**Monthly Online Spending for Groceries**

All Retail Formats and Receiving Methods

Nov '20: $8.1 Billion
Nov '21: $8.6 Billion

**Methods Used to Receive Online Orders**

All Retail Formats and Receiving Methods

- **Delivery**: Nov '20 - 56.4%, Nov '21 - 44.6%
- **Pickup**: Nov '20 - 39.1%, Nov '21 - 40.5%
- **Ship-to-home**: Nov '20 - 34.9%, Nov '21 - 57.4%

**Combined Pickup & Delivery Sales Share**

All Retail Formats

- Nov '20: 72.7%
- Nov '21: 81.2%

**Percent of 1st & 4th Time Customers**

All Retail Formats and Receiving Methods

<table>
<thead>
<tr>
<th>Order</th>
<th>Nov '20</th>
<th>Nov '21</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>17.1%</td>
<td>21.9%</td>
</tr>
<tr>
<td>≥ 4th</td>
<td>58.3%</td>
<td>44.5%</td>
</tr>
</tbody>
</table>

**Average # of Monthly Online Orders**

All Retail Formats and Receiving Methods

- Nov '20: 2.82
- Nov '21: 2.68

**Likelihood to Use Grocery Service Again**

All Retail Formats and Receiving Methods

- Nov '20: 82.9%
- Nov '21: 58.3%

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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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