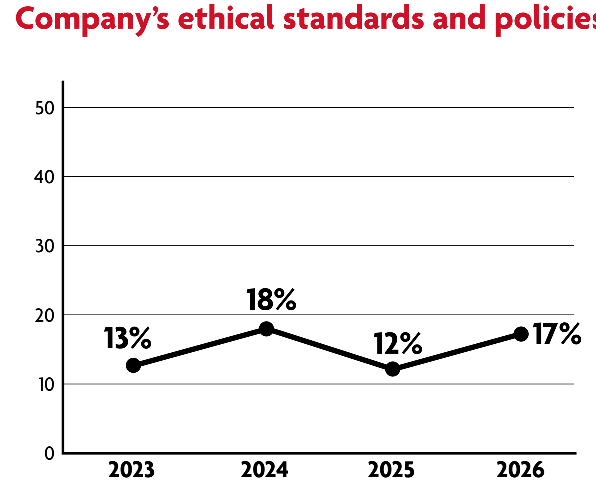
Factors that play the biggest role in **cosmetic/beauty product** purchases:



*Represents largest single-year change across answer choices since 2023



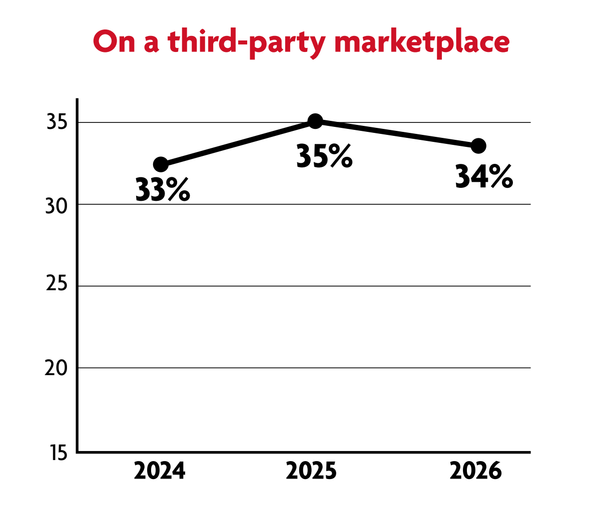


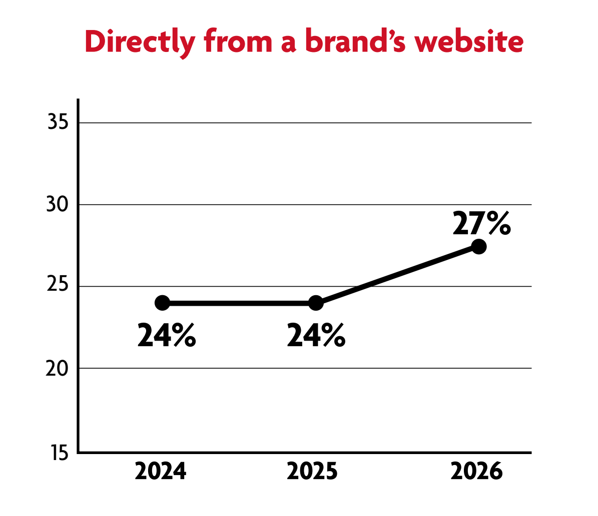


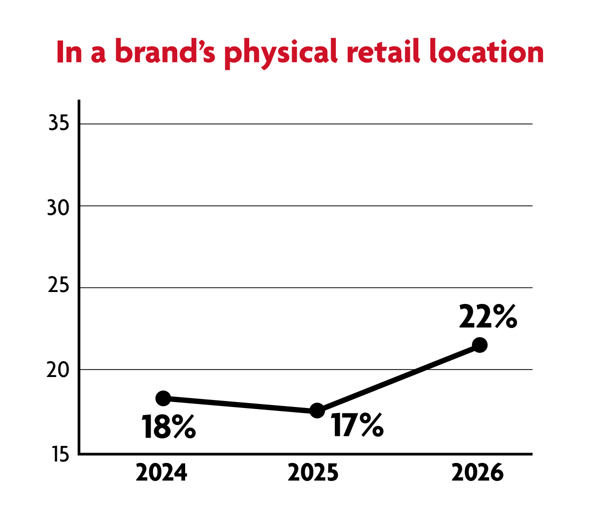
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

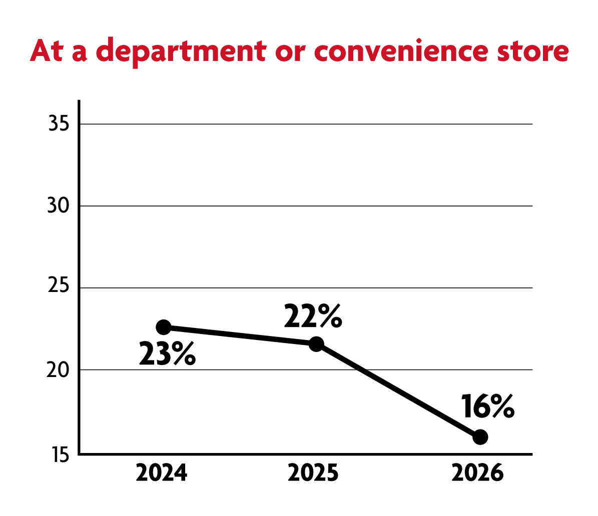
Beauty shoppers have a digital-first mindset but value in-store options

Where shoppers prefer to buy **beauty products:**

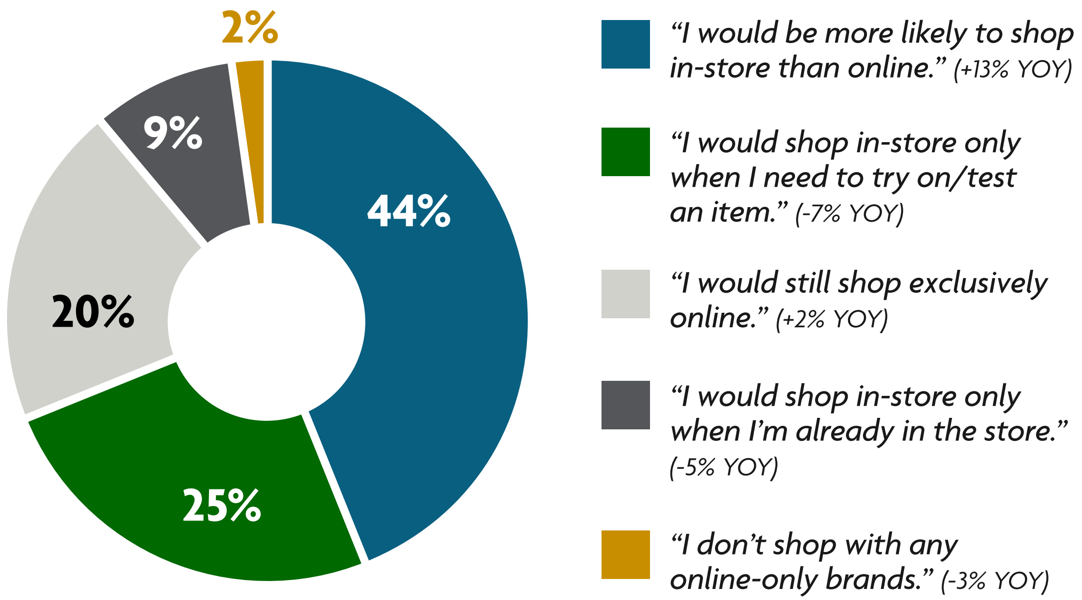








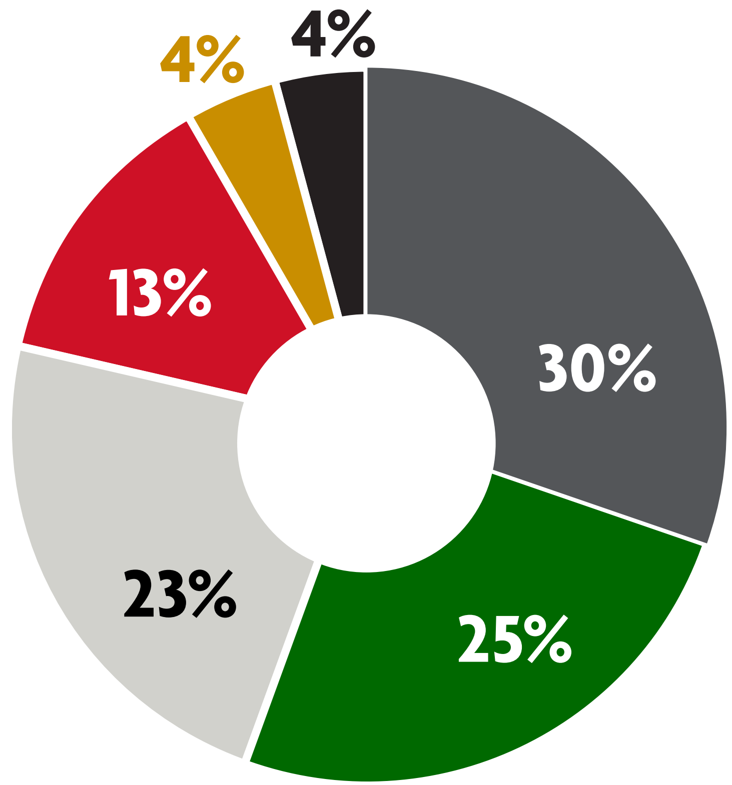
*"If an online-only beauty brand you shop with began carrying products in a physical store near you, **how would it affect how you shop with the brand?**"*



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Perks drive customer loyalty, but thoughtful packaging choices matter

"When thinking about the experience of opening up a package you ordered online, what factor is ***MOST likely to make you want to shop with the same brand again in the future?"***



- Coupons, discounts, or credit toward a future purchase *(-9% YOY)*
- Free product samples *(-5% YOY)*
- Sustainable packaging *(+6% YOY)*
- A premium experience (unique packaging, tissue paper, twine, ribbon, etc.) *(+7% YOY)*
- A personal note *(no change)*
- Swag (stickers, keychains, etc.) *(no change)*

Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

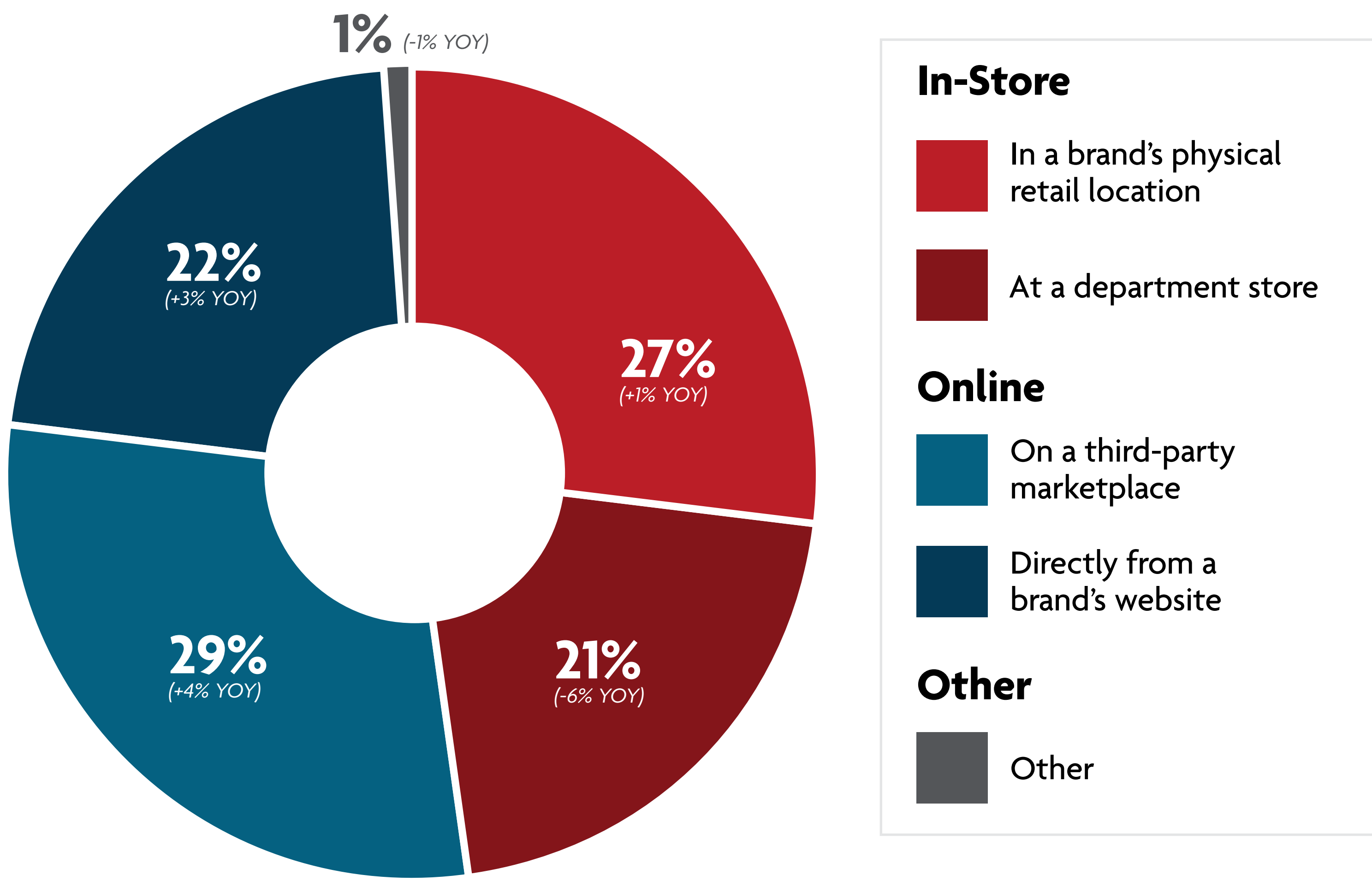
APPAREL SHOPPERS

APPAREL SHOPPERS:
KEY TAKEAWAYS

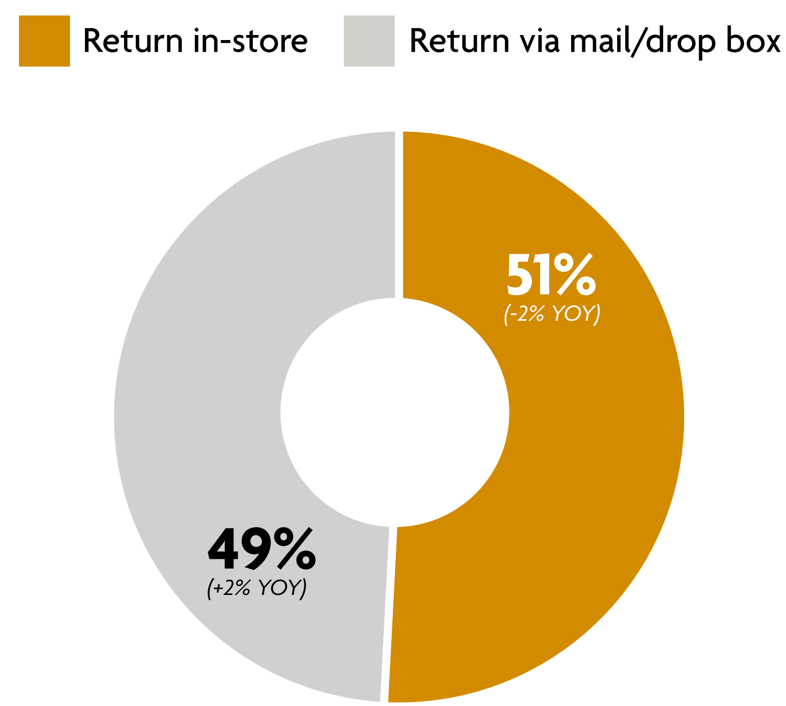
- Physical and digital shopping channel preferences strike balance
- Despite losing ground to delivery speed, free shipping remains key influence in apparel shoppers' purchasing decisions
- Returns are deciding factor in apparel e-commerce loyalty
- Price influence declines for apparel shoppers as other values gain ground

Physical and digital shopping channel preferences strike balance

Where apparel shoppers prefer to buy clothing:



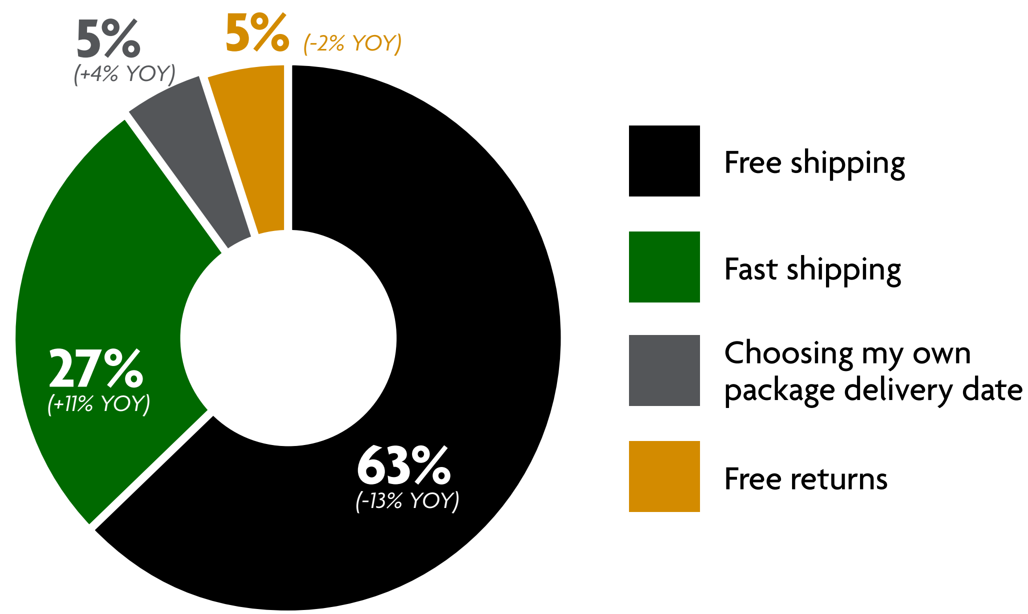
Return method preference for online purchases:



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

Despite losing ground to delivery speed, free shipping remains key influence in apparel shoppers' purchasing decisions

Factors that play the biggest role in deciding where to make an online purchase:



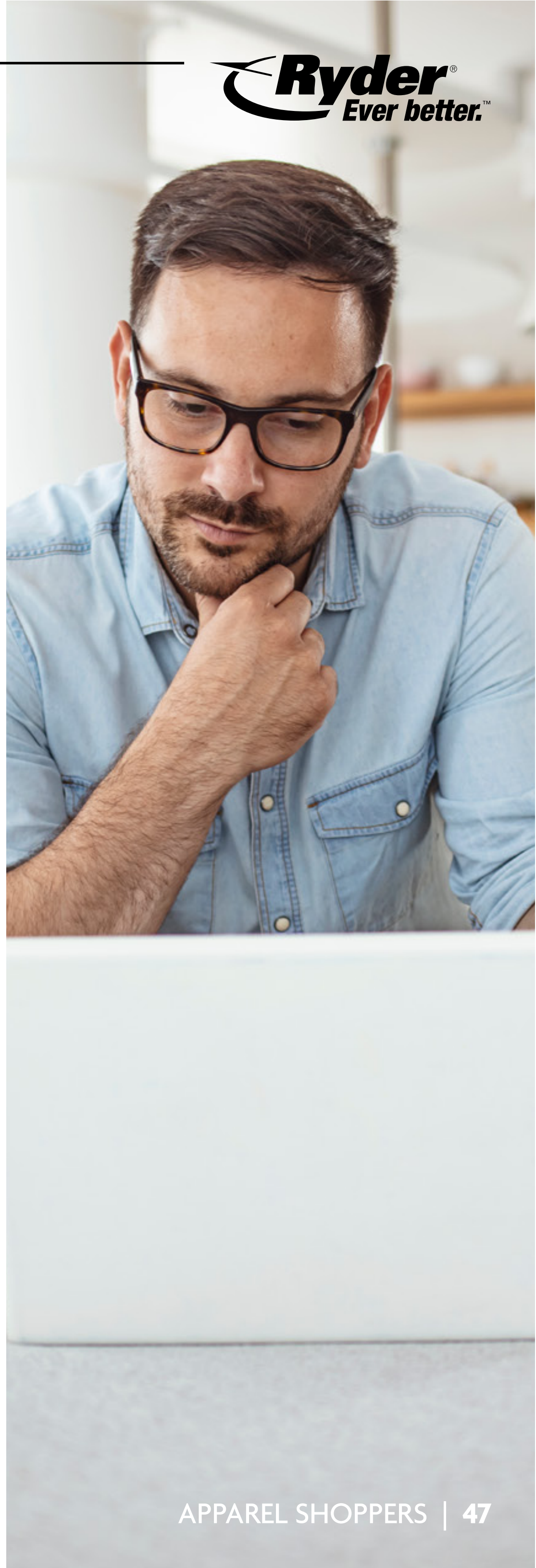
72%

of apparel shoppers have abandoned carts upon seeing unanticipated shipping costs. *(-1% YOY)*

75%

of apparel shoppers have added more items to their online carts to qualify for free shipping. *(+2% YOY)*

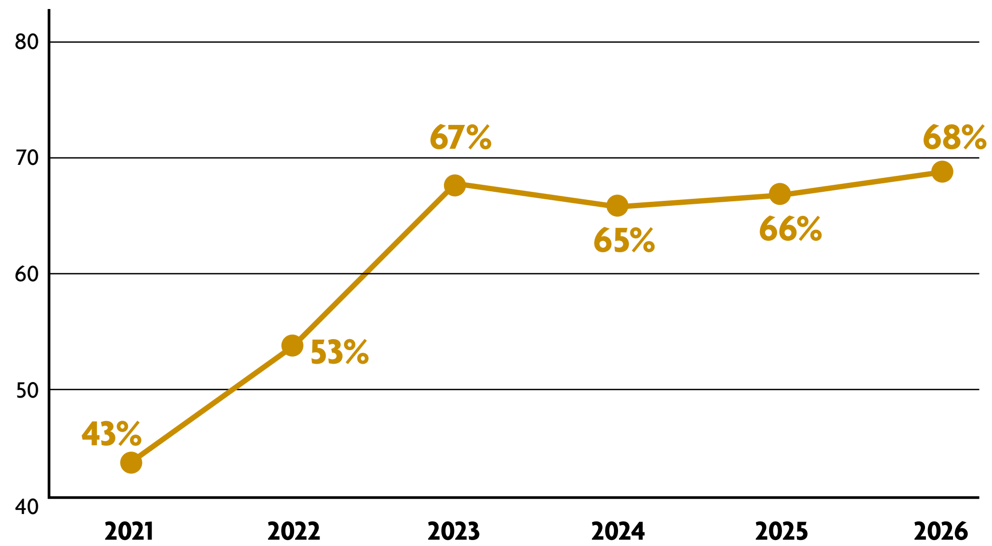
Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.



Returns are deciding factor in apparel e-commerce loyalty

In the past year, 49% of apparel shoppers reported returning clothing they purchased online.

More than ever, being offered a returnless refund makes apparel shoppers want to shop with a brand again:

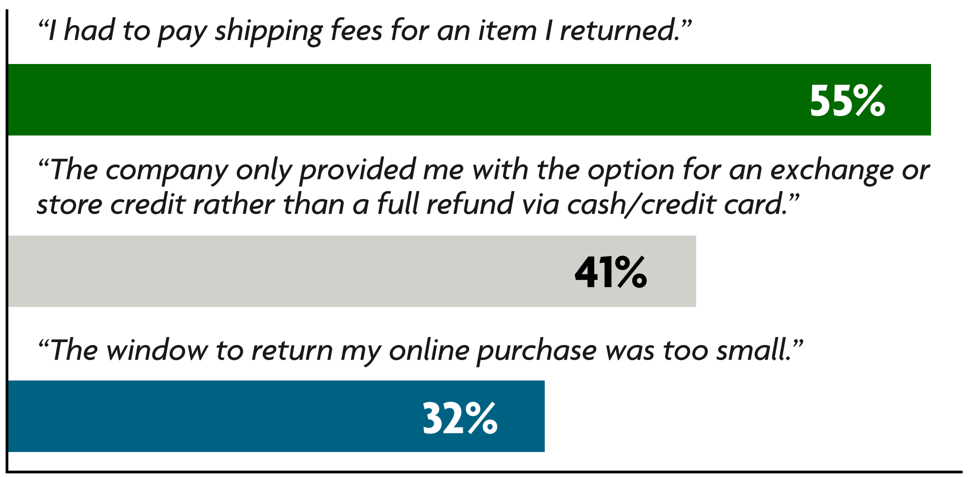


52% of apparel shoppers **will not make an online purchase** from a brand that doesn't offer free returns. *(-5% YOY)*

Specifically related to returning online orders:

80% of apparel shoppers had an experience that prevented them from continuing to shop with a company. *(+7% YOY)*

Of those, the 3 most common experiences were:

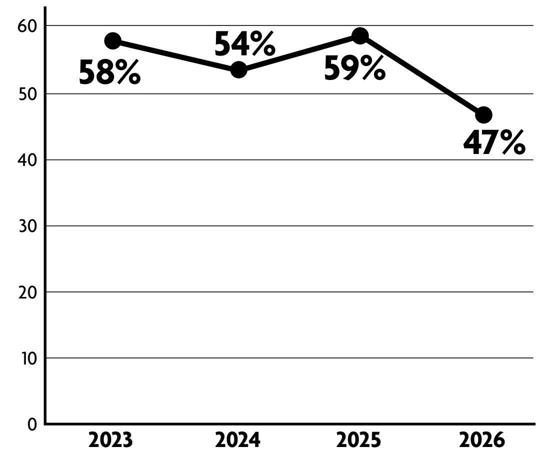


Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

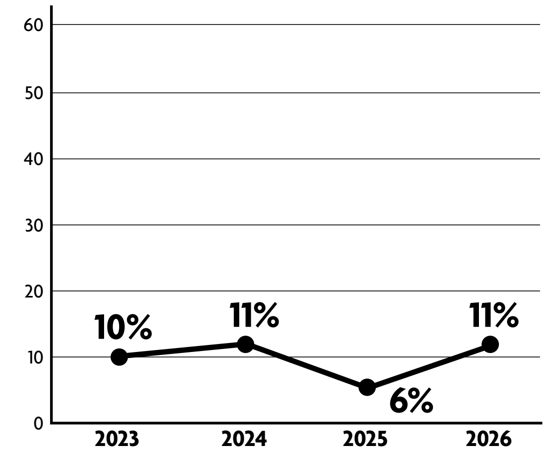
Price influence declines for apparel shoppers as other values gain ground

Factors that play the biggest role in **apparel purchases:**

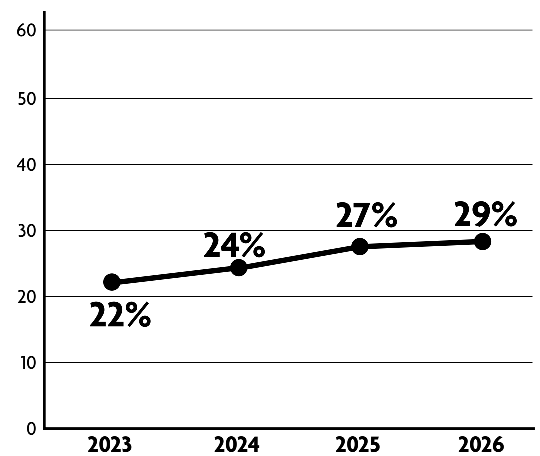
Price



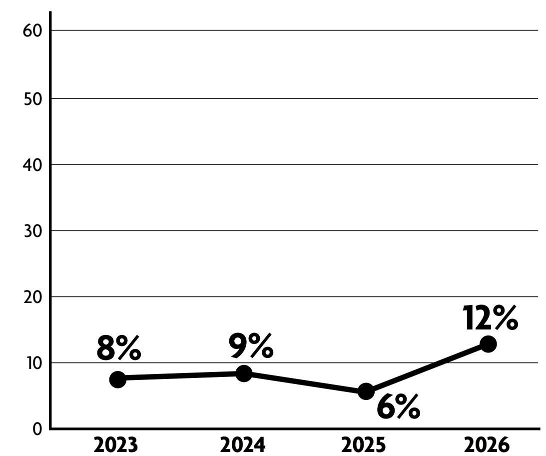
Company's ethical standards and policies



Materials used in the products



Company's/product's environmental impact



Note: Percentages may not total 100% due to rounding and/or because respondents could select more than one answer.

METHODOLOGY

In March 2026, Ryder hired a third-party research company to survey 1,160 consumers who reported shopping online either “often,” “sometimes,” or “all the time” about behavior, preferences, experiences, and expectations pertaining to their online and in-store activity from 2025 to 2026. Subject matter comprised purchasing behavior, packaging, shipping, returns, sustainability, and omnichannel experience.

Gender breakdown:

Male: **48%**

Female: **52%**

Other: **< 1%**

Age breakdown:

18-29: **13%**

30-44: **35%**

45-60: **30%**

>60: **21%**

Regional breakdown:

South: **35%**

West: **24%**

Midwest: **21%**

Northeast **20%**

ABOUT RYDER SYSTEM, INC.

Ryder System, Inc. (NYSE: R) is a nearly $13 billion leading provider of outsourced logistics and transportation services throughout the United States, Canada, and Mexico. Ryder offers supply chain, dedicated transportation, and fleet management solutions that integrate every step of the supply chain port to door, including cross-border logistics, fleet and transportation management, warehousing and distribution, and final delivery to customers' doorsteps. Ryder's broad portfolio of services encompasses managed transportation, freight brokerage, dedicated contract carriage with professional drivers, full service fleet leasing and maintenance, commercial truck rental, automation and robotics, digital technologies, contract manufacturing and packaging, omnichannel retail fulfillment including e-commerce and last-mile delivery, and used vehicle sales. Serving more than 20 industries, Ryder manages approximately 240,000 commercial vehicles, operates nearly 800 maintenance locations, and runs approximately 320 warehouses totaling more than 100 million square feet. Ryder is consistently recognized for technology driven innovation and industry leading practices in safety, health, security, talent acquisition, and environmental management, and was most recently named to Fortune's "America's Most Innovative Companies" list.

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