eGrocery Dashboard | Total U.S.

Monthly Online Spending for Groceries
All Retail Formats and Receiving Methods

- Mar '20: $6.5 billion
- Mar '21: $9.3 billion

Monthly Active Users (Millions)
By Receiving Methods

- Delivery: Mar '20 - 25%, Mar '21 - 32%
- Pickup: Mar '20 - 32%, Mar '21 - 53%
- Ship-to-home: Mar '20 - 49%, Mar '21 - 35%

Combined Pickup & Delivery Sales Share
All Retail Formats

- Mar '20: 61.5%
- Mar '21: 76.9%

Percent of 1st & 4th Time Customers
All Retail Formats and Receiving Methods

<table>
<thead>
<tr>
<th>Order</th>
<th>Mar '20</th>
<th>Mar '21</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>24.6%</td>
<td>19.8%</td>
</tr>
<tr>
<td>≥ 4th</td>
<td>38.0%</td>
<td>47.1%</td>
</tr>
</tbody>
</table>

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

- Mar 20: 2.5
- Mar '21: 2.8

Likelihood to Use Grocery Service Again
All Retail Formats and Receiving Methods

- Mar '20: 49.1%
- Mar '21: 58.9%

“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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