

Progressive Grocer State of the Industry Study

Final Report
March 2025

Prepared for:

**Progressive
GROCER**

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EnsembleIQ



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Overview & methodology

Progressive Grocer commissioned the annual State of the Industry report in 2025 with the following goals:

- Understand how grocers are thinking about strategy and operations in the year ahead
- Establish benchmarks to inform future retail business strategies

The survey fielded from **February 19, 2025 – March 10, 2025** and responses were gathered from **n=59** grocery retailers sourced from the *Progressive Grocer* audience list.

Throughout the report, comparisons will be made to last year, as follows:



Statistically significantly **higher** or **lower** than 2024 score at the 95% confidence level

(-10 pts)

Point change from 2024 to 2025 (*in the example to the left, the 2025 value is -10pts lower than the 2024 value*)



Key Findings

Overview

- **Cautious Outlook:** Grocers are increasingly cautious, with only half maintaining optimism for 2025, reflecting economic uncertainty and anticipated inflation.
- **Marketing Shifts:** In-store signage remains dominant for 3 years in a row, while retail media declines, indicating a preference for tangible marketing strategies.
- **Consumer Preferences:** Personalized services and community involvement are highly valued, while automated solutions like chatbots are losing traction.
- **Digital Engagement:** Consumers increasingly value app features like digital flyers and personalized offers, which offer a more informed shopping experience.

Challenges

- **Economic Pressures:** Expected inflation is likely to reduce shoppers' purchasing power, potentially decreasing net profits and having uncertain impacts on gross margins.
- **Operational Concerns:** The industry faces challenges from labor issues, supply chain disruptions, and emerging regulatory concerns, requiring retailers to adapt accordingly.
- **Technology Investment Decline:** Reduced technology investments could hinder innovation and service development.
- **Delivery Challenges:** Dissatisfaction with third-party delivery services, combined with a reluctance to invest in proprietary solutions, poses a challenge.

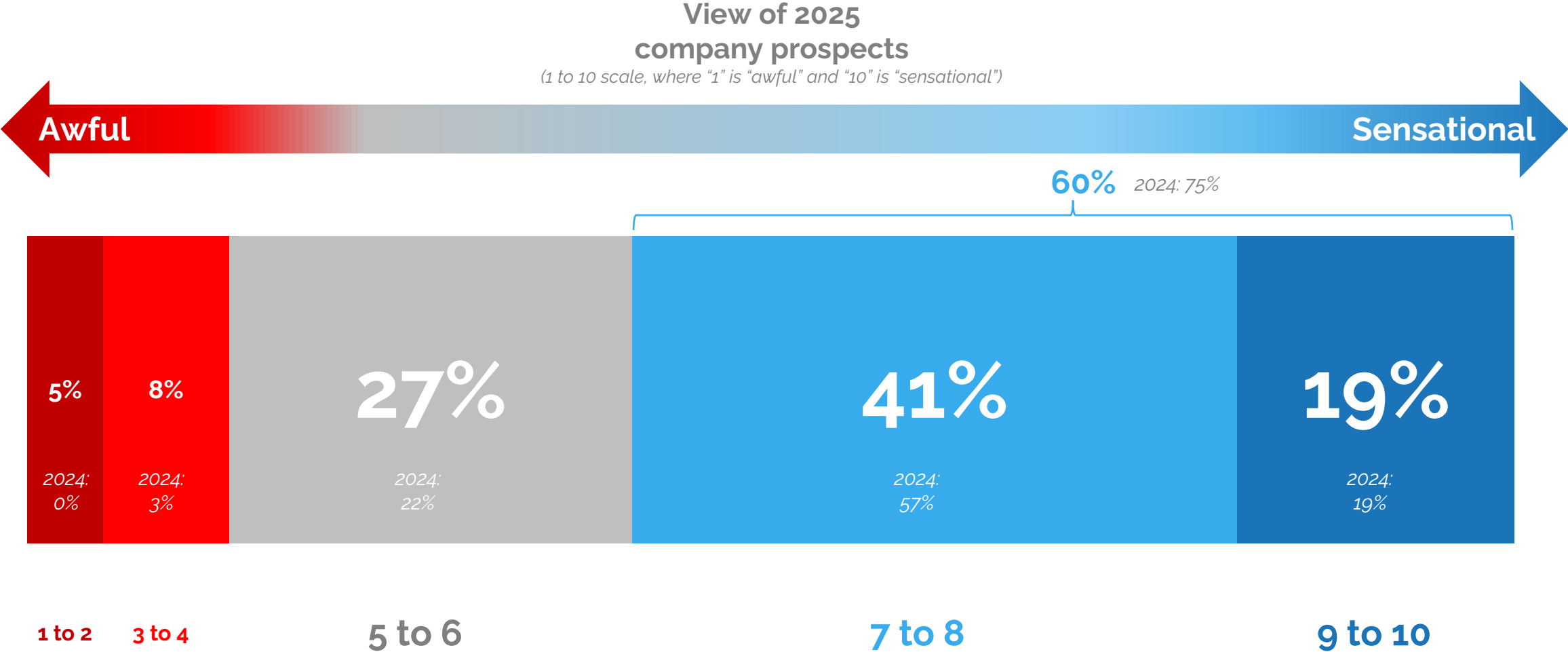
Opportunities

- **Private Label Growth:** Private labels are poised to drive sales and growth, offering opportunities for product enhancement and portfolio expansion.
- **Personalized Engagement:** Investing in personalized services can enhance consumer loyalty and engagement.
- **Optimized Store Remodeling:** Prioritizing the remodeling of existing stores offers an opportunity to enhance customer experience and operational efficiency.
- **Enhanced Meat Department Experience:** Leveraging on-site butchers as a key in-store service can significantly enhance the meat department experience, driving traffic and sales.

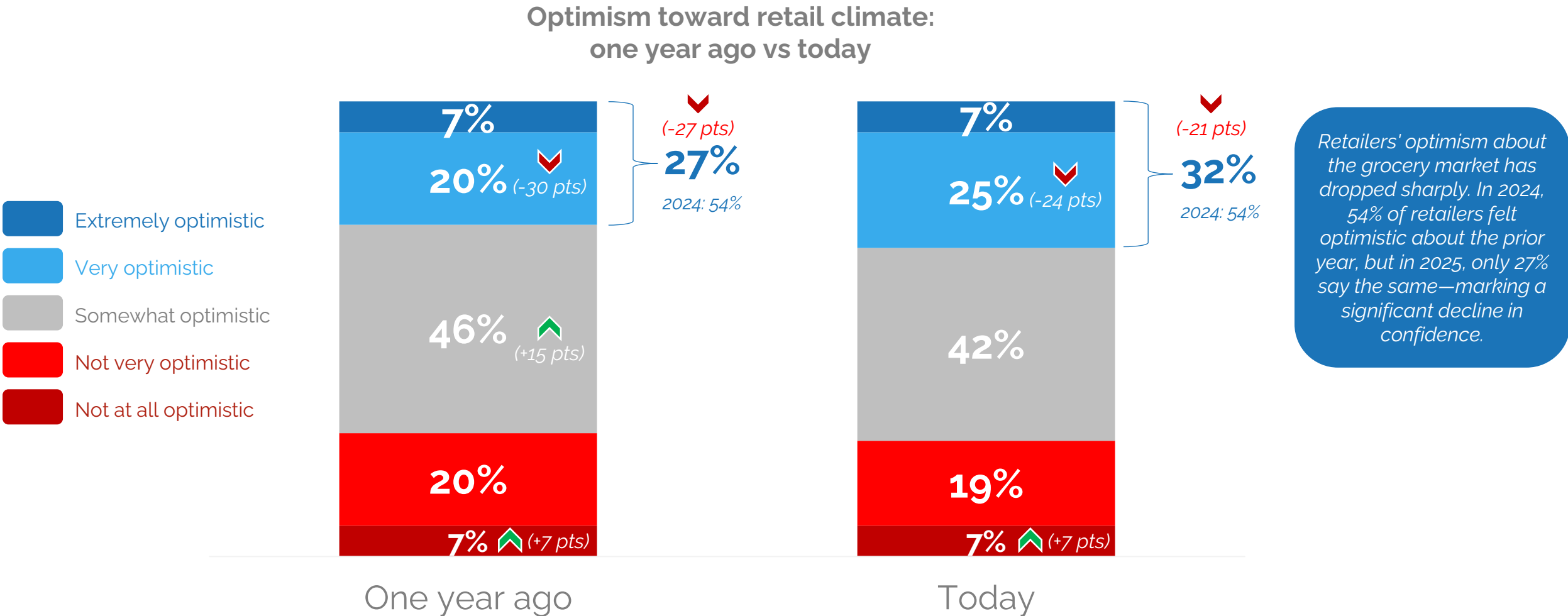
2025 outlook



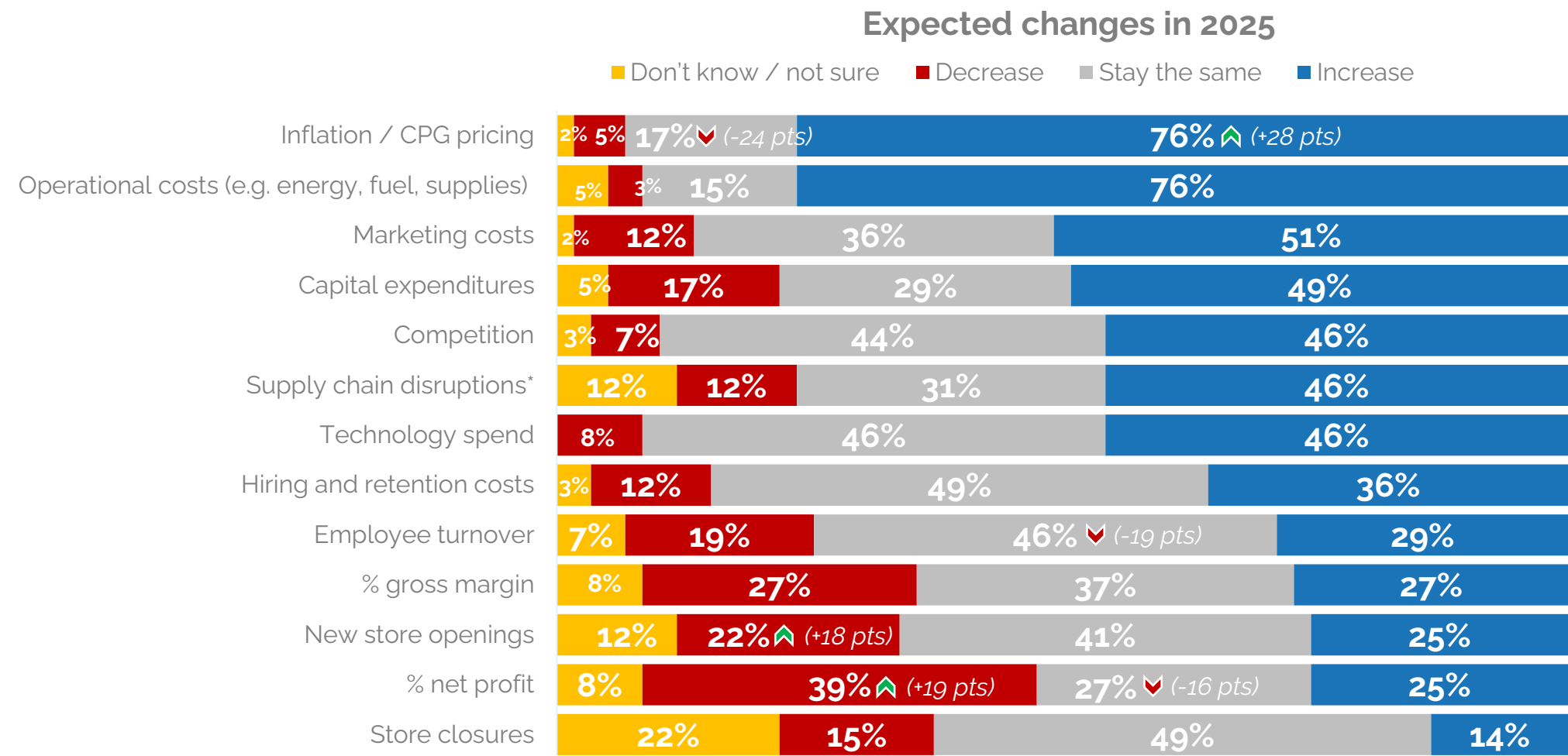
Grocers are adopting a more cautious stance for 2025. Currently, only 6 out of 10 remain optimistic, compared to 7 out of 10 who held a positive outlook last year.



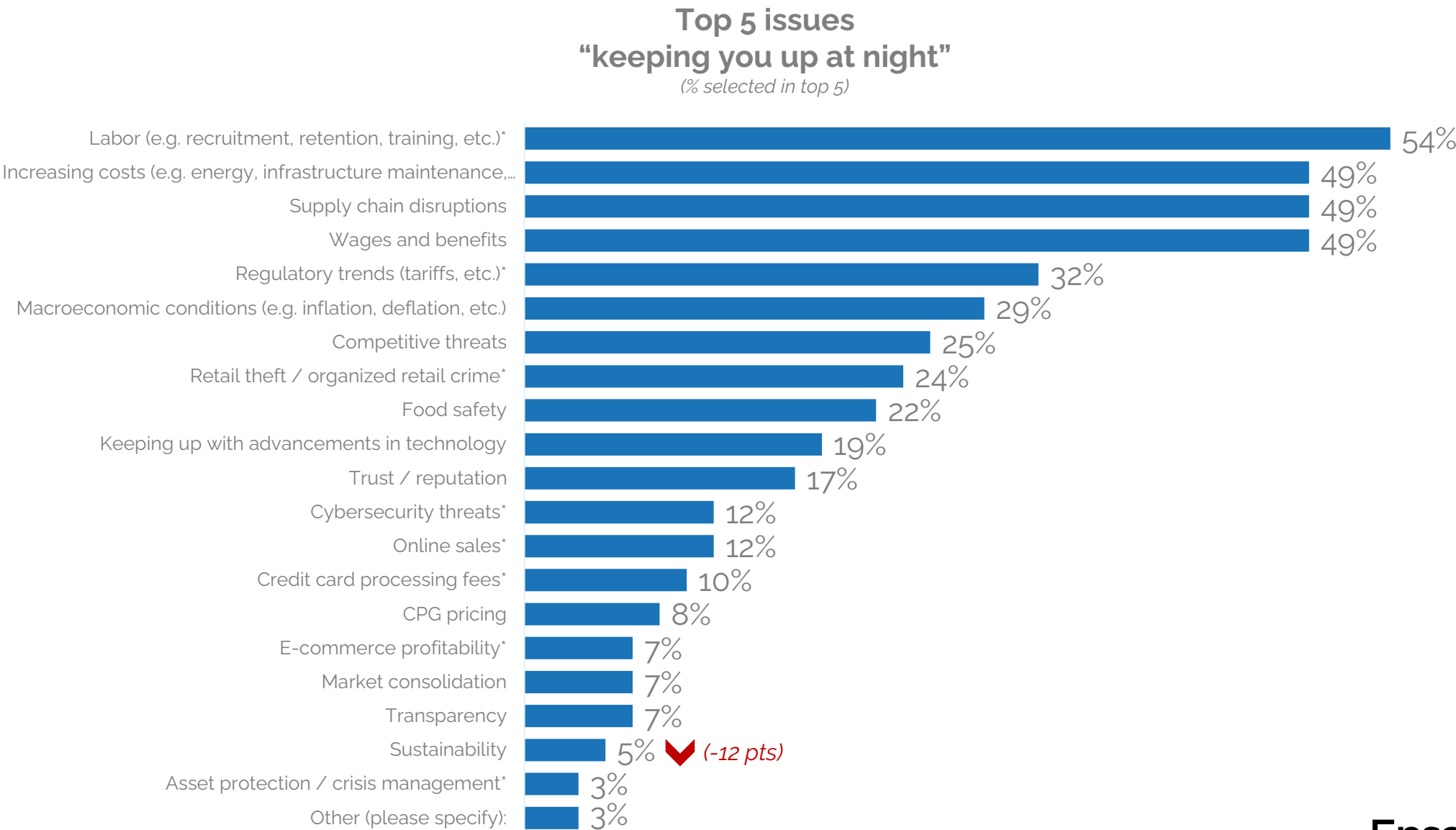
Expectations for last year's retail climate were cautious, reflecting a degree of uncertainty. This year, grocers continue to follow a similar trend, suggesting they are preparing for potential challenges ahead.



Grocers anticipate substantial inflation growth, leading to reduced investments in technology and new store openings. As a result, net profits are expected to decline.



Labor-related issues remain a top concern for grocers. Compared to last year, supply chain disruptions tends to increase and concerns about regulatory factors such as tariffs are emerging.



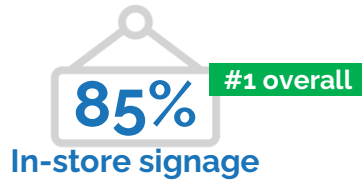
Business strategy



Key business strategies: summary

% Top 2 Box Importance

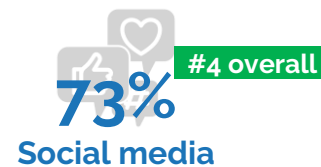
CONSUMER MARKETING / ADVERTISING



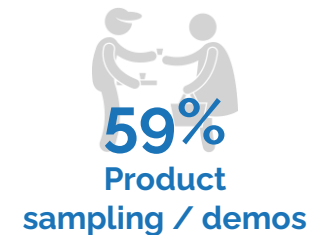
MERCHANDISING / BRAND ENHANCEMENT



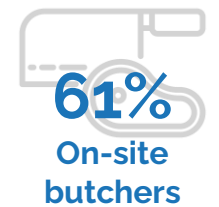
CONSUMER ENGAGEMENT



CUSTOMER INTERACTION



IN-STORE SERVICES

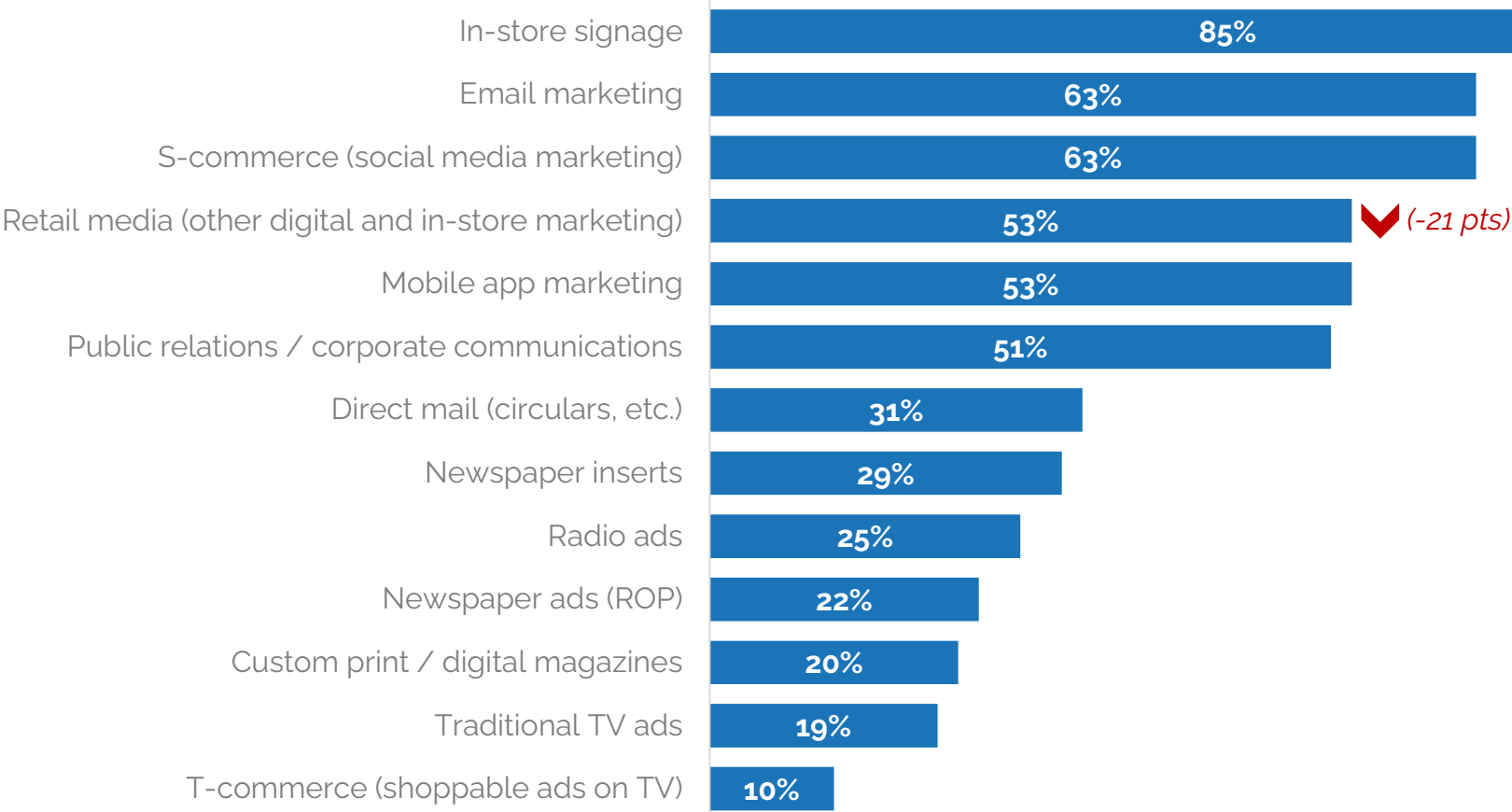


For the third consecutive year, grocers view in-store signage as their primary consumer marketing strategy, highlighting its perceived effectiveness. Conversely, retail media has experienced a significant decline.



Importance of strategies for
consumer marketing / advertising

(Top 2 Box Importance on a 6-point scale)



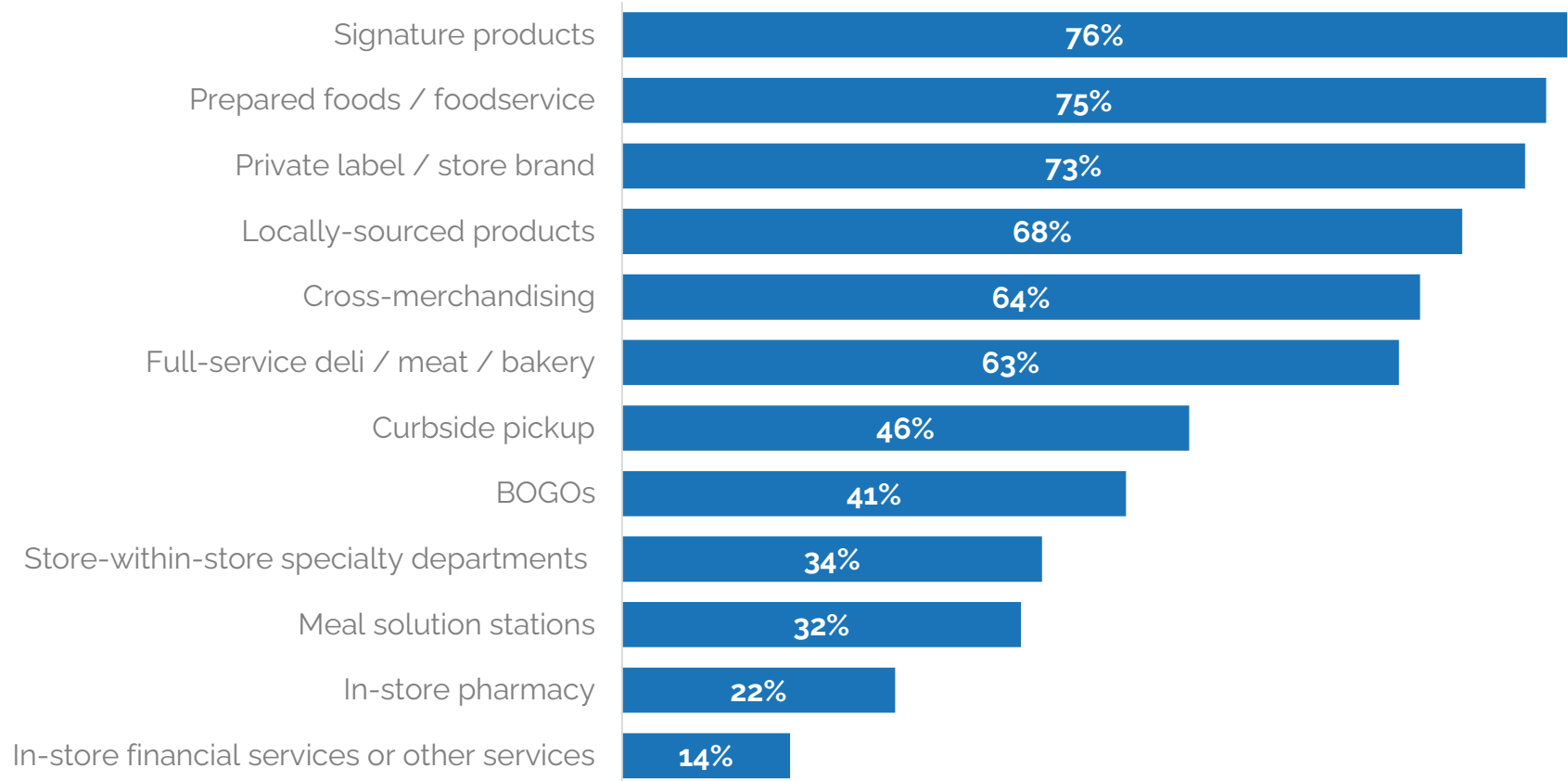
#1 in 2023 &
2024:
in-store signage

***Public relations / corporate communications" added as a new response option in 2025.*
Source: 2025 PG State of the Industry Study. Base: 2025 respondents, n=59. 2024 respondents, n=69. 2023 respondents, n=32.
Q220A. How important are each of the following strategies to your company for consumer marketing / advertising?

In terms of merchandising strategies, nearly 8 out of 10 grocers prioritize signature products. Meanwhile, there is a declining trend in the adoption of store-within-store and meal solutions strategies.

Importance of strategies for merchandising / brand enhancement
(Top 2 Box Importance on a 6-point scale)

MERCHANDISING
/ BRAND
ENHANCEMENT

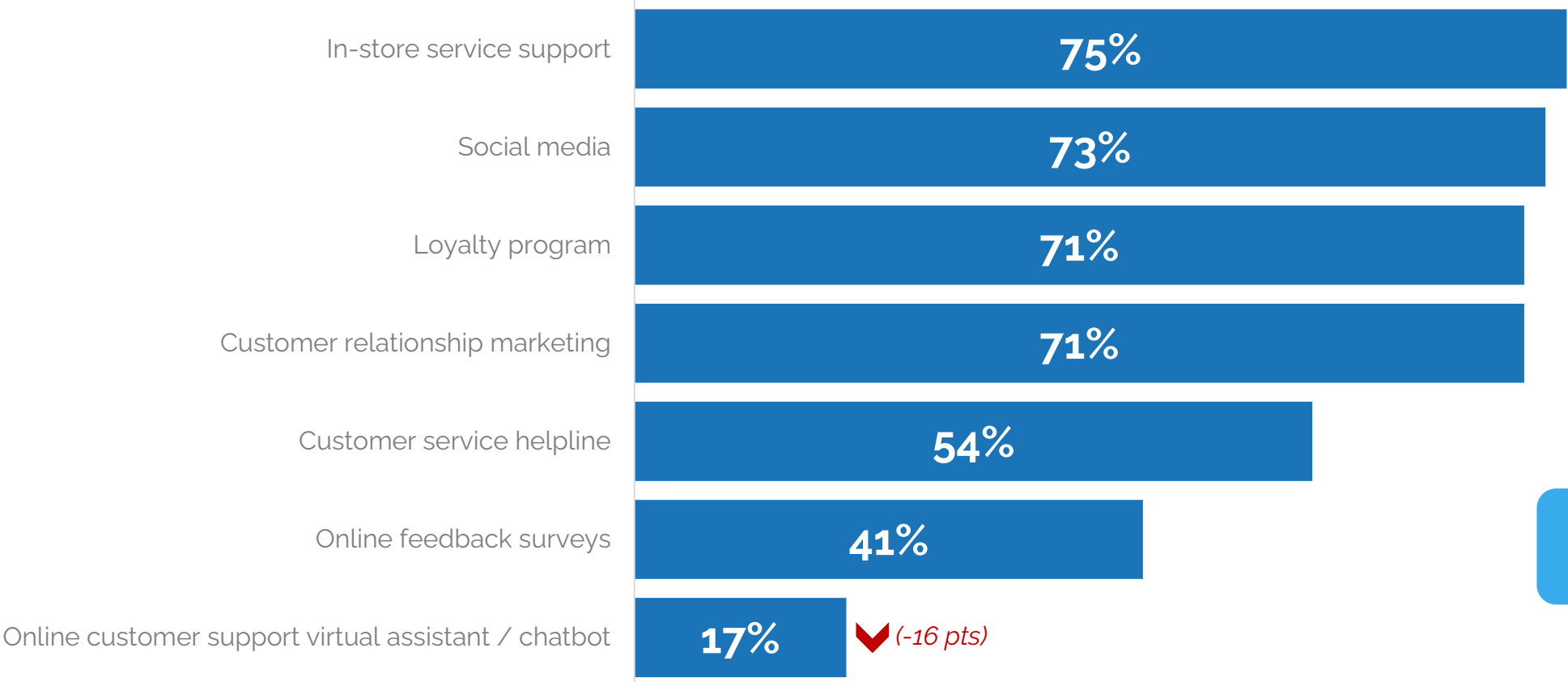


#1 in 2024:
Prepared foods /
foodservice

In-store service support continues to be the leading strategy for consumer engagement. Meanwhile, chatbots are losing importance, indicating that consumers increasingly value personalized services.



Importance of strategies for
consumer engagement
(Top 2 Box Importance on a 6-point scale)



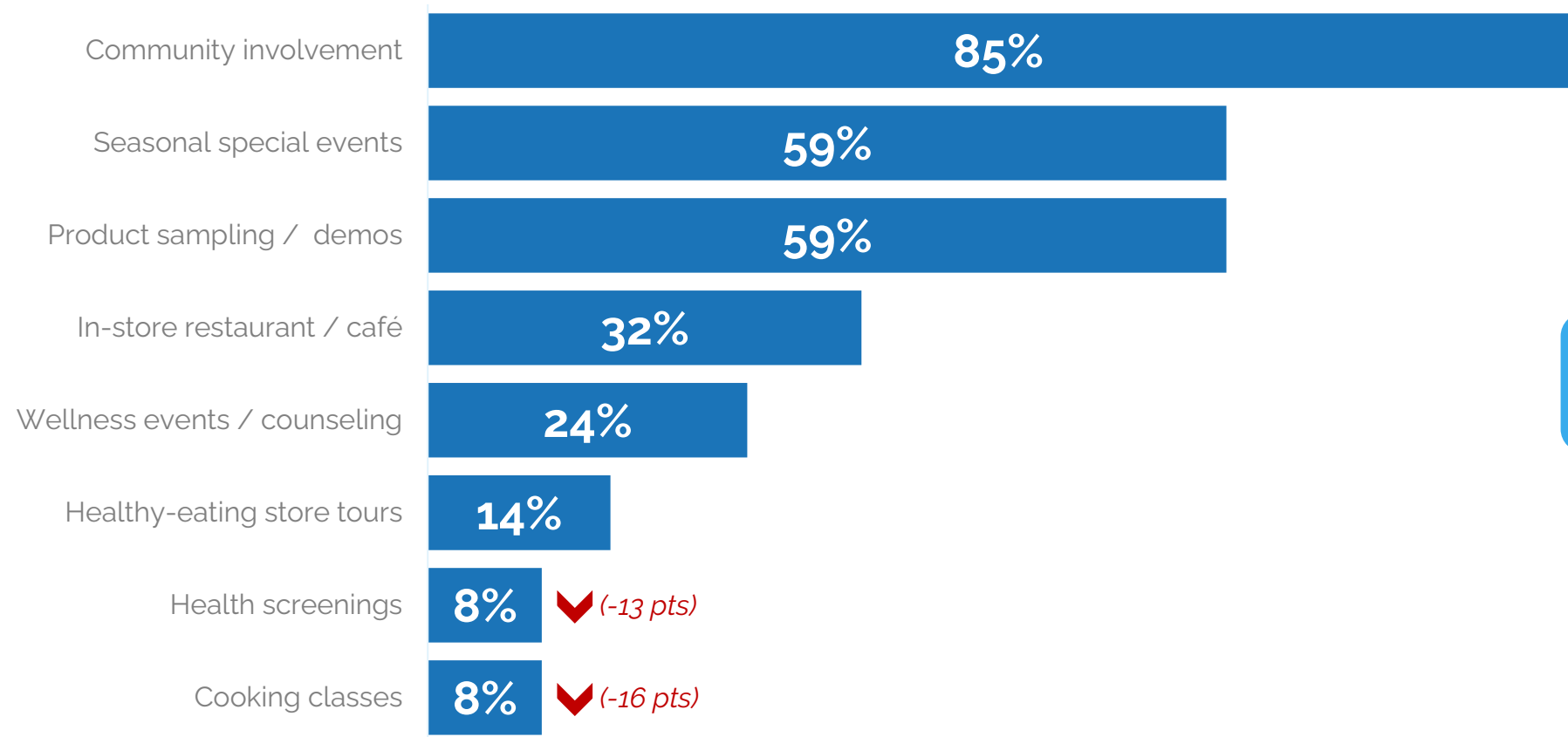
#1 in 2024:
In-store service support

***"In-store service support" added as a new response option in 2025.*
Source: 2025 PG State of the Industry Study. Base: 2025 respondents, n=59. 2024 respondents, n=69.
Q220C. How important are each of the following strategies to your company for consumer engagement?

Community involvement continues to dominate customer interaction strategies for grocers, with 8 out of 10 recognizing its value. In contrast, other food-related experiences are losing traction.



Importance of strategies for customer interaction
(Top 2 Box Importance on a 6-point scale)



#1 in 2023 & 2024:
community involvement

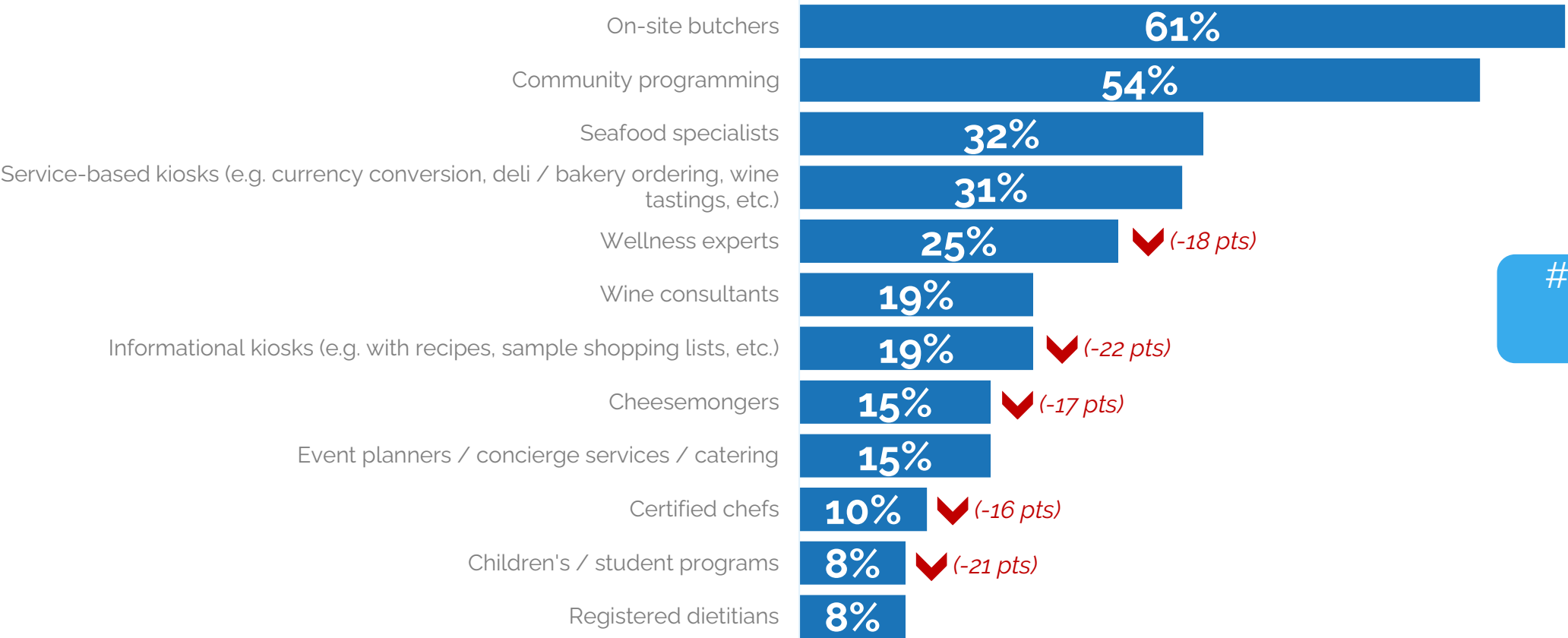
For the third consecutive year, on-site butchers are identified as the top in-store service, indicating a high level of shopper appreciation. Meanwhile, experts in other categories appear to be losing relevance.

Importance of strategies for
in-store services

(Top 2 Box Importance on a 6-point scale)

IN-STORE SERVICES



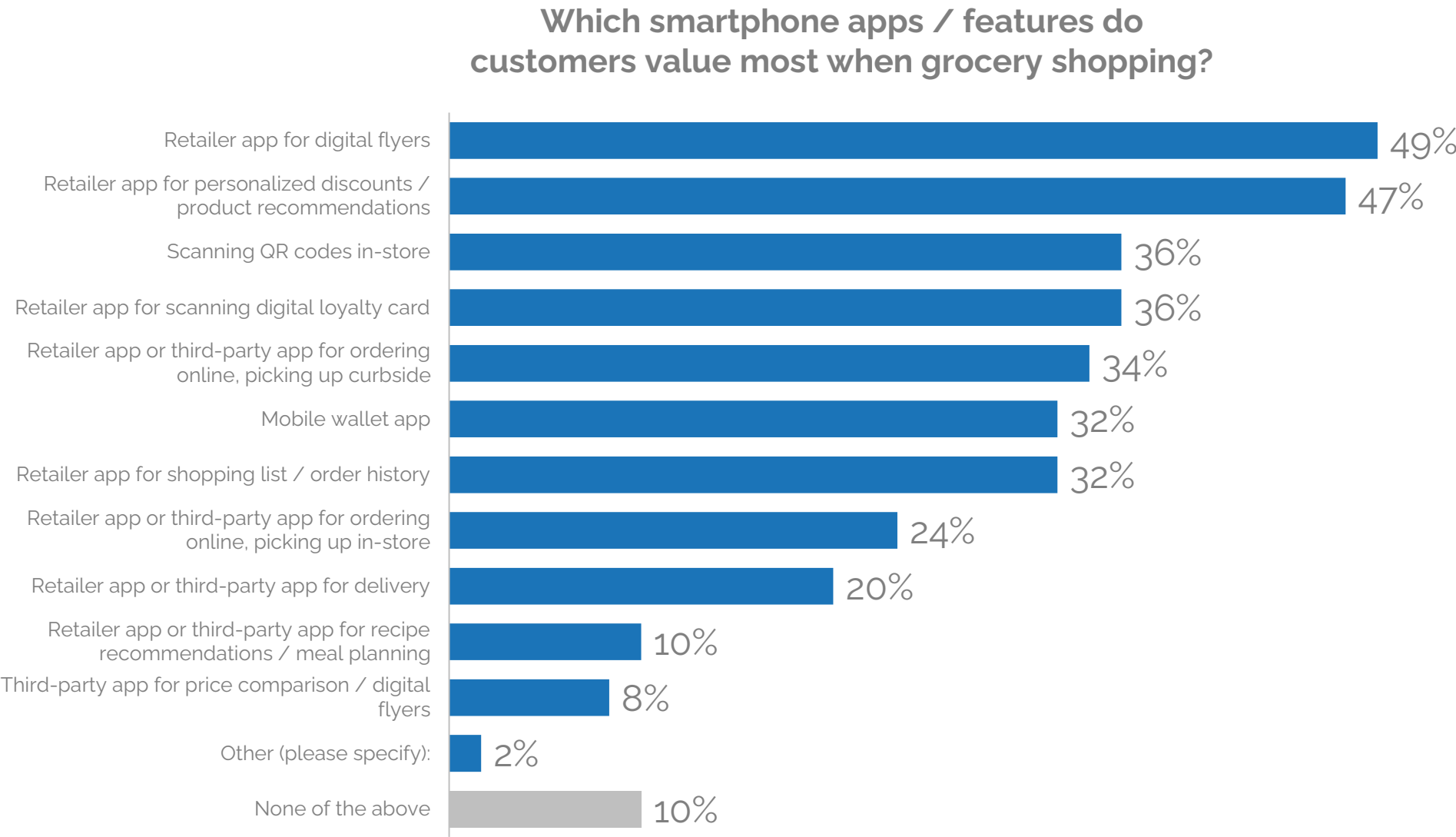


#1 in 2023 &
2024:
on-site butchers

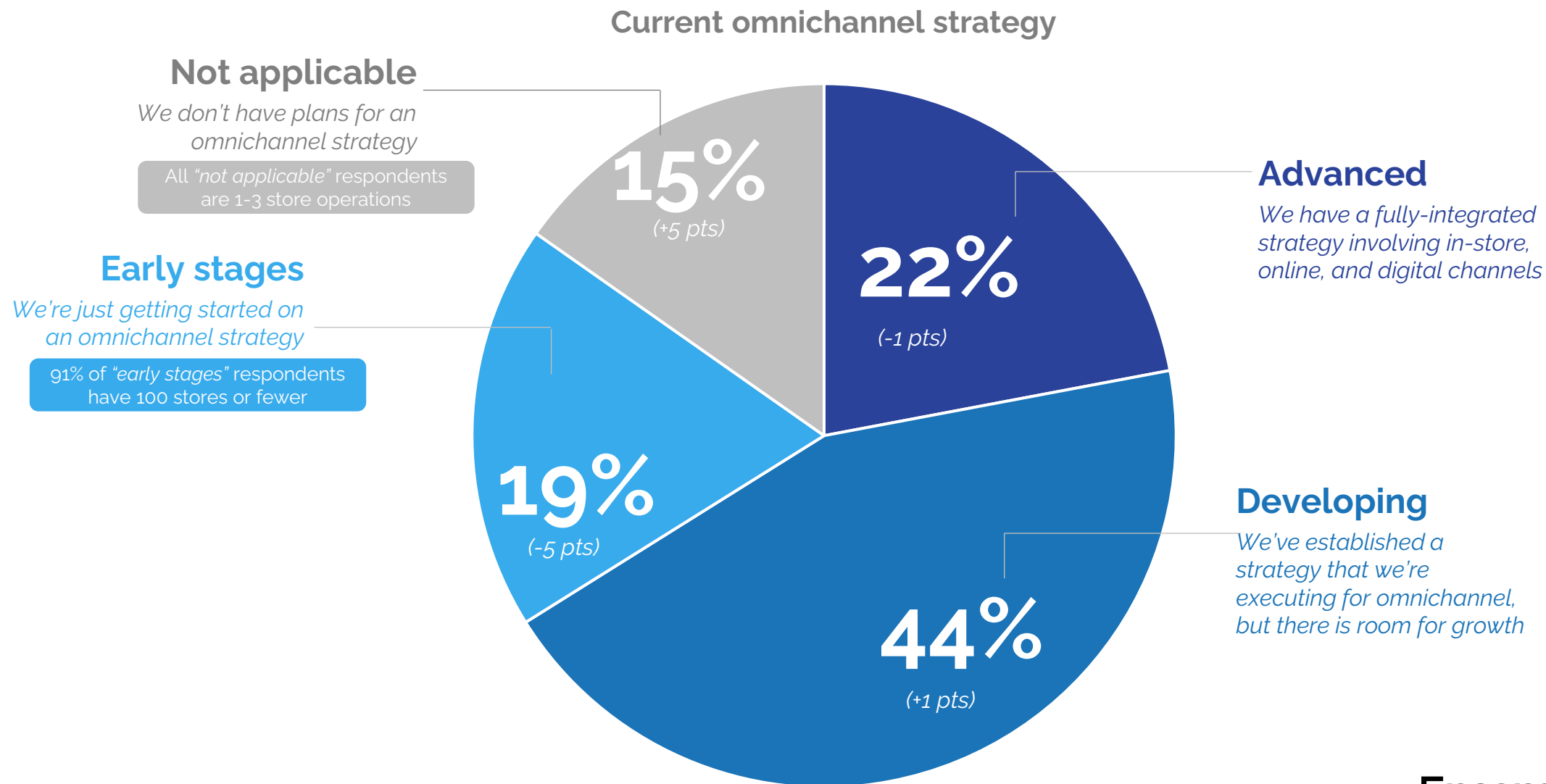
Leveraging technology



Retailers believe consumers increasingly value app features like digital flyers and personalized offers. This is followed by scanning capabilities such as QR codes and digital loyalty card.



Most grocers are either developing or have advanced omnichannel strategies, reflecting its high priority status in the industry.



Top omnichannel services: summary

Currently offered

69% Order online for in-store pickup
(retailer-supported / in-house)

64% Delivery
(third-party vendor - e.g. Instacart)

63% Mobile shopping app

Plan to offer

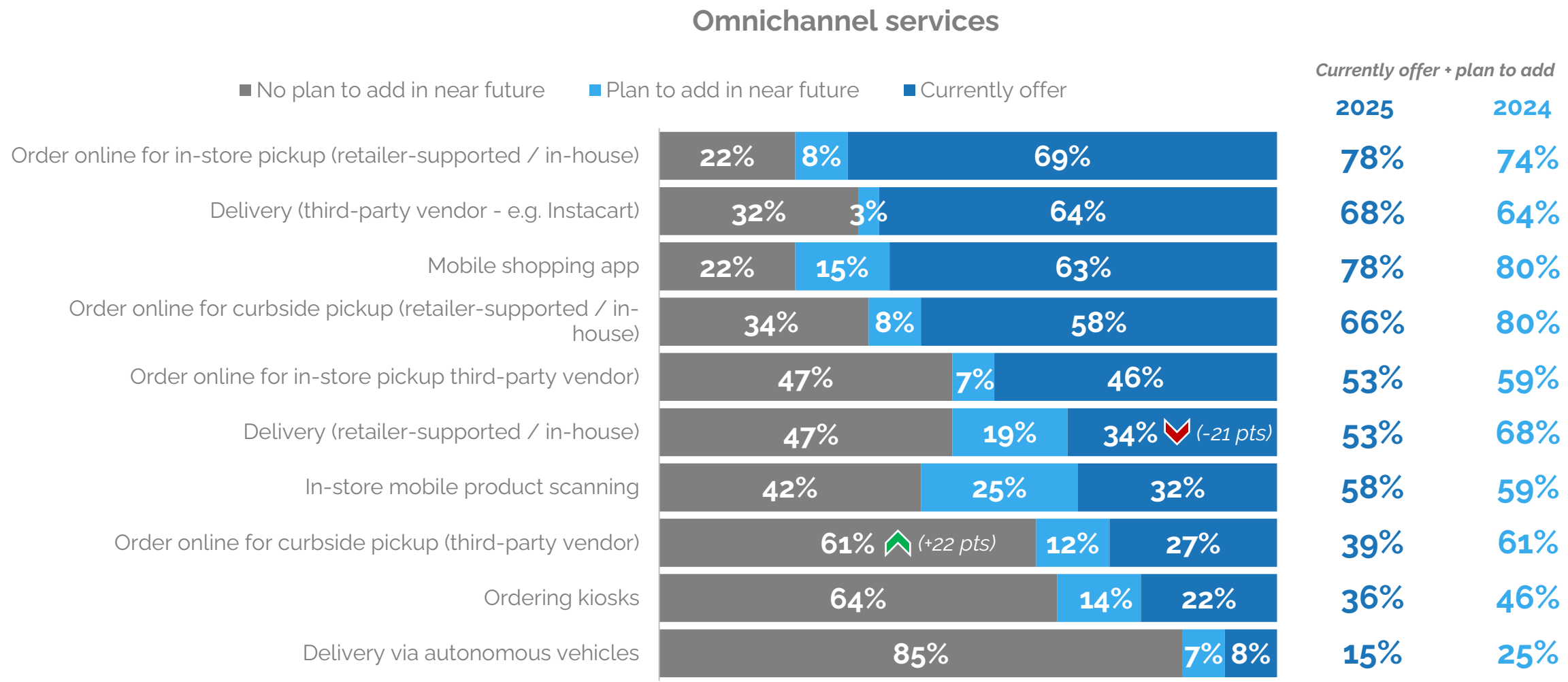
25% In-store mobile product scanning

19% Delivery
(retailer-supported / in-house)

15% Mobile shopping app

14% Ordering kiosks ▼ (+13 pts)

Online ordering for in-store pickup remains the leading omnichannel service. Meanwhile, curbside pickup is becoming less of a priority as fewer retailers plan to invest in this technology in the near future.

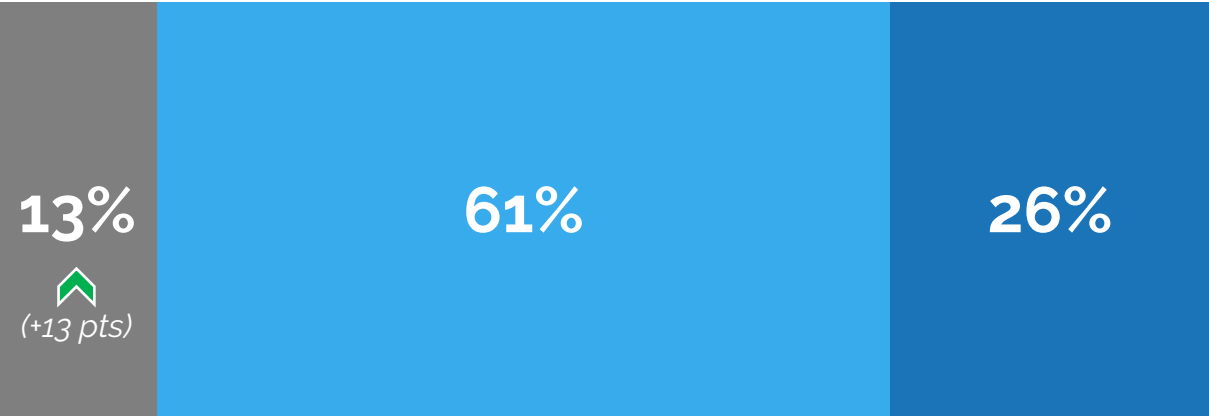


Although grocers are increasingly dissatisfied with their current third-party delivery providers, they are less inclined to invest in developing their own delivery apps potentially due to macroeconomic uncertainty.

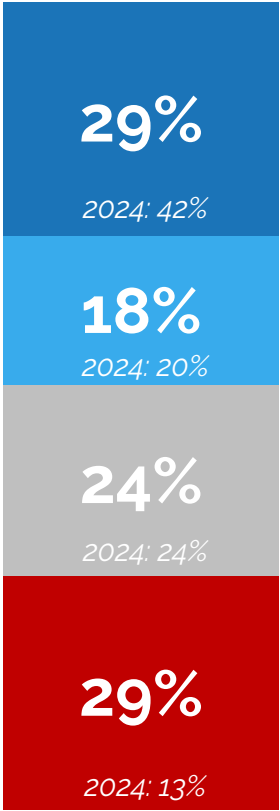
Satisfaction with current third-party vendor used for delivery / pickup

(among those using a third-party for delivery or pickup, n=38).

■ Not at all / not very satisfied ■ Somewhat satisfied ■ Very / extremely satisfied



Likelihood of developing in-house app for delivery / pickup



■ Already have one active / in development
■ Very / extremely likely
■ Somewhat likely
■ Not at all / not very likely

Measuring success



Remodeling existing stores has been the top investment choice for the past three years and is expected to remain so in the future, as it ensures optimal performance of current locations.

Best investment in **past 1-3 years**

- 1 Remodeled / invested in existing stores (22%)
- 2 Technology upgrades / new investments (12%)
- 3 Upgraded pricing / promotions solutions (8%)
- 4 Closed underperforming stores (7%)

Best investment in **next 1-3 years**

- 1 Remodel / invest in existing stores (17%)
- 2 Improve hiring, training and retention programs (15%)
Technology upgrades / new investments (15%)
- 3 Retool assortments / trim or expand SKUs (8%)
Invest in private label / store brands (7%)
Build new stores (5%)
Upgrade pricing / promotions solutions (5%)

Why is this the best investment?

- "Real Estate options are very limited. New stores are very hard to come by without building from the ground up. Best to invest in ourselves".
- "Manage your existing business first seek optimal performane from same store sales, train associates in existing stores for long term retention and promote internally for max retention then send trained associated to build new markets in future".
- "We've been putting of big maintenance for too long and now it's time to overhaul some sections of our store."

- "A strong committed work force is the root to phenomenal customer service and optimal productivity."
- "Better staff means a better shopping experience"
- "Retaining associates will improve efficiencies and provide a better shopping experience for our customers."

- "to keep up with the ever-evolving tech landscape among our competitors."
- "New POS system would give us invaluable feedback compared to our current POS system."
- "Currently implementing ESL at all locations. We will be replacing all front-end systems and department scales going forward. More efficiency."

24 For full results, see appendix.
Source: 2025 PG State of the Industry Study. Base: 2025 respondents, n=59.
Q245. What is the best investment your company has made in the past 1-3 years?
Q250. What is the best investment your company can make to be successful in the next 1-3 years?
Q250B. Why did you select [RESPONSE FROM Q250] as the best investment your company can make in the next 1-3 years?

Given the reduced shopper purchasing power due to inflation, grocers expect private label alternatives to drive the most sales and growth. Meanwhile, meat is anticipated to be the primary traffic driver.

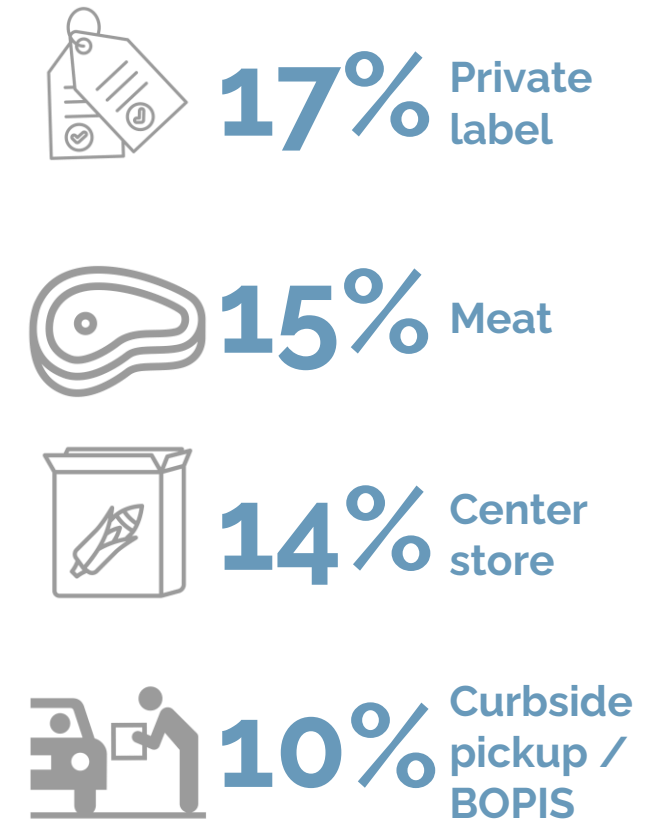
Top departments for generating sales



Top departments for driving traffic



Top departments for anticipated 2025 sales growth



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Due to the potential of private labels, investments are anticipated in areas such as product enhancement, portfolio expansion, advertising and competitive pricing.

Private label

- "Increased assortment, price investment and displays of private label and reduced reliance on branded products from CPG's that give Costco and Walmart preferential treatment".
- "Through a combination of reformulating and rebranding existing products, as well as making strategic investments into competitive pricing for these items".
- "Offer more products, display both side by side national brands along with endcaps and pallet drops of deals".
- "Consumers continue to buy more private label products as inflation continues to grow. We are designing more ads and selling events featuring our private label line".
- "Upgraded tech to establish when/where/why our private store brands can be able to drive sales".
- "Plans for us to offer best value in PB to help offset inflation".
- "Featuring our PL more in-store, off-shelf".
- "Through a company wide investment backed by omnichannel marketing."
- "Increasing product assortment and heavy promotion".

Meat

- "Partner with local ranchers, strong promo plans, cross merchandising, meal solutions".
- "We have invested in new retail cases and remodeled our cutting room".
- "Focus on our in-store Butchers will help to drive traffic in our stores. Continuing to push sales on Fresh and showcasing our focus on fresh foods with a focus on our in-house experts will be key to winning market share in 2025".
- "Highest quality in the area with full service counter".
- "More specials and keeping prices affordable".
- "Provide value items in an inflationary environment".
- "Continue to offer private brand meat products".

Center Store

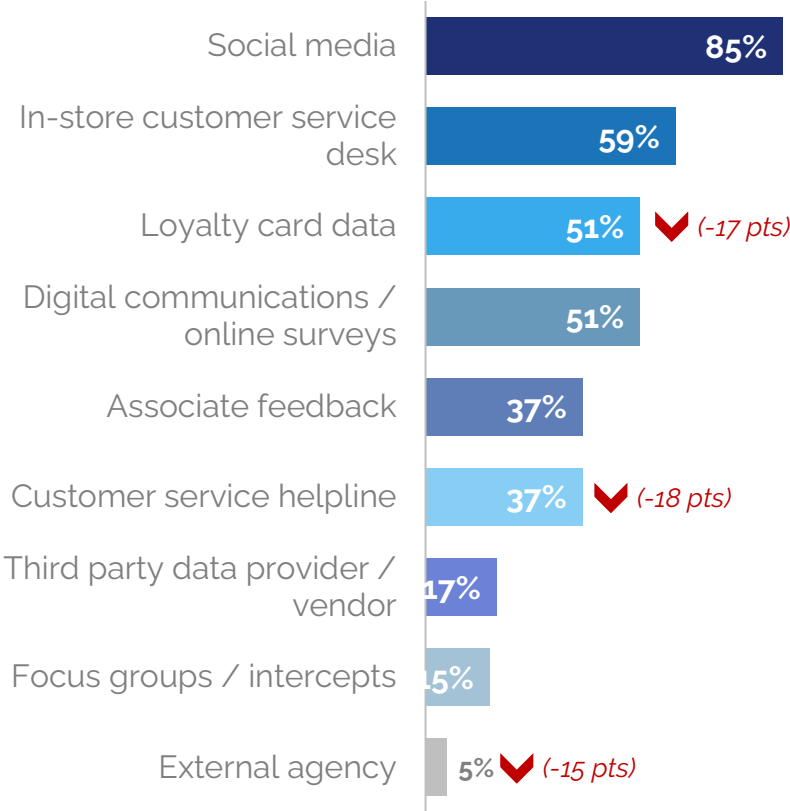
- "Best pricing strategies. Focusing on natural foods".
- "That's where our biggest portion of sales has been for a long time".
- "More local offerings".
- "Better store layout and product selection".
- "Sales, BOGO's".
- "Stay current in what's trending".
- "Better pricing".

Curbside pickup / BOPIS

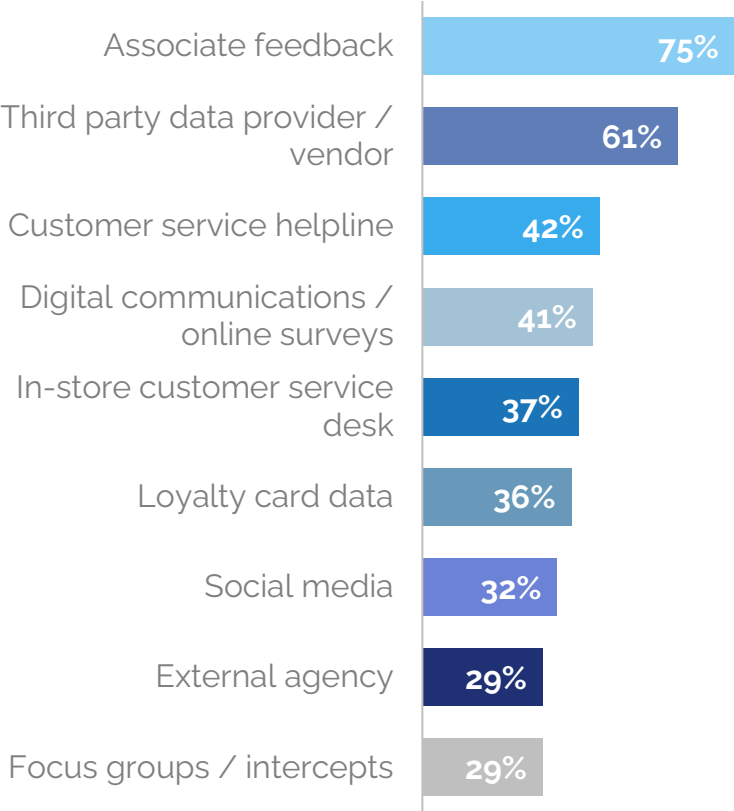
- "Advertising it everywhere and offering it free".
- "More options".
- "Advertise that we offer this service".
- "New app in development".
- "Because it's the fastest growing department".

Social media continues to be the preferred channel for customer engagement, whereas loyalty card data, customer service helpline and external agencies are losing favor. While, associate feedback and third-party data are gaining priority for enhancing business operations.

Tools for customer engagement



Tools for improving business operations

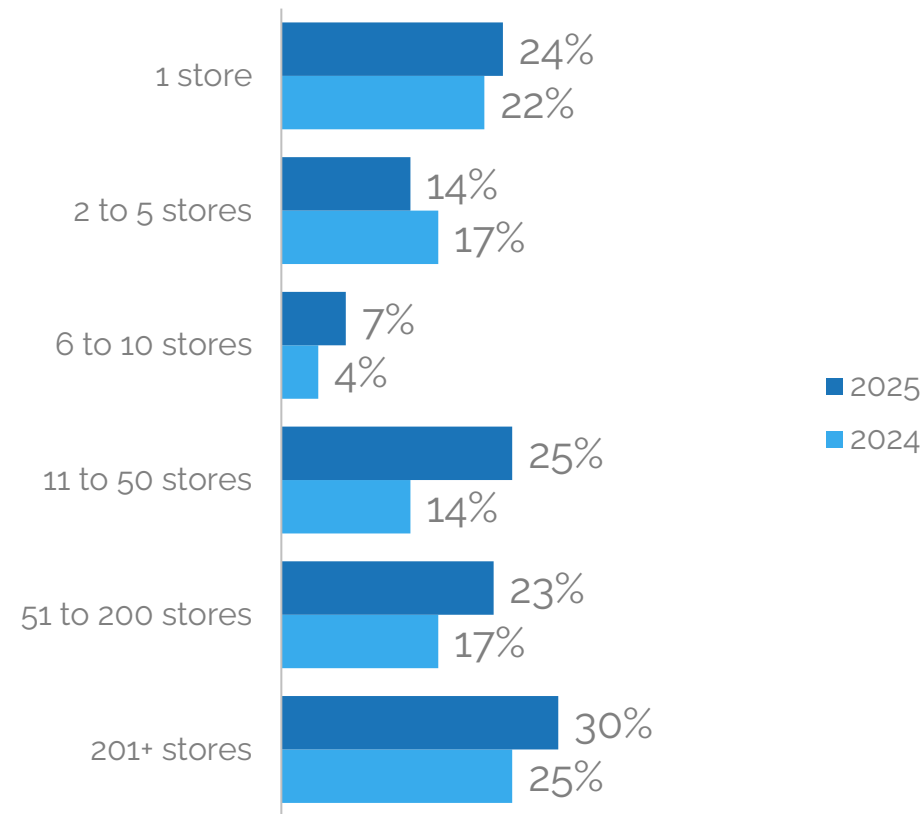


Appendix

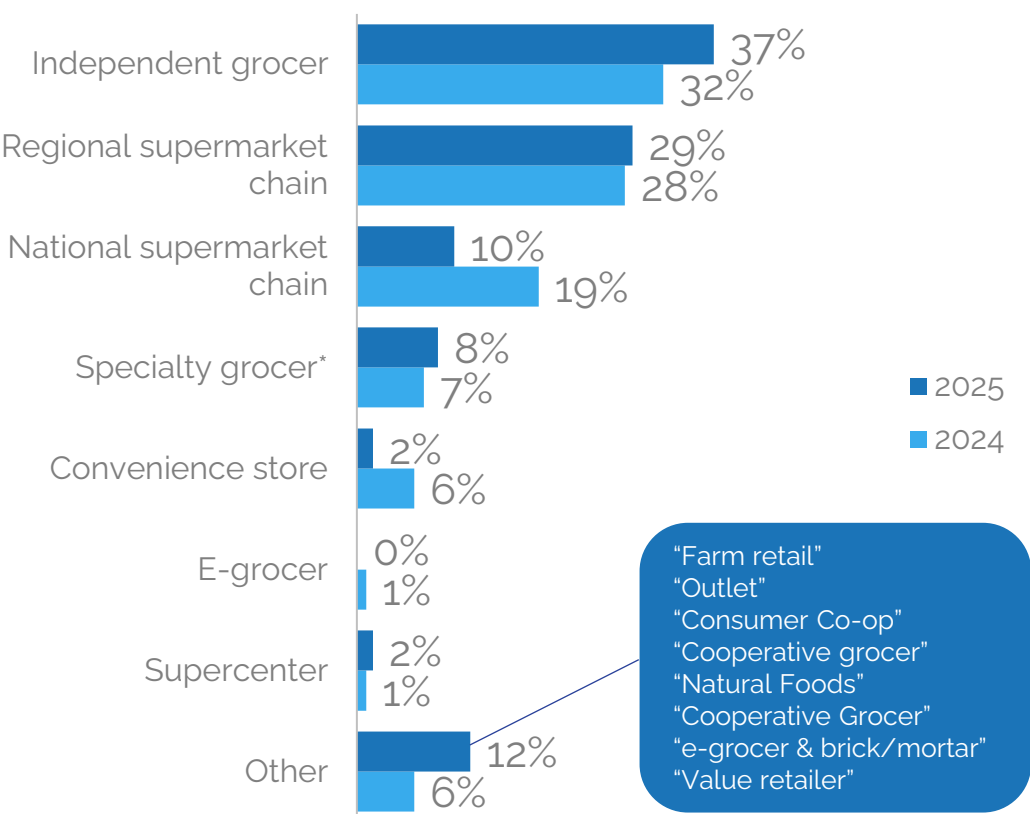


Number of stores & retailer type

Number of stores

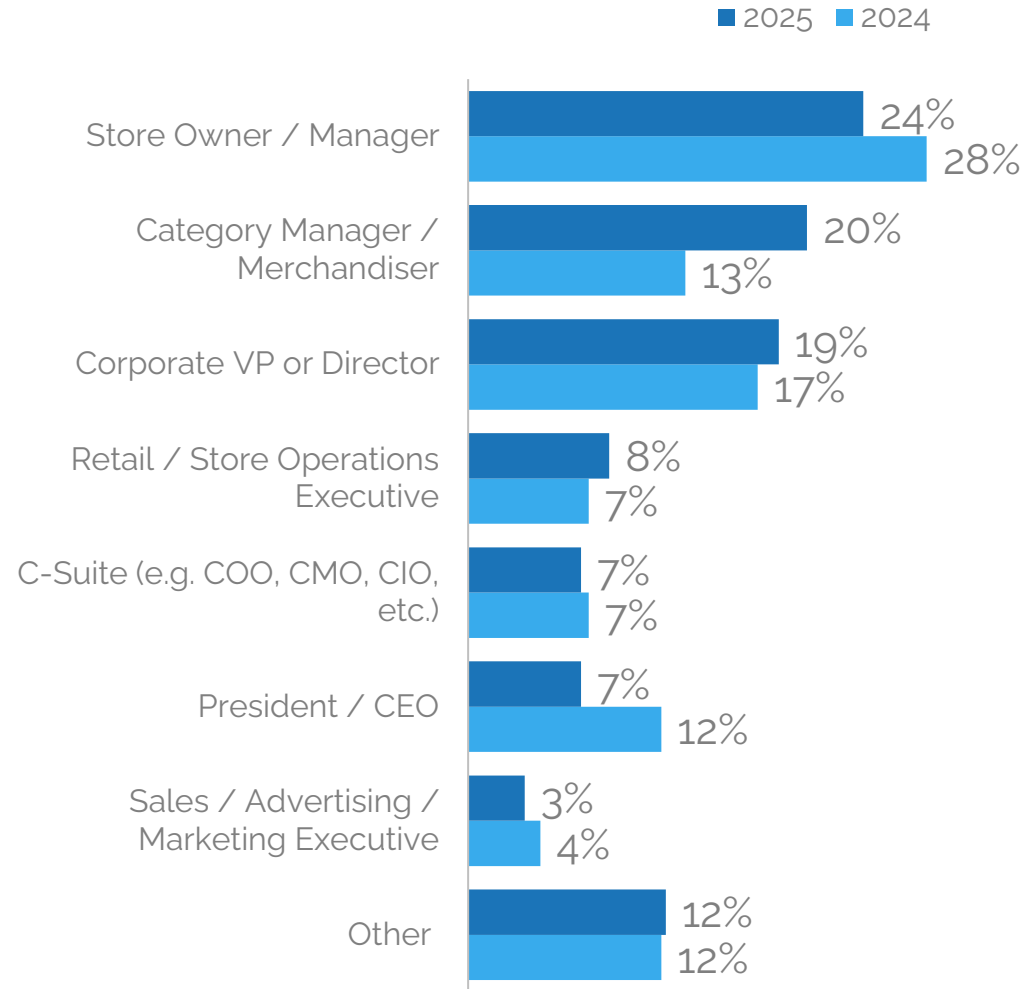


Retailer type

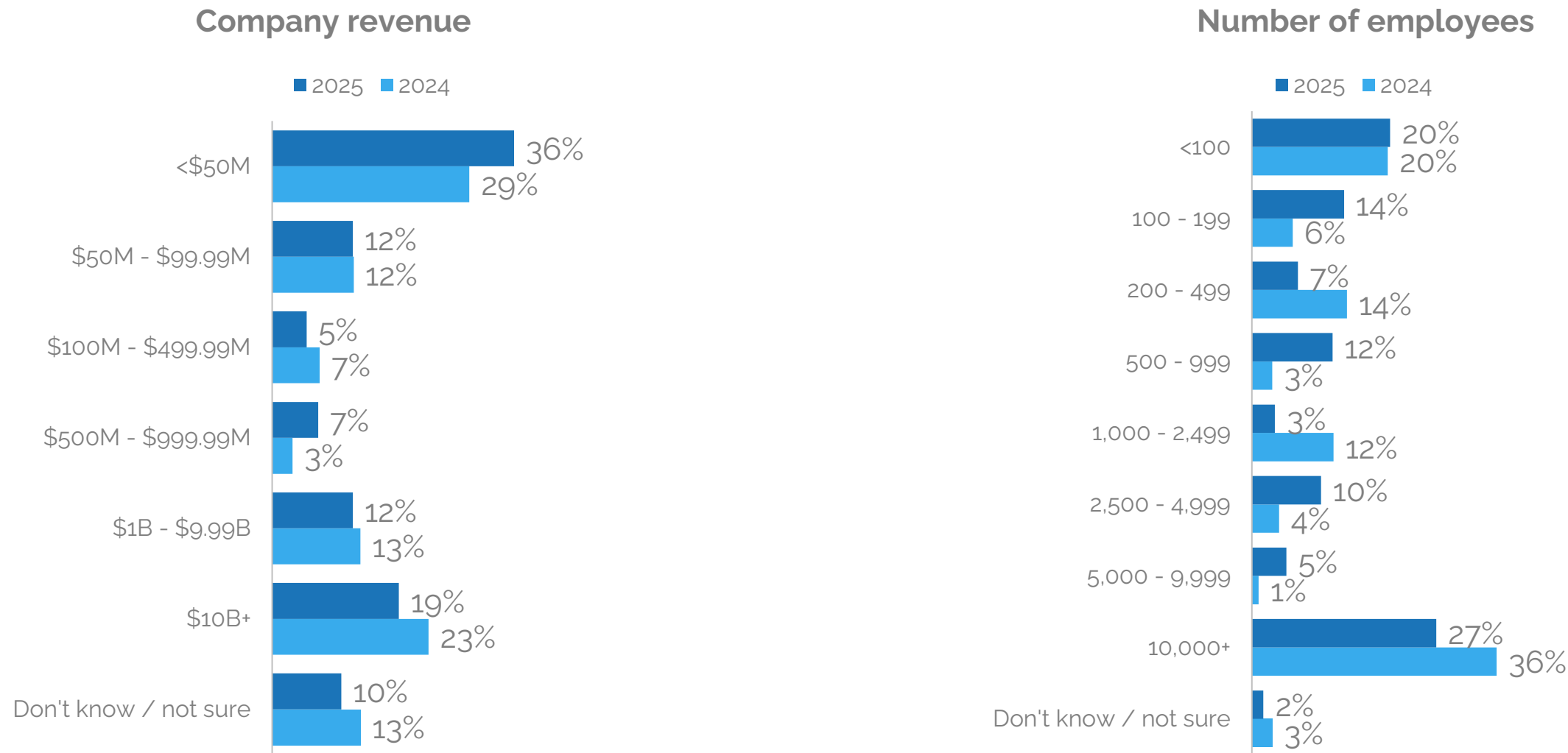


Source: 2025 PG State of the Industry Study. Base: 2025 respondents, n=59. 2024 respondents, n=69.
Q105. How many grocery stores / supermarkets does your company operate?
Q110. Which of the following best describes your organization?

Job Level



Company revenue & number of employees



Best investment

Best investment in past 1-3 years	
Remodeled / invested in existing stores	22%
Technology upgrades / new investments	12%
Upgraded pricing / promotions solutions	8%
Closed underperforming stores	7%
Overhauled loyalty program	5%
Enhanced social media strategy	5%
Launched or enhanced retail media initiative	5%
Retooled assortments / trimmed or expanded SKUs	5%
Invested in private label / store brands	5%
Executed on geographic expansion	5%
Changed store format (e.g. smaller stores, bigger stores, new formats)	3%
Upgraded infrastructure for better efficiencies	3%
Built new stores	2%
Hiring, training and retention programs	2%
Deployed AI	2%
Expanded assortments (e.g. "free-from", organic)	2%
Developed sustainability strategy	2%
Focused more on health and wellness services	2%
Other (please specify):	3%

Best investment in next 1-3 years	
Remodel / invest in existing stores	17%
Improve hiring, training and retention programs	15%
Technology upgrades / new investments	15%
Retool assortments / trim or expand SKUs	8%
Invest in private label / store brands	7%
Build new stores	5%
Upgrade pricing / promotions solutions	5%
Enhance social media strategy	3%
Develop and / or expand foodservice program	3%
Launch / expand retail media	3%
Deploy AI	3%
Overhaul loyalty program	2%
Change store format (e.g. smaller stores, bigger stores, new formats)	2%
Enter into strategic partnerships	2%
Close underperforming stores	2%
Focus more on health and wellness services	2%
Other (please specify):	5%

Response options that were included in the questionnaire but are not shown above yielded 0% of responses.

Source: 2025 PG State of the Industry Study. Base: 2025 respondents, n=59.

Q245. What is the best investment your company has made in the past 1-3 years?

Q250. What is the best investment your company can make to be successful in the next 1-3 years?

Why is this the best investment your company can make in the next 1-3 years?

Build new stores

- "New stores always generate incremental revenue".
- "I think consumers need more of what we offer".
- "Expand the Brand".

Overhaul loyalty program

- "Loyalty Programs benefit the Customer experience by offering discounts and/ or reward points".

Enhance social media strategy

- "Social media is the quickest easiest way to market products to so many customers. It gives a real time update".
- "Low costs to run and far reach to new customers where people get information now".

Change store format

- "Cost of real-estate is rising in the US Smaller foot print seem to be the core of the company's thinking "More with Less".

Develop and / or expand foodservice program

- "Our locations are near big businesses and factories. We serve tons of hot prepares food".
- "We did a large store remodel and expansion incorporating a food service program hot bar, salad bar, and grab and go. We have not seen the sales we anticipated and need to focus on expanding the food service program to increase sales and interest of new products offered".

Enter into strategic partnerships

- "We can't be everyone's store but we need partners to service every customer that walks in".

Retool assortments / trim or expand SKUs

- "Ensure cash and inventory investment going towards items that generate ROI, improve turns and reduce Shrink (out of dates/ reduce un-necessary markdown \$ loss)".
- "Get rid of slow moving products".
- "Consumers are trading down to private label and lower priced items. Our assortment is top heavy on higher priced specialty products and brands and redundant lower performing skus in categories across non-PL brands. We also need to be less restrictive in our product policy. We have had a "natural-only" focus for decades - but we are losing shoppers to conventional due to our refusing to stock selected popular products our shoppers request based on ingredients not meeting our standard. We recognize we need to make strategic exceptions based on shopper requests".
- "Currently doing it and under pilot".
- "Have/will have tech in place that will allow much better tracking what is and what is not selling based on many different category. Add to private brand offerings with better info on what needs to be added to make offerings more competitive with leading national brands".

Launch / expand retail media

- "Needing to get our name out there--to create store recognition".
- "Real growth opportunity for us".

Remodel / invest in existing stores

- "Real Estate options are very limited. New stores are very hard to come by without building from the ground up. Best to invest in ourselves".
- "We want to put a second story on our building to be able to offer community events".
- "Manage your existing business first seek optimal performance from same store sales, train associates in existing stores for long term retention and promote internally for max retention then send trained associated to build new markets in future".
- "Energy efficiency, modernize, focus on what sells/works".
- "Refresh existing stores".
- "Last remodel of our stores were 7 and 10 years ago. Equipment is starting to break down and customer experience is growing stale".
- "It's a refresh, offering better selections and services to customers and the communities".
- "Existing stores have been neglected due to rapid expansion into new areas".
- "We've been putting of big maintenance for too long and now it's time to overhaul some sections of our store".
- "Because someone of our oldest stores in the worst condition are in high sales areas".

Upgrade pricing

- "Our current Strategic Pricing team and process is leaving a lot to be desired and has the biggest impact everyday to our base business".
- "Get away from traditional ads and promotions, try buying in larger volumes for deeper discounts . Promote through different formats via QR codes, digital channels and apps. Loyalty programs have worked really well for us too".
- "People complain about prices too often".

Improve hiring, training and retention programs

- "Need skilled positions".
- "We are working on lowering our labor hour to sales ratio, and improving in HR is important for that to work".
- "Because a strong committed work force is the root to phenomenal customer service and optimal productivity".
- "Better staff means a better shopping experience".
- "Providing customers with a positive experience is important to retaining customers & increasing our client base. People are key to making this happen. Giving our teams the tools that they need to succeed will empower them and will in turn improve their attitude at work and help them to make the shopping experience more enjoyable for our shoppers".
- "It is absolutely impossible to find good employees and retain them on a regular basis".
- "Not having enough trained employees affects customer satisfaction".
- "The labor market is and has been a challenge. Retaining associates will improve efficiencies and provide a better shopping experience for our customers".
- "Need to invest in the staff we have".

Deploy AI

- "Reinvest time and resources into performing stores".

Why is this the best investment your company can make in the next 1-3 years?

Technology upgrades / new investments

- "To keep up with the ever-evolving tech landscape among our competitors".
- "SAP implementation".
- "Some of the programs we utilize daily are outdated".
- "A new pos system would give us invaluable feedback compared to our current pos system".
- "In-house systems are getting old".
- "Our current equipment is getting old and keeping current is important".
- "Currently implementing ESL at all locations. We will be replacing all front-end systems and department scales going forward. More efficiency".
- "Because we need it"
- "Dated software does not work well with other company technology's"

Close underperforming stores

- "Private label drives loyalty and offers great value to shoppers".
- "Our wholesaler is rebranding the line offers our customers a competitive quality product to compete against big box stores".
- "Customers are purchasing more store brands. Due to higher costs of national brands".
- "More profitable and less reliance on CPG's! Retailers with exponential growth are doing this now".

Execute on geographic expansion

- "Employees who have been with the company for long periods of time and know their position have not been promoted, cheaper to hire outside the company for less pay. We run our stores short handed on purpose to save money and have no problem letting our best employees go as long as we can replace them for some one cheaper, point blank".
- "Costco, Amazon and Wal-mart are taking away our business by being able to deliver to the house on the same day as an order is placed".
- "Invest more labor so that we can drive more sales".
- "Customers are increasingly interested in information from their retailer about health and wellness".
- "It will fundamentally change the way we integrate new processes and technology with both customers and employees".
- "It's the future".

Department drivers

Which departments are most successful at...	Generating sales	Driving traffic
Private label / store brand	69%	29%
Dairy	64%	34%
Center store	63%	41%
Frozen foods	58%	29%
Beer / wine / liquor	53%	37%
Produce	53%	46%
Deli	49%	34%
Prepared foods / foodservice	49%	32%
Health, beauty, & wellness	49%	41%
Meat	49% ▼ (-22 pts)	37%
Fresh bakery	46%	34%
General merchandise	46% ▼ (-21 pts)	41%
Organic	44%	32%
Checkout lanes / front end	44%	54%
Seafood	42%	39%
Floral	39%	20%
Ethnic	37%	49%
Gourmet / specialty products	37%	25%
Curbside pickup / BOPIS	34%	51%
Pharmacy	15%	31%

Anticipated sales growth driver in 2025	
Private label / store brand	17%
Meat	15%
Center store	14%
Curbside pickup / BOPIS	10%
Prepared foods	8%
General merchandise	7%
Produce	7%
Dairy	5%
Beer / wine / liquor	3%
Ethnic	3%
Health, beauty, & wellness	3%
Deli	2%
Frozen foods	2%
Organic	2%
Pharmacy	0%
Other (please specify):	2%

How do you plan to drive sales growth for this category? (category that is expected to drive the greatest sales growth for 2025)

Private label

- "Featuring our PL more in-store, off-shelf".
- "Increased assortment, price investment and displays of private label and reduced reliance on branded products from CPG's that give Costco and Walmart preferential treatment".
- "Through a company wide investment backed by omnichannel marketing".
- "Through a combination of reformulating and rebranding existing products, as well as making strategic investments into competitive pricing for these items".
- "Facebook".
- "Offer more products, display both side by side national brands along with endcaps and pallet drops of deals".
- "Promote, display, pricing".
- "Consumers continue to buy more private label products as inflation continues to grow. We are designing more ads and selling events featuring our private label line".
- "Plans for us to offer best value in PB to help offset inflation".
- "Upgraded tech to establish when/where/why our private/store brands can/well be able to drive sales of same".

Meat

- "Partner with local ranchers, strong promo plans, cross merchandising, meal solutions".
- "We have invested in new retail cases and remodeled our cutting room".
- "Focus on our in-store Butchers will help to drive traffic in our stores. Continuing to push sales on Fresh and showcasing our focus on fresh foods with a focus on our in-house experts will be key to winning market share in 2025".
- "Fresh meat in the natural category continues to be a high draw department".
- "Highest quality in the area with full service counter".
- "More specials and keeping prices affordable".
- "Provide value items in an inflationary environment".
- "Advanced selection".
- "Continue to offer private brand meat products".

Beer / wine / liquor

- "Wine stewards in all stores sample bars in stores expand wine and liquor selection".
- "Focus".

Center store

- "Best pricing strategies. Focusing on natural foods".
- "New stores, reno, resets"
- "That's where our biggest portion of sales has been for a long time".
- "More local offerings"
- "Better store layout and product selection".
- "Sales, BOGO's".
- "Stay current in what's trending".
- "Better pricing".

Dairy

- "Inflationary pressures in Eggs, Milk, and Orange Juice will continue to create sales growth (just not much tonnage growth)".
- "Be fresh and in stock. Eggs are a constant battle and prices keep increasing. Organic is growing, so keep the variety growing in this category".
- "Greater private brand presence"

Curbside pickup

- "Advertising it everywhere and offering it free".
- "More options".
- "Advertise that we offer this service".
- "New app in development".
- "Because it's the fastest growing department".

Prepared foods

- "Maintain signature favorites while offering new and exciting protein/meal/sides grab n go options, new sandwiches, expanded and improved scratch baked goods alongside slack-out baked goods that are locally or regionally produced. Keep Cafes and Juice/Coffee bar friendly, delicious and exciting, with top-notch service and convenience".
- "Better offerings that appeal to the customers, customized preparations".
- "Execution, offering, packaging, variety".
- "increase assortment".
- "More private label products, wholesaling to other stores, new recipe development".

How do you plan to drive sales growth for this category? (category that is expected to drive the greatest sales growth for 2025)

General merchandise

- "Bigger Selection and better curated merchandise".
- "Competitive pricing and effecting marketing and merchandising".
- "Get in unique products off Faire".
- "Rationalize assortment".

Produce

- "Info customers if the local and fresh aspect of the produce line. Keep numerous sale items available".
- "It seems all the focus is on fresh vegetables, placed first in all the stares mass areas".
- "Buying and selling more local".
- "Better quality produce and eye catching displays".

Health, beauty, & wellness

- "Trainings for staff Teaching sales techniques to create larger basket size".
- "Vitamin, CBD and loose herb/spice expansion".

Ethnic

- "Expanding our assortment of trendy items".
- "Assortment Merchandising Marketing in store and out".

Frozen foods

- "With prices rising in grocery and dairy customers will want to keep food as long as possible before their next shopping".

Organic

- "Increasing product assortment and heavy promotion".

Deli

- "We just expanded our set to 28 feet".

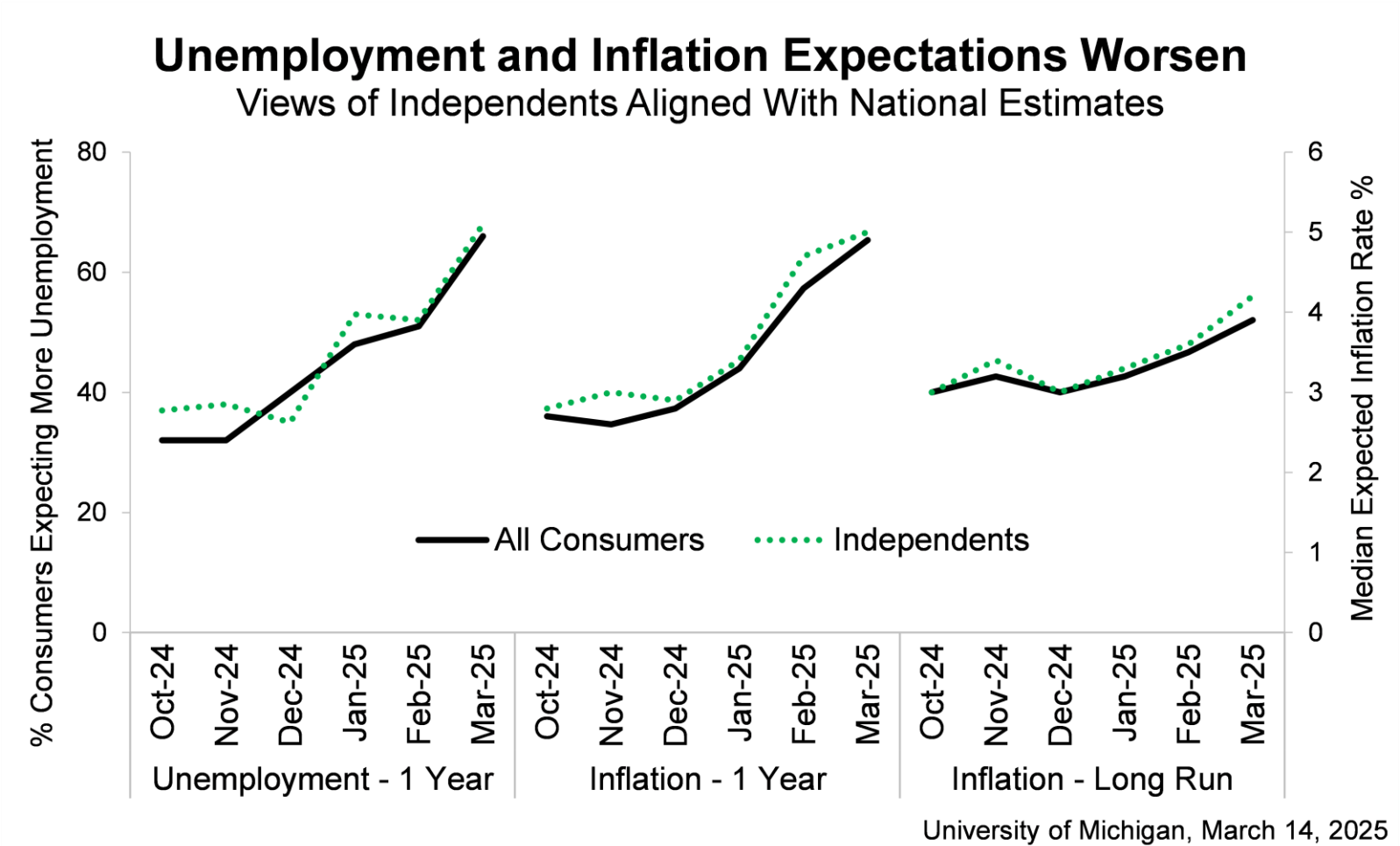
Other: THC beverage section

- "We just expanded our set to 28 feet".

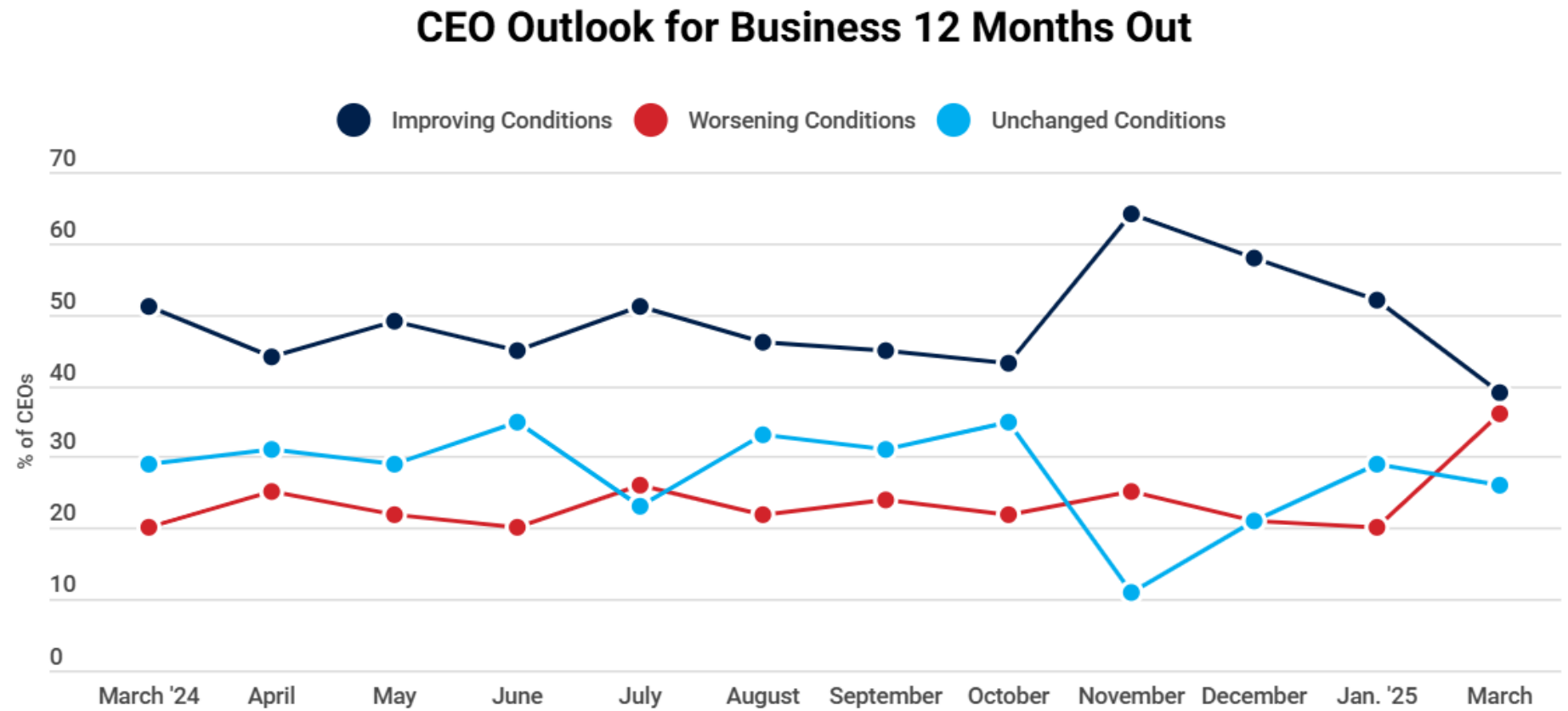
Secondary research



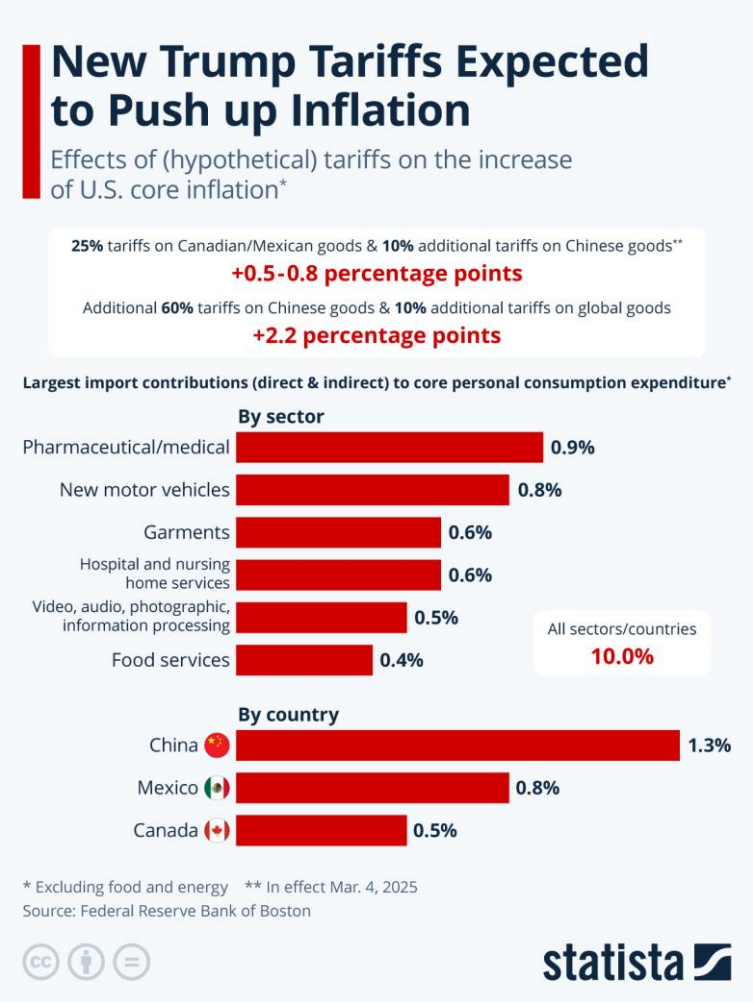
Consumer sentiment has fallen for three consecutive months, driven by deteriorating expectations across economic facets and heightened uncertainty. Inflation expectations have also surged.



CEO optimism about the business climate has dropped significantly. The primary concerns include the Trump administration's tariff threats and rising geopolitical uncertainty, with 48% of CEOs predicting a recession or slowdown within six months.



The Trump administration's tariffs could increase U.S. core inflation by 0.5-0.8 percentage points, with potential additional tariffs raising it by up to 2.2 percentage points.



Thank you.

If you have any questions, please contact:

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