For Immediate Release

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Total U.S. Online Grocery Sales for March 2021 Up 43% Versus Year Ago

New research shows how a year of accelerated growth has disrupted online grocery

Barrington, Ill., April 15, 2021 – The U.S. online grocery market finished March with $9.3 billion in sales, a return to January’s record spending levels, as over 69 million households placed an average of 2.8 online orders during the month, according to Brick Meets Click/Mercatus Grocery Shopping Survey fielded March 26-28, 2021. The 43% jump in sales, versus a year ago when sales were $6.5 billion, quantifies the disruptive impact of a pandemic that continues to alter the way people get their groceries.

“A year since COVID-19 changed how we live, work and shop, online grocery demonstrates continued strength and impressive staying power,” said David Bishop, partner, Brick Meets Click. “The monthly active user base remains robust, average order values are at similarly elevated levels and order frequency has gone up.”

The ongoing independent research initiative created and conducted by Brick Meets Click and sponsored by Mercatus found that 69.3 million households placed one or more online orders during March 2021, compared to 74.5 million during the same period a year ago when stay-at-home orders and retail restrictions first went into effect.
While this represents a 7% decline in the monthly active user base, the decrease was entirely driven by fewer households making online grocery purchases that are shipped to the home via common or contract carriers. In fact, the ship-to-home segment of the online grocery market lost 27% of its monthly users on a year-over-year basis, while the pickup segment gained 12% and delivery gained 23%, illustrating one way the pandemic has changed the way people engage in online grocery shopping.

Regarding order share, the ship-to-home segment captured the largest share of orders before the pandemic and even during March 2020. However, over the past year it has ceded nearly 19 percentage points of order share to the delivery and pickup segments. Today pickup is the dominant way online orders are received in the U.S.

Monthly active users placed an average of 2.8 online orders during March of this year compared to 2.5 orders a year ago. The 12% gain in order frequency is mainly attributed to the fact that households were still largely shopping in physical stores until states announced stay-at-home orders, with California being the first to do so on March 19, 2020.

At $84, the average value for delivery and pickup orders remained essentially unchanged compared to a year ago, while ship-to-home declined 6% to $49 during the same period. Of note, average order values across all the segments had already risen by 16% to 18% in March 2020 versus pre-COVID levels as households began buying more groceries online.

A year ago, online grocery shoppers faced a range of challenges, including out-of-stocks and insufficient order slot capacity, which degraded the overall experience and led to repeat intent rates plummeting to under 43%. Today, retailers have largely addressed these issues and the effect is evident. For March 2021, the leading satisfaction indicator, “likelihood to use a specific service again,” came in at 62%.

“Over the last 12 months, consumers’ dramatic shift to online grocery shopping has solidified, with curbside pickup attracting the largest share of monthly shoppers at 53% compared to ship-to-home and delivery,” said Sylvain Perrier, president and CEO, Mercatus. “In fact, pickup continues to have stronger consumer demand across all market types compared to delivery. Those brick-and-mortar chains that have invested in optimizing pickup services likely will continue to benefit from the high repeat intent rate as indicated in the data.”

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 Mar. 26-28, 2021 with 1,811 adults, 18 years and older, who participated in the household’s grocery shopping.

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 Feb. 26-28, 2021 (n=1,812), Jan. 28-31, 2021 (n=1,776) and throughout 2020: Nov. 11-14 (n=2,067), Aug. 24-26 (n=1,817), June 24-25 (n=1,781), May 20-22 (n=1,724), April 22-24 (n=1,651), and March 23-25 (n=1,601).

**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 is the authoritative voice for food retailers who want to strengthen their relationship with shoppers in a digital space. We help leading grocers get back in charge of their eCommerce experience, empowering them to deliver exceptional branded omnichannel shopping experiences end-to-end, 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 empower clients to create authentic digital shopping experiences with solutions to drive shopper engagement, grow share of wallet and profitability, and quickly adapt to changes in consumer behavior. The Mercatus Integrated Commerce® platform is used by leading North American retailers, including Weis Markets, Save Mart brands, Brookshire’s Grocery Company brands, WinCo Foods, Smart & Final and others. Mercatus is headquartered in Toronto, Canada.