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February U.S. eGrocery Sales Reach $8.7 Billion Up Nearly 9% Versus Prior Year

*YOY analysis shows Pickup continues to capture the largest share of total online grocery sales at 47%, while Delivery captures 37% and Ship-to-Home drops to 16%*

Barrington, Ill. – March 17, 2022 – The total U.S. online grocery market generated $8.7 billion in sales during February, a gain of 8.5% compared to the same period a year ago, according to the Brick Meets Click/Mercatus Grocery Shopping Survey fielded February 26-27, 2022.

Pickup, the largest segment of eGrocery, grew 6% versus a year ago, generated $4.0 billion in sales, and accounted for 47% of the total sales during the month. Delivery reported a year-over-year gain of 37%, which equated to $3.2 billion, capturing 37% share of eGrocery spending. Ship-to-Home, which was the largest segment pre-COVID with over 40% of spending, is now the smallest with just 16%; it finished with $1.4 billion in sales, down 24% year-over-year.

“New service providers, a broader range of retailers selling grocery-related products online, and services targeting faster cycle times contributed to Delivery’s strong sales growth, but even so, more shoppers still prefer Pickup for range of reasons that will benefit this service model going forward,” said David Bishop, partner at Brick Meets Click.
During February, shopper interest in online grocery shopping remained strong as over 68 million households bought groceries from a wide variety of providers and retail channels, which was nearly 11% higher than last year’s monthly active user (MAU) base. All three segments, Pickup, Delivery, and Ship-to-Home reported double-digit gains in their respective MAU bases with Delivery reporting the largest year-over-year gain at approximately 28%.

Overall spending per order, also known as average order value (AOV), softened in February, declining in aggregate by more than 2% year over year. Given the recent and significant uptick in price inflation, this suggests a reduced number of items in the basket. Ship-to-Home was the main contributor to the overall spending decline; its AOV fell more than 25% to under $40 in February 2022, while Pickup’s AOV declined by less than 4% and Delivery’s AOV grew by 12%.

February’s order frequency was up 3% versus a year ago as MAUs completed 2.73 orders during the month, driven by increased usage of both Pickup and Delivery while Ship-to-Home decreased by mid-single digits. The increased order frequency, however, was not evenly distributed across market types. Only in the Large Metro markets did MAUs complete marginally more orders this year versus last; the three smaller metro market types reported mid- to upper-single digit declines.

The share of Grocery’s MAU base that cross-shopped online with Mass during the month increased 1.3 percentage points versus last year and finished at almost 26% for February 2022. The likelihood for an online grocery shopper to use the same service again within the next month came in at over 62% for the month, climbing by more than four percentage points on a year-over-year basis. And, for the second time in the last several months, Grocery’s specific repeat intent rate overtook the Mass repeat intent rate.

"Today, customer expectations for online grocery shopping are different than they were even a year ago, not to mention before COVID," according to Sylvain Perrier, president and CEO, Mercatus. "To grow their online share of wallet going forward, conventional grocers need to find ways to better satisfy those changing expectations. Inflationary pressures suggest retailers should look at optimizing online meal planning, showcasing store brands, and encouraging repeat customers to take advantage of online loyalty discounts."

For information about access to the research and monthly eShopper/eMarket reports, go to brickmeetsclick.com.

About this consumer research
The Brick Meets Click/Mercatus Grocery Shopping Survey is an ongoing independent research initiative created and conducted by Brick Meets Click and sponsored by Mercatus. Brick Meets Click conducted the survey on February 26-27, 2022, with 1,790 adults, 18 years and older, who participated in the household’s grocery shopping. This research is scheduled to run monthly through 2022; then the cadence will be reevaluated to best suit the industry’s needs.
The three receiving methods for online grocery orders are defined as follows:

- **Delivery** includes orders received from a first- or third-party provider like Instacart, Shipt or the retailer’s own employees.
- **Pickup** includes orders that are received by customers either inside or outside a store or at a designated location/locker.
- **Ship-to-Home** includes orders that are received via common or contract carriers like FedEx, UPS, USPS, etc.

Results were adjusted based on internet usage among U.S. adults to account for the non-response bias associated with online surveys. Responses are geographically representative of the U.S. and weighted by age to reflect the national population of adults, 18 years and older, according to the U.S. Census Bureau. Brick Meets Click used a similar methodology for each of the surveys conducted in 2022 – Jan. 29-30 (n=1,793); in 2021 – Dec. 29-30 (n = 1,836), Nov. 29-30 (n=1,785), Oct. 29-30 (n=1,751), Sept. 28-29 (n=1,728), Aug. 29-30 (n=1,806), July 29-30 (n=1,892), June 27-28 (n=1,789), May 28-30 (n=1,872), Apr. 26-28 (n=1,941), Mar. 26-28 (n=1,811), Feb. 26-28 (n= 1,812), and Jan. 28-31 (n=1,776); in 2020 – Nov. 11-14 (n=2,067), Aug. 24-26 (n=1,817), Jun. 24-25 (n=1,781), May 20-22 (n=1,724), Apr. 22-24 (n= 1,651), and Mar. 23-25 (n=1,601); and in 2019 – Aug. 22-24 (n = 2,485).

**About Brick Meets Click**

**Brick Meets Click** is an analytics and strategic insight firm that connects today's grocery business with tomorrow's needs. Our clear thinking and practical solutions help clients make their strategies and customer offers more compelling and relevant in the changing U.S. grocery market. We bring deep industry expertise, knowledge of what's coming next, and fact-based analysis to the challenge of finding new routes to success.

**About Mercatus**

**Mercatus** helps leading grocers get back in charge of their eCommerce experience, empowering them to deliver exceptional retailer-branded, end-to-end online shopping, from store to door. Our expansive network of more than 50 integration partners allows grocers to work with their partners of choice, on their terms. Together, we enable clients to create authentic digital shopping experiences with solutions to drive shopper engagement, grow share of wallet and achieve profitability, while quickly adapting to changes in consumer behavior. The Mercatus Digital Commerce platform is used by leading North American retailers, including Weis Markets, Save Mart brands, Brookshire’s Grocery Company brands, WinCo Foods, Smart & Final, Stater Bros. Markets and others. Mercatus is headquartered in Toronto, Canada.