eGrocery Dashboard | Total U.S. (May)

Monthly Online Spending for Groceries
All Retail Formats and Receiving Methods

- $7.0 (May '21)
- $7.1 (May '22)

Methods Used to Receive Online Orders
Percent of Monthly Active Users

- Delivery: 55.3%
- Pickup: 45.6%
- Ship-to-home: 39.8%

Combined Pickup & Delivery Sales Share
All Retail Formats

- May '21: 83.5%
- May '22: 80.4%

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

<table>
<thead>
<tr>
<th>Order</th>
<th>May '21</th>
<th>May '22</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>$66</td>
<td>$69</td>
</tr>
<tr>
<td>≥ 4th</td>
<td>$93</td>
<td>$100</td>
</tr>
</tbody>
</table>

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

- Per Monthly Active User: 2.80 (May '21) vs. 2.65 (May '22)

Likelihood to Use Grocery Service Again
Grocery & Mass/Supercenter

- % Extremely/Very Likely: 52.5% (May '21) vs. 62.7% (May '22)

“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

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
- Convenience, e.g., 7-Eleven, Circle-K
- Other, e.g., Beauty, Convenience, Drug, Pet

*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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