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

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

<table>
<thead>
<tr>
<th></th>
<th>Jul '22</th>
<th>Jul '23</th>
</tr>
</thead>
<tbody>
<tr>
<td>$Billions (USD)</td>
<td>$7.8</td>
<td>$7.2</td>
</tr>
</tbody>
</table>

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

- **Delivery**: 53.4% (Jul '22), 54.8% (Jul '23)
- **Pickup**: 44.8% (Jul '22), 42.8% (Jul '23)
- **Ship-to-home**: 42.3% (Jul '22), 40.0% (Jul '23)

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

- **Jul '22**: 81.9%
- **Jul '23**: 80.8%

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

<table>
<thead>
<tr>
<th>Order</th>
<th>Jul '22</th>
<th>Jul '23</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>$65.62</td>
<td>$68.15</td>
</tr>
<tr>
<td>≥ 4th</td>
<td>$102.86</td>
<td>$102.14</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

<table>
<thead>
<tr>
<th></th>
<th>Jul '22</th>
<th>Jul '23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Per Monthly Active User</td>
<td>2.76</td>
<td>2.48</td>
</tr>
</tbody>
</table>

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

- **Jul '22**: 63.5%
- **Jul '23**: 63.0%

**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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