

BACKGROUND:

- ❑ We surveyed 1,500 US consumers balanced to census to scope grocers, grocery delivery, and meal kits.

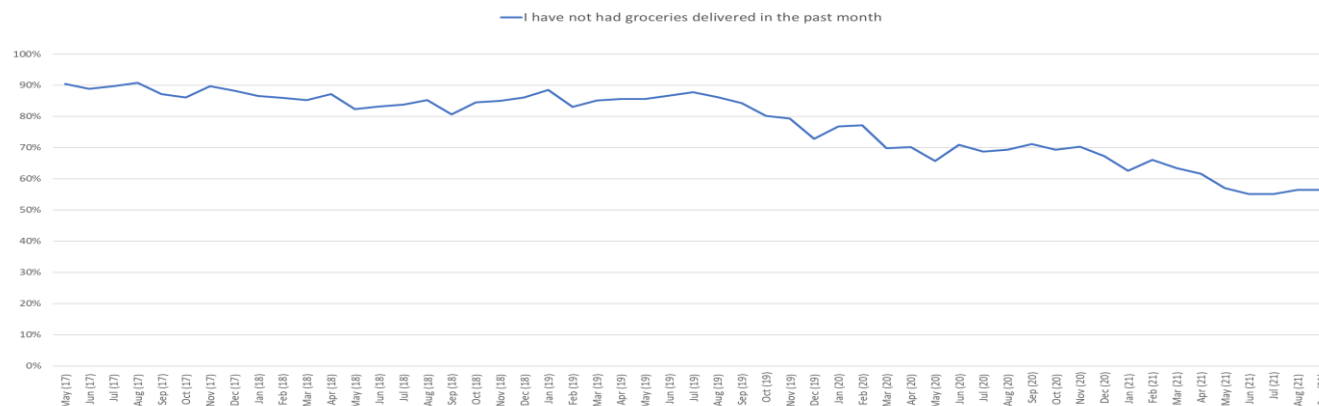
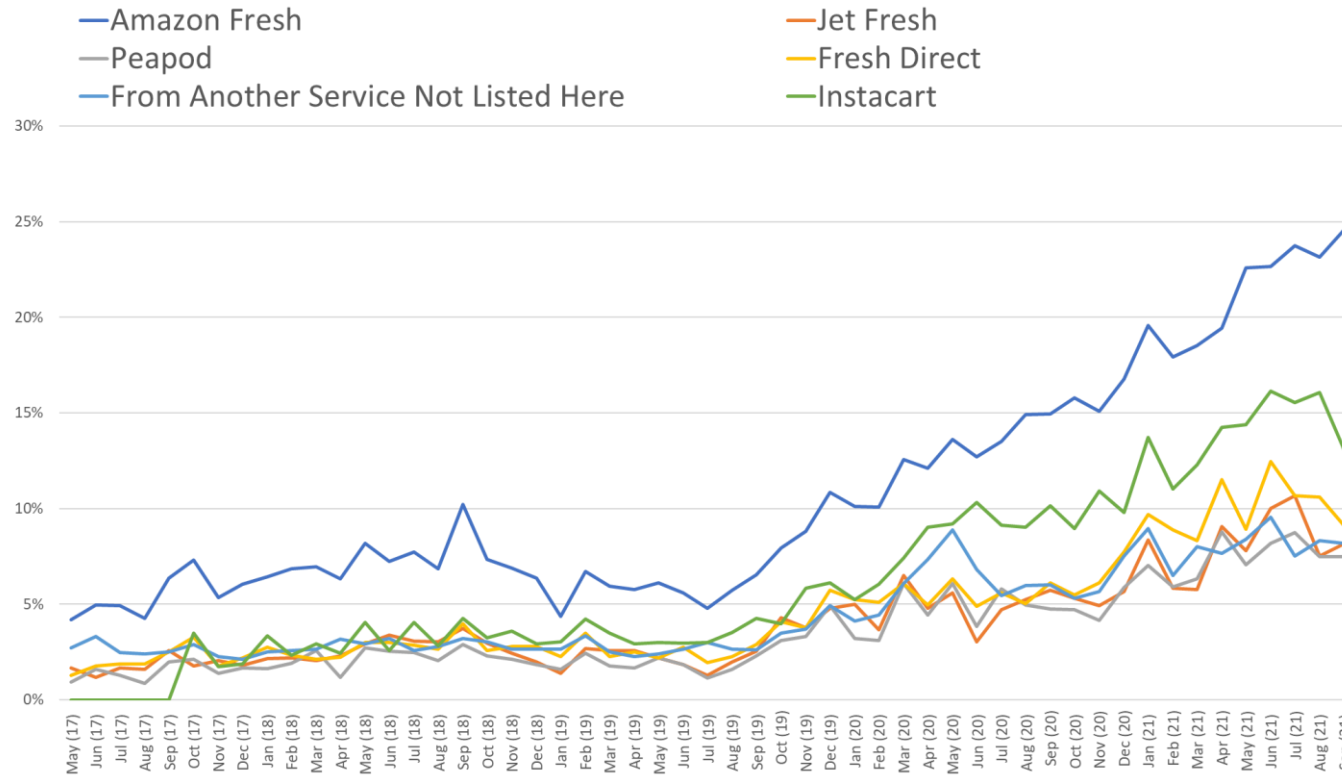
FINDINGS:

- ❑ Online grocery ordering gained considerably during the pandemic, but engagement/adoption trends have been flatter in the past few months. Despite this trend, the % of consumers who ordered from Amazon Fresh in the past month still increased to a new high this month (the rest of the online grocers we track rolled over m/m following significant gains made previously during the pandemic).
- ❑ The same trend is visible in our meal kits tracking data. Meal kits engagement increased considerably throughout the pandemic, but it has been flatter in recent months with some roll-over for specific platforms.
- ❑ Conversely, in-store grocery shopping saw a bit of a bump in engagement in the past few months after seeing traffic drop during the pandemic. Target has grown its share of consumers shopping it for grocery over the past year.
- ❑ Though self-reported engagement with Instacart has flattened in the last couple months, the % of consumers who use the platform has increased considerably since the start of the pandemic. Notably, the average age of Instacart users was driven quite a bit higher in age since ~ March of 2020. Put another way, the pandemic pulled forward adoption of Instacart by older cohorts.



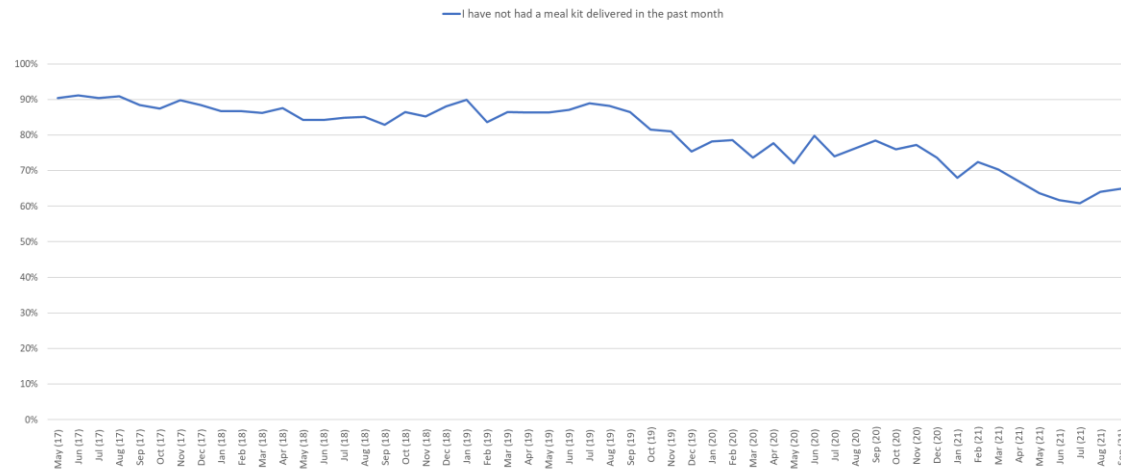
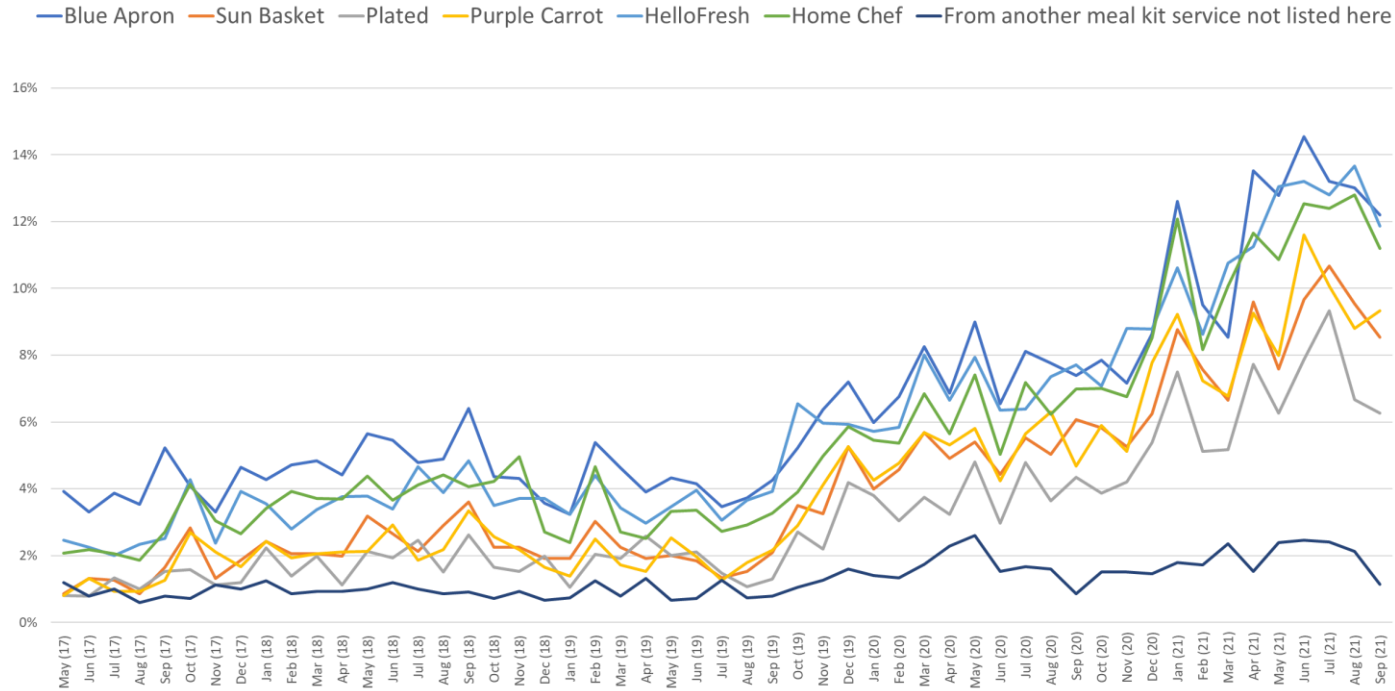
Have you gotten groceries delivered in the past month from any of the following?

Posed to all respondents.



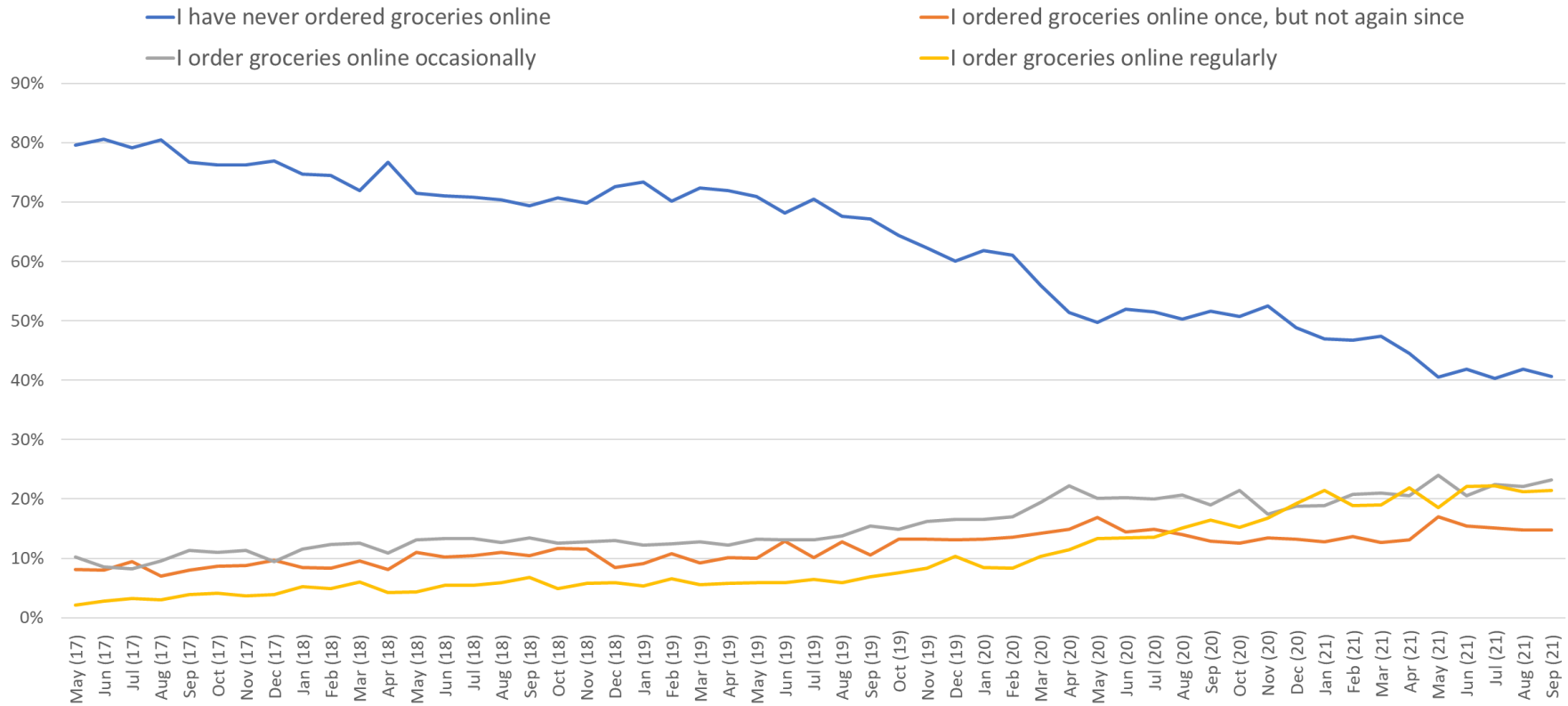
Have you gotten meal kits delivered from any of the following in the past month?

Posed to all respondents.



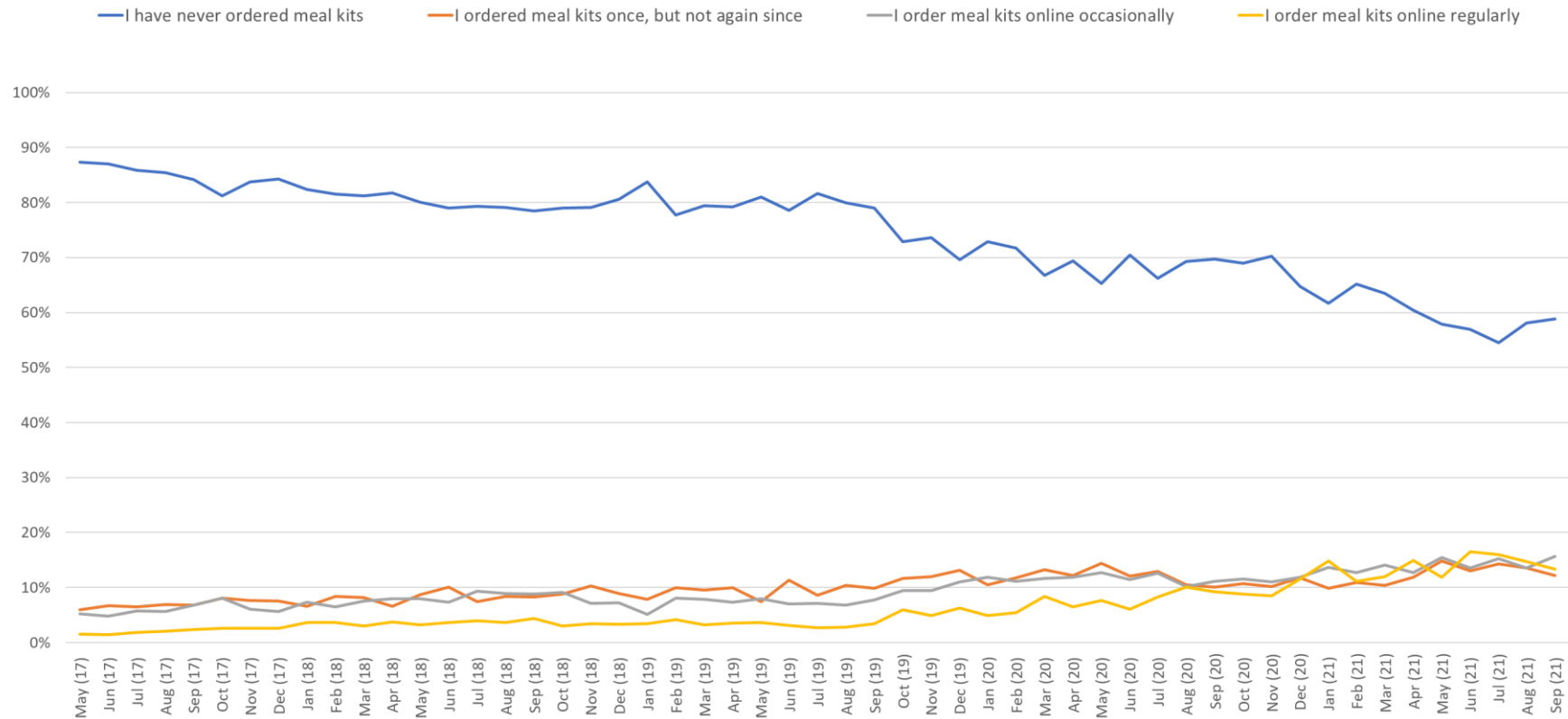
Please characterize your experience with ordering groceries online:

Posed to all respondents.



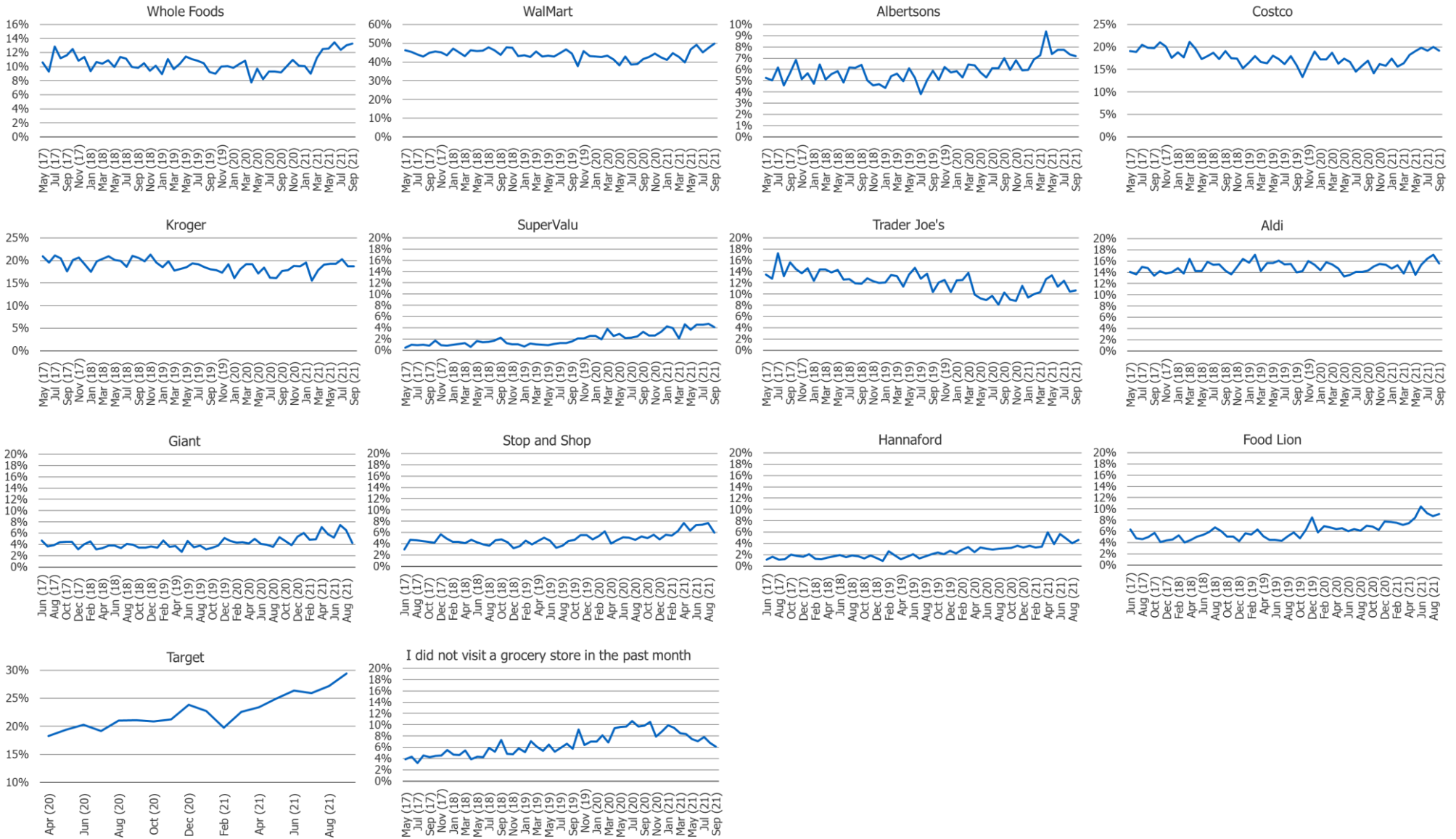
Please characterize your experience with ordering meal kits online:

Posed to all respondents.



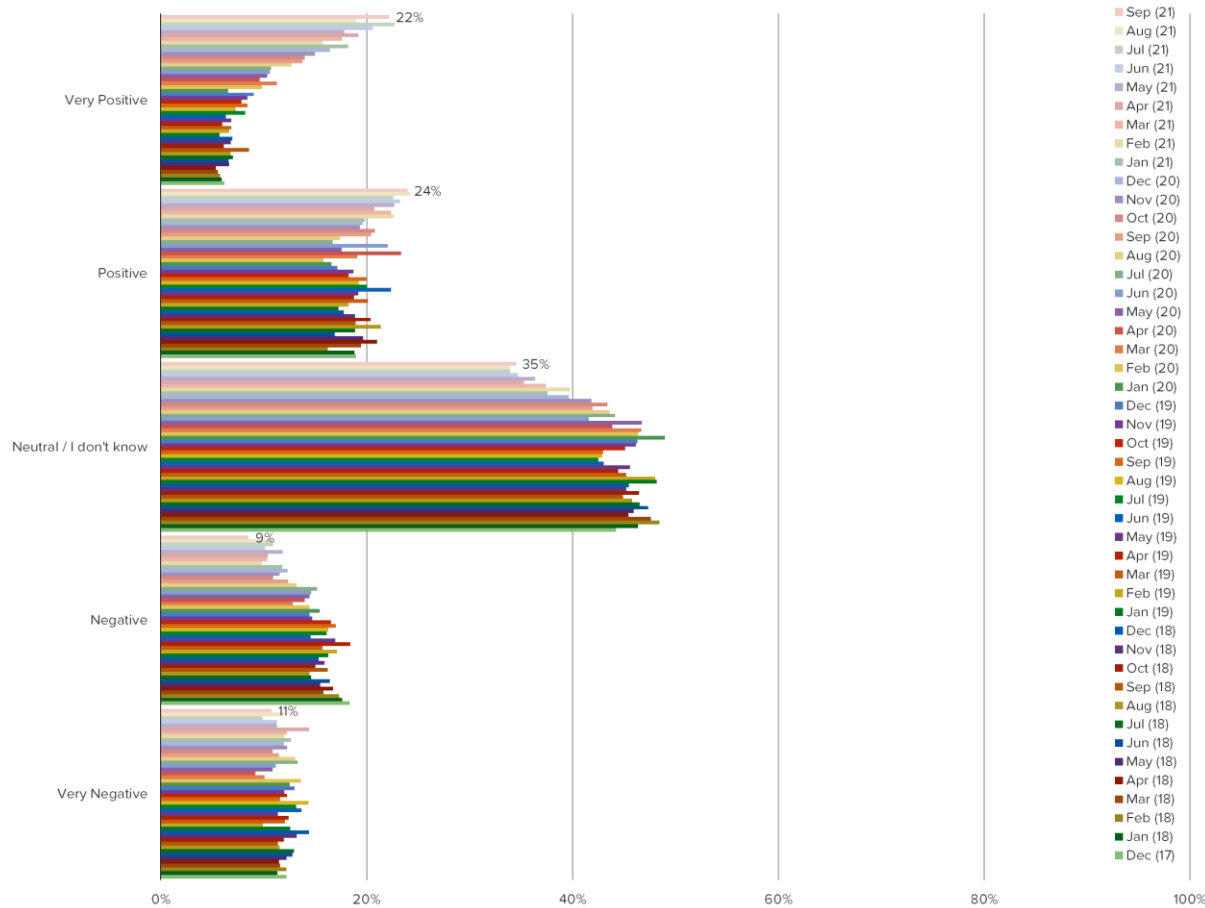
Have you visited any of the following in the past month for groceries or grocery related items?

Posed to all respondents.

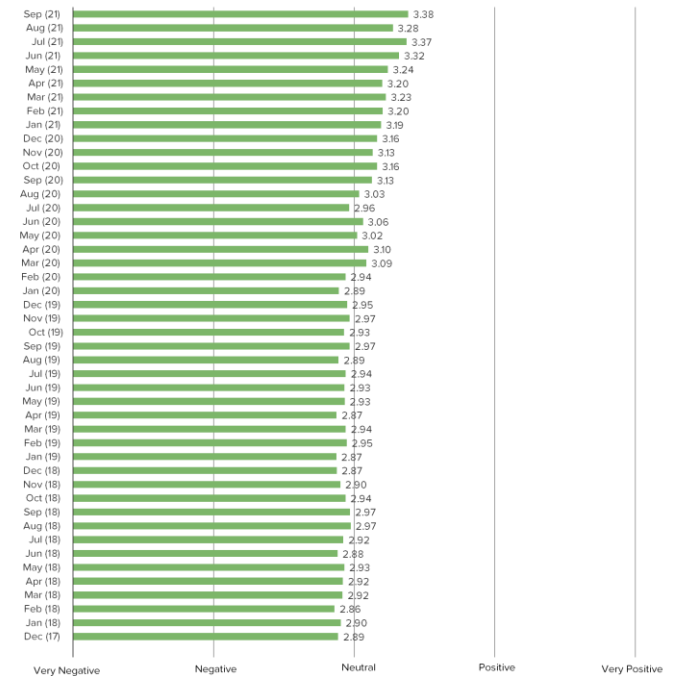


In general, how do you feel about the thought of ordering groceries online?

Posed to all respondents.

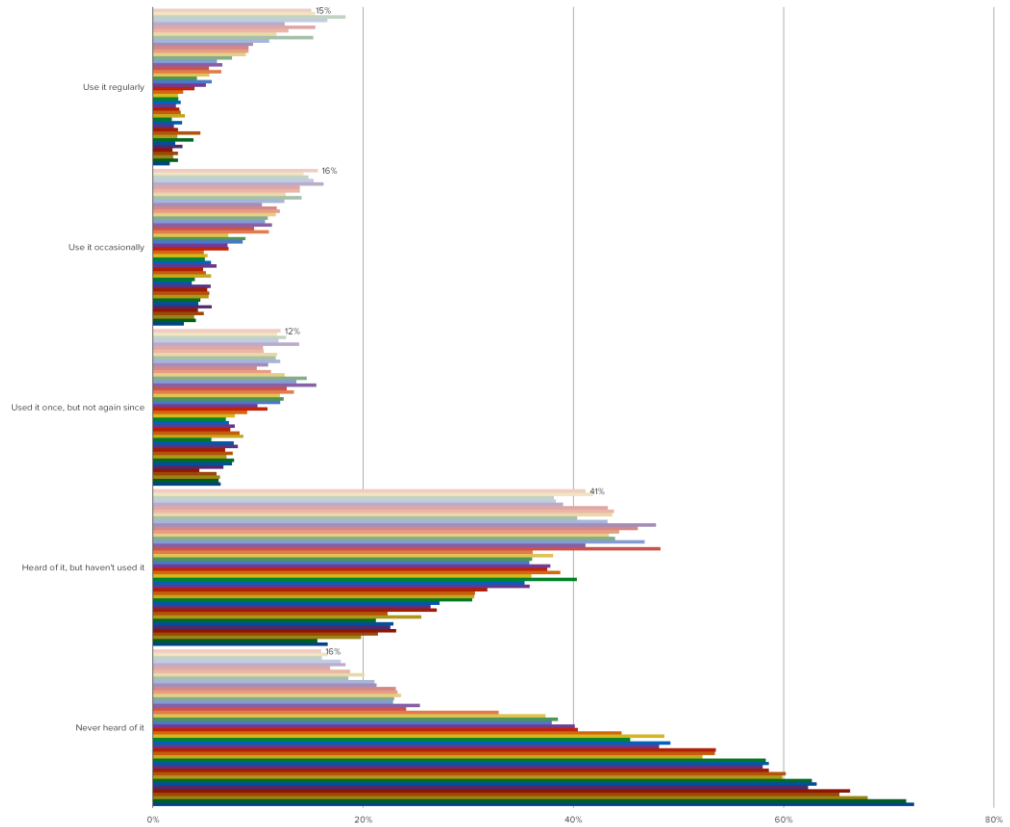


Weighted Average



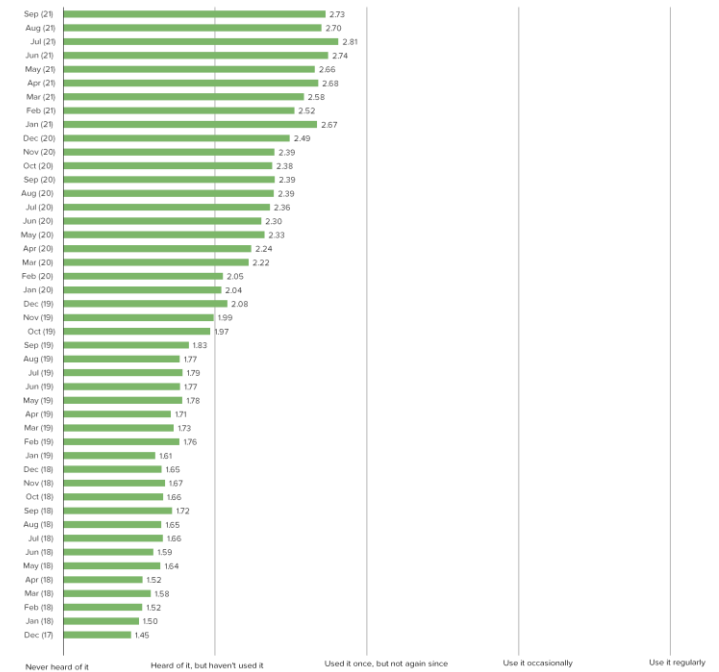
What is your familiarity with Instacart?

Posed to all respondents.



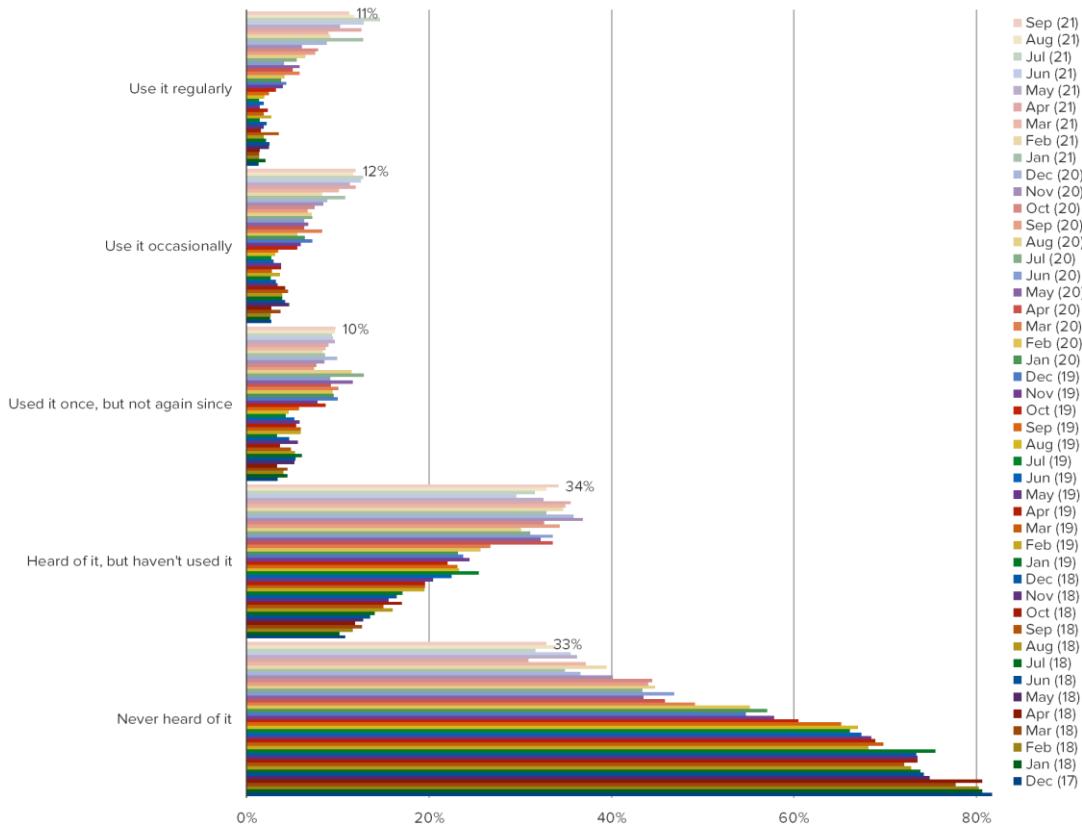
- Sep (21)
- Aug (21)
- Jul (21)
- Jun (21)
- May (21)
- Apr (21)
- Mar (21)
- Feb (21)
- Jan (21)
- Dec (20)
- Nov (20)
- Oct (20)
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- Oct (18)
- Sep (18)
- Aug (18)
- Jul (18)
- Jun (18)
- May (18)
- Apr (18)
- Mar (18)
- Feb (18)
- Jan (18)
- Dec (17)

Weighted Average

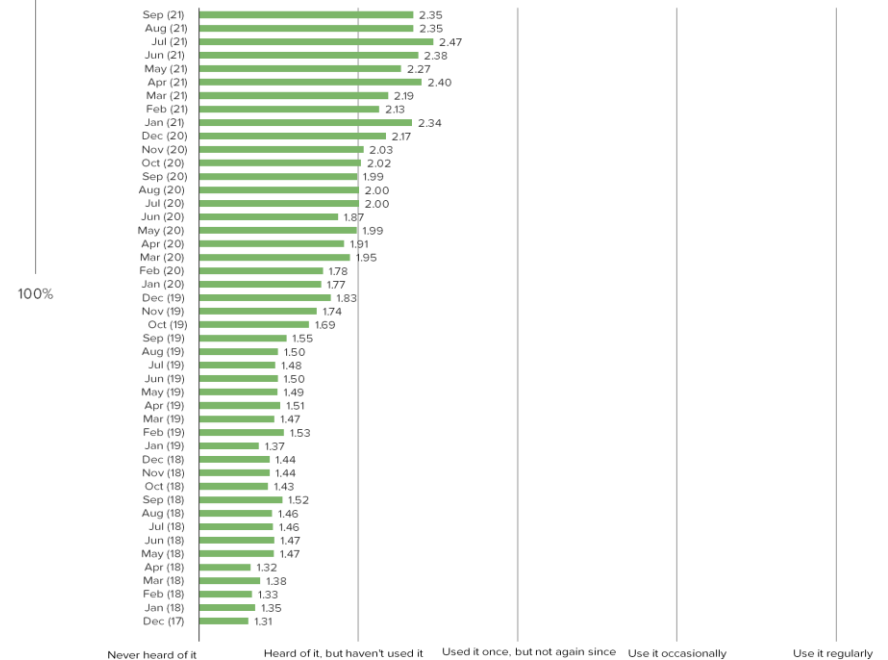


What is your familiarity with Shipt?

Posed to all respondents.

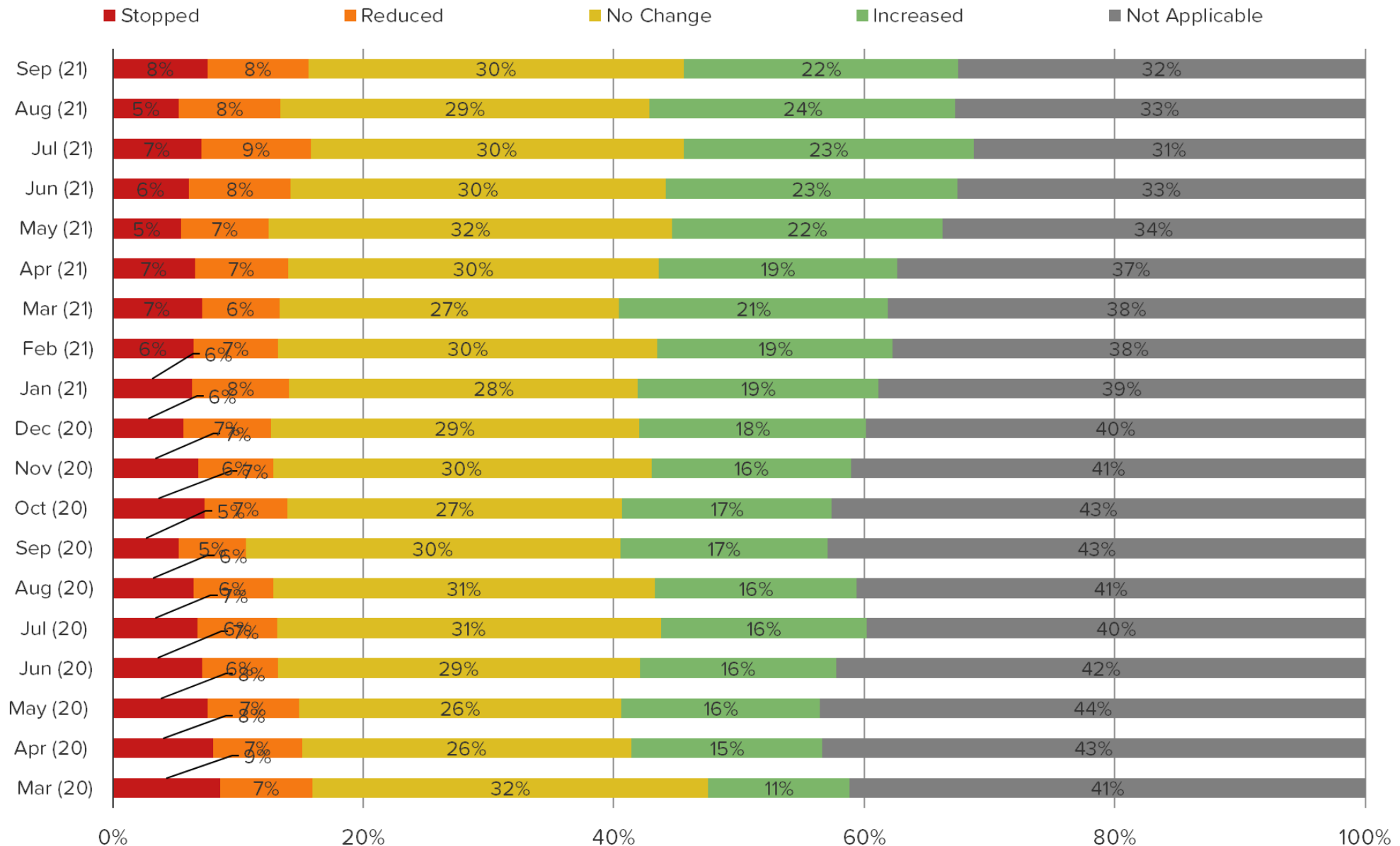


Weighted Average



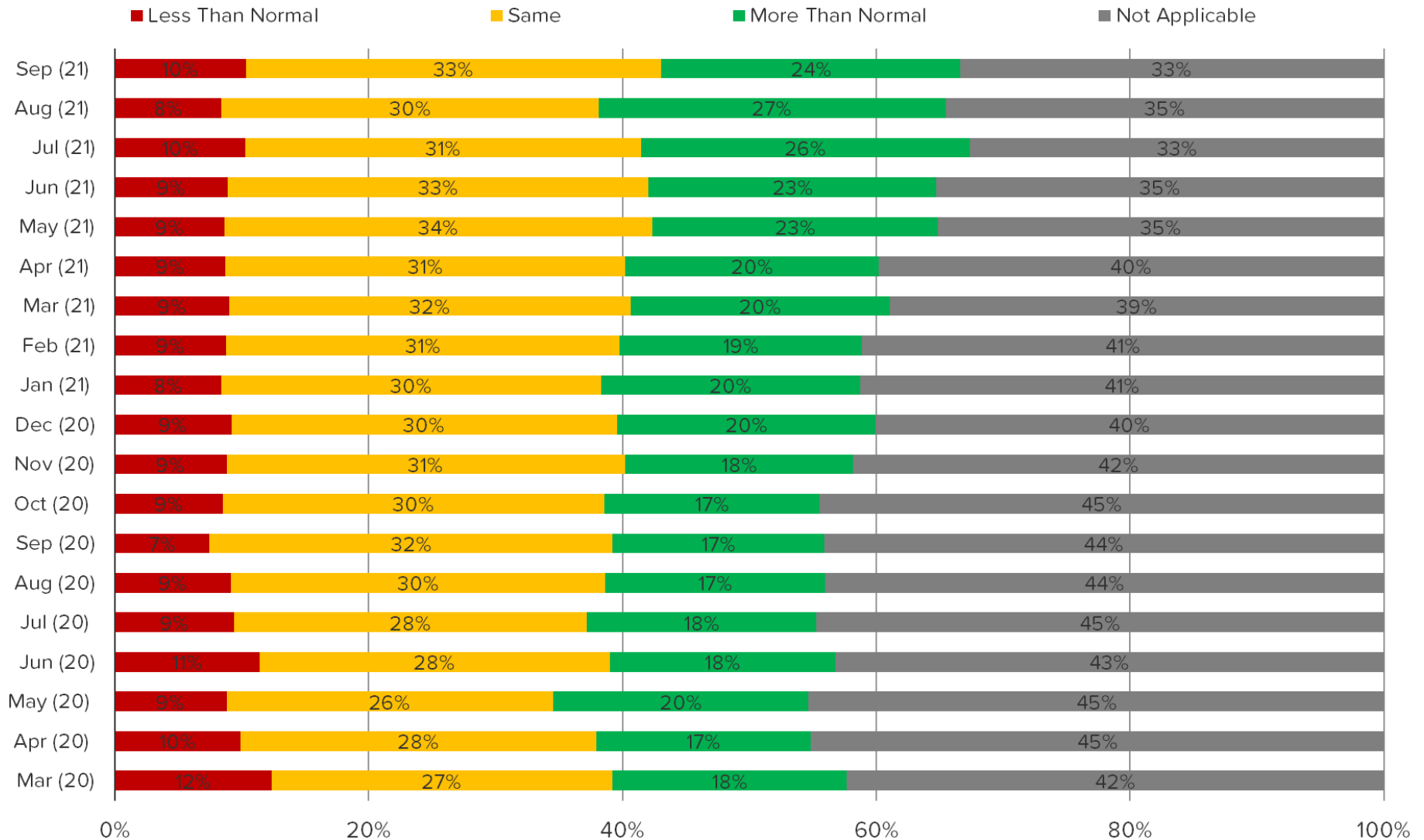
Have you changed how often you use grocery delivery (ie, Amazon Fresh, Whole Foods Delivery, Fresh Direct, etc) because of the Coronavirus and its impact to your life / the economy?

Posed to all respondents



Going forward, do you expect to use grocery delivery (ie, Amazon Fresh, Whole Foods Delivery, Fresh Direct, etc) more or less often than normal because of the Coronavirus and its impact to your life / the economy?

Posed to all respondents



Average Age of Instacart users:

Posed to respondents who said they use Instacart regularly or occasionally.

Weighted Average Key:

- 1 = 18-24
- 2 = 25-34
- 3 = 35-44
- 4 = 45-54
- 5 = 55-64
- 6 = 65-74
- 7 = 75+

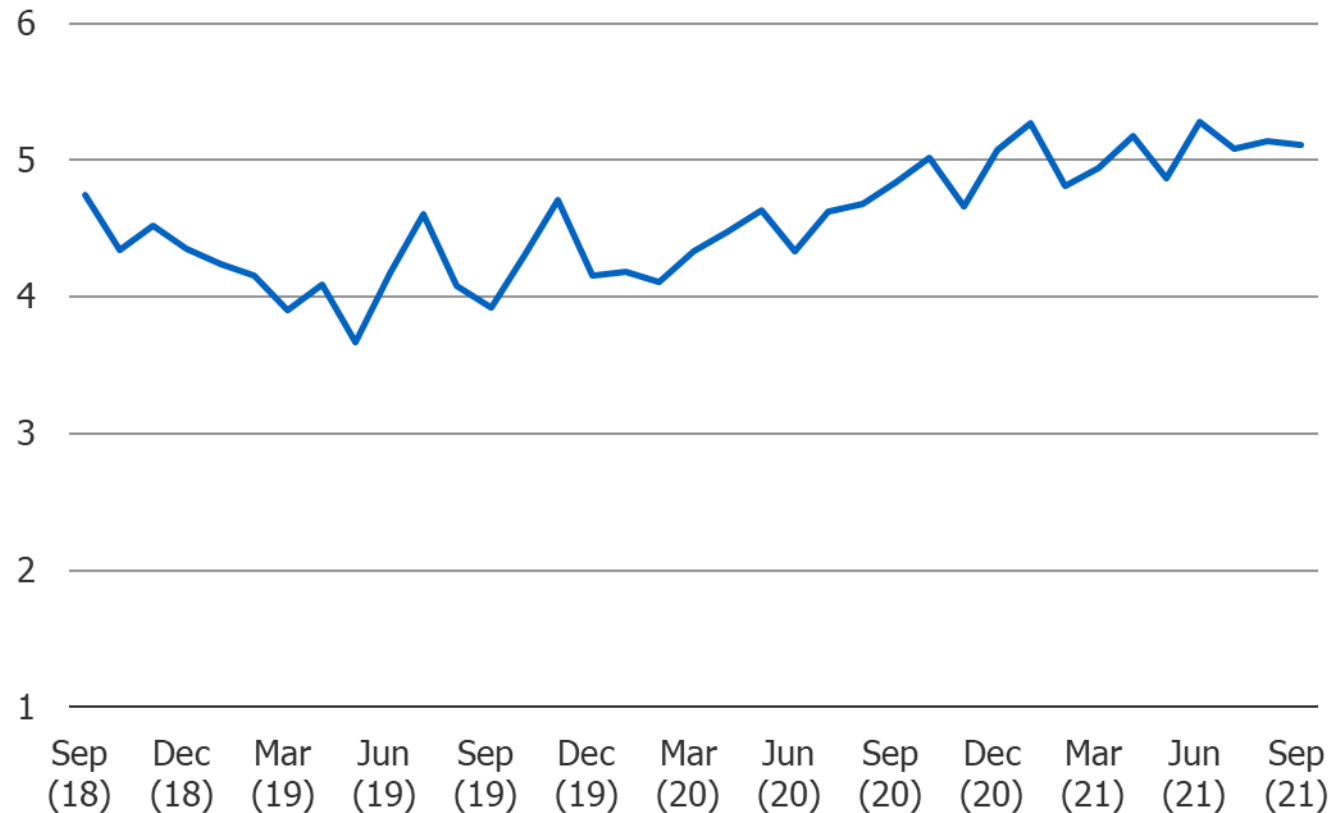


Average Income of Instacart users:

Posed to respondents who said they use Instacart regularly or occasionally.

Weighted Average Key:

- 1 = Less than \$15,000
- 2 = \$15,000 to \$24,999
- 3 = \$25,000 to \$49,999
- 4 = \$50,000 to \$74,999
- 5 = \$75,000 to \$99,999
- 6 = \$100,000 to \$149,999
- 7 = \$150,000 to \$199,999
- 8 = \$200,000 to \$249,999
- 9 = \$250,000 to \$499,999
- 10 = \$500,000 to \$999,999
- 11 = \$1 million +



Have you made any changes at all to avoid catching Covid?

Posed to respondents who said they use Instacart regularly or occasionally.

Total	Mar (20)	Apr (20)	May (20)	Jun (20)	Jul (20)	Aug (20)	Sep (20)	Oct (20)	Nov (20)	Dec (20)	Jan (21)	Feb (21)	Mar (21)	Apr (21)	May (21)	Jun (21)	Jul (21)	Aug (21)	Sep (21)
Working from home	33%	42%	37%	34%	31%	33%	39%	40%	42%	45%	43%	35%	43%	42%	43%	38%	42%	40%	45%
Avoiding large events/gatherings	36%	46%	44%	42%	35%	40%	42%	38%	46%	32%	36%	39%	42%	36%	36%	38%	37%	34%	38%
Avoiding public transportation	29%	32%	35%	35%	32%	34%	32%	26%	35%	31%	36%	31%	33%	33%	32%	29%	31%	31%	34%
Reducing restaurant visits	33%	45%	40%	45%	32%	35%	33%	34%	41%	29%	33%	29%	33%	30%	30%	34%	28%	34%	33%
Keeping children home from school	28%	29%	26%	26%	22%	19%	28%	28%	29%	26%	27%	24%	29%	28%	25%	26%	28%	28%	30%
Cancelling or postponing travel	26%	37%	36%	34%	28%	33%	34%	30%	38%	25%	31%	29%	34%	29%	30%	29%	29%	26%	29%
Social distancing (ie, not shaking hands or hugging others)	19%	36%	28%	37%	29%	29%	30%	29%	35%	24%	26%	27%	33%	24%	27%	25%	23%	26%	26%
Reducing visits to stores for non-essential items	25%	38%	35%	40%	29%	30%	25%	26%	36%	26%	27%	29%	30%	25%	27%	26%	23%	24%	25%
Cancelling or postponing business meetings or conferences	22%	27%	23%	23%	18%	16%	18%	24%	19%	22%	20%	19%	24%	21%	19%	20%	24%	18%	24%
Reducing visits to stores for everyday items	21%	37%	31%	34%	25%	25%	19%	23%	29%	23%	24%	22%	26%	20%	25%	21%	22%	22%	22%
No changes at all to my daily routine	12%	9%	9%	9%	10%	12%	9%	12%	6%	11%	7%	10%	10%	8%	10%	13%	10%	13%	10%
Count	2.84	3.79	3.44	3.57	2.92	3.04	3.09	3.10	3.55	2.95	3.10	2.95	3.36	2.96	3.04	2.97	2.96	2.96	3.15

