

2026 Ocado Ads

Shape of the Shop

From discovery to doorstep

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Introduction

Shape of the Shop 2026

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Welcome to the Shape of the Shop Report 2026

Online grocery shopping has shifted from a linear routine into a flexible, digital-first ecosystem. While physical retail binds shoppers to aisle layouts, the digital storefront allows consumers to navigate fluidly and treat their carts as living documents edited over multi-day sessions.

The *Ocado Ads Shape of the Shop Report 2026* looks beyond the search bar to analyze the complete, end-to-end journey across Ocado.com. Drawing on platform data this report examines how consumers navigate, discover, and edit their shops.

Report Structure:

- **Storefront Entry & Initial Build:** Homepage foyer dynamics, 60-second dwell times, and initial £88 basket drafting across 21 categories.
- **Favourites & Algorithmic Loyalty:** How saved lists strip away choice friction, auto-pin products, and drive high-converting repeat buys.
- **Curated Discovery & Events:** Leveraging digital displays to capture new shoppers and fuel cross-category trial.
- **Search & Trending Intent:** High-intent query mechanics, top branded keywords, and social-trend momentum.
- **The Asynchronous Basket Edit:** The 48-hour editing window, spend acceleration near delivery cut-offs, and final basket completion.

“While search remains the heart of the online shop, the way our customers build their baskets is far richer and more dynamic than a single search bar. From initial homepage inspiration and multi-day basket edits, to curated event spaces and late-stage checkout discoveries, this year’s report opens up the full picture of our virtual store. It shows how millions of decisions unfold across the entire site, giving us and our supplier partners an unprecedented look at how customers truly browse, discover, and fall in love with products.”

Laura Belchier– Retail Media Director



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Who are Ocado Ads & what makes us unique?

Ocado Ads exists as the UK's premier online-only retail media network, built to drive customer-first brand growth for our supplier partners. By operating as a pure-play digital platform, we eliminate the traditional friction between marketing and sales, replacing rigid lead times and departmental silos with a seamless, full-funnel media solution.

What truly sets Ocado Ads apart comes down to three key operational advantages:

- **All under one roof:** We integrate offsite and onsite media directly with your commercial trade plans. By uniting sales and marketing under a single, shared data view, we ensure every media campaign directly supports your broader trade objectives.
- **Pure Play advantage:** Because Ocado is 100% online, we capture every single customer interaction and purchase digitally with zero physical store-level noise. This rich first-party dataset powers precise audience targeting and delivers pure, closed-loop attribution so you can measure exact ROI.
- **Pivot faster:** Built as an agile disruptor and the home of test-and-learn in the UK, we empower advertisers with flexible self-serve tools. You can adjust creative messaging, and react to live stock levels in real time—not weeks later.





Shape of the Shop

Shape of the Shop in numbers



1.3m

Active Ocado customers



19.4

Orders per year



£127.16

Average basket size

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Per a given order, Ocado customers...

view **268**
Different Skus

checkout on average
3 times

use **18** Search
Terms

spend on average **2**
days building
their basket

visit **90** Pages



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Headlines

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Entering the Shop

Arriving at the Digital Storefront

Online retail completely breaks the linear sequence of physical grocery shopping. Unbound by store architecture or physical proximity, consumers navigate an open, non-linear platform. Entry is heavily driven by established routine, with direct app and site visits accounting for 31% of overall traffic—demonstrating that online grocery shopping has become a daily reflex rather than a sporadic task.

The Role of the Homepage

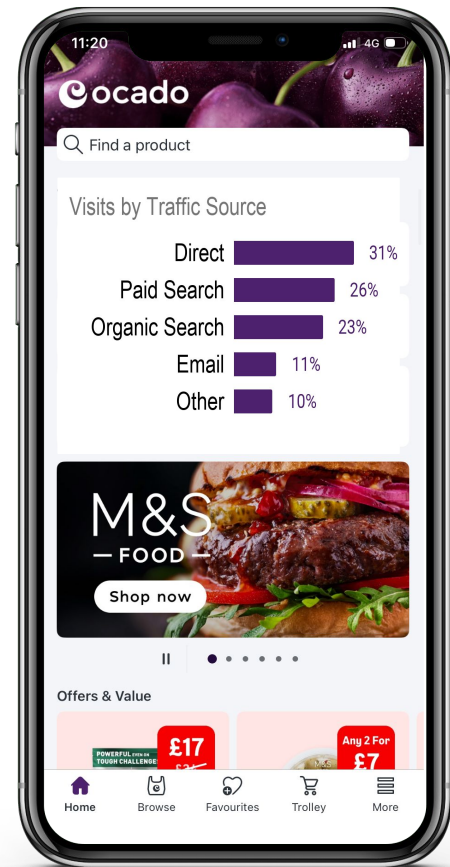
Regardless of the arrival channel, over 90% of all incoming traffic lands directly on the homepage. Serving as a digital entry foyer, the homepage acts as the central starting point where shoppers spend an average of 60 seconds, which represents 13% of their total site dwell time. Consumers use this minute to absorb seasonal hero banners, scan top-level promotions, and set their shopping goals before moving on to specific product tasks.

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Building the Initial Basket

Immediately following entry, shoppers begin drafting their cart, adding an average of 26 SKUs across 21 distinct categories to reach an initial draft spend of £88.00. Early additions are largely driven by logistical spend thresholds, such as the £40 minimum spend required to reserve a preferred delivery slot. As a result, high-ticket placeholder items like spirits over-index during this initial build phase before shoppers edit their carts over subsequent days.

Initial basket building varies significantly by customer tenure. Lacking saved purchase histories, "Nursery" shoppers making their first few orders must build carts entirely from scratch using search queries and homepage promotions. Once shoppers complete these initial orders, platform familiarity increases, layout friction dissolves, and behavior transitions rapidly into automated re-ordering. Prominent entry-point positioning is therefore critical for acquiring new customers and securing long-term lifetime value.



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The Importance of Favourites

The Power of Habit: Bypassing the Shelf to Lock In Brand Loyalty

While search drives active hunting, the Favourites list holds immense passive power. It eliminates choice friction by presenting a pre-curated store of trusted products. The Favourites page delivers an exceptionally high conversion rate per impression, accounting for 18% of all basket items.

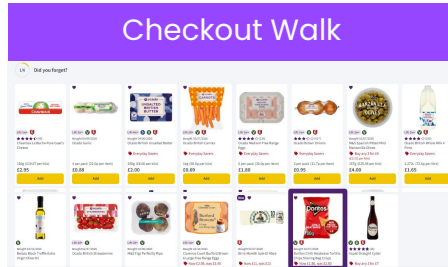
Once purchased, a product becomes a 'Favourite' and automatically pins to the top of Search Results, Aisles, and the Checkout Walk—bypassing traditional shelf competition to transform a single purchase into an automated household regular.

To capture this coveted status, tactics like **Sampling** and **Checkout Walk Gifting** are highly effective. Placing trial items directly into baskets ensures they become customer Favourites and benefit from boosted visibility

71% of adds are favourite items



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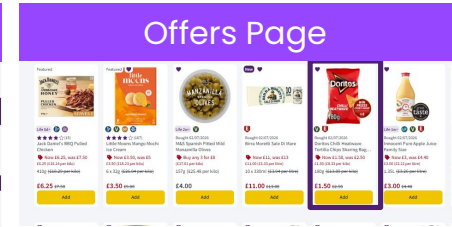
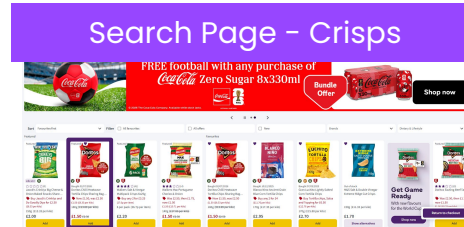


Category Mindsets: Repeat Buys vs. Open Discovery

Adoption is shaped by purchase cadence and shopper intent:

- **High-Frequency Staples (Fresh, Chilled, Dairy):** Depend heavily on Favourites. Shoppers prioritize speed, reordering routine essentials in seconds via saved lists or automated prompts.
- **Low-Frequency Discretionary (Home, Clothing, Seasonal):** Invert this behavior. Purchased occasionally, these items tend to display after high frequency Favourites; consumers switch to open discovery, browsing virtual aisles, events, and search for inspiration.

This demands a tailored approach: high-volume staples must focus on driving early trial to secure permanent Favourite status and minimize churn, while discretionary brands should maximize visual merchandising, event placements, and search visibility to capture impulse purchases.



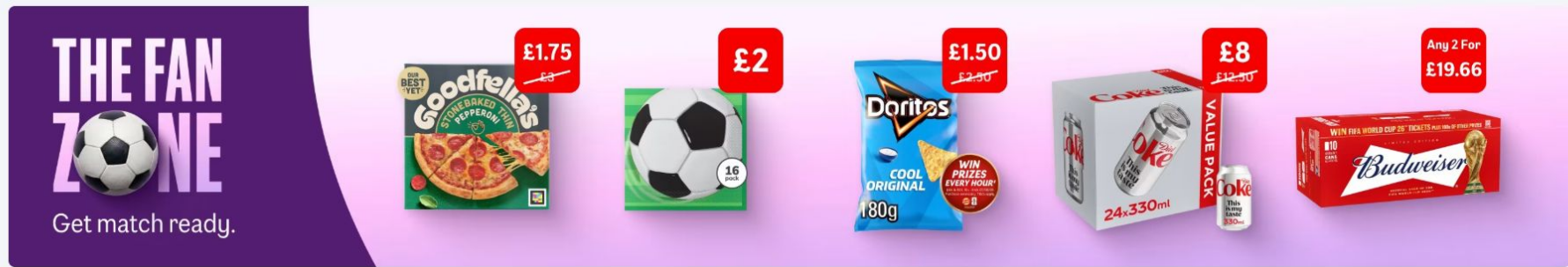
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Event Driven Discovery



Browse Shop ▾ Recipes Offers Coupons Favourites Shopping Lists Instant Shop Regulars Reserved Orders Smart Pass Brands We Love

Shop All Fan Zone Snacks & Treats Beer, Wine & Spirits Soft Drinks Deli & Picky Bits BBQ & Pizzas Partyware & Merch



While loyal shoppers rely on automated reordering, first-time and exploratory buyers spend the most time in the events section. Functioning as digital mannequin displays, events provide inspiration for shoppers without a saved purchase history, making them the primary battleground for top-of-funnel acquisition and cross-category discovery.

Unlike static physical aisle displays, digital events dynamically bundle complementary SKUs around specific consumer missions (e.g., barbecues or back-to-school).

This framing intercepts shoppers when they are open to trial, experimentation, and brand switching rather than locked into habit.

Events being organized around lifestyle occasions rather than rigid departments allows shoppers to easily navigate across

categories, expanding basket breadth with higher-margin, discretionary items they would otherwise bypass.

Engaging with a well-merchandised event shifts behavior to open exploration. For challenger brands and new launches, event placement drives trial, captures impulse additions, and accelerates the transition into favourites.

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Feedback

Live Chat

Search is still King

Search as a Targeted Hunting Tool

When shoppers need items outside their essentials, the search bar acts as a high-precision utility. Consumers deploy an average of 18 distinct queries per ordering session, reflecting targeted, problem-solving navigation. Search pages represent a highly transactional touchpoint, accounting for 37% of total product views and directly driving 43% of all items added to the digital basket.

Speed of Decision and Grid Visibility

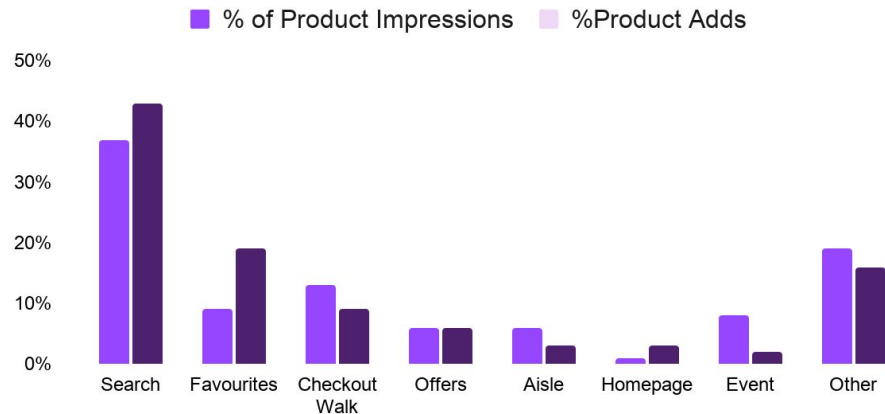
Buying decisions on search pages happen with rapid momentum. The average dwell time on search is 42 seconds. Furthermore, the average add-to-basket position sits at position 6, meaning most selections occur within the top two rows on desktop or a single scroll on mobile. Products outside this top grid miss critical high-intent decision windows. **Featured Products** which sit in the first 4 products are therefore a hugely valuable way to get in front of high intent customers.

The Non-Search Majority

While search is a critical conversion engine, 57% of all items added to baskets originate outside the search bar. Shoppers rely heavily on passive navigation, curated Events, category aisles, automated Favourites, and checkout prompts to complete their shop.

Strategic Media Implications

Over-allocating media budgets exclusively to search advertising leaves brands competing for less than half of the total digital basket. While search remains essential for capturing active commercial intent, a balanced media strategy must combine search keywords with passive display, homepage placement, and checkout touchpoints to engage shoppers across the full journey.



The Search Barometer: Top Brands & Viral Cravings

Moving the needle;
What's trending this year

1. Ole & Steen
2. Buzzballz
3. GSN
4. Daise
5. Chocolate Fruits
6. Rodds
7. Lola ('s Cupcakes)
8. 6 Ingredients
9. M&S Ingredients
10. Lamington



The Branded Battleground Top 10 Branded searches this year

1. Weetabix
2. Diet Coke
3. M&S Ready Meals
4. M&S Biscuits
5. Coke
6. Fairy Liquid
7. Lurpak
8. Pepsi Max
9. Marmite
10. Pink Lady Apples **New**



While foundational search behavior remains stable, tracking this year's top-searched brands and trending keywords offers a real-time view into evolving consumer demand. From viral social media trends directly triggering high-intent queries to emerging brands gaining rapid search momentum, the search bar continues to act as a direct barometer of cultural interest and brand discovery.

Editing the Basket

Online grocery orders operate as living documents rather than single transactions. Customers spend an average of 16 minutes editing per order—accounting for 42% of total on-site time—with 33% of orders being edited three or more times before delivery.

- **Micro-Sessions & Mobile Dominance:** Shoppers frequently re-enter the app for rapid, targeted additions. Over a third (35%) of search-led sessions seek just one specific item, and 20% of sessions with an add-to-bag result in a single SKU addition. Mobile drives 74% of these quick basket edits compared to 67% of initial order placements.
- **Cut-Off Deadline Urgency:** Customer spend per edit session accelerates as the delivery cut-off time approaches

Value Added (Net Impact) on Edit vs Cutoff Time

<4 Hours until cutoff

£9.62

4-24 Hours until cutoff

£7.83

>24 Hours until cutoff

£3.63



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Department Shifts & Strategic Implications

The editing phase captures a distinct shift in category mix. Initial edits draw a heavy concentration of non-food household replenishment alongside impulse additions. Departments that over-index significantly in early basket builds relative to final completed orders include **Party (175 ix)**, **Clothing (169 ix)**, **Suncare (167 ix)**, **Beauty (162 ix)**, **Health & Toiletries (142-143 ix)**, and **Confectionery (131 ix)**.

Because basket building is an extended process, securing an initial placement is only the first step. Non-food, personal care, and impulse brands must maintain continuous visibility across app touchpoints, search, and checkout prompts to capture late-stage spend before the final order window closes.



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Key takeaways

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The Ocado Ads 2026 Shape of the Shop report expands beyond the search bar to analyze the complete non-linear customer journey across Ocado.com. Drawing on comprehensive platform data, the report tracks how 1.3 million active monthly shoppers navigate, discover, and build their baskets across 19.4 annual orders, reaching an average final basket value of £127.16.

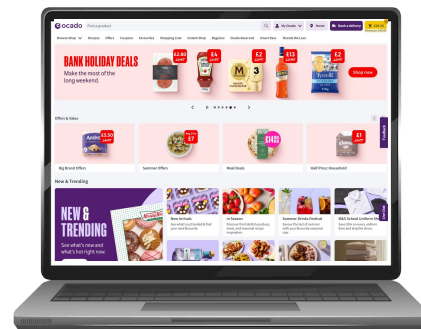
Key Findings:

- **The Digital Foyer & Initial Build:** Over 90% of traffic enters via the homepage, lingering for 60 seconds (13% of site dwell time). Shoppers quickly build an initial draft averaging £88.00 across 26 SKUs. Early additions are driven by spend thresholds (e.g., £40 minimum delivery reservation), causing high-ticket items like spirits to over-index at 125.
- **Search vs. Non-Search:** Search remains a high-intent engine—driving 37% of views and 43% of basket additions at an average of 25 seconds per item. However, the non-search majority (57%) relies on passive aisle browsing, curated events, and reorder lists to complete their shop.
- **Favourites & Habitual Loyalty:** Saved lists account for 17%–20% of basket items. Earning "Favourite" status automatically pins products to the top of search, aisle browsing, and checkout paths, bypassing traditional shelf competition for returning shoppers.

- **Events & Nursery Onboarding:** For new "Nursery" shoppers lacking saved histories, the Events page holds the highest dwell time. Acting as digital mannequins, curated occasion displays drive initial trial, cross-category discovery, and basket expansion.
- **The 48-Hour Edit & Checkout Walk:** Carts operate as living documents edited over 48 hours across 3 checkouts. The trip finishes with the digital Checkout Walk—encountered by all customers when first checking out a basket—which surfaces forgotten routine items as well as inspiration before final payment.

What Next?

While search captures active commercial intent, long-term brand growth requires a full-funnel approach. Securing early visibility and event placement drives initial trial, locking products into automated, repeat household purchasing.



Interested in learning more, contact the team



Laura Belchier
Retail Media Director
laura.belchier@ocado.com



Elisa Musiu
Retail Media Analyst Manager
elisa.musiu@ocado.com