

# US F&B Digest

July 2021

Issue 1



# From the CEO



**Jeremy King**  
Attest

**A**s the saying goes, necessity is the mother of invention. Some of those inventions - and the insights that generate them - are truly unmissable. That's what this F&B Digest is all about.

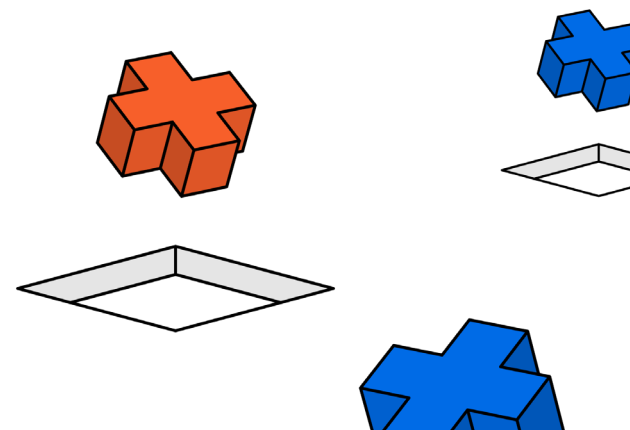
The pandemic has certainly helped to speed up developments in F&B retail technology. The sector has faced the challenge of making stores safer and maintaining footfall, while coping with skyrocketing demand for home delivery and adapting to entirely new demands in ever-shifting local contexts.

This means that retailers have been experimenting with ways to help shoppers minimize contact and carry out shopping trips more conveniently and efficiently. They've also turned to technology to scale-up and increase accessibility to last-mile grocery delivery and much broader supply chain moves. Some of the innovations are truly exciting, like robots that can fetch all the items on your shopping list in seconds, AI that helpfully suggests products you might like to try, new business models that offer values and personalisation that appeal to new groups of buyers in entirely new ways, or driverless delivery vehicles that can be dispatched to your home.

In this edition of the F&B Digest, we wanted to take a look at the most interesting developments in food retail technology and gauge real consumer reaction. What we found is that younger Americans especially are likely to adopt any technology that makes getting their groceries quicker and easier - even at a reasonable cost.

We also wanted to bring real producers into the equation (that's where grocery products actually come from, so it can't all be about demand and supply chain, we need to cover real supply too!). So, alongside data from 2,000 consumers, you'll also find an interview with the insights director from Organic Valley, detailing how the farmers cooperative approaches new product development. And, we ask the CRO of beverage brand DRY how they turned their website into a growth engine by pivoting to direct-to-consumer (D2C) sales.

**Bon appetit!**



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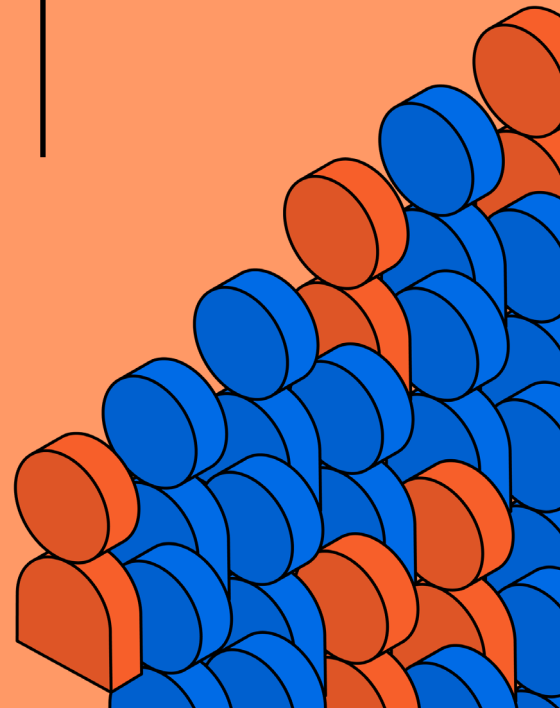
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01

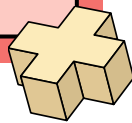
# Smart carts & in-store satnav: tech US grocery shoppers want



# New data shows US consumers desire a more automated grocery shopping

Americans are in favor of a more automated grocery shopping experience, a nationally representative survey of 2,000 consumers shows. Although they add the human touch, less than half of people (44%) would choose to check out with a cashier.

Given the option, how would you prefer to check out when grocery shopping in-store?



49.4%  
Self-check out

43.9%  
Cashier

6.3%  
No check out

0.4%  
Other

The younger you are, the less likely you are to desire human interaction when paying for your groceries; only 28% of Gen Z (aged 18-25) would opt for a cashier. As one respondent commented, "I have social anxiety."

The data comes as Amazon announces the launch of a new Amazon Fresh store in Bellevue, Washington - the first full-sized supermarket to be equipped with the brand's Just Walk Out checkout-free technology.

The technology relies on computer vision to track items as they move from shelves to carts. Customers using the system identify themselves as they enter by using a QR code, scanning their palm with an Amazon One reader, or inserting a credit or debit card connected to their Amazon account. When ready to leave, customers use the same method they used to enter to finish their transaction.

Amazon aren't the only ones investing in automation; Giant Eagle are adding Grabango's checkout-free technology to stores in Pittsburgh. Grabango, who have recently secured \$39m series B funding, say they have also signed deals with four other retailers. Meanwhile, Israeli tech firm WalkOut are making smart carts less expensive, with cameras and touch screens that can be retrofitted.

Nearly 41% of respondents say they would use smart carts that automatically detect items added, while a further 38% might use them. Only 21% wouldn't want to use a smart cart, indicating that this tech is likely to prove popular.

# Consumers reject biometric payment methods

While Americans show high interest in check-out-free technology, they're still most likely to want to pay using traditional methods. Only a tiny 2% would choose a biometric payment option, such as Amazon One, which lets users pay with their palm prints and is being rolled out in Whole Foods Market stores.

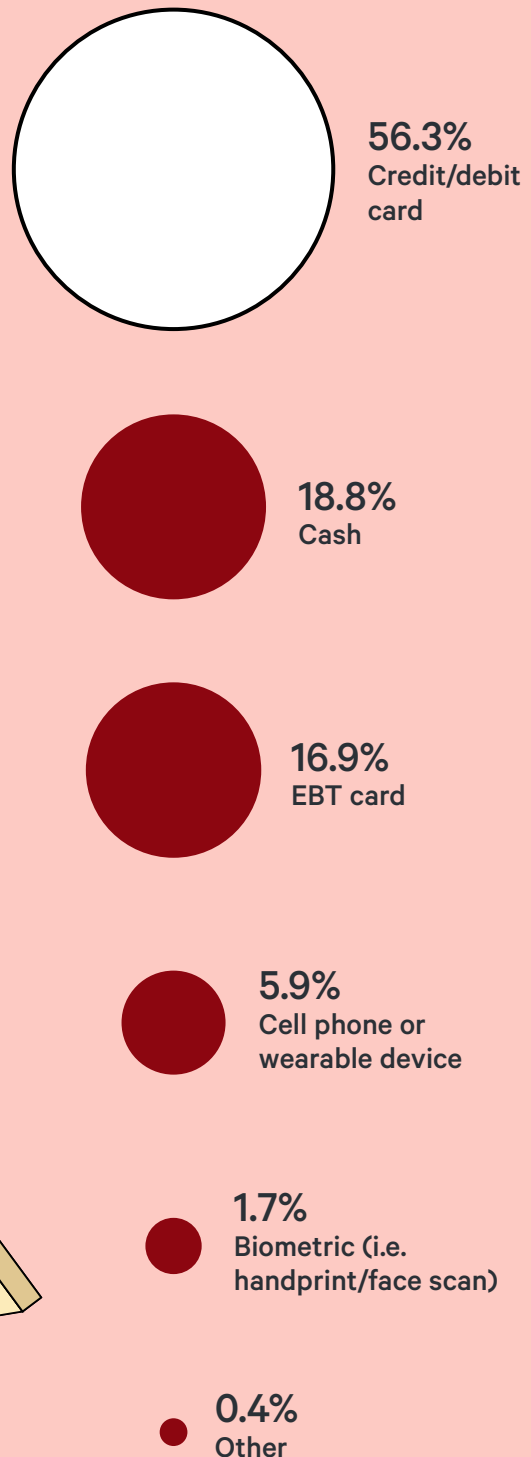
Adoption of contactless payment, such as Apple Pay on a cell phone or smartwatch, also remains surprisingly low. Just 6% of people would select this method given a choice.

Credit or debit card is still the most popular method for paying for groceries in-store, chosen by 56% of respondents. And behind that, it's good ol' cash (19%), which is something retailers thinking of going cashless should take note of. Lower-income individuals can be more reliant on cash, so retailers must take care not to discriminate when integrating checkout-free technology.

Interestingly, younger people also show a preference for cash, with 25% of Gen Z opting to pay with it. On the other hand, Boomers (aged 56-66), perhaps having the most access to credit, are the demographic least likely to choose cash (14%).

Equally important for inclusivity is accepting payment via EBT card; 17% of Americans wish to pay for their groceries this way.

Given a choice, which payment method would you prefer to use when grocery shopping?





# In-store satnav is consumers' most desired tech

We asked consumers about their likelihood to adopt other emerging in-store technology, and we found that in-store navigation is most in demand. Nearly 54% of respondents say they would use a navigation tool to help them find the locations of products, while a further 32.5% say they might use it. Satnav functionality is something that can be provided via smart carts.

For retailers looking to expand their product range without extending their square footage, introducing 'virtual aisles' could be a good solution. Just over 35% of Americans say they would use in-store screens to browse items and order them for home delivery, and 36% say they might use them. Giant Eagle have recently partnered with Vous Vitamins to install 220 Higi Digital Stations across stores, creating virtual vitamin aisles.

How do you feel about the following technologies being used in supermarkets?

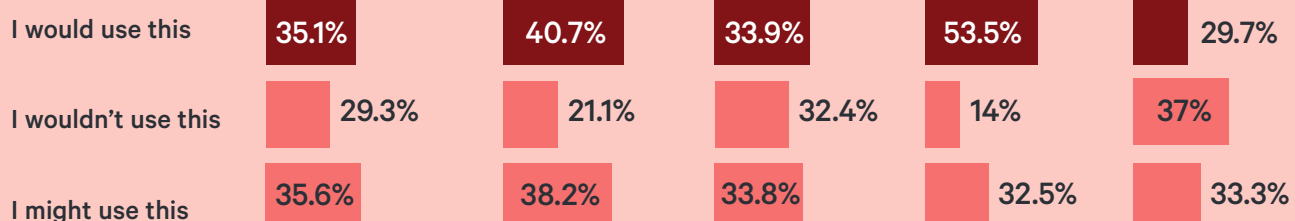
Virtual aisles where you view products on a screen and order for home delivery

Smart carts that automatically detect items added

Virtual try-on screens for clothes and make-up

Navigation app to help you find the location of items

Robot picker that fetches items for you



Meanwhile, tools that use artificial intelligence and augmented reality to let shoppers virtually try on makeup or clothes can help stores be more Covid-safe. Whole Foods Market is rolling out Mineral Fusion's virtual makeup testing tool, which people can use via their smartphones. It's tech that 34% of people say they would use and 34% might use.

And even though it could save shoppers lots of time hunting down items, the least desired in-store tech is robotic pickers. This is what Urbx Market is planning to use at its sky scraper-style vertical stores. Shoppers will order at kiosks in the lobby and robots will bring their orders out to them within minutes (the system can retrieve 50 items in 135 seconds). According to our respondents, 30% would use this facility, a third might use it, while 37% wouldn't use it.

Openness to new tech correlates to age, with Boomers significantly less likely to be interested in using it than their younger counterparts.

# Boosting browsing post-pandemic

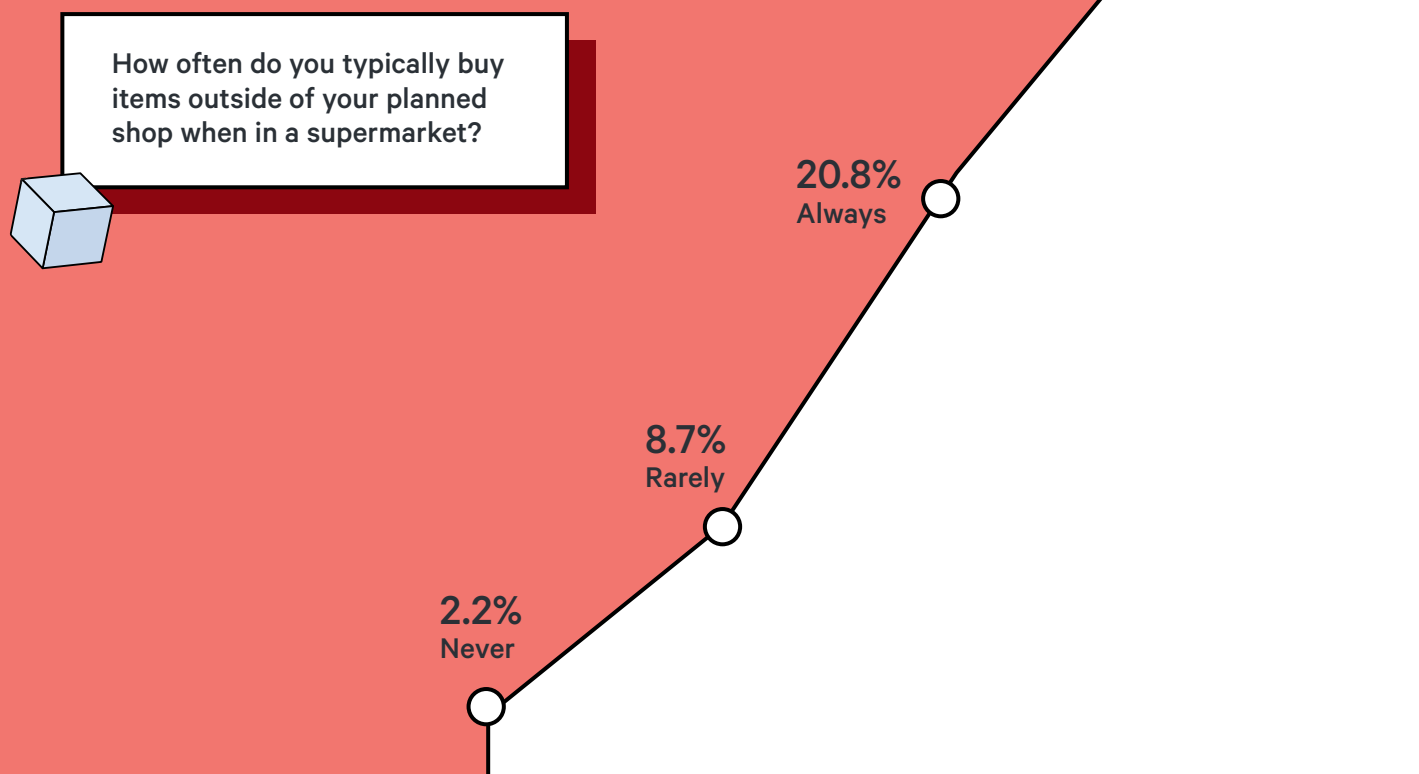
In our last US F&B study carried out earlier this year, we discovered that shoppers were spending less time browsing in grocery stores than they used to, due to the pandemic. We highlighted that retailers would need to consider this when designing store layouts and product displays.

One new solution to this problem is coming out of Europe from retail design firm Interstore | Schweitzer. They have developed a modular grocery store concept centered around mobile fixtures that can easily be rearranged. It means retailers can experiment, test new concepts, and have temporary pop-ups.

Our data shows that more than half of American consumers frequently make an unplanned purchase when shopping for groceries (21% 'always' do and

30.5% do so 'most of the time'). The demographic most likely to buy items outside of their planned shop are Millennials (aged 26-40); 28% say they always do and 30% do most of the time.

Trialing different layouts and displays will help retailers appeal to these shoppers and boost discovery of new brands and products. This will be increasingly important if footfall in grocery stores fails to return to pre-pandemic levels due to the increased adoption of online shopping.





# Membership model could work for grocery stores

Another idea to increase in-person sales is extending grocery store opening hours. Main Street Market, which has opened in Evansville, Minnesota, offers 24-hour access to members who pay a \$75 annual fee. The unmanned store lets shoppers scan items and pay with their phones, or use a self-checkout terminal. But is a membership model likely to catch on?

Nearly 43% of Americans say they wouldn't be prepared to pay for 24/7 access to a convenience store, however, more than half would. The key is finding the sweet spot on the membership fee. The single largest percentage (13%) say they would be prepared to pay up to \$10 per month, but a further third would pay even more than this.

Gen Z show strong interest in the membership model, with only 22% not prepared to pay for grocery store access (this is in contrast to the 74% of Boomers who aren't willing to pay). They're also prepared to pay the most for the privilege; 12% would pay more than \$30 a month, making this a concept well worth exploring.

**42.5%**  
I would not  
be prepared  
to pay

How much would you be prepared to pay to have access to an unmanned local convenience store 24-hours a day, 7 days a week?

**13%**  
Up to \$10  
per month

**11.9%**  
Up to \$5  
per month

**8.7%**  
Up to \$15  
per month

**8.1%**  
Up to \$20  
per month

**6.7%**  
More than  
\$30 per  
month

**4.6%**  
Up to \$25  
per month

**4.6%**  
Up to \$30  
per month

# 02

# Grocery delivery: how retailers can deliver what Americans want

**Americans will expect  
groceries delivered faster  
and cheaper in future.**

The grocery delivery sector is hotting up, with scores of providers vying to deliver goods to people in their homes or at work - in increasingly imaginative ways.

From bikes that promise to reach you in 15 minutes, to deliveries direct to your fridge while you're out, there are more and more choices for American consumers. But which are likely to win the most market share?

We ran a nationally representative survey of 2,000 US consumers to find out, including people's expectations around delivery times and costs, their payment preferences, and their willingness to invest in home delivery tech.

# Americans want groceries delivered by humans, not robots



Growing demand for grocery delivery is likely to put increasing pressure on the gig economy. Some companies are reducing their reliance on cheap and flexible workers with robotic delivery solutions.

Estonian technology firm Cleveron have unveiled a driverless, semi-autonomous delivery vehicle that can carry up to 500 pounds and travel within a 30-minute range of the warehouse or store at a maximum speed of 30 miles per hour. Teleoperators will be able to remotely supervise up to 10 vehicles at a time as they traverse low-traffic areas and roads.

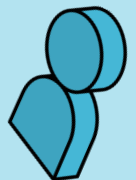
Meanwhile, Walmart have partnered with DroneUp to make grocery deliveries by drone following a successful trial delivering coronavirus testing kits. The retailer says they are uniquely positioned to execute drone deliveries nationwide, already having 4,700 stores located within 10 miles of 90% of the US population.

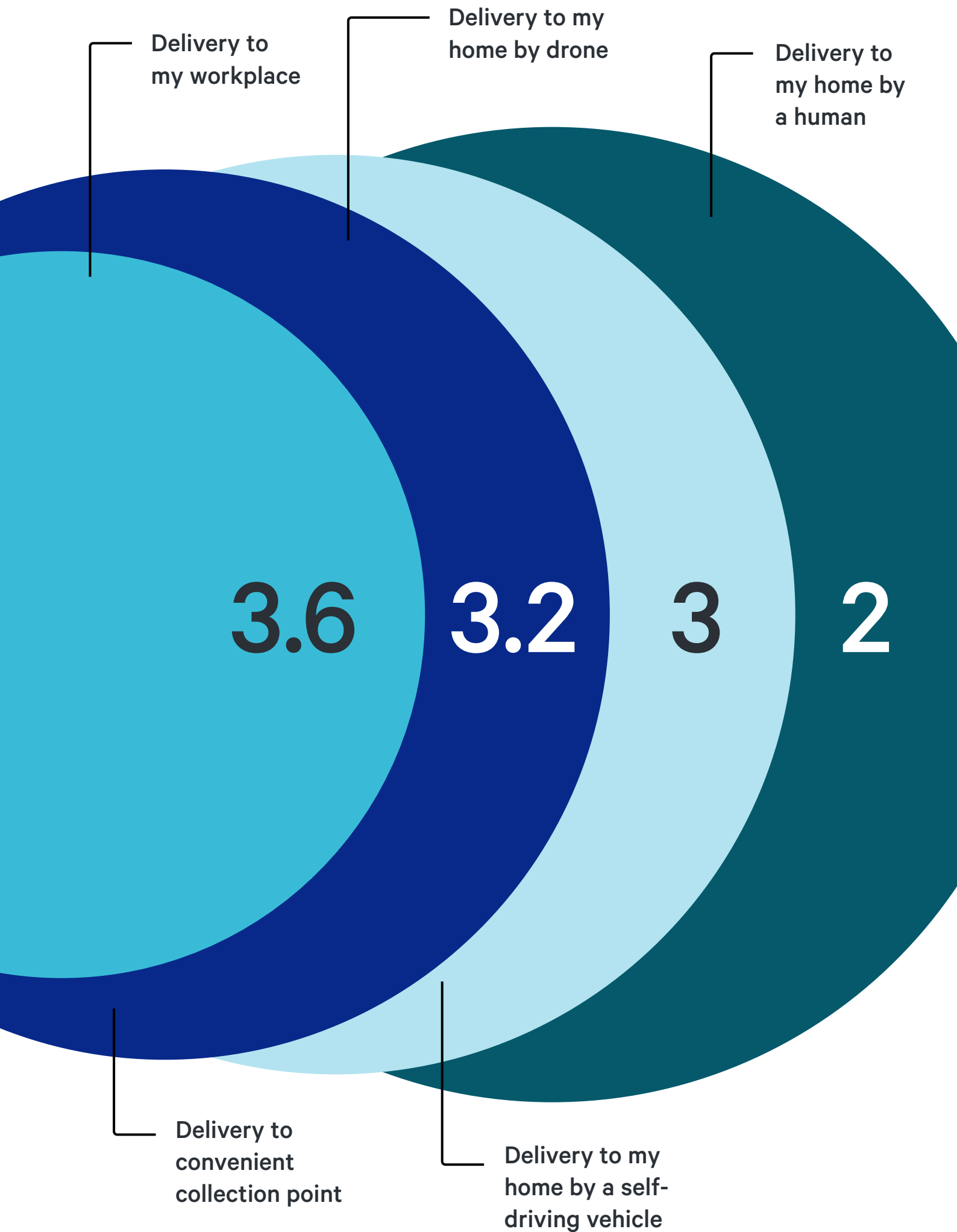
But while these solutions sound exciting, Americans show a strong preference for having their groceries delivered by humans. Only 13% would choose drone delivery given the option, while a self-driving vehicle would be the first choice for 15% of people. By contrast, 54% would opt for delivery to their home by a human.

This is surprising given that people prefer to use a human-free checkout option when shopping in-store, as highlighted in the previous article. Perhaps people have concerns about their deliveries reaching them safely or maybe they feel access to their home is unsuitable for drones or autonomous vehicles.

Other delivery options let people receive groceries at work (Lowes Foods is providing grocery pickup services at office buildings in North and South Carolina) or at a convenient centralized location (Minnow has recently secured \$3m in seed funding for its automated food lockers).

While these options are less popular than receiving groceries at home, delivery to a convenient collection point would be the first choice for 10% of Americans, while 8% would prefer delivery to their workplace. Millennials (aged 26-40) show the most interest in these two options, while Gen Z (aged 18-25) over-index for delivery by autonomous vehicle and Gen X (aged 41-55) over-index for drone delivery.

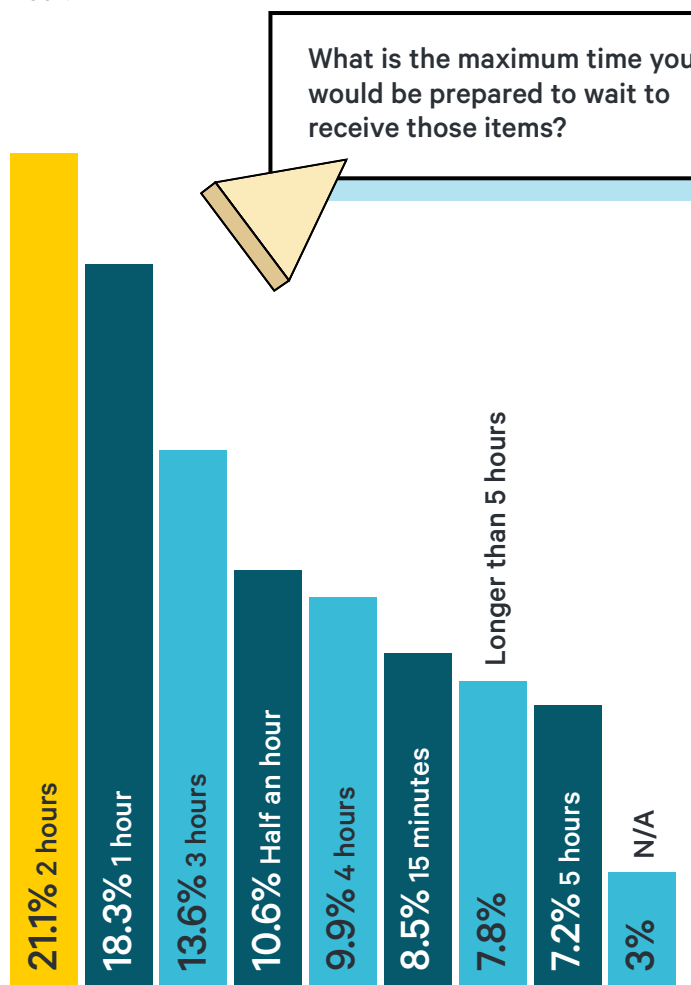




# American consumers expect delivery in 2-hours

The 'instant delivery' space is becoming increasingly competitive - and valuable. goPuff, which delivers in 30 minutes in 41 states, has doubled its valuation to a staggering \$8.9 billion. Meanwhile, New York City-based Fridge No More, is seeking to outdo them by delivering in just 15 minutes. But just how impatient are we when it comes to grocery deliveries?

Our data shows that the single largest percentage of people (21%) are willing to wait up to two hours, while 18% will wait an hour. Only 11% expect delivery in half an hour and 8.5% within 15 minutes. The demographic least willing to wait are Gen Z, the single largest percentage of whom (20%) expect delivery in one hour.



If you needed a few grocery items, what is the maximum you would be prepared to pay for same day delivery?

23.8%

I would not pay for delivery

23.2%

Between \$5-\$6.99

21.8%

Less than \$5

17.5%

Between \$7-\$9.99

13.7%

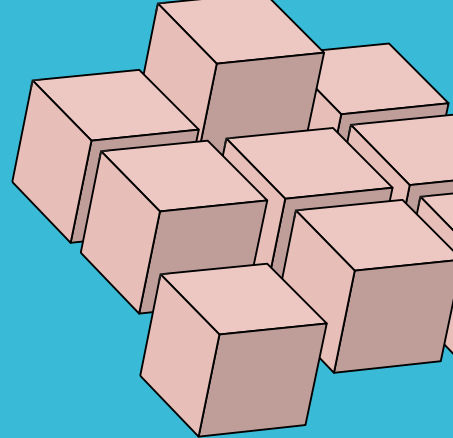
Over \$10

For the most part, though, offering delivery within two hours should keep shoppers happy - providing the price is right. Walgreens have announced nationwide delivery of 24,000 products in under two hours for a delivery fee of \$7.99. According to our data, this is a bit on the expensive side.

Among Americans who are willing to pay for the delivery of grocery items - that's 76% of the population - the single largest percentage (23%) expect to pay between \$5-\$6.99, while 22% expect to pay less than \$5.

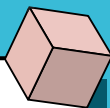
Gen Z and Millennials are willing to pay the most for quick delivery, with a quarter of those aged 18-25 happy to pay \$7-\$9.99 and 23% of those aged 26-40. On the other hand, 43% of Boomers are unwilling to pay anything at all for delivery, which is the largest by some margin.

# EBT cards are an important payment option



49.3%  
Credit or  
debit card

Given a choice, how would  
you prefer to pay for grocery  
purchases made online?



When it comes to paying for groceries ordered online, credit and debit cards are the firm favorite but there are other payment options that retailers should not ignore. Accepting payment by Electronic Benefits Transfer (EBT) card is particularly important, as 16% of Americans would choose to pay this way.

Publix is the latest retailer to join the government's SNAP Online Purchasing Pilot, alongside Walmart, Aldi and Amazon, to enable their customers to pay by EBT card. In joint second place when it comes to payment preferences is PayPal, selected by 16% of respondents. Meanwhile, eWallet options including Apple Pay and Google Pay are only preferred by 7% and 4%, respectively.

We do see some notable variations when we look at the preferences of different demographics; Gen Z over-index for Apple Pay (13%) and Google Pay (8%), Millennials over-index for cryptocurrency (4%) and Gen X over-index for PayPal (18%).

16.3%  
Paypal

16.3%  
EBT card

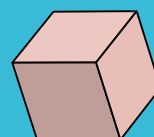
6.6%  
Apple pay

4.1%  
Amazon pay

4%  
Google pay

2.4%  
Crypto-  
currency

0.9%  
Other





# Grocery delivery box will become a standard feature of American homes

HomeValet is a startup that has designed a secure, temperature-controlled grocery delivery box to go outside people's homes. Founder John Simms believes they'll soon be a standard home feature, just like a mailbox - and it looks like he could be right.

48% of people say they're likely to invest in a chilled grocery delivery box in the next couple of years (including 23% who are 'very' likely), while 7% already have one. Gen Z, especially, love the concept; 60% say they're likely to buy one, while Millennials are most likely to say they already have one (10%).



Other innovations that help people receive groceries when they're not at home also look set to grow. For example, if you have a smart lock that can give

delivery drivers one-time access to your home, they can enter your kitchen and put groceries directly in your fridge (it's something Walmart is already trialing). Just over a third of Americans say they're likely to invest in this technology in the near future, with 7% already owning it.



Alternatively, for shoppers who aren't comfortable with the idea of a stranger entering their home while they're out, a smart garage door can let them leave deliveries in the garage. Amazon is providing this service to Prime members in more than 5,000 locations. Nearly 36% of people say they're likely to invest in a smart garage door, while 7% say they already have it. Millennials over-index for being 'very' likely to invest in smart doors in the next two years.

The level of interest in home delivery tech suggests that e-commerce will continue to thrive post-pandemic. This means grocery retailers will need to place a big focus on growing distribution hubs and logistics in the coming years.

03



# Organic Valley: farming insights to power new product development

# Organic Valley's Senior Director of Consumer Strategy, Tripp Hughes, reveals how insights shape NPD at the farming co-operative

When you work for a fast-paced F&B brand, continually developing and marketing new products, there are always lots of decisions to be made. Tripp Hughes, Senior Director of Consumer Strategy at Organic Valley, is tasked with helping his teams make the right ones.

"I am director for consumer insights and so constantly working with my team and helping them uncover insight areas around our consumers," he says.

Attest has become a key tool for Hughes, who uses it to fuel innovation, speed up iteration and nail down the most effective messaging. He explains how the platform played a pivotal role in the development of Organic Valley's latest breakfast innovation, Egg Bites, uncovering surprising insight.

"We were able to identify the top three flavors that we then wanted to bring into the pilot labs. But while our primary insight was around flavors, we also got back a secondary unanticipated insight around how the consumers were clustered around the naming of products as well."

"It wasn't just around choosing the right flavor but it was choosing the right flavor in the context of a broader name. To get specific, one of the options was 'spicy tomato salsa egg bites' and the consumers said it reminded them of the Mexican dish huevos

rancheros. And so then we were able to test 'spicy tomato salsa egg bites' versus 'Mexican egg bites with rancheros salsa'."

Hughes and his team noticed that small tweaks to the name could have a big impact on the flavors respondents said they were most interested in. For example, 'New York pizza egg bites' proved to be more attractive than plain 'pizza egg bites'.

"Attest gives us the ability to get these quick a-ha's at a low threshold," he says. "I'm trying to get more of my partners that I work with internally to go, 'yeah I don't have a huge amount of funds, but I need to ground my hunch', and then once they start to understand that, they dive in more."



# Making 10-fold savings

Hughes estimates that being able to make quick initial learnings through Attest saves Organic Valley between 10 to 20 times what it would cost to make the discoveries later down the line.

“Folks who are launching new products, they know the importance of getting a quick read, to get a quick iteration,” he says. “The impact is coming in reduced time and improved next-round thinking that we’re taking into focus groups where we’ve got a high cost factor. If we don’t go in with the right materials and the right framework, we’re wasting money. And so Attest has helped us do a lot of the front-end work that then we’re able to go and build on.”

The short quantitative surveys that Organic Valley run on Attest often allow them to bypass bigger quantitative research. And where more expensive qualitative research is required, the quant feedback lets Hughes go in preloaded with good directional hunches.

“Through the short surveys we’re often getting at some of the most important nuggets. And so by running a couple of shorts, that can help set us up and save money.”

Attest saves Organic Valley between 10 to 20 times what it would cost to make the discoveries later down the line.

“Attest has helped us do a lot of the front-end work that then we’re able to go and build on.”

“...by running a couple of shorts, that can help set us up and save money.”



# Critical for internal alignment

As well as using Attest for NPD, Organic Valley has adopted the platform for testing campaign creative and packaging designs. By A/B testing, Hughes aims to understand what resonates best with the brand's target audience. For a recent campaign he was able to blend the best performing attributes from different pieces of creative into one fully-optimized ad.

"It lets me see if the campaign is meeting its metrics - without Attest, I'm not sure."

He adds that getting consumer feedback at each phase is also critical for internal alignment: "We're able to get a quick-read so that the teams I work with can check back in with the broader group of stakeholders and say, 'here are the reasons I believe that we're on track, that we can be successful, here's the feedback we've gotten and where we've tweaked'. Attest's role in doing that is perhaps where it's the most valuable."

In the past, getting a 'quick-read' could take four weeks, and so brand managers found it difficult to justify their decisions when they were challenged on them. Now, that's not the case.



With the platform accessible to employees across Organic Valley, everyone who needs insights can get them in a matter of hours.

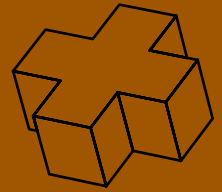
"Literally a week ago we were in an innovation launch meeting and the brand managers ran up against a stone wall with some internal folks who said, 'I don't know that I agree with you'. And so the brand manager said, 'well, what if I could quickly run it against some research with our target audience?'"

For Hughes, the key benefit of a solution like Attest is the democratization of insights. With the platform accessible to employees across Organic Valley, everyone who needs insights can get them in a matter of hours.

"It's not entirely on me as an insights director; I can set it up so that some of our younger associates can start to dive in and construct their own surveys. And, honestly, for me as a director, that's powerful because there aren't a lot of ways they can do that."

04

DRY CRO Betsy  
Frost on the  
benefits of  
taking F&B direct-  
to-consumer





**D2C can be challenging for F&B brands, but DRY have used the pandemic to take non-alcoholic occasion drinks direct into consumers' homes.**

Beverage brand DRY pivoted their focus from retail to direct-to-consumer (D2C) during the pandemic. And in doing so, they've turned their website into a successful growth engine.

Chief Revenue Officer, Betsy Frost, explains how they've ridden the opportunity and overcome barriers to establish a whole new drinks category online.

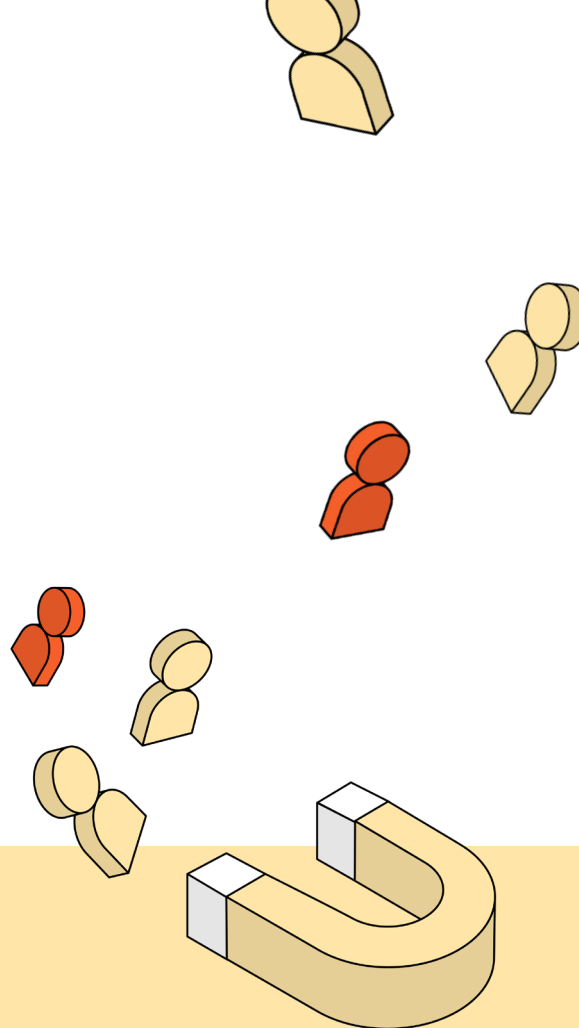
**What's it been like at DRY over the last year? Is the pandemic and your move to D2C responsible for your upwards growth?**

"We've been around for 15 years and have a pretty solid retail footprint but we're really late to the D2C space. That's because it's hard to ship liquid across the country in an affordable way. But if you look at the low and no alcohol space, it was really primed for D2C because there's really no spot in stores for the segment and this idea of alcohol-free sets just doesn't exist. It's really hard for consumers to find stuff in stores and retailers are still trying to figure out where it goes. So you have this need that's growing and taking off but no place to buy it and that's where D2C comes in. Those two things came in right at the exact same time.

"We did some work with Attest on consumer behavior and I would say that the pandemic has accelerated the adoption of low and no for us. People got alcohol fatigue and they needed a ritual to move from day to night on a Tuesday but they didn't want to drink anymore. The pandemic has also made people more

**What drove you to jump on that opportunity with the D2C model?**

"We did go into 2020 with a plan to launch a D2C site but really only as a customer service and a learning platform. We did not expect it to be a growth engine but it's taken off as people are changing the way they buy. They find the convenience of delivery to be worth the price point. For us, it's also been a new platform to experiment with innovation."



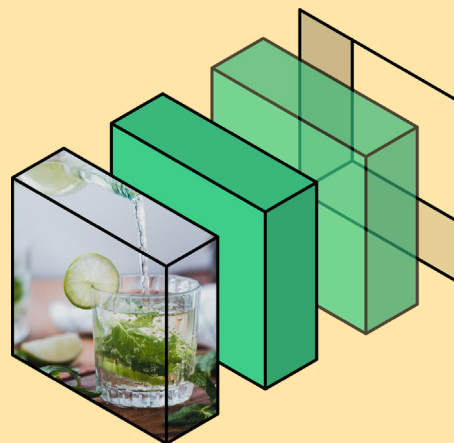
**What do you think is going to happen to how people shop as we come out of the pandemic? And what trends do you see right now that you're jumping on?**

"We've been doing these little pulse surveys throughout the pandemic on shopping behavior to understand how online is impacting on retail. Pre-pandemic, we had discovery happening online and then stocking up happening in retail. Now what we're finding is that people are using stores for discovery and using D2C to stock up.

"The other part of the business that truly took off for us was the adoption of Instacart or grocery delivery and I believe 100% that's going to continue, particularly on the stock-up side as you have your carts saved. It's been a huge driver for us, especially as an emerging category where people don't know where to find you in store. Instacart is a great short cut for that because you just type in the category and you can pop right up. That's helped us improve overall brand penetration."

**What are people searching for on Instacart and how did you make sure that DRY was the most discoverable?**

"We've been able to buy terms in categories that are adjacent to us. In the store, we sit in 'specialty soda', which doesn't necessarily make a ton of sense but there was no place else to go. We've been able to buy terms of 'non-alcoholic', 'mixer', 'NA wine', 'NA beer' - anything related to the occasion, and that has helped discovery happen because you don't have to go to that very narrow set in the store."



**How important are marketplaces in your strategy?**

"Amazon is a huge part of our business; they're actually now our third largest customer. It is probably the most essential part of my marketing mix right now. What we're finding is when people are searching for products they're more often searching on Amazon than on Google, so you've got to be there. There is a bit of a catch 22 situation to working with them; they're not the most lovely when you have issues and their distribution is hard to work through and it's expensive.

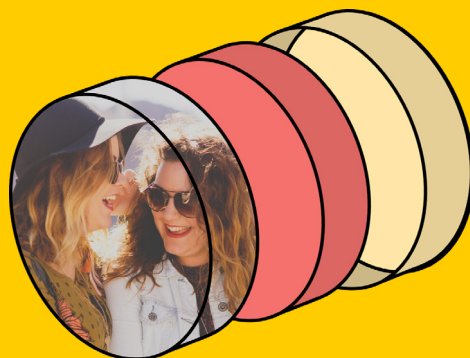
"Pre-pandemic, Amazon was pretty much a breakeven marketing tool. We realised how important it is for the discovery of the brand but you have to spend to be able to get the advertising and the placement to be discovered. We reset the business model and took a really hard decision to almost double the price to move into Seller Essentials. That has created a self-sustaining investment and accelerated discovery. The amount of money we're able to put back into the channel is driving over 60% of our new-to-brand customers."



## What factors motivate people to shop with you D2C?

“What we’re finding is that Millennials and Gen Z are visual buyers and so the visual representation of your brand experience is a huge motivating factor. We actually just updated our website earlier this year and our conversion rate has doubled just by upgrading the visual experience.

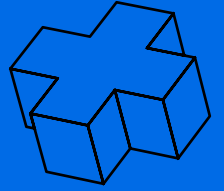
“The other factors are recommendations and customer reviews - people really do use them. And for us, it’s also about creating impulse reasons or celebration occasions to just say yes. We’re finding that email marketing specific to occasions is driving purchase behavior. For example, encouraging people to stock up for Father’s Day or stock up for Memorial Day. People are starting to think of the low and no space in the same way they do about food allergies - You want to have something special on hand for all your guests.”



## What’s the one piece of advice you’d give to brands that are thinking about their D2C strategy this year?

“I would say that it’s really going back to basics. Truly knowing what your brand stands for, what that purpose is and how that authentic story translates to the consumer is at the core. I think sometimes, particularly for a business that’s starting in D2C and hasn’t gone through some of those deep questions, you can get lost. And so it’s about going back to basics to understand the true value proposition and making sure it comes out in a truly authentic way.”

05



# Top 10 tech trends in grocery shopping and delivery



**56%**

prefer self-checkout  
in a grocery store



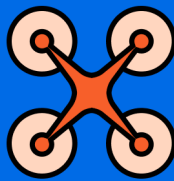
**2%**

prefer a biometric  
payment method



**68%**

want virtual try-on  
tools for clothes  
and makeup



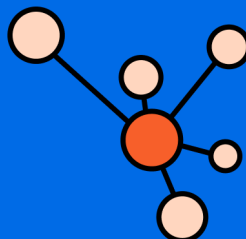
**13%**

of people would  
choose grocery  
delivery by drone



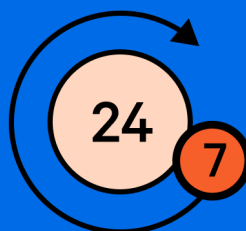
**79%**

show interest in  
smart carts



**86.5%**

would try an in-  
store navigation  
tool



**57%**

would pay for 24/7  
grocery store access



**2 hours**

is the expected  
delivery time for  
grocery



**\$5.99-\$6**

is the sweet spot for  
delivery charges



**48%**

say they're likely to  
invest in a grocery  
delivery box



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