**Monthly Online Spending for Groceries**

All Retail Formats and Receiving Methods

- **Billions (USD)**
  - Apr '22: $8.1
  - Apr '23: $8.2

**Methods Used to Receive Online Orders**

Percent of Monthly Active Users

- Delivery
- Pickup
- Ship-to-home

- **Apr '22**
  - Delivery: 55.7%
  - Pickup: 47.4%
  - Ship-to-home: 37.0%

- **Apr '23**
  - Delivery: 54.0%
  - Pickup: 39.2%
  - Ship-to-home: 38.9%

**Combined Pickup & Delivery Sales Share**

All Retail Formats

- **Apr '22**
  - Sales Share: 78.0%

- **Apr '23**
  - Sales Share: 82.3%

**AOV 1st & 4th Time Customers**

Grocery & Mass/Supercenter

- **Order**
  - 1st: $65
  - ≥ 4th: $100

**Average # of Monthly Online Orders**

All Retail Formats and Receiving Methods

- **Per Monthly Active User**
  - Apr '22: 2.61
  - Apr '23: 2.47

**Likelihood to Use Grocery Service Again**

Grocery & Mass/Supercenter

- **% Extremely/Very Likely**
  - Apr '22: 62.8%
  - Apr '23: 57.5%

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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

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

Source: Brick Meets Click/Mercatus Grocery Shopping Survey

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