Monthly Online Spending for Groceries
All Retail Formats and Receiving Methods

- $9.3 Billion (USD) Jan '21
- $8.5 Billion (USD) Jan '22

Methods Used to Receive Online Orders
Percent of Monthly Active Users

- Delivery: 52% Jan '21, 56% Jan '22
- Pickup: 46% Jan '21, 43% Jan '22
- Ship-to-home: 40% Jan '21, 40% Jan '22

Combined Pickup & Delivery Sales Share
All Retail Formats

- 77% Jan '21, 82% Jan '22

Retail Formats
- Grocery, e.g., Kroger, FreshDirect, Aldi
- Mass, e.g., Meijer, Target, Walmart
- Club, e.g., BJ’s, Costco, Sam’s Club
- Amazon pure-play, e.g., Subscribe & Save
- Meal Kits, e.g., Blue Apron, Hello Fresh
- Dollar, e.g., Dollar General, Dollar Tree
- Other, e.g., Beauty, Convenience, Drug, Pet

“A Grocery” Definition
- Comprises product categories typically found in a conventional supermarket
- Includes food (UPC & PLU), beverages, HBC, nonfood, general merchandise, and alcohol

Online Order Receiving Methods
- Pickup, e.g., curbside, in-store, or locker at store or designated location
- Delivery, e.g., attended or unattended drop-off via 1P or 3P provider
- Ship-to-home, e.g., distributed by common or contact carrier

AOV 1st & 4th Time Customers*
Grocery & Mass/Supercenter

- 1st Order: $62 Jan '21, $65 Jan '22
- ≥ 4th: $97 Jan '21, $95 Jan '22

Average # of Monthly Online Orders
All Retail Formats and Receiving Methods

- Per Monthly Active User: 2.8 Jan '21, 2.7 Jan '22

Likelihood to Use Grocery Service Again
Grocery & Mass/Supercenter

- % Extremely/Very Likely: 57.6% Jan '21, 61.3% Jan '22

*AOV = average order value, includes only pickup and delivery orders.

Source: Brick Meets Click/Mercatus Grocery Shopping Survey

Research sponsored by mercatus*

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