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

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

- **Dec ’21**: $8.9 Billion (USD)
- **Dec ’22**: $9.1 Billion (USD)

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

- **Dec ’21**:
  - Delivery: 55.2%
  - Pickup: 46.0%
  - Ship-to-home: 42.7%

- **Dec ’22**:
  - Delivery: 55.5%
  - Pickup: 41.1%
  - Ship-to-home: 40.5%

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

- **Dec ’21**: 80.0%
- **Dec ’22**: 83.6%

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

<table>
<thead>
<tr>
<th>Order</th>
<th>Dec ’21</th>
<th>Dec ’22</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>$61</td>
<td>$73</td>
</tr>
<tr>
<td>≥ 4th</td>
<td>$99</td>
<td>$104</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

- **Dec ’21**: 2.79
- **Dec ’22**: 2.59

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

- **Dec ’21**: 62.9%
- **Dec ’22**: 56.2%

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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
- **Dollar**, e.g., Dollar General, Dollar Tree
- **Convenience**, e.g., 7-Eleven, Gopuff
- **Other**, e.g., Beauty, Drug, Pet

Research sponsored by Mercatus

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Source: Brick Meets Click/Mercatus Grocery Shopping Survey

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