Monthly Online Spending for Groceries

- Jan '22: $8.5 billion
- Jan '23: $8.4 billion

Methods Used to Receive Online Orders

- Delivery: 56.0% Jan '22, 57.5% Jan '23
- Pickup: 42.6% Jan '22, 39.6% Jan '23
- Ship-to-home: 39.7% Jan '22, 38.9% Jan '23

Combined Pickup & Delivery Sales Share

- Jan '22: 82.4%
- Jan '23: 84.8%

AOV 1st & 4th Time Customers*

<table>
<thead>
<tr>
<th>Order</th>
<th>Jan '22</th>
<th>Jan '23</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>$65</td>
<td>$65</td>
</tr>
<tr>
<td>≥ 4th</td>
<td>$95</td>
<td>$103</td>
</tr>
</tbody>
</table>

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

Average # of Monthly Online Orders

- Jan '22: 2.70
- Jan '23: 2.57

Likelihood to Use Grocery Service Again

- Jan '22: 61.3%
- Jan '23: 59.5%

Source: Brick Meets Click/Mercatus Grocery Shopping Survey

“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

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