eGrocery Dashboard | Total U.S.  (Mar. YOY)

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

- Billions (USD)
  - Mar ’21: $9.3
  - Mar ’22: $8.7

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

- Delivery: 53%
- Pickup: 53%
- Ship-to-home: 48%

Mar ’21: 49% Delivery, 41% Pickup, 35% Ship-to-home
Mar ’22: 53% Delivery, 53% Pickup, 48% Ship-to-home

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

- Mar ’21: 76.9%
- Mar ’22: 83.5%

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

<table>
<thead>
<tr>
<th>Order</th>
<th>Mar ’21</th>
<th>Mar ’22</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>$69</td>
<td>$56</td>
</tr>
<tr>
<td>≥ 4th</td>
<td>$102</td>
<td>$101</td>
</tr>
</tbody>
</table>

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

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

- Per Monthly Active User
  - Mar ’21: 2.82
  - Mar ’22: 2.68

**Likelihood to Use Grocery Service Again**
Grocery & Mass/Supercenter

- % Extremely/Very Likely
  - Mar ’21: 62.3%
  - Mar ’22: 63.7%

**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

Research sponsored by Mercatus

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Source: Brick Meets Click/Mercatus Grocery Shopping Survey

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