**eGrocery Dashboard | Total U.S. (Dec. ‘21)**

**Monthly Online Spending for Groceries**
All Retail Formats and Receiving Methods

- **Billions (USD)**
  - 10/21: $8.1
  - 11/21: $8.6
  - 12/21: $8.9

**Methods Used to Receive Online Orders**
Percent of Monthly Active Users

- **Delivery**
  - 10/21: 46.7%
  - 11/21: 44.6%
  - 12/21: 46.0%
- **Pickup**
  - 10/21: 41.1%
  - 11/21: 40.5%
  - 12/21: 42.7%
- **Ship-to-home**
  - 10/21: 52.4%
  - 11/21: 57.4%
  - 12/21: 55.2%

**Combined Pickup & Delivery Sales Share**
All Retail Formats

- 10/21: 79.0%
- 11/21: 81.3%
- 12/21: 80.0%

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

<table>
<thead>
<tr>
<th>Order</th>
<th>10/21</th>
<th>11/21</th>
<th>12/21</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>22.2%</td>
<td>21.9%</td>
<td>22.0%</td>
</tr>
<tr>
<td>≥ 4th</td>
<td>45.0%</td>
<td>44.5%</td>
<td>44.3%</td>
</tr>
</tbody>
</table>

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

- **Per Monthly Active User**
  - 10/21: 2.74
  - 11/21: 2.68
  - 12/21: 2.79

**Extremely/Very Likely to Use Service Again**
Grocery & Mass/Supercenter

- **% of Monthly Active Users**
  - 10/21: 57.2%
  - 11/21: 58.3%
  - 12/21: 62.9%

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**“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
- **Other**, e.g., Beauty, Drug, Dollar, Pet

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Source: Brick Meets Click/Mercatus Grocery Shopping Survey

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US eGrocery Dashboard v010522