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AUSTRALIAN
**FOOD &
GROCERY**
COUNCIL

What happens when shoppers no longer do the shopping?

How AI will make Australian
grocery shopping less human
touch, more human-centric



■ ■ ■
The better the question. The better the answer.
The better the world works.

Foreword

For more than 70 years, the basic bargain of grocery shopping has barely changed: shoppers decide what they need, choose where to buy it and make hundreds of small decisions before reaching the checkout.

Today, almost all Australians shop at one of the major supermarket chains. Yet advances in artificial intelligence invite us to imagine a different model - one where shoppers describe what they need and their AI agent builds the grocery list, compares retailers and buys on their behalf.

This research, commissioned by Richard Rome, Associate Partner, Consumer Industry, Ernst & Young, Australia, and conducted in collaboration with the Australian Food and Grocery Council, explores Australians' willingness to embrace this emerging concept of AI-assisted grocery shopping.

Although autonomous capabilities are still developing, it is increasingly feasible to envisage shoppers telling their AI agent what they need and value, rather than what to buy. An agent would translate a shopper's priorities and preferences, interpret product information, plan meals, replenish household essentials and purchase from multiple retailers to optimise value and convenience.

This research surfaces questions we have not attempted to answer here: how trust and permission may change with experience of AI agents; how shoppers might trade control for time or savings; and how those choices may vary across needs, products and purchasing occasions.

Uncertainty is precisely what gives grocery retailers and suppliers food for thought. The more AI fills the basket, the less grocery shopping will rely on the human touch, and businesses need to understand who the basket is for.

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About the research

EY Studio+ conducted a nationally representative online survey of 1,000 Australian adults aged 18 years and over in June 2026 to explore how artificial intelligence could reshape grocery shopping.

In the context of this research, we define an AI-powered shopping agent as a trusted, retailer-agnostic assistant that can plan, compare and recommend grocery choices across retailers and, with permission, eventually make purchases on a shopper's behalf.

EY Studio+ asked respondents about their current shopping behaviours, attitudes towards AI, willingness to delegate grocery decisions, the conditions required for adoption and the role of AI-powered shopping agents.

Respondents were selected using a random stratified sample with quotas for age, gender and region, and results were weighted to reflect the Australian population. The survey has a maximum margin of error of $\pm 3.1\%$ at the 95% confidence level.

Together, these findings provide an evidence base for how Australians may adopt AI agents for grocery shopping and what this could mean for retailers, brands and the future of grocery commerce.

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Executive summary

Will Australians use AI agents to shop?

Australian grocery shoppers are adopting AI at a rapid rate. They are willing to use AI to simplify grocery shopping, provided it delivers genuine benefits.

72% are comfortable with AI gathering prices, deals and product options.

1 in 3 are at least somewhat comfortable with AI automatically reordering regularly purchased items without asking for confirmation.

What decisions will shoppers hand over first?

Most Australian shoppers are open to some form of assistance, but very few are ready to hand over complete control.

Level of control	Current shopper mindset	% of respondents
No delegation	"I'd still rather do it myself."	35%
Assisted decisions	"I'll use AI, but I'll review every item."	25%
Routine delegation	"AI can handle the routine purchases."	24%
Full delegation	"I trust AI to order automatically."	8%
Unsure / Other	Undecided	8%

Which products will AI choose?

AI agents are most likely to initially take over lower-risk, repeatable purchases: pantry staples, beverages, snacks and household products. Purchases involving health, family or personal responsibility are less likely to be delegated.

How does an AI agent earn shoppers' trust?



Make it worth my while

#1 priority is to find the best price or value for money.

Earn my trust

41% said an AI agent is only usable if it provides accurate, trustworthy recommendations and clearly explain its reasoning.

Save me time

15-30 minutes time saving is the sweet spot.

Treat my data responsibly

59% are willing to share information about themselves in return for recommendations, but privacy and responsible use of data are among their top three priorities for AI adoption.

Keep me in charge

63% want to retain some human oversight.*

Loyal to shoppers, not supermarkets

88% already shop across more than one grocery retailer each month. A retailer-agnostic AI agent could make shopping across the market even easier.

The research sets out what these signals mean for retailers and suppliers, with practical actions to consider now, next and beyond.

The starting point is the human behind the basket.

*Excludes "Don't know" and "not sure" responses

Introduction

As AI becomes increasingly capable, it's not difficult to imagine a future where shoppers outsource some, or even most, of their purchasing decisions to intelligent agents acting on their behalf.

So, we wanted to understand how this might unfold. Who are likely to be the early adopters? What will drive them to adopt AI and what will hold them back. Which categories are most vulnerable to disruption? And what are the implications for retailers and brands if the primary decision-maker is no longer a human shopper?



Five questions for grocery retailers and suppliers

And five takeaways for what comes next

1. Will Australians use AI agents to shop?

Permission granted, but conditions apply.

Australian shoppers are adopting AI at a rapid rate. They are willing to use AI to simplify grocery shopping, provided it delivers genuine benefits.

Here are just some signals of appetite:

72%

are comfortable with AI gathering prices, deals and product options.

49%

are likely to use an AI tool that reliably sources their usual basket across multiple supermarkets.*

58%

of large online shoppers would hand over control to AI to complete purchases if it saved them up to 30 minutes per large online shop.

1 in 3

are at least somewhat comfortable with AI automatically reordering regularly purchased items without asking for confirmation.

*Excludes "Don't know" and "not sure" responses

A hand holding a receipt in a grocery store setting. The background is blurred, showing shelves and lights. The receipt is white with black text and a barcode.

This willingness to use AI is not unconditional. Shoppers are negotiating a value exchange. They expect AI to earn the right to make decisions on their behalf by delivering demonstrable benefits: lower prices, meaningful time savings, greater convenience and less mental effort.

Exhibit 1: The price of permission

- 01 Save me money
- 02 Earn my trust
- 03 Save me time
- 04 Understand 'me'

Insight: Shoppers are not giving AI permission simply because it is clever. The early opportunity is to use technology to remove effort while preserving value, control and choice.

Familiarity opens the door. Trust keeps it open.

Experience with AI is strongly associated with openness to using it for grocery shopping. More than half (52%) of shoppers with no AI experience say nothing would make them consider using an AI agent, compared with just 5% of those with some experience and 2% of those with very high experience.

But experience doesn't mean a blank cheque. Even among highly experienced AI users, 57% want accurate, trustworthy recommendations, 56% want control of the final decision and 53% want their privacy protected.

2. What decisions will shoppers hand over first?

Shopping is moving from decision to delegation.

When asked to imagine AI reducing grocery shopping to less than five minutes a week, most Australian shoppers we surveyed were open to some form of assistance, but very few were ready to hand over complete control.

Instead, the findings suggest a progression rather than a leap, as AI gradually takes over hundreds of small, repetitive decisions. The factors shaping that progression are likely to overlap: age, AI experience, product type, price and trust may all play a part. This initial research does not test how these factors might interact.

Exhibit 2: Delegation one step at a time

Level of control	Current shopper mindset	% of respondents
No delegation	"I'd still rather do it myself."	35%
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Unsure / Other	Undecided	8%

Insight: Not every shopper will embrace 100% automation. But for many, today's AI assistant will become tomorrow's purchasing agent.

Trust has a price tag

Shoppers appear willing to make a deal. Shoppers expect a **42% average discount** when using agentic AI for a large grocery shop.

Whether a saving of that scale is realistic is almost beside the point. The finding suggests there is a price at which the benefits of AI can outweigh concerns about trust and control. This price is unlikely to be fixed and may come down as shoppers become more familiar and comfortable with the technology.

3. Which products will AI choose?

Every trolley has its trade-offs.

Shoppers are not willing to delegate every grocery decision. The research suggests a hierarchy of trust, rather than a hierarchy of purchasing decisions.

Shoppers are most comfortable delegating routine purchases. As purchases become more personal or carry greater

responsibility, their willingness to delegate falls sharply.

This suggests AI agents are most likely to take over habitual purchases: pantry staples, beverages, snacks, and home and household products. Purchases involving health, family or personal responsibility are less likely to be delegated.

Insight: The greater the consequence of AI getting a choice wrong, the less willing shoppers are to hand it over.

Exhibit 3: The higher the stakes, the lower the trust

Type of decision	Departments	Overall	Gender		Age		
			Male	Female + Others	18-34	35-54	55-74
Habit Routine purchases with little consequence if AI gets them wrong	Pantry	32%	27%	37%	41%	41%	22%
	Beverages	30%	28%	32%	38%	37%	23%
	Snacks & confectionery	30%	27%	32%	45%	35%	19%
	Home & household	29%	27%	32%	39%	36%	21%
	Frozen produce	27%	24%	30%	39%	31%	19%
	Condiments, sauces & spreads	27%	25%	29%	34%	33%	19%
Judgement Purchases where quality, freshness or personal taste matter	Chilled & dairy	26%	24%	28%	36%	33%	17%
	Fresh produce	25%	23%	26%	35%	32%	13%
Responsibility Purchases shoppers see as too personal or important to delegate	Health & wellness	19%	18%	20%	29%	25%	8%
	Pet care	18%	16%	20%	26%	24%	10%
	Baby products & family care	10%	9%	11%	20%	12%	4%

Note: 50% would not delegate any of the listed purchases.

Meet the early adopters

Attitudes towards AI grocery shopping vary by generation far more than by gender. Younger shoppers are significantly more willing to delegate routine grocery decisions to AI, while older shoppers are more cautious.

But familiarity matters as much as demographics. People who already understand AI and have used it while shopping are more willing to let it do more.

So, who goes first? The research points to younger, higher-income, busy and digitally influenced households. But ultimately, the shoppers most willing to hand over the basket may simply be those who already know what AI can do.

And as the technology improves and confidence grows, today's figures may understate how quickly willingness to delegate could grow.

Exhibit 4: Who is ready to hand over the shopping basket?

70%

of families with children under 18

67%

of those aged 18-34 years old

65%

of higher-income households

62%

of full-time workers/self-employed

57%

of those aged 35-54 year olds

4. How does an AI agent earn shoppers' trust?

Trust is earned through performance, not promises.

Shoppers are willing to let AI help with the grocery shopping but are not prepared to hand over the basket without proof. The research suggests they are looking for AI to demonstrate competence before it takes on greater responsibility.

Rather than relying on a single factor, trust is built progressively. Shoppers want AI to make good recommendations, explain its reasoning, learn their preferences, protect their personal information and leave the final decision in their hands.

How does an AI agent earn shoppers' trust?



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Save me time

15-30 minutes time saving is the sweet spot.

Treat my data responsibly

59% are willing to share information about themselves in return for recommendations, but privacy and responsible use of data are among their top three priorities for AI adoption.

Keep me in charge

63% want to retain some human oversight.*

Insight: Trust builds in stages: assist, approve, automate.

*Excludes "Don't know" and "not sure" responses

Exhibit 5: The delegation threshold is higher online than in-store

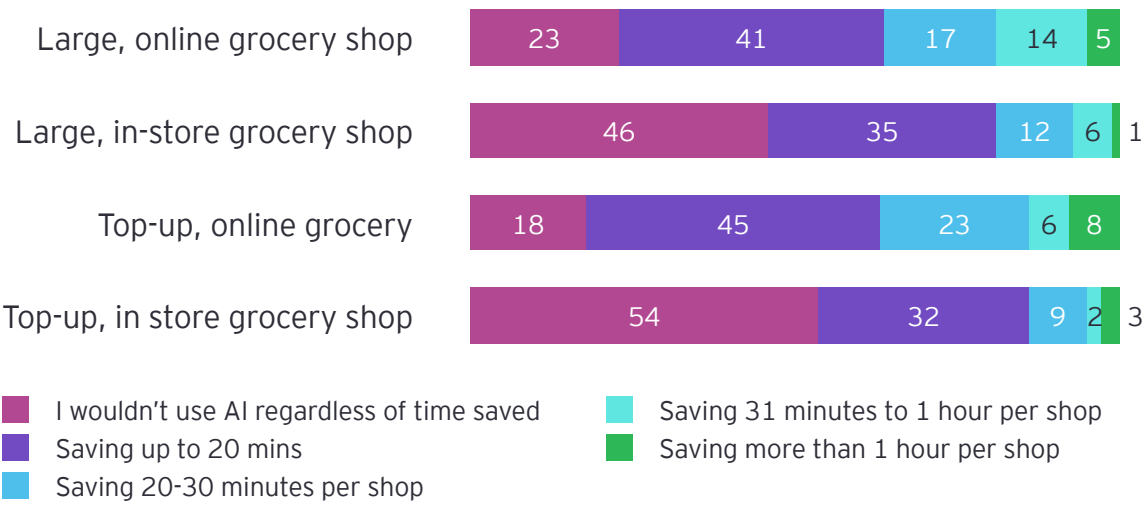
How much time do shoppers need to save on a typical large, online grocery shop to hand over control of purchasing?

The average time-saving requirement is broadly consistent across online shopping missions, at 18.6 minutes for a large shop and 18.8 minutes for a top-up shop. In contrast, shoppers require an average saving of 10.8 minutes for a large in-store shop and 8.8 minutes for an in-store top-up.

This suggests that the perceived benefits of AI delegation varies by shopping channel. Online shoppers appear to expect a greater time-saving benefit, potentially reflecting the additional effort involved in planning, comparing products and building a basket.

Whether AI saves two minutes or 20, time may be shorthand for something harder to define than minutes: mental load.

Time savings required for agentic adoption





Minimising the mental load

Grocery shopping carries a significant mental load. Planning meals, checking cupboards, comparing prices, hunting for specials and managing budgets and dietary needs that all require time and attention. What consumers are really telling us is that they want help reducing that effort.

The opportunity for AI isn't just to save time. It's to reduce friction, remove decision fatigue and simplify a task that, for many households, feels like administration. And that's a much bigger value proposition than simply saving minutes.

Ultimately, this isn't really about technology. It's about making shopping simpler, more personalised and less mentally demanding.

5. Whose side is the shopping agent on?

The supermarket is not necessarily the starting point.

Australian grocery shopping is already fragmented. Shoppers assemble their grocery basket across multiple channels, retailers and store formats.

88%

of Australians shop across more than one grocery retailer each month

64%

shop at alternatives to supermarkets

37%

fresh food markets

33%

local grocery stores

18%

specialty food stores

Younger shoppers are more likely to choose alternative store formats. This means the shoppers most receptive to AI may also be the least attached to a supermarket-first model.



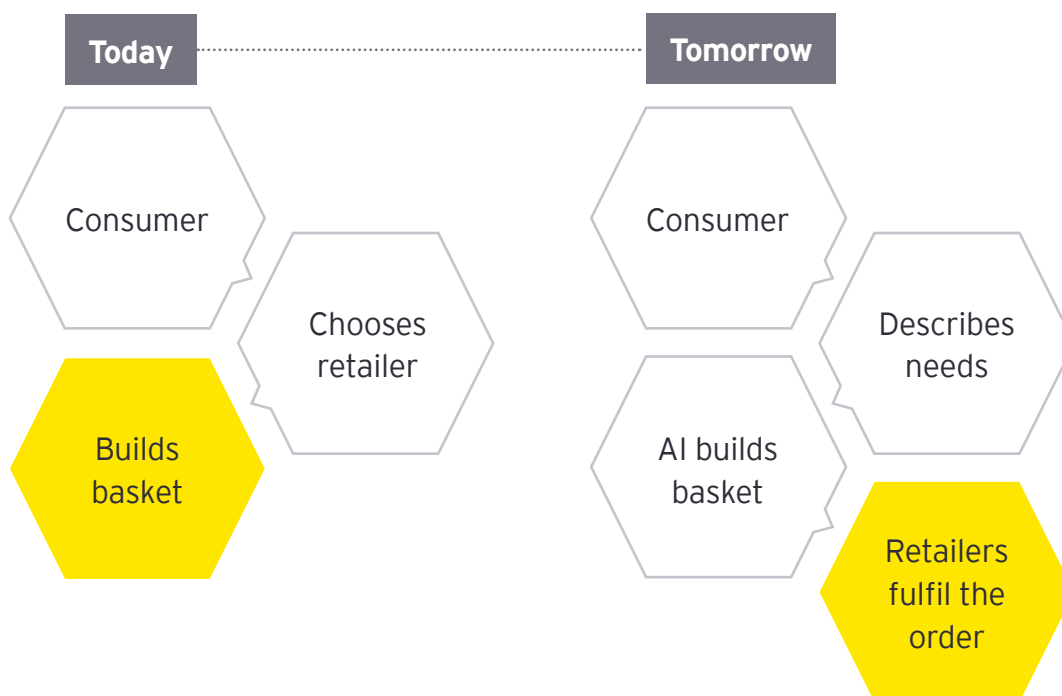
This fragmentation creates a real problem for AI to solve. But it also creates a tension for retailers. A supermarket app can optimise brilliantly within its own range. A shopper-controlled agent can, in principle, answer a different question: what is the best basket for me across the market?

Shoppers may favour independent AI agents - or even build their own - that can compare options, assemble the best value basket and then decide where each item should be purchased. But who provides that trusted, retailer-agnostic agent?

Then there's the physical world constraints. Digital optimisation may prove much easier than actual delivery. An agent could theoretically assemble the cheapest basket across multiple retailers and suppliers, but delivery fees, minimum spends, cold-chain requirements and multiple fulfilment points may quickly erase the saving. The winning proposition may therefore be the best overall basket, rather than the cheapest collection of individual products.

Insight: It's too early to tell which models will win and retailers retain advantages in customer relationships, loyalty, range, fulfilment, availability and proprietary data.

Exhibit 6: Shopping starts with a prompt



A woman with blonde hair in a bun, wearing a light-colored jacket over a patterned scarf, is looking at a smartphone. The background is dark with warm, out-of-focus bokeh lights.

What happens next?

Looking beyond the grocery basket

The research gives us signals, rather than clear signposts.

Shoppers want AI to deliver value. They want to retain control while trust is being built. Routine, repeatable categories are easier to delegate. Younger and AI-familiar shoppers are likely to move earlier. And the existing fragmentation of grocery shopping gives AI a genuine problem to solve.

But we do not yet know how quickly assistance will become autonomy, or how that shift will play out across different shoppers, products, platforms and price tiers. We don't know how agents will reshape logistics or commercial relationships between retailers and suppliers.

And perhaps most importantly, we don't know where control and influence will sit when the decision-maker is partly machine.

EY is working with retailers and suppliers to think deeply about how AI-powered shopping will influence customer strategy, technology, data, product, marketing and commercial models. The pages that follow translate some of that thinking into practical priorities for retailers and suppliers to consider: what to do now, what to prepare for next and what to keep in view beyond.

Ultimately, the more AI fills the basket, the more businesses need to understand who the basket is for.

What suppliers can do

NOW: Focus on fundamentals

- **Review your product data:** Make your products machine-readable. Consider whether AI can easily access and compare accurate, structured product information, including ingredients, nutrition, claims, pack sizes, price points, barcodes and availability.
- **See what AI sees:** Test how existing AI tools describe, compare and recommend your products. Smaller suppliers might do this without building proprietary AI.
- **Think in needs, not categories:** Map the consumer needs your products solve, not just the categories they occupy. Consider how AI may optimise across products and retailers for multiple objectives at once.

NEXT: Make the shortlist

- **Earn algorithmic trust:** Learn what makes an AI agent recommend one product over another, whether that's price, nutrition, sustainability, availability or customer preferences. Think about how to make product attributes visible to rapidly evolving algorithms.
- **Explore needs-based solutions:** Test how AI might turn individual products into broader solutions, from meal-prep bundles to weekly basics tailored to different households.
- **Track what changes:** Measure discovery, substitution, repeat purchase and the circumstances in which consumers still insist on a particular brand, and which attributes are influencing recommendations. Consider whether high-low pricing survives in a world of "save me money" prompts.

BEYOND: Win without the shelf

- **Be part of the answer:** As AI agents increasingly mediate product discovery and choice, influence may shift upstream. Explore how your brand becomes part of new collaborations and complementary products that strengthen your place in recommendations.
- **Watch commercial evolution:** Consider how commercial models, delivery economics, promotions and brand investments might change if an AI agent increasingly mediates purchasing decisions; retailer-agnostic agents could create new opportunities for suppliers if products are easy to find, compare and fulfil, for instance.
- **Protect emotional loyalty:** AI may optimise routine purchasing decisions, but many brands are chosen for reasons that extend beyond price or convenience. Understand which preferences are negotiable and those which are not.

What retailers can do

NOW: Start where shoppers are

- **Design for human oversight:** Shoppers are signalling they want AI to assist rather than replace them. Balancing automation with transparent, responsible use of AI is likely to build trust more quickly.
- **Lighten the mental load:** Test AI use where shoppers already see benefits, including comparison, planning, recommendations, basket building and finding better value.
- **Build the data foundations:** Strengthen product, inventory, pricing and fulfilment data so AI can work with reliable, up-to-date information.

NEXT: Turn needs into solutions

- **Explore the interface:** Test where and how shoppers might want to interact with retailer-owned AI alongside other shopping agents.
- **Redesign shelf space:** AI agents can't be persuaded by pretty packaging or eye-catching end-of-aisle displays, so structure product information in ways that algorithms can digest.
- **Give AI a reason to choose you:** Consider how range, price, availability, loyalty benefits and fulfilment can make your business the best place for an AI agent to place the order.

BEYOND: Win the basket

- **Solve the logistics:** Consider how value and convenience can work together. The cheapest individual products won't necessarily create the best basket once delivery fees, minimum spends, availability, substitutions and fulfilment are in the mix.
- **Prepare for multiple futures:** Consider scenarios in which the retailer remains the trusted shopping interface against those in which it becomes one of several fulfilment options and how different shopping missions may produce different models.
- **Play to your scale:** Smaller retailers don't need to build sophisticated proprietary AI to prepare. Making range, pricing and availability digitally accessible, improving fulfilment and solving a distinctive need are credible places to start.

Contact

Talk to me about what the AI shopper wave means for your consumer strategy.



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