Numerator

OMNIFUTURE

Prepare for the Next Generation of Consumer Shopping

OMNIFUTURE

ABOUT THE REPORT

NUMERATOR'S OMNIFUTURE distills the technological world into six distinct consumer segments to help business leaders craft the right digital strategy in a tech-forward world. The segments were discovered through a latent-class analysis and went through several dozen iterations to provide the clearest view on where consumers sit on the spectrum of technology.

Over 10,000 panelists were segmented in early November 2022 through Numerator Surveys and applied to Numerator's Insights platform for verified purchase behaviors and tracking.

These segments are available for use in the Numerator Insights platform–reach out to your Numerator account lead to learn more.

Going digital is one of the biggest bets being made by brands and knowing where to go to help your consumer is critical for proper spending.

US DIGITAL AD SPEND

$57B

for CPG in 2023 (up +58% vs 2022)[1]

$66B

for retail in 2023 (up +58% vs 2022)[1]

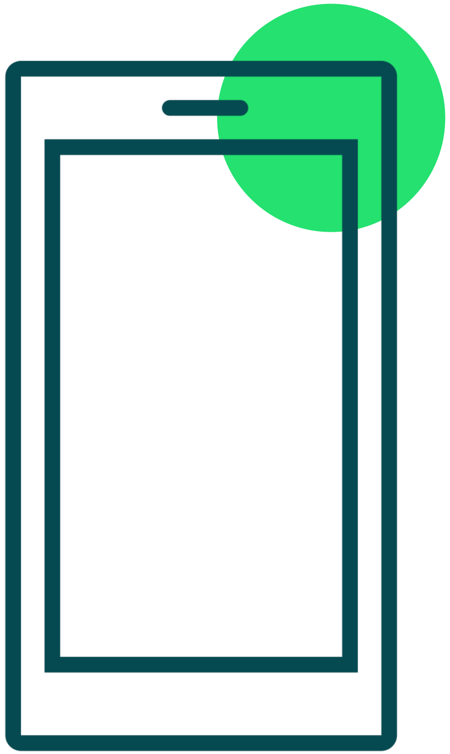
DIGITAL TRANSFORMATION

88%

of retail decision-makers say their company has a digital transformation initiative[2]

$24B

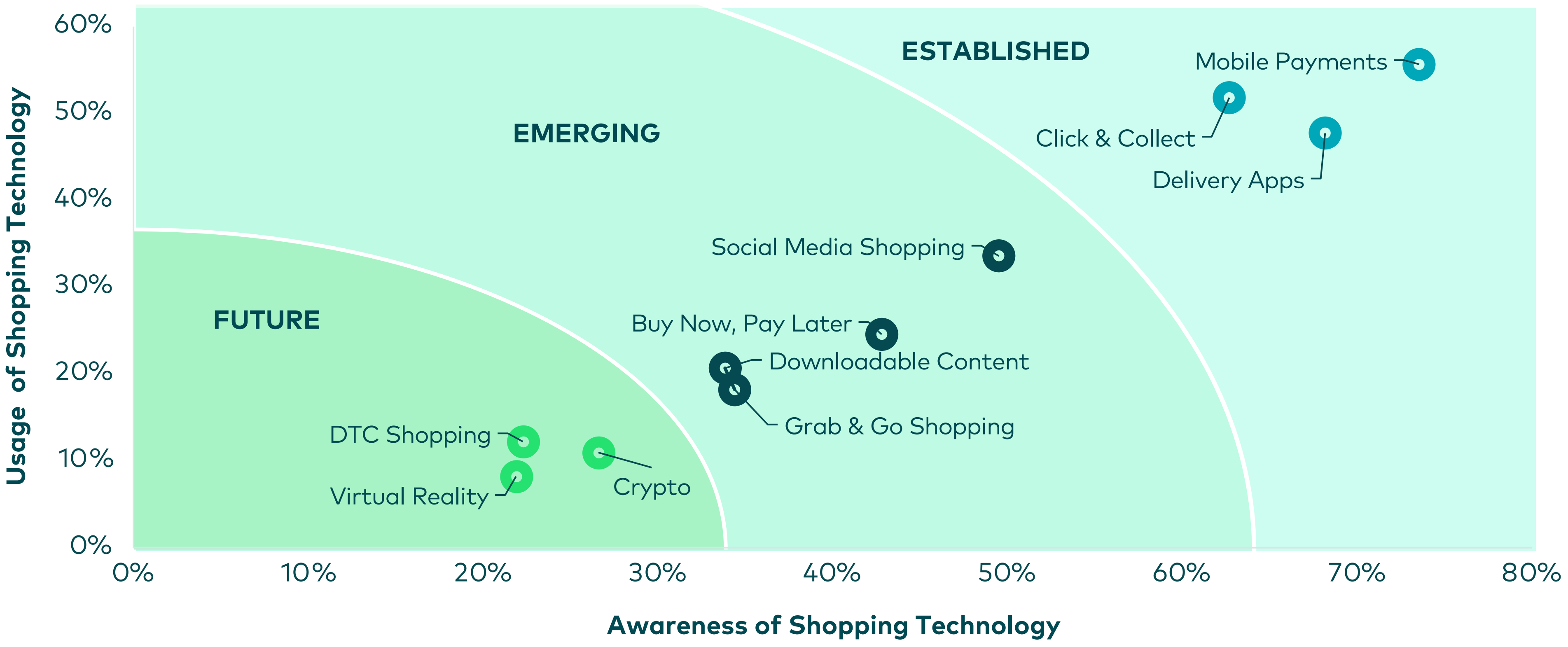
is expected to be spent on CPG digital transformation by 2030[3]



Numerator OMNIFUTURE | Numerator Research
[1]Emarketer Digital Ad Spending | June 2021 | [2]Jabil Retail Technology Innovation Report | 2020 | [3]ABI Research | June 2021

Technological innovation is continuing to accelerate at breakneck pace, and consumers are adopting three worlds of technology.

THE THREE WORLDS OF SHOPPING TECHNOLOGIES



Numerator OMNIFUTURE | Awareness n=10,144 | Usage sample varies by technology
Q. Which of the following technologies are you familiar with?
Q. Of the technologies you are familiar with, which have you used?

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However, not all consumers are at the same pace requiring brands & retailers to strategize across the spectrum of technology adoption.

THE OMNIFUTURE SEGMENTS

DISCONNECTED
(10%)

Accessibility and interest in technology overall is the weakest among this group. Skewing retired, disabled and low-income, this underserved group are the least likely to find technology as being accessible.

CATCHING UP
(26%)

Although similar in demographic profile to Disconnected households, Catching Up believes in giving technology a try even against all the headwinds they face if they are given proper education on it.

IN REAL LIFE
(21%)

This segment signals a transition towards using technology. While they are knowledgeable and have utilized shopping technologies, they seek privacy and prefer to shop in-store and being in the present instead of being virtual.

SMARTPHONE SURFERS
(19%)

Stopping short of future technology, this segment uses their smartphones as a vector to shopping. While underexposed to future tech, they could be interested in it if they are shown how the technology can improve their shopping experience.

NEW AGE EXPLORERS
(20%)

New Age Explorers are young, but seemingly naïve. They've skipped established and emerging tech, but they are cautious and financially insecure now which is preventing them from diving deep in future tech.

IN THE MATRIX
(5%)

A niche group of super users who are ahead of the technology curve. They are familiar with and have used almost all technologies surveyed. The group skews younger, male, and are higher income. They forgo a greater degree of privacy to ensure quick access to innovation.

1010
1010

Winning consumers over with technological innovation requires a multi-faceted targeting approach.

CORE DEMOGRAPHICS & BEHAVIORS OF THE OMNIFUTURE SEGMENTS

<table>
<tr><th></th><th>AGE GENERATION</th><th>PURCHASE POWER</th><th>GENDER</th><th>URBANICITY</th><th>EMPLOYMENT</th></tr>
<tr><td>DISCONNECTED</td><td rowspan="2">Boomer+</td><td rowspan="2">Bottom 30th</td><td>Male</td><td>Suburban & Urban</td><td>Disabled & Retired</td></tr>
<tr><td>CATCHING UP</td><td rowspan="3">Female</td><td>Rural</td><td>Retired</td></tr>
<tr><td>IN REAL LIFE</td><td>Gen X & Boomer+</td><td rowspan="3">Middle 40-70th</td><td rowspan="3">Suburban</td><td>Full-Time & Retired</td></tr>
<tr><td>SMARTPHONE SURFERS</td><td rowspan="2">Millennials & Gen X</td><td>Full-Time & Student</td></tr>
<tr><td>NEW AGE EXPLORERS</td><td rowspan="2">Male</td><td>Full-Time</td></tr>
<tr><td>IN THE MATRIX</td><td>Millennials & Gen Z</td><td>Top 30th</td><td>Urban</td><td>Full-Time & Self-Employed</td></tr>
</table>

Numerator OMNIFUTURE | n=10,114
*Purchase power is a wealth measure accounting for income, cost of living and household size and is cut into deciles.

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NUMERATOR OMNIFUTURE

Imperatives to Creating a Shopping Transformation

ENABLE TECHOCRACY

Democratizing technology to all consumers is a social requirement to drive retail innovation forward. Leaders will need to have teams create accessibility for consumers physically, geographically and financially.

LEARN THE STORY

ADVISE THE META-AVERSE

The metaverse, blockchain and web 3.0 is here, but consumers are on standby. Brands and retailers need to commit to privacy for consumers to accelerate growth through their unique position in consumer trust.

LEARN THE STORY

REALIZE THE V-ROI

Do consumers value fiat & VR technology? Two groups that dabble in technology haven't fully digitalized their life. Both seek to understand the value thesis of moving into future technology and it's up to brands to craft that.

LEARN THE STORY

ENTER THE MATRIX

If you are making a big bet on future technology, then winning over the lucrative In the Matrix and New Age Explorer segments is key to success. One requires a bit of backtracking while the other can go a level deeper.

LEARN THE STORY

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ENABLE

TECHOCRACY

Democratizing technology to all consumers is a social requirement to drive retail innovation forward.

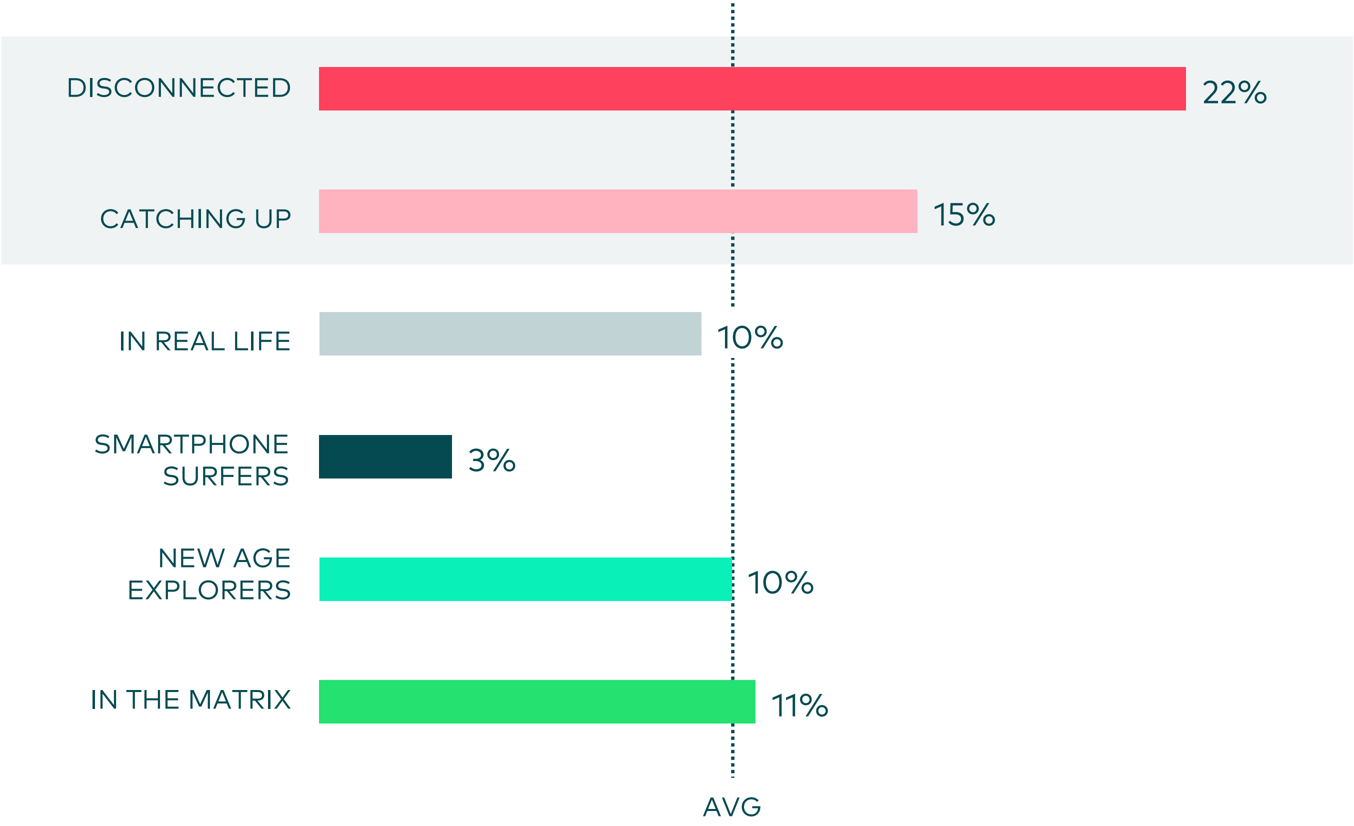
Brands will need to close accessibility gaps to drive tech adoption as not all segments find technology to be easily accessible.

1 in 10

US consumers find technology is **not accessible** to them

TECHNOLOGY IS NOT ACCESSIBLE TO SOMEONE LIKE ME

% of Respondents | Strongly / Somewhat Agree



Numerator OMNIFUTURE | n=10,114
Q. How much do you agree or disagree with the following statements about technology?

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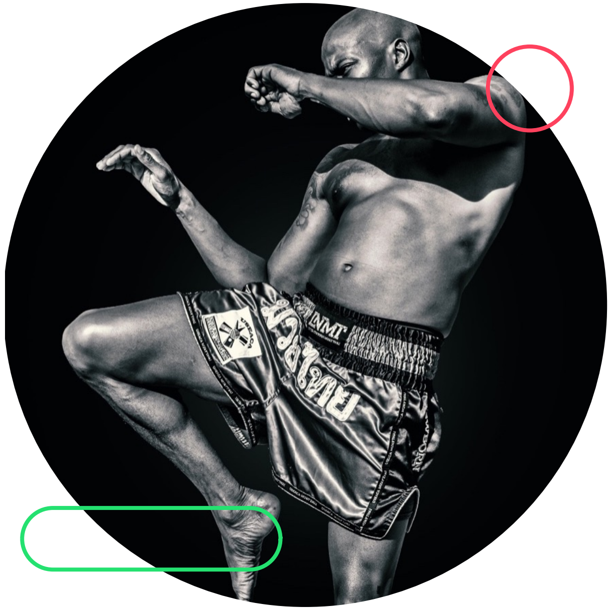
Address three core accessibility gaps: the physical, geographic and financial.

PHYSICAL ACCESS

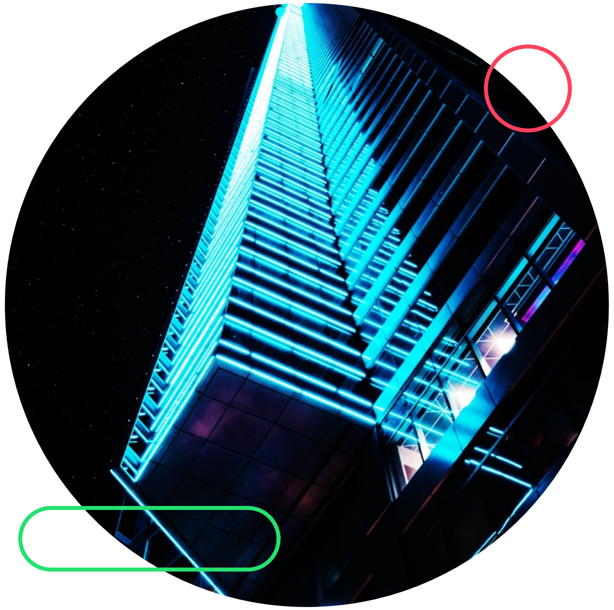


1 in 10 have a form of condition preventing tech usage.

GEOGRAPHIC ACCESS

Nearly 1 in 3 find tech-enabled services & offerings inaccessible because of where they live or unreliable internet.

FINANCIAL ACCESS



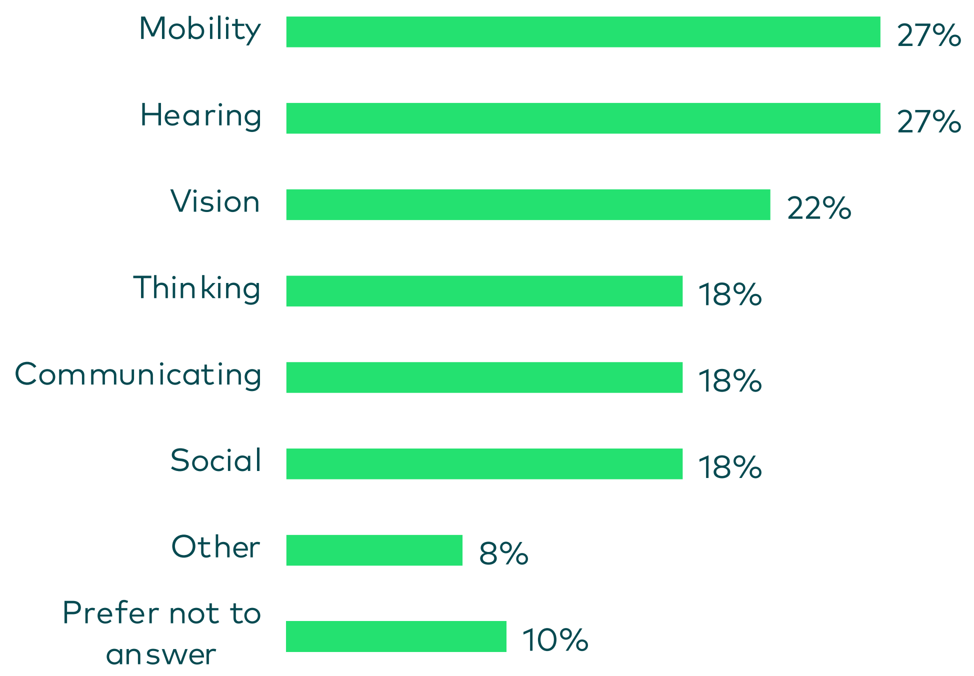
1 in 3 say technology is too expensive to afford

Numerator OMNIFUTURE | Numerator Instant Survey n=514 | Of Disconnected and Catching-Up segments who find technology to be inaccessible to them.

Providing ways to counter conditions like dry eyes and arthritis can help reduce disparity driven by audio-visual and mobility impairments.

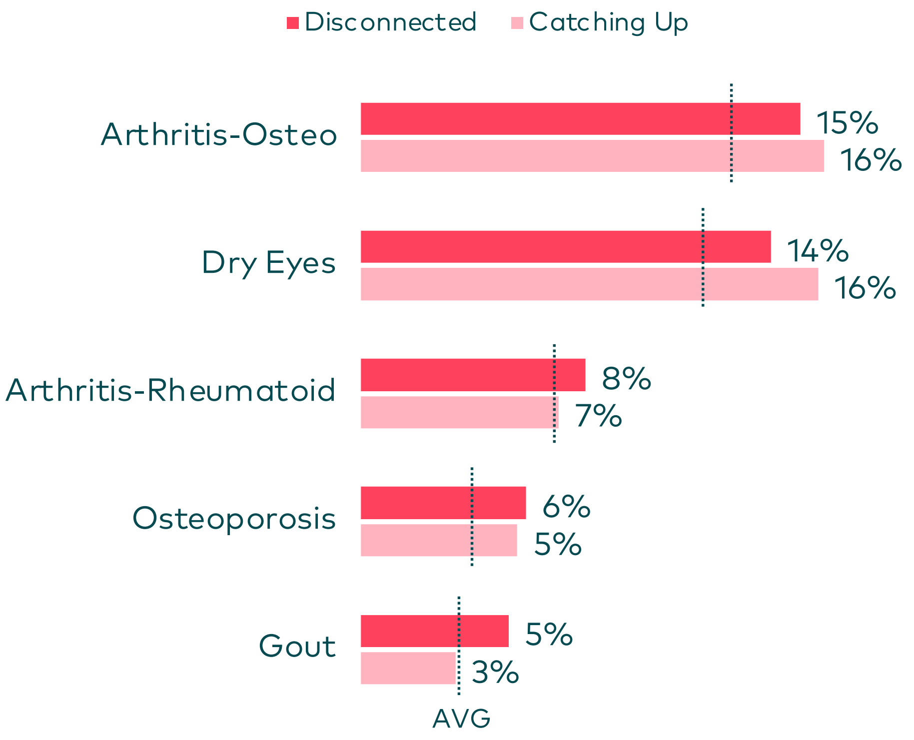
TYPE OF DISABILITY W/ DISCONNECTED & CATCHING UP SEGMENTS

Of those who find technology not accessible | % of Respondents



TOP OVERINDEXED TRACKED HEALTH CONDITIONS

% of Households | Indexed to All Respondents



Requiring tech innovation to utilize a human-centered design can be a large impact as millions of households are affected beyond just Disconnected & Catching Up.

NUMBER OF US HOUSEHOLDS WITH TRACKED HEALTH CONDITION

Total US Projected Households | Latest 52 Weeks Ending 10/31/2022

MOBILITY RELATED CONDITION

Arthritis-Osteo	15.9 million
Arthritis-Rheumatoid	8.7 million
Osteoporosis	4.7 million
Gout	4.2 million

VISION RELATED CONDITION

Dry Eyes	16.8 million

HOW DO YOU DRIVE DISABILITY EQUALITY?

Procter & Gamble created a run of their Olay Regenerist line that utilizes an easy open lid to make beauty accessible to all women. Even more, they decided to not patent the design and share with other manufacturers.

IS VR DETRIMENTAL TO HEALTH?

Not necessarily. In fact, the FDA approved luminopia, a VR-based digital therapy for those facing amblyopia, or lazy eye, in October 2021.

Limited internet accessibility suggests some relationship to households being more tech-averse.

THE RELATIONSHIP BETWEEN INTERNET ACCESSIBILITY AGAINST CONSUMER SENTIMENT TOWARDS TECH BY STATE

Numerator OMNIFUTURE | n=10,114
[1]A composite score for each state was made based on the proportion of households across segment. The composite score was ranked with the lowest leaning most to tech-averse segments. 9 states (in notes) were excluded due to limited sample size.
[2]BROADBAND NOW RESEARCH, "Best and Worst States for Internet Coverage, Prices and Speeds, 2021" Click here for report.

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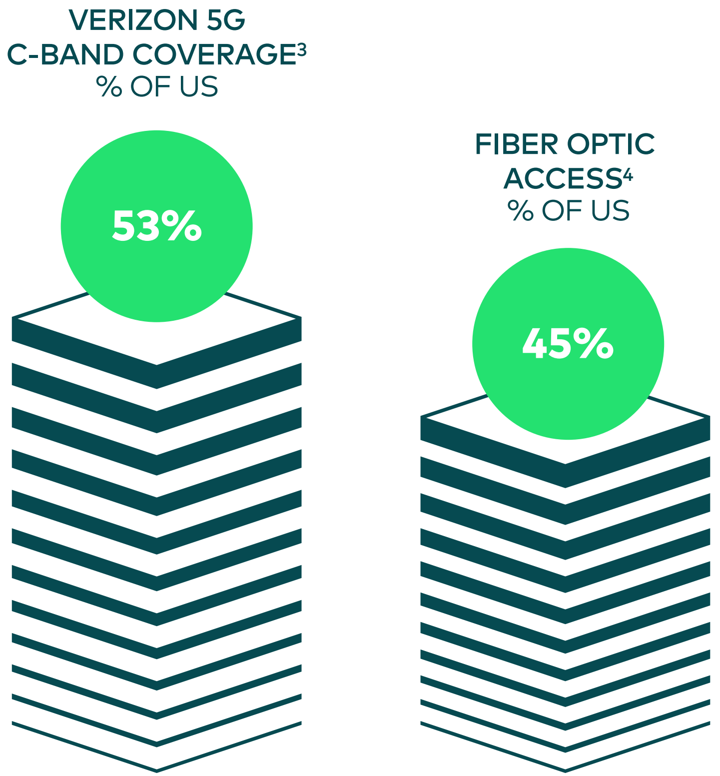
Expanding coverage & latency will be crucial for big bets in tech to take off as 5G and fiber optic networks become a requirement for many future technologies.

WHAT THE METAVERSE NEEDS COMPARED TO WHERE THE US IS TODAY

REQUIREMENTS	TODAY	RECOMMENDED FOR VIRTUAL REALITY
Latency The time it takes for information to travel between two points.	40 ms[1]	10 ms[1]
Internet Speed Amount of information someone can send and receive.	**Mobile[2]** Download 72Mbps Upload 9Mbps **At Home[2]** Download 182Mbps Upload 22Mbps	Download 1-2Gbps[1] Upload 1-2Gbps[1]



Numerator OMNIFUTURE | Numerator Research
[1]Mangiante, Simone & Klas, Guenter & Navon, Amit & Zhuang, Guanhua & Ran, Ju & Silva, Marco. (2017). VR is on the Edge: How to Deliver 360° Videos in Mobile Networks. 30-35. 10.1145/3097895.3097901.
[2]Speedtest.net Global Index Reporting, Median Speeds October 2022 |[3]Verizon March 2022
[4]BROADBANDNOW RESEARCH Fiber-Optic Internet in the United States. April 2022

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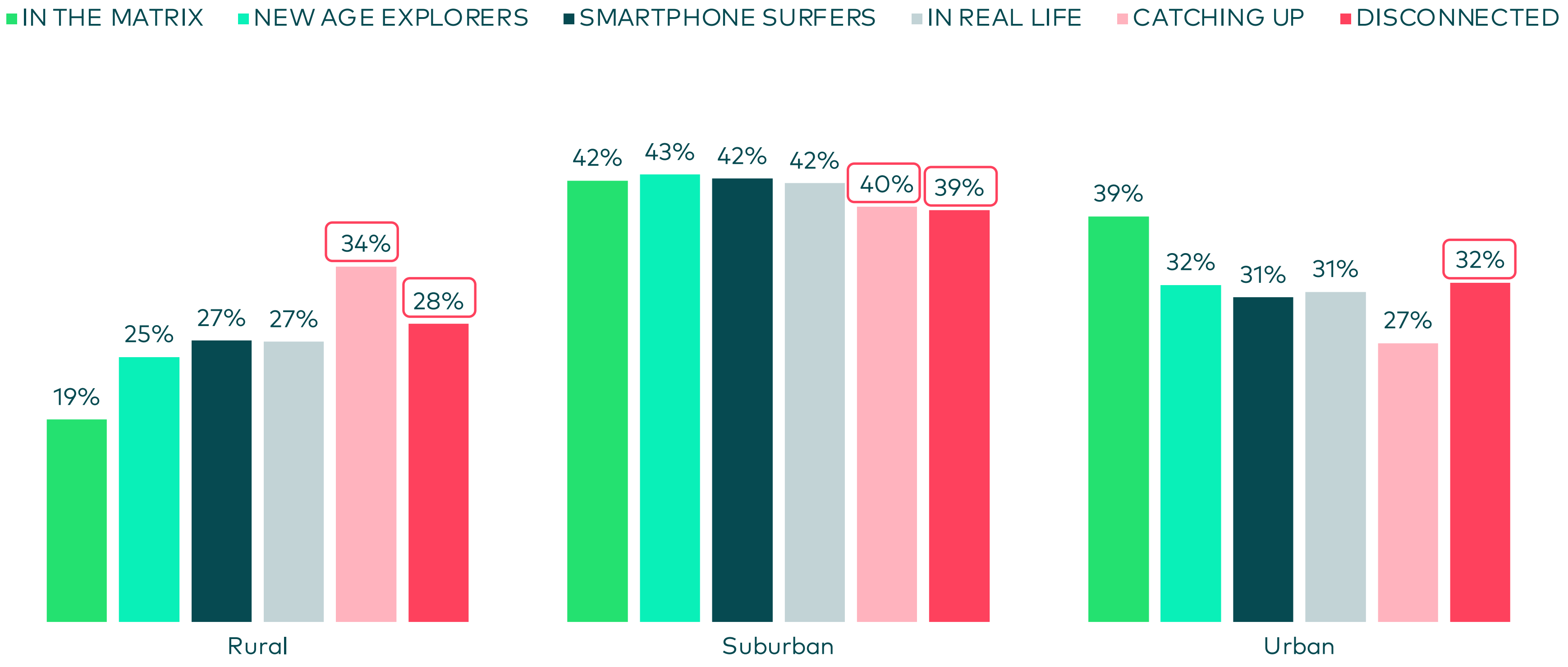
Underserved Rural & Urban areas face the largest internet access issues where Catching Up and Disconnected are more likely to be found, respectively.

"About **81 percent of rural households** are plugged into broadband, compared with about 86 percent in urban areas... But the number of **urban households without a connection, 13.6 million**, is almost three times as big as the 4.6 million rural households that don't have one."

- US Census via The New York Times

URBANICITY BY OMNIFUTURE SEGMENT

% of Respondents

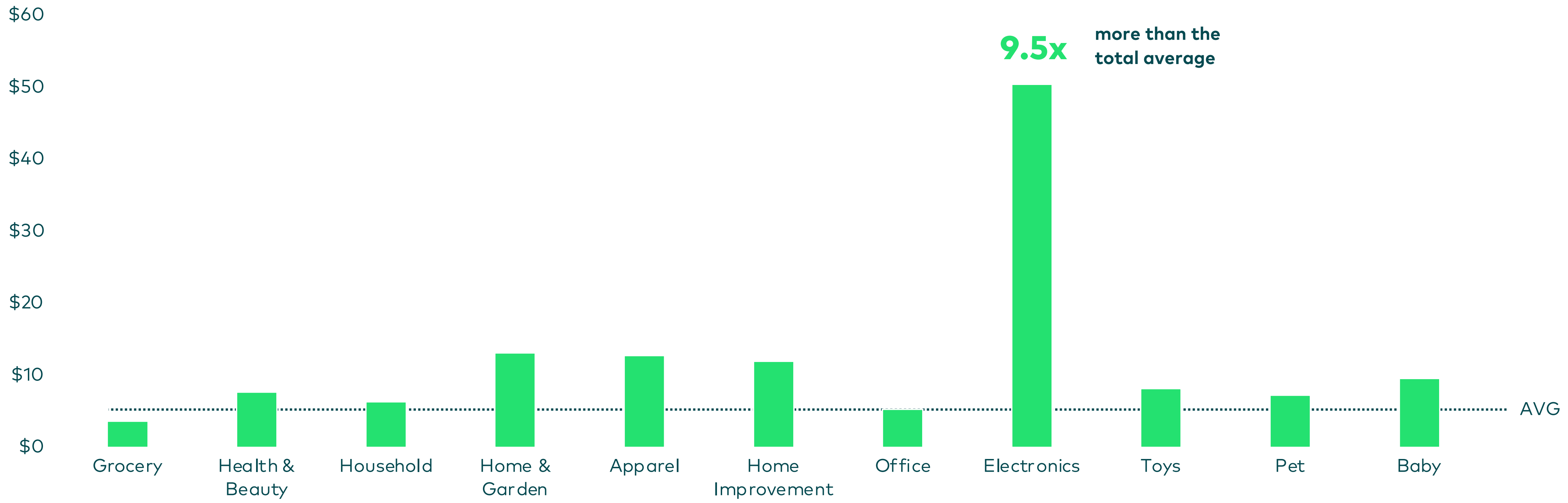


Numerator OMNIFUTURE n=10,114
[1]The New York Times, "A Rural-Urban Broadband Divide, but Not the One You Think of." June 2021

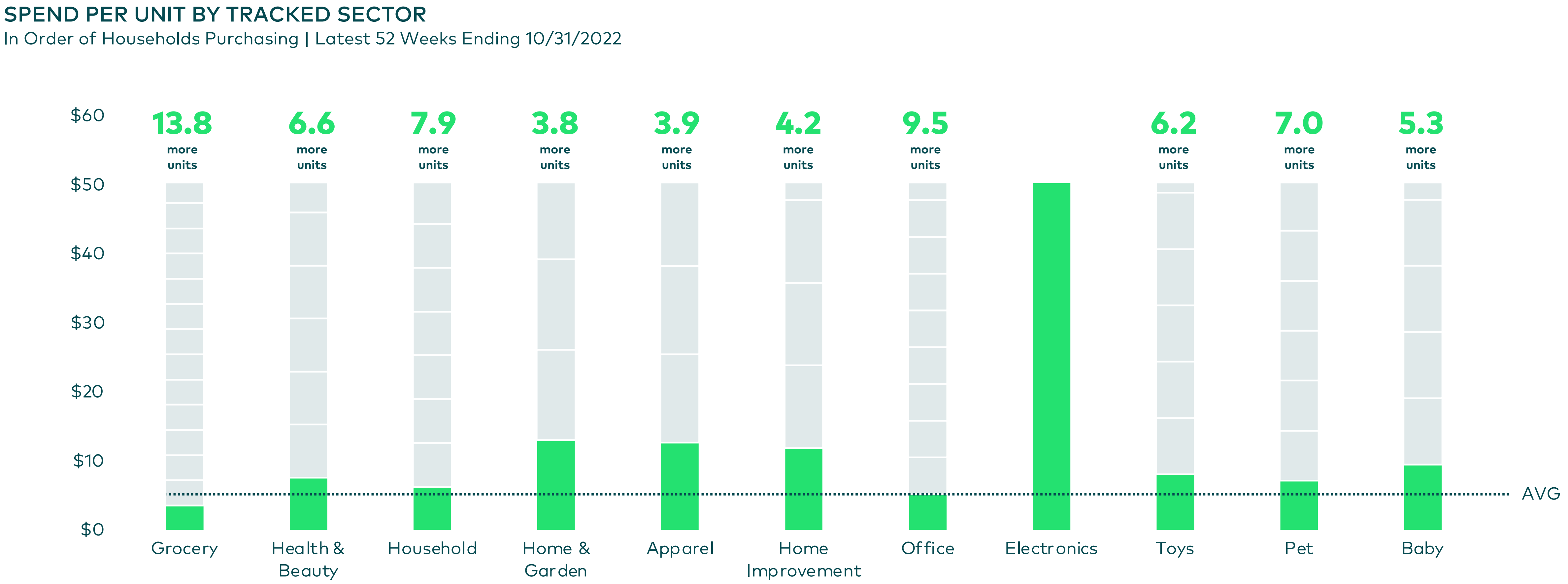
Financial accessibility is also important. Electronics are the single-most expensive category within general consumer good purchasing.

SPEND PER UNIT BY TRACKED SECTOR

In Order of Households Purchasing | Latest 52 Weeks Ending 10/31/2022



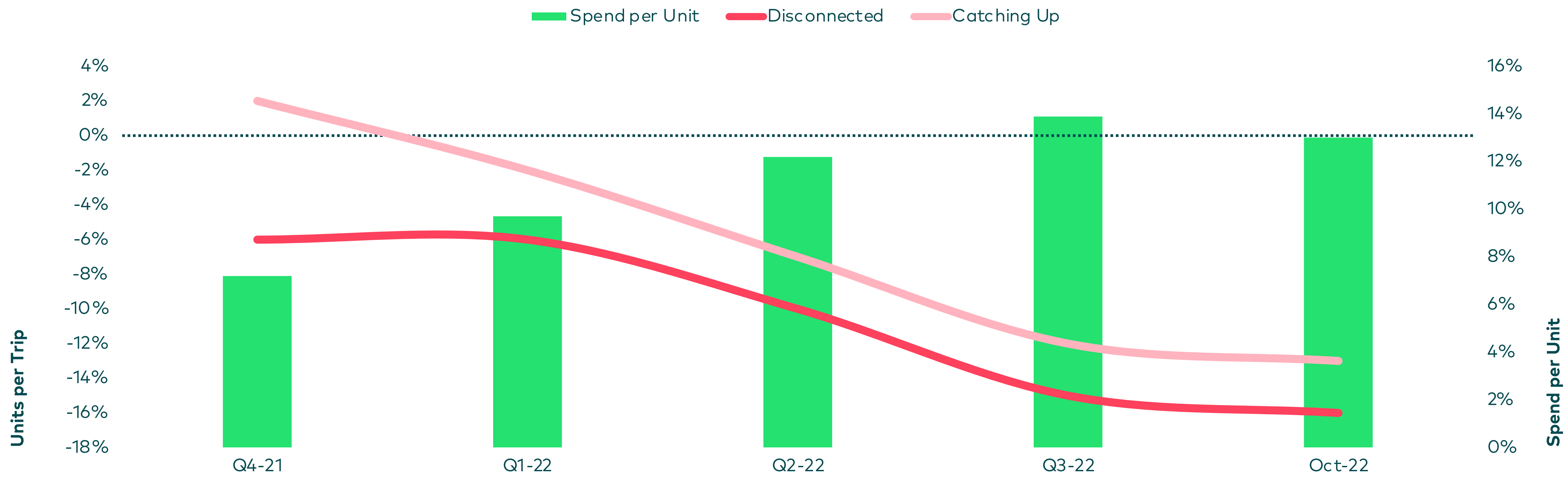
The average price of an electronic item can be worth over a dozen items of groceries.



And the most tech-averse consumers are dropping units as inflation occurs, but there's a twist...

UNITS PER HOUSEHOLD VS YEAR AGO BY OMNIFUTURE SEGMENT

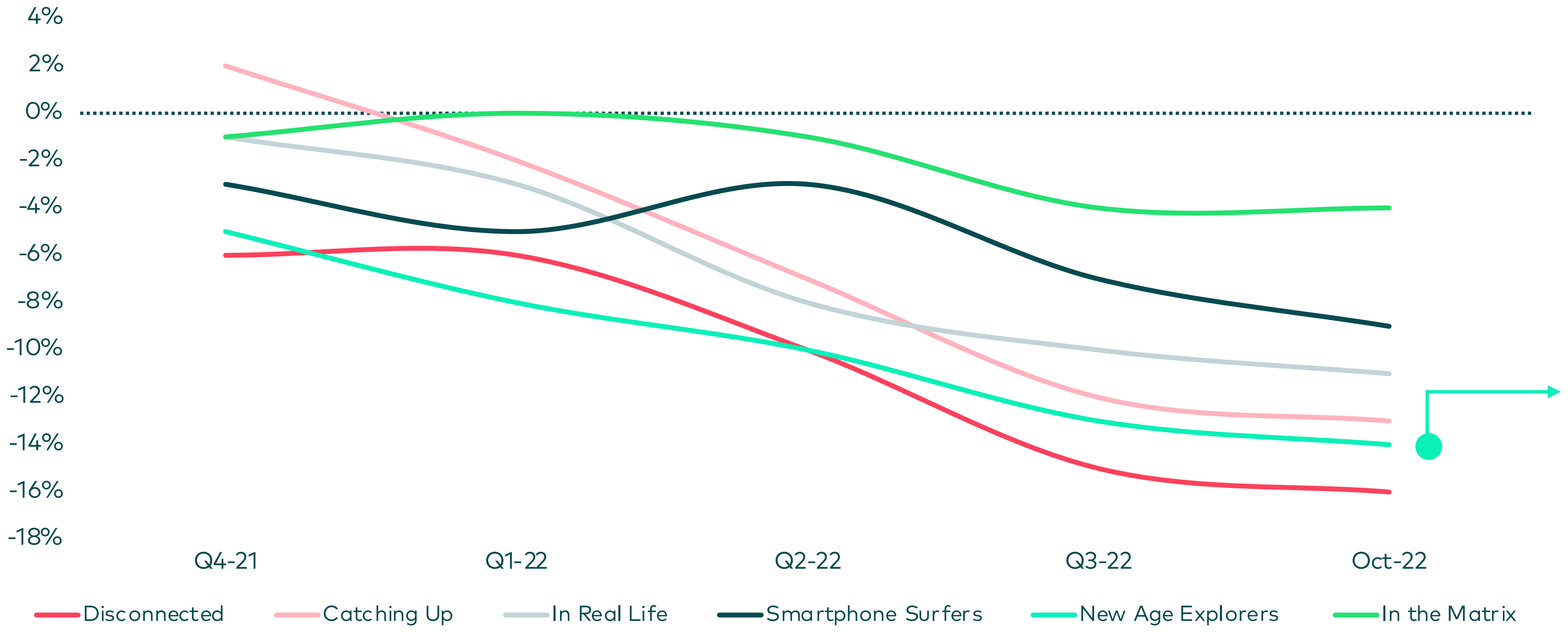
Discrete Quarters | Total CPG Categories | Latest 52 Weeks Ending 10/30/2022



New Age Explorers are also looking to cut back and are struggling in the current environment even with their higher purchasing power.

UNITS PER HOUSEHOLD VS YEAR AGO BY OMNIFUTURE SEGMENT

Discrete Quarters | Latest 52 Weeks Ending 10/30/2022



New Age Explorers significantly overindex with the **Struggling - High Purchase Power** from our New Realities segmentation.

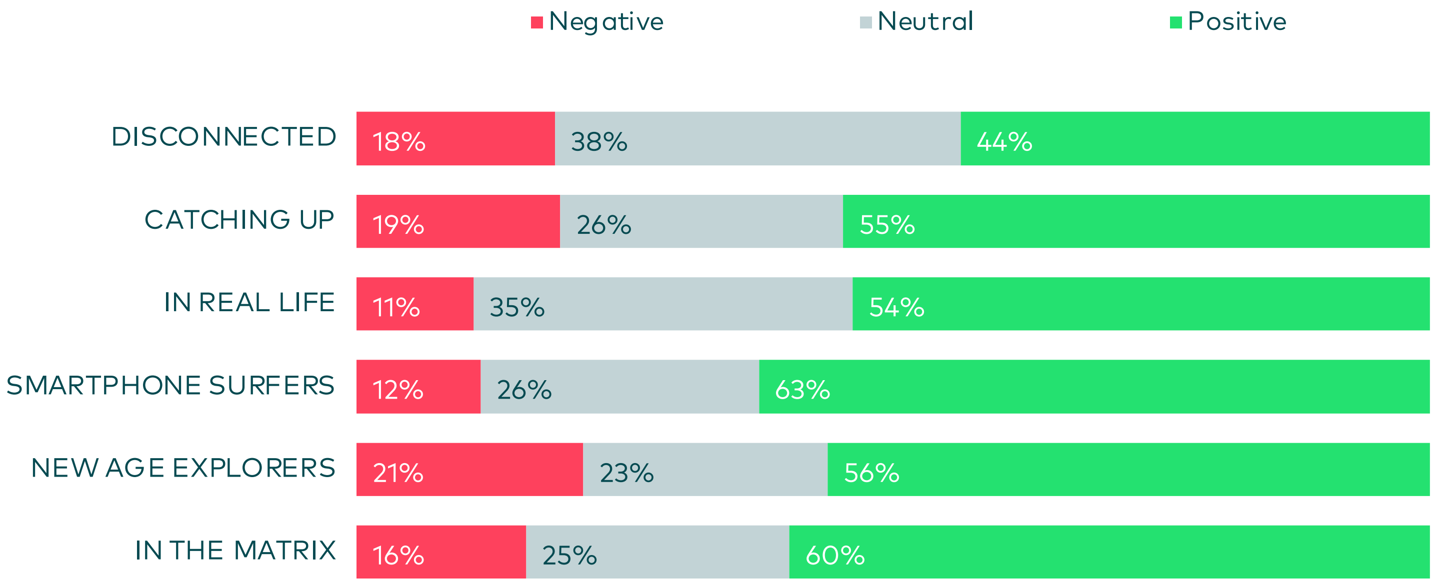
Numerator OMNIFUTURE | Numerator Insights n=10,114

Numerator

Introducing tech-enabled experiences to those who have pulled back the most will likely not resonate.

OVERALL SENTIMENT IN THE NEXT YEAR

% of Respondents



Numerator OMNIFUTURE
New Realities August 2022 Survey Cross-Sectioned by OMNIFUTURE segments (Sample varies by segment. All > n=50)
Q. Thinking about your expectations for your life over the next year, would you say your outlook is…

Inspiration for Growth

EMPHASIZE THE PHYSICAL IN THE VIRTUAL

The implication is clear–to move the most tech-resistant over to a more receptive point of view, technology needs to be accessible to all disabilities. Leaders will need to challenge both digital and non-digital teams to think broad and start:

- Employing agencies focused on accessibility and human-centered design for digital work.
- Doing due diligence of technology and websites to confirm ADA compliance and going beyond basic requirements such as hitting WCAG 2.1 Level AA conformance.
- Creating goals in growing penetration among households with disabilities.

QUENCH THE DIGITAL DESERTS

The current economic environment is not conducive to consumers buying tech innovation. Additionally, many consumers lack the requirements for today's technology. Brands & retailers wanting to accelerate digital transformation are at risk of creating a disadvantage for shoppers if they don't work towards eliminating digital disparities. A bias to action could be:

- Identifying internet-sparse homes and democratizing technology by funding & lobbying for tech initiatives in the community.
- Striving to target Disconnected, Catching Up, and New Age Explorer segments and providing financial relief through trade or engage in tech-enabled shopper marketing in-store.
- Creating innovation within what consumers already own such as Google Cardboard.

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ADVISE THE

META-AVERSE

The metaverse, blockchain and web 3.0 is here, but consumers are still standing by.

Adhering to privacy is a virtue for brands & retailers in order to transition all segments to new technology.

PRIVACY: A UNIVERSAL IMPERATIVE

CONCERNED ABOUT PERSONAL INFORMATION TRACKING

% of Respondents | Strongly / Somewhat Agree

TAKES STEPS TO PROTECT ONLINE PRIVACY

% of Respondents | Strongly / Somewhat Agree

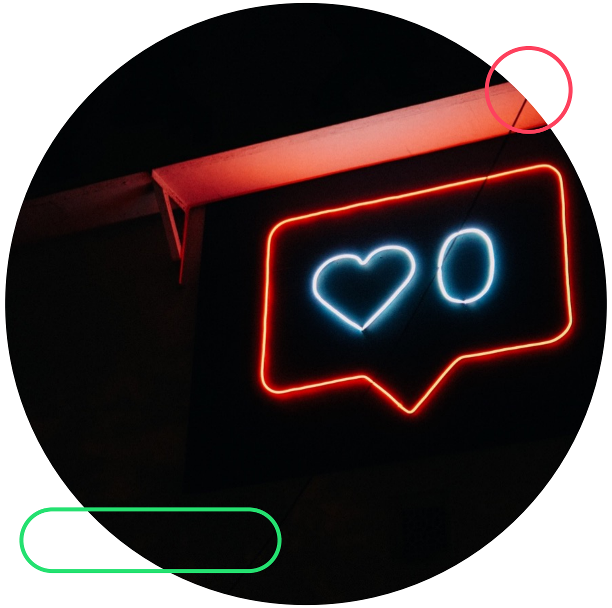
Numerator OMNIFUTURE | n=10,114
Q. How much do you agree or disagree with each of the following statements about privacy?
Left: Companies tracking by personal information concerns me. Right: I take steps to protect my online privacy (e.g., VPN, ad blocker)

Certain technologies are more receptive to less privacy concerned consumers.

OPEN PRIVACY

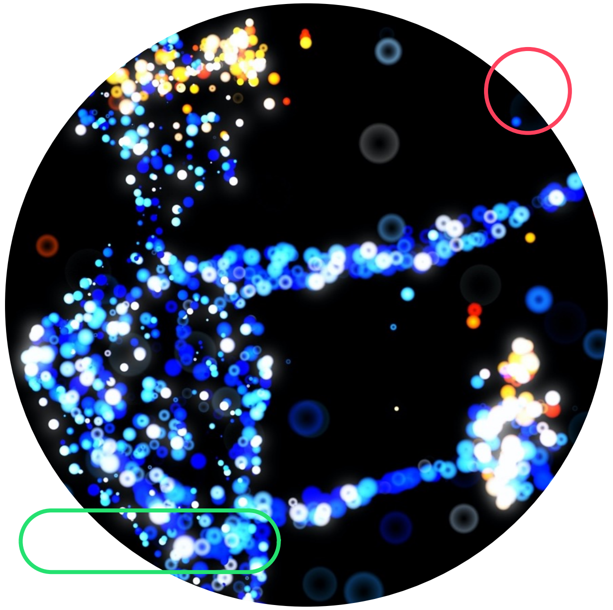
Click & Collect
Buy Now, Pay Later

NEUTRAL PRIVACY



Mobile Payments
Social Media Shopping
Grab & Go Shopping
DTC Shopping

CRITICAL PRIVACY



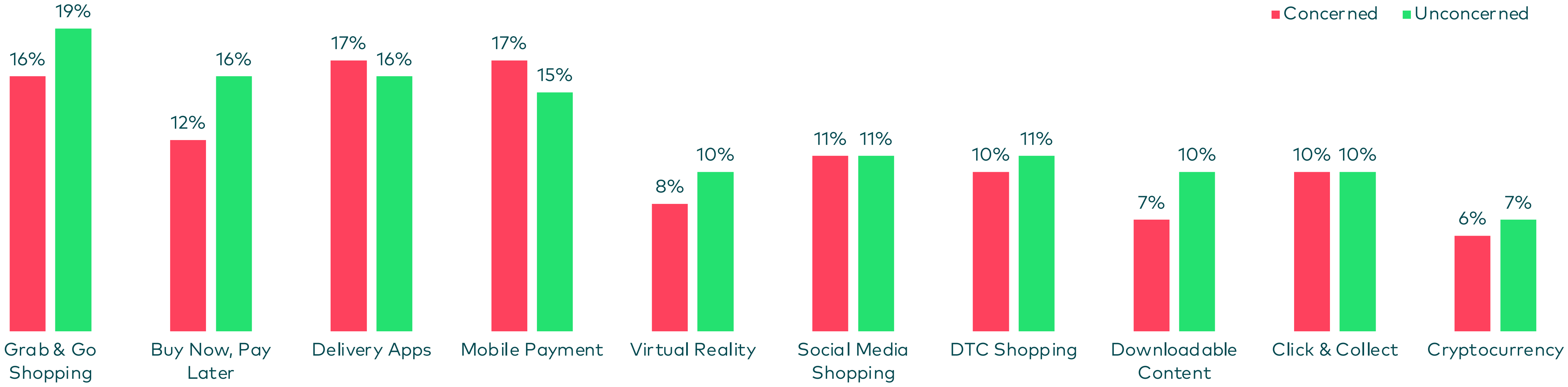
Delivery Apps
Downloadable Content
Cryptocurrency
Virtual Reality

Numerator OMNIFUTURE | Numerator Instant Survey n=514 | Of Disconnected and Catching-Up segments who find technology to be inaccessible to them.

However, interest in engaging with technology is similar between both privacy concerned & privacy unconcerned.

INTEREST IN USING TECHNOLOGY

Of those aware but have not used the technology | % of Respondents

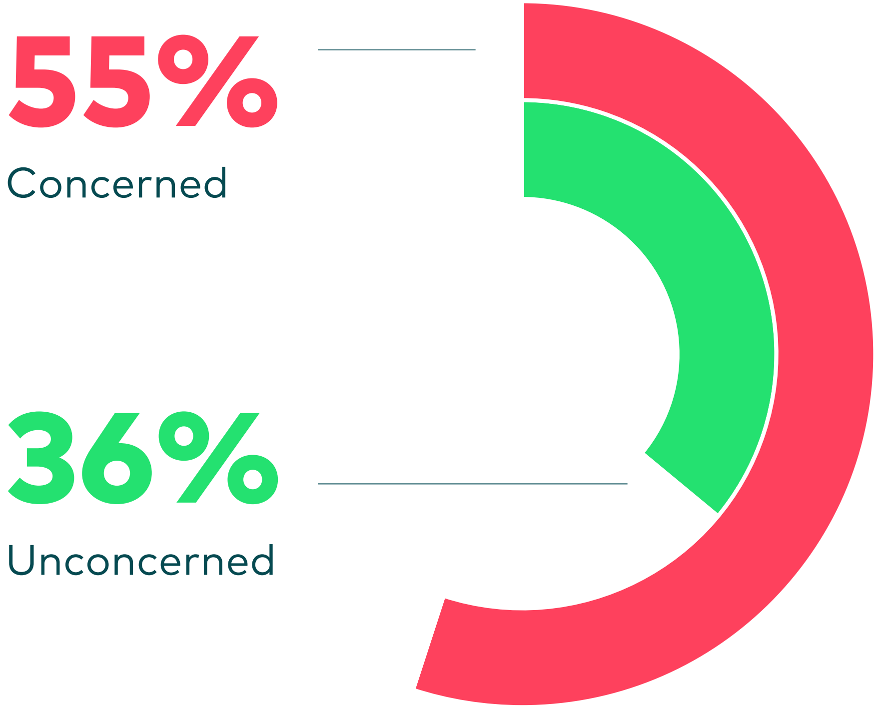


Numerator OMNIFUTURE | n=10,114

Q. Of the technologies that you are familiar with but have not used, which would you consider using?

Educating privacy is important as over half of privacy-concerned consumers find it hard to keep up with technology.

TECHNOLOGY IS BECOMING TOO ADVANCED TOO QUICKLY
% of Respondents



HOW DOES WEB 3.0 AFFECT CONSUMER PRIVACY?

WEB 3.0

Web 3.0 promises decentralized transparency on data collection and anonymity. While there are concerns around misuse, it is time for brands and retailers to help educate consumers on the benefits (and risks) to galvanize trust.

Numerator OMNIFUTURE | n=10,114
Q. How much do you agree or disagree with each of the following statements about technology?

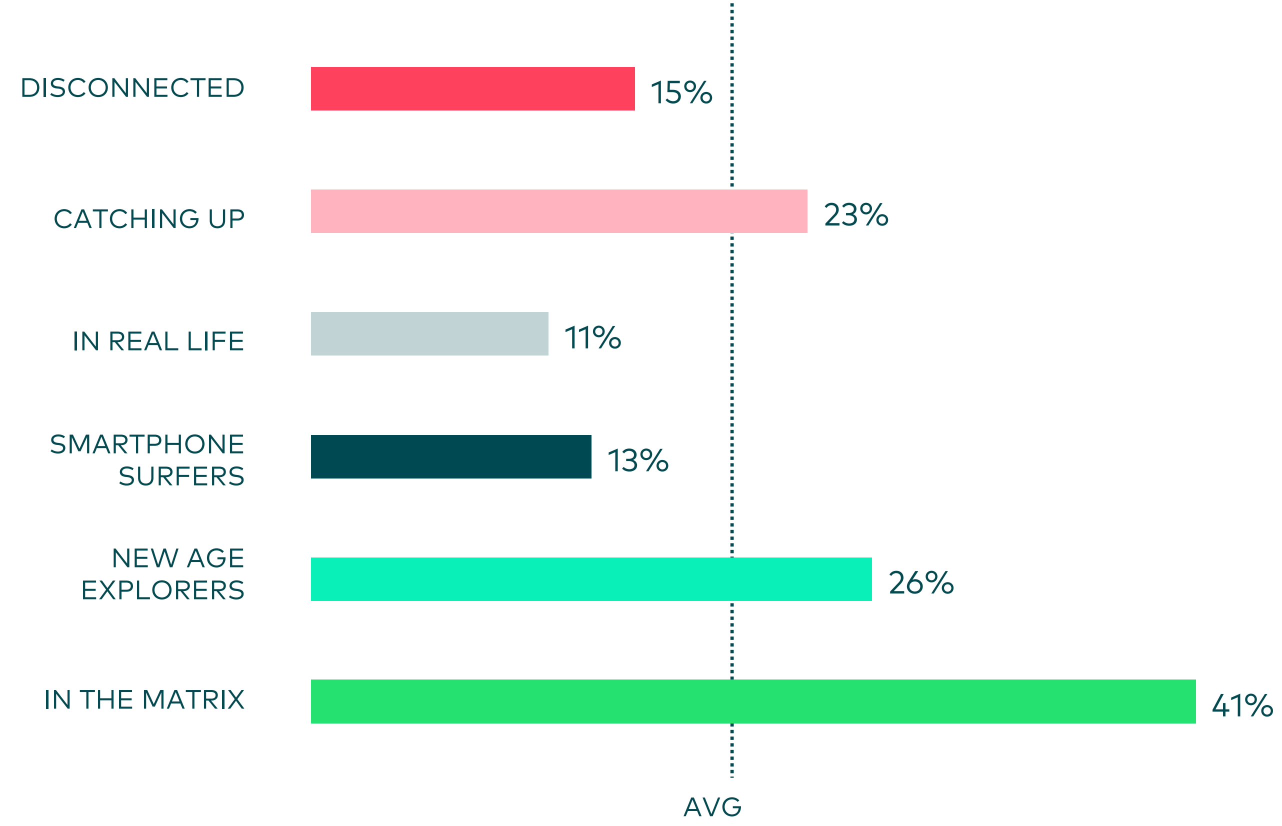
Most consumers, including more tech-adept segments, are still skeptical about privacy that utilizes blockchain technology.

Only 1 in 5

Believe cryptocurrency makes transactions more secure

CRYPTOCURRENCY MAKES TRANSACTIONS MORE SECURE

% of Respondents excl. I don't know | Strongly / Somewhat Agree



Numerator OMNIFUTURE | n=10,114

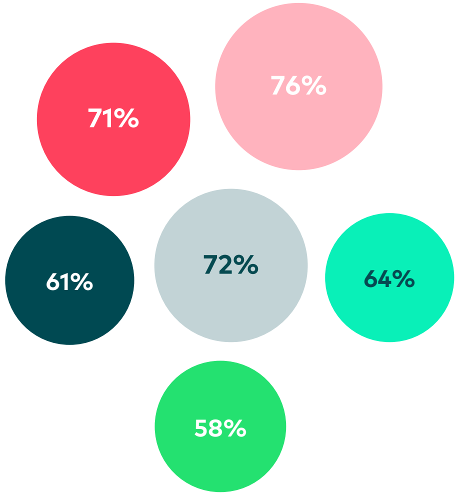
Q. How much do you agree or disagree with each of the following statements about cryptocurrency?

Remember three themes to encourage trust to allow for greater tech adoption: educate, use privacy enhanced tech, and value creation.

THREE CORE TENETS TO BUILDING TRUST

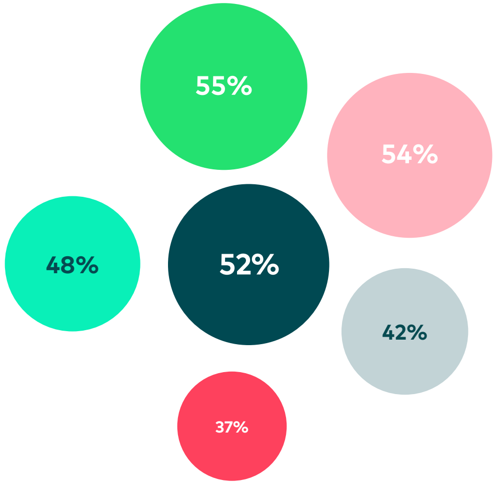
EDUCATE SECURITY FOR THE TECH-AVERSE

"Avoids new technology until I know how they secure my data."



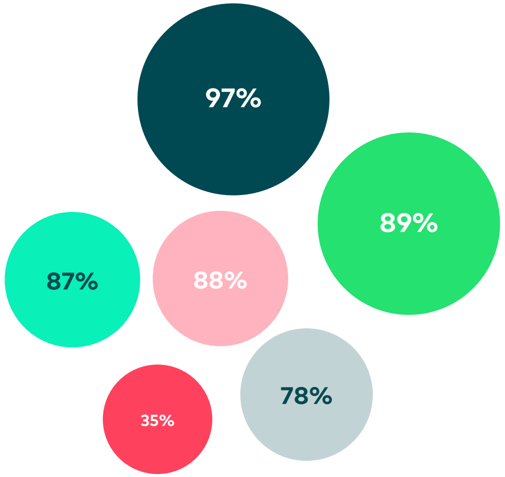
USE PRIVACY ENHANCED TECHNOLOGY FOR MOST

"New technologies make it easier for me to control my digital privacy."



SHOWCASE VALUE OF TECHNOLOGY

"Technology makes my life easier."



DISCONNECTED | CATCHING UP | IN REAL LIFE | SMARTPHONE SURFERS | NEW AGE EXPLORERS | IN THE MATRIX

Numerator OMNIFUTURE | n=10,114 | Top 2 Box (Extremely / Somewhat Agree)
Q. How much do you agree or disagree with the following statements about privacy/technology?

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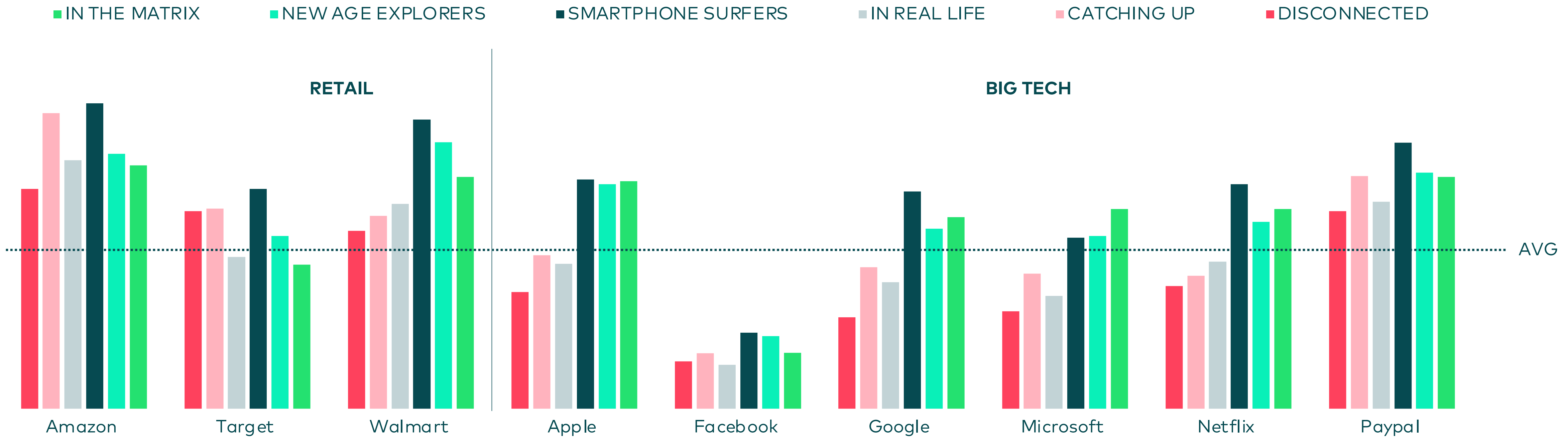
Retail has a unique proposition in leading consumer trust over big tech to usher future tech privacy.

COMPANIES CONSUMERS FIND TRUSTWORTHY BY SEGMENT

% of Respondents | Select list of brands organized by alphabet



Numerator OMNIFUTURE | Numerator Instant Survey n=1091
Q. Which of the following companies do you consider trustworthy?

Inspiration for Growth

LEAD PRIVACY POLICY

The fundamental truth is that consumers do not understand the new era of technology we are entering. They also are more trusting of retail over big tech, so retailers have an advantage to teach consumers (and their own employees) this new way of thinking. Consider the following:

- Educating transparently. Consumers know their data is being used and are hesitant to engage without learning. Teach consumers what it does for you, why it is secure and if there are any privacy risks.
- Engaging your legal counsel early. The biggest tech brands aren't as universally trusted as consumer brands, so it's your chance to be a respected & ethical voice in the future of privacy.

INVEST IN TECH PRIVACY

Web 3.0 emphasize the inherent, secure nature underlying in its blockchain technology. As the world begins to transition to this phase, figuring out where to invest is crucial. Should the budget allow, have your teams begin:

- Creating the framework for how blockchain tech can be integrated in 'privacy critical' technologies.
- Hiring tech talent to execute. Consumer goods companies are at a unique disposition to bolster both the economy and their own workforce given the tech pool is at its all time high.

GO TO NEXT SECTION

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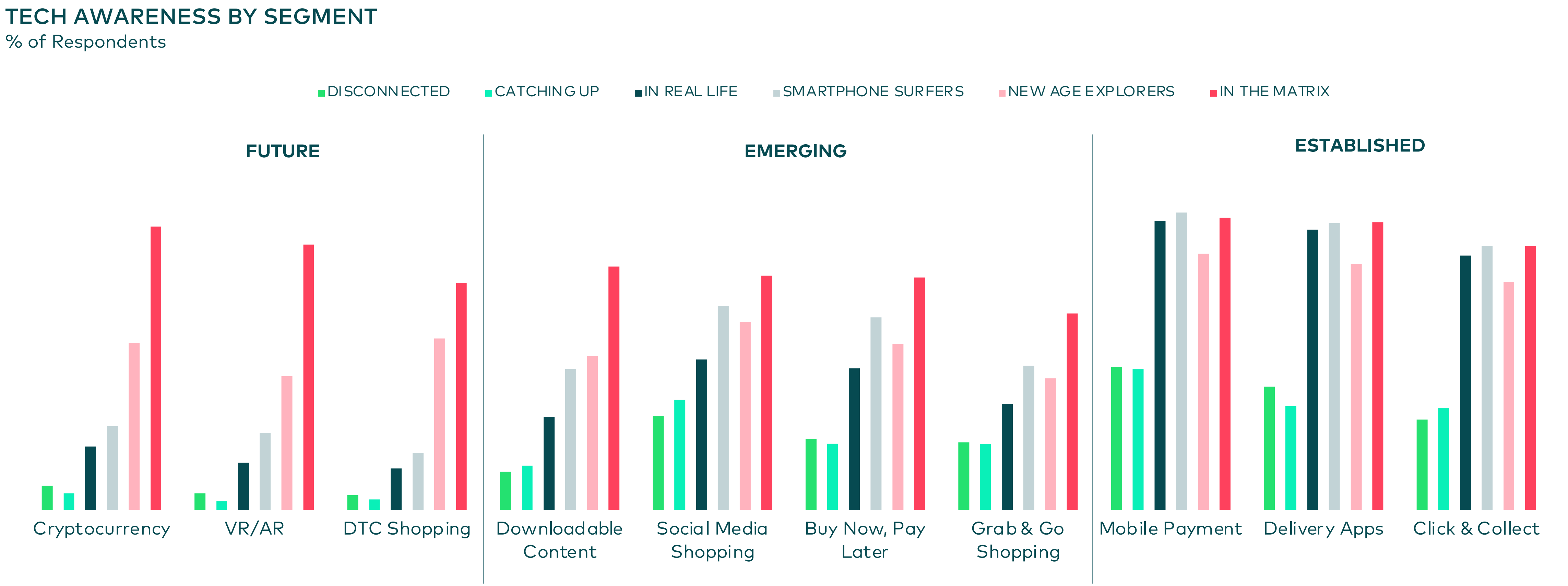
REALIZE

THE V-ROI

Do consumers value fiat & VR technology? Two groups that dabble in technology haven't found the value thesis of fully digitalizing their life.

In Real Life and Smartphone Surfers are generally more knowledgeable with Emerging and Established tech. However, they plunge in future tech awareness.



Numerator OMNIFUTURE | n=10,144
Q. Which of the following technologies are you familiar with?

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The In Real Life segment cares for physical touch and shows the lowest interest in virtual reality after Disconnected.

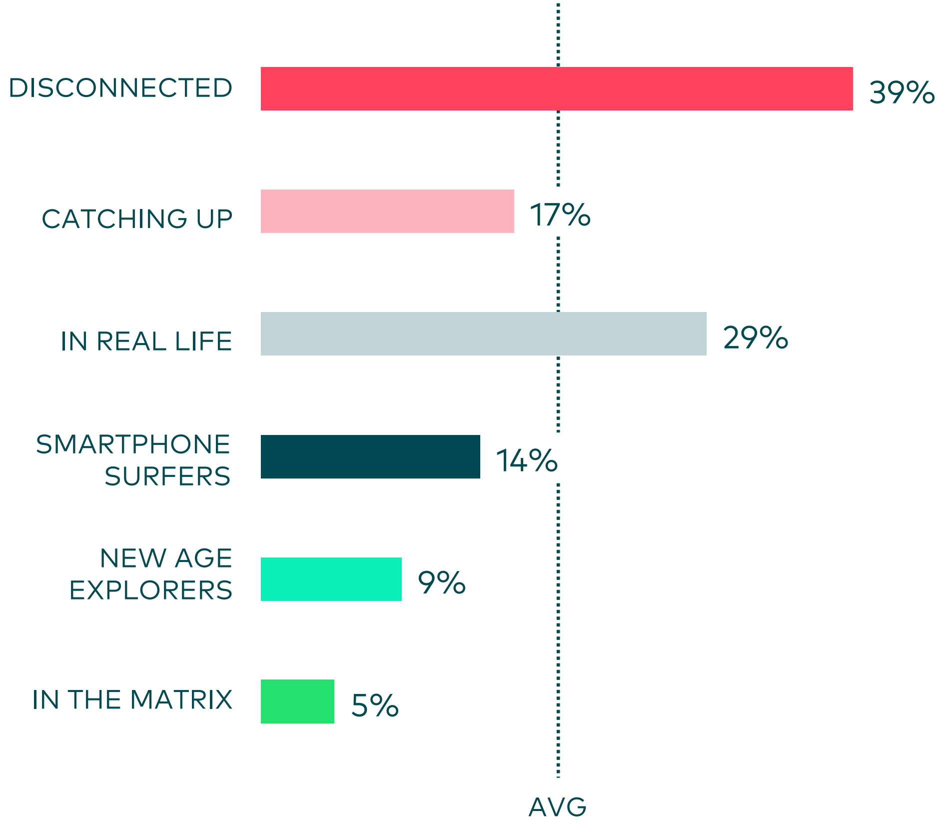
IN REAL LIFE

3 in 4

say it is difficult to shop for products online because they can't physically see/feel them

NOT INTERESTED IN VR EXPERIENCES

Of those interested in using the technology but have not | % of Respondents



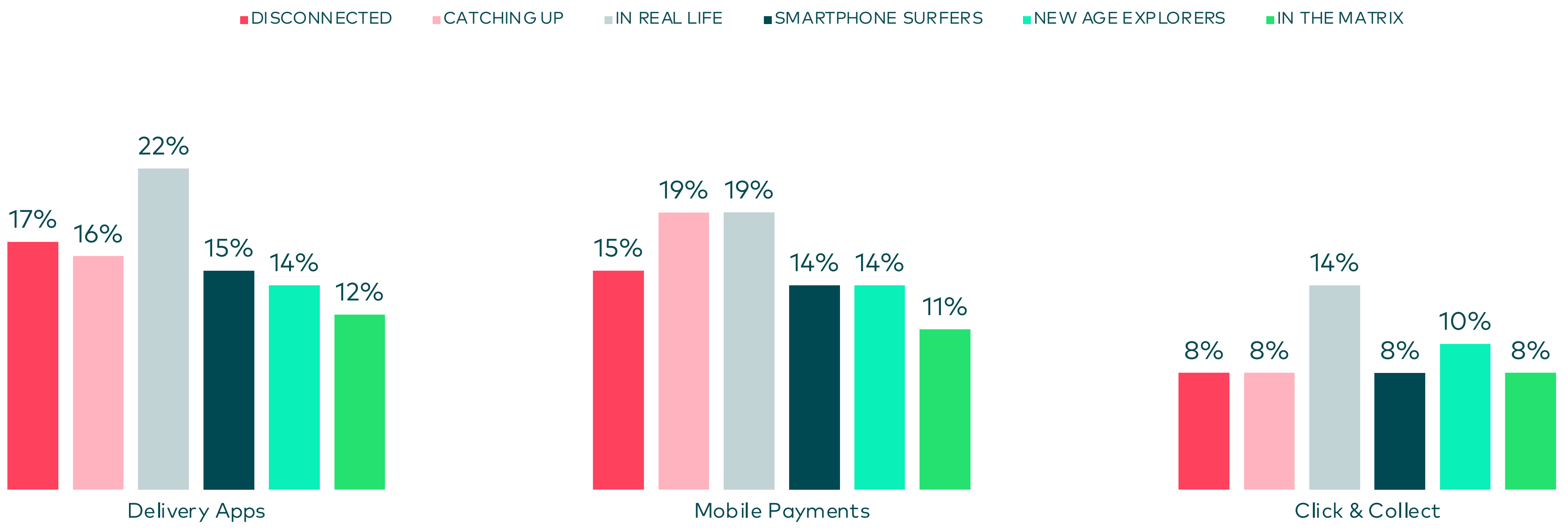
Numerator OMNIFUTURE | n=10,144

Q. How much do you agree or disagree with each of the following statements about shopping in general?

The technologies where In Real Life could head are those digitalizing the real world to deliver convenience.

TECH INTEREST BY SEGMENT

Of those aware but have not used the technology | % of Respondents

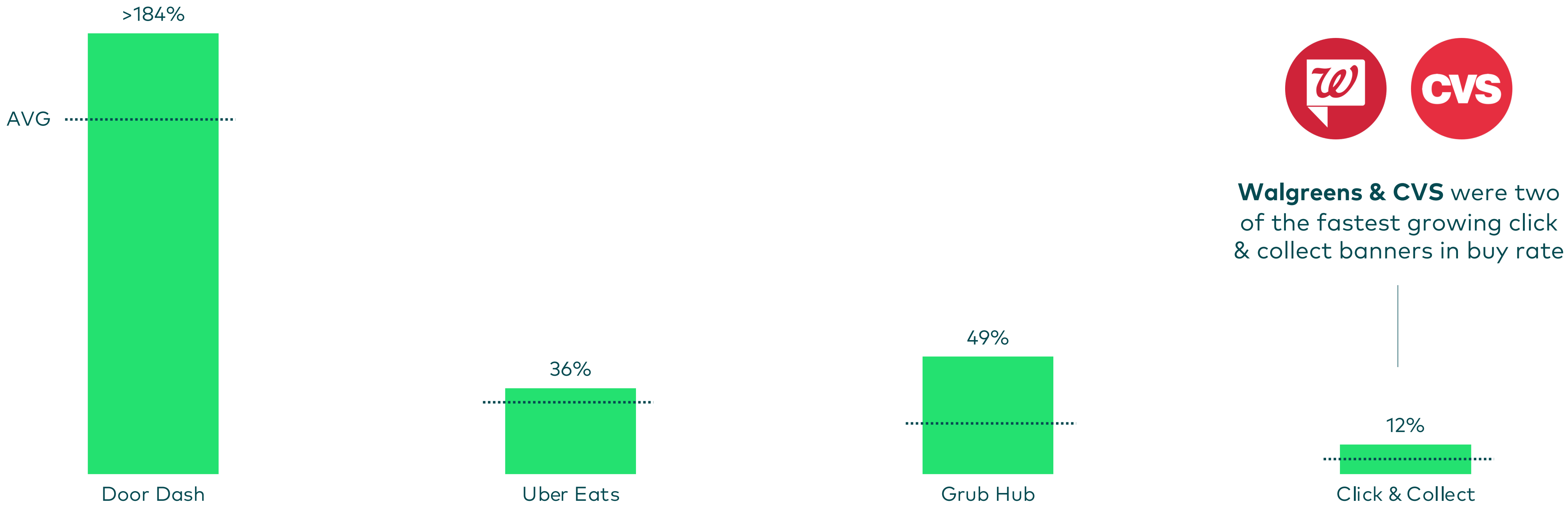


Numerator OMNIFUTURE | n=10,144

Q. Of the technologies that you are familiar with but have not used, which would you consider using?

In fact, In Real Life's engagement with delivery apps and click & collect has outpaced other segments.

BUY RATE ($) VS YEAR AGO ACROSS SERVICE
Of In Real Life Segment | Latest 52 Weeks Ending 10/31/2022



Expanding grab & go shopping could be a lucrative opportunity as Amazon's offering hasn't made land where In Real Life shoppers live.

USAGE OF GRAB & GO SHOPPING

Of those aware | % of In Real Life Respondents

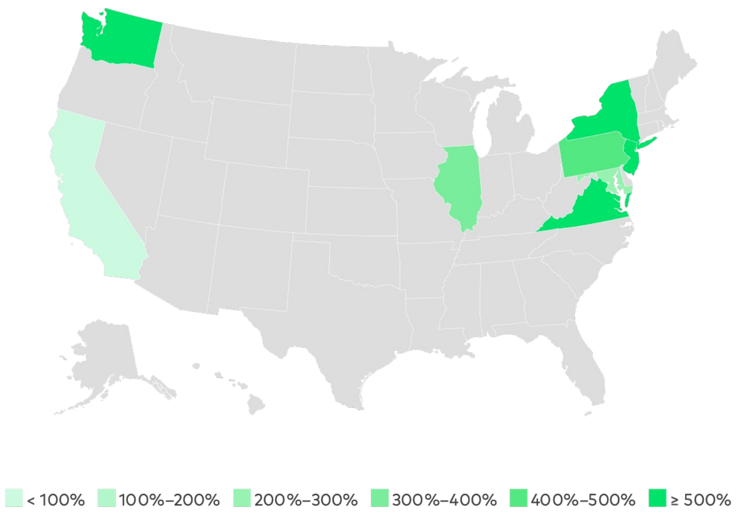
15%

have used **grab & go shopping** before

THE REGIONAL RISE OF AMAZON FRESH

AMAZON FRESH SALES GROWTH[1]

Latest 52 Weeks Ending 10/31/2022 vs YAG



Amazon Fresh, originating in Los Angeles and Chicago, is their latest entry into the space offering Dash Carts which help shoppers skip the checkout line. The technology has been expanded into select Whole Foods stores.

Amazon has grown sales of Amazon Fresh stores by over **274%[1]** and has recently expanded in New Jersey & New York.

Around **1 in 3 In Real Life** shoppers live in the states where Amazon Fresh operates in.

Numerator OMNIFUTURE | n=10,144 | [1]Numerator TruView

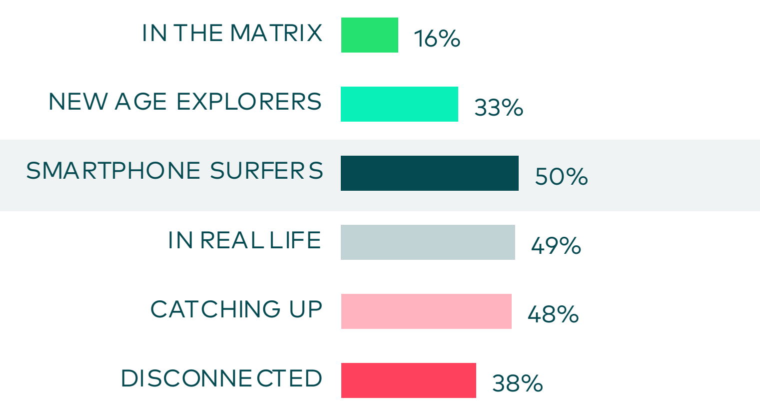
Q. Of the technologies that you are familiar with but have not used, which would you consider using?

Brands can craft the future tech narrative as Smartphone Surfers lack an opinion on it–even more than tech-averse segments.

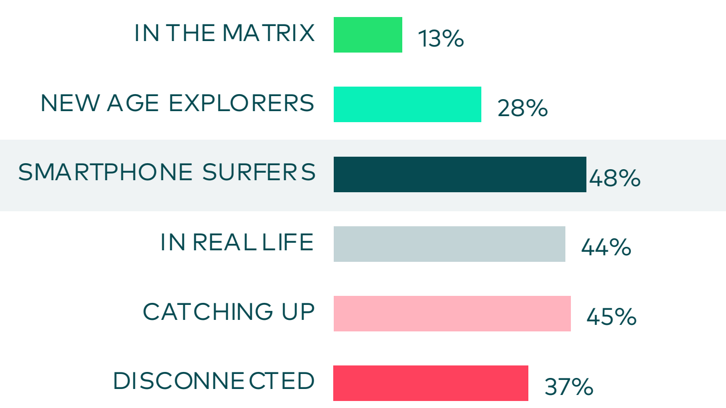
RESPONSE RATE OF SAYING "I DON'T KNOW" TO SENTIMENT TOWARDS TECH

All Respondents | % of Respondents

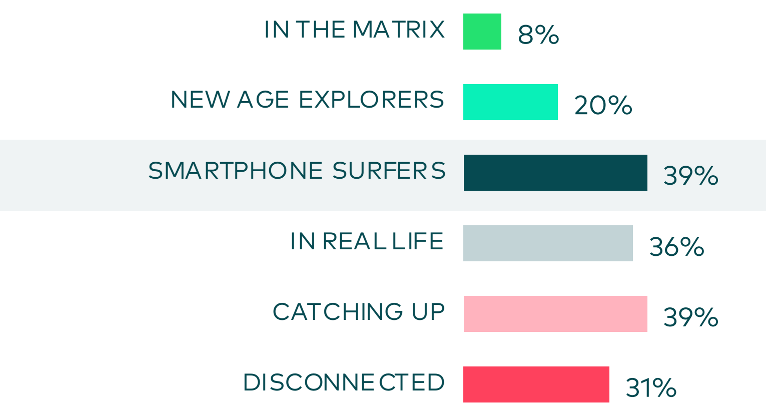
NFTS HAVE A POSITIVE IMPACT ON CREATORS & CONSUMERS



CRYPTOCURRENCY HAS A NEGATIVE ENVIRONMENTAL IMPACT



CRYPTOCURRENCY WILL REPLACE TRADITIONAL FIAT CURRENCIES



Numerator OMNIFUTURE | n=10,144
Q. How much do you agree or disagree with each of the following statements about cryptocurrency and NFTs (non-fungible tokens)?

Communicating value is key. Smartphone Surfers recognize the value of technology in relation to shopping more than any other segment.

SMARTPHONE SURFERS' SENTIMENT TO TECHNOLOGY WHEN SHOPPING ONLINE

% of Respondents

96%
compare prices online to find the lowest cost
113 Index to Total

98%
say technology allows them to discover new products
116 Index to Total

96%
claim they have more options available when shopping online
121 Index to Total

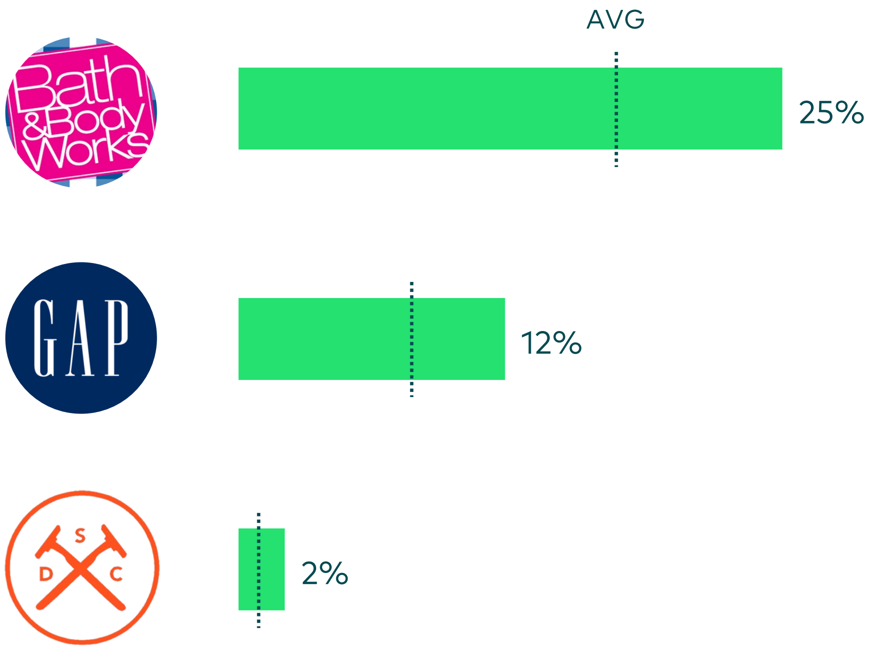
99%
believe technology makes shopping more convenient
118 Index to Total

Numerator OMNIFUTURE | n=10,144
Q. How much do you agree or disagree with each of the following statements about online shopping?

Smartphone Surfers engage with DTC stores the most even though they are more unaware of DTC. They have also explored online shopping the most.

DTC SHOP PENETRATION WITHIN SMARTPHONE SURFERS

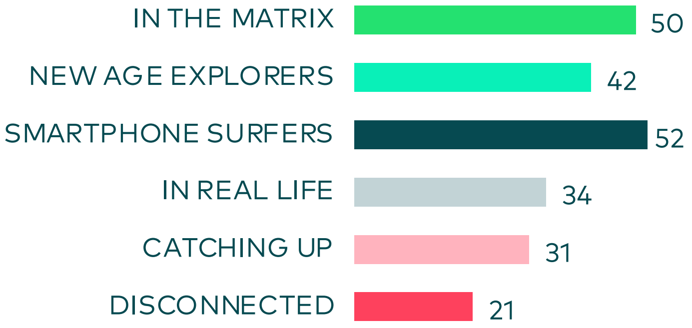
Purchase Verified | % of Household | Latest 52 Weeks Ending 10/30/2022



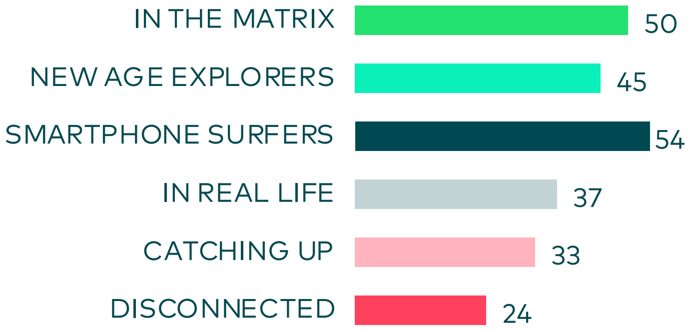
ONLINE SHOPPING TRENDS

Purchase Verified | Of any eCom store | Latest 52 Weeks Ending 10/30/2022

Average Number of Brands Shopped Online

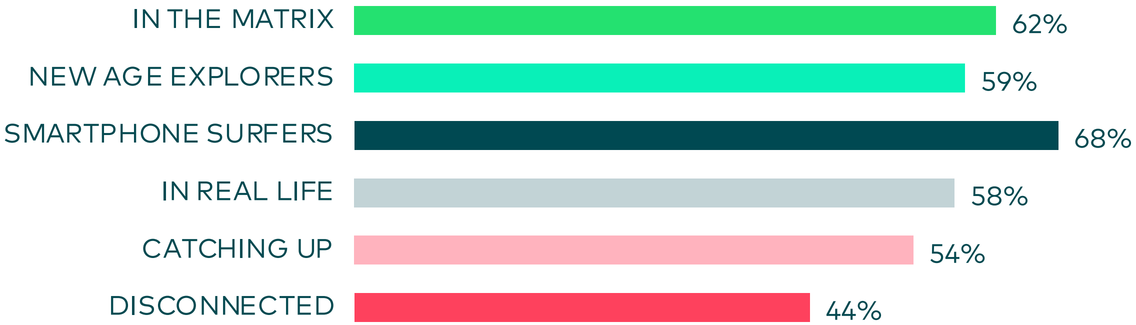


Average Number of Major Categories Shopped Online

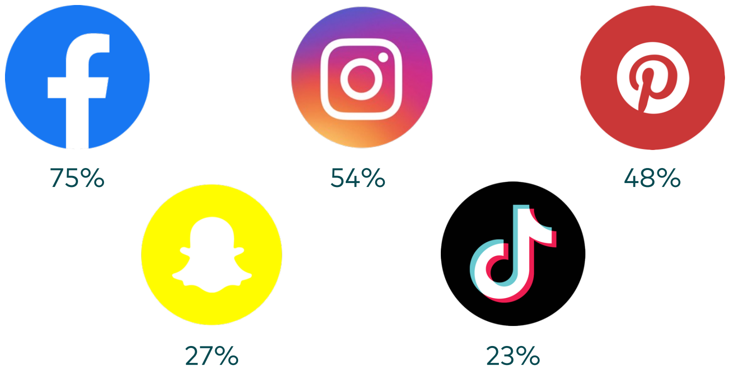


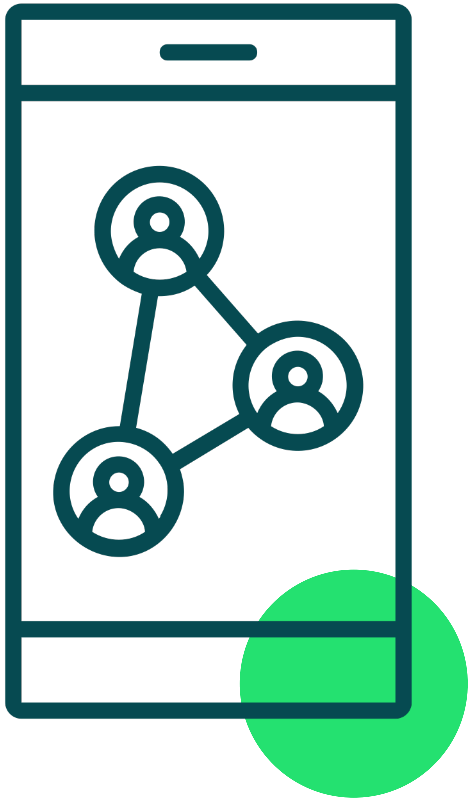
Smartphone Surfers' lives are centered on their phones and social media.

USE THEIR PHONE >2 HOURS A DAY
% of Respondents



PLATFORMS MOST PENETRATED WITH SMARTPHONE SURFERS
% of Smartphone Surfers





Influencers and social media shopping are entry points to connecting with the Smartphone Surfer and pushing them to future tech.

3 in 5

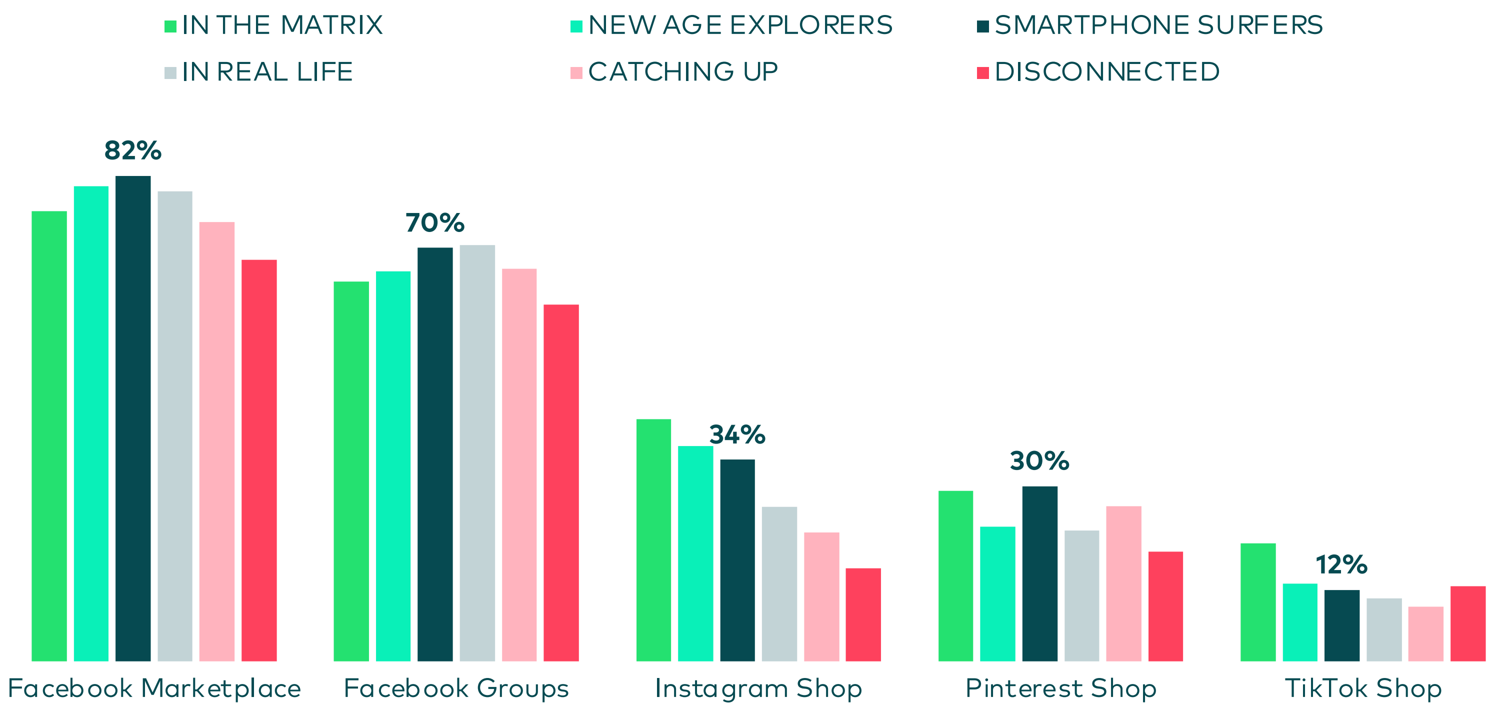
say social media **influencers** impact what they purchase

WHY INFLUENCERS?

Having built up their following from scratch, influencers can cascade a brand's value through a voice that relates to their followers. In fact, 60% of marketers believe influencer marketing had a grater ROI vs traditional.

SOCIAL MEDIA SHOPPING PLATFORMS USED

Of those who have used social media shopping | % of Respondents



Numerator OMNIFUTURE | n=10,144
Left: Q. What type of impact do social media influencers have on your purchases, if any?
Right: Q. Which of the following social media shopping platforms have you used?

Numerator

Inspiration for Growth

BE DIGITAL IN REAL LIFE

Some consumers find little value in entering a metaverse. While time will tell if they ever lean into the pixelated world, opportunity lies in digitalizing their world today. They are interested in tech that is unobtrusive, less immersive and makes small changes. For leaders, action could include:

- Furthering tech that focuses on convenience such as mobile payments, delivery and click & collect.
- Piloting grab & go stores and popups in test markets where In Real Life shoppers live. Amazon has already implemented its Grab & Go technology to select Whole Foods stores.

CARVE A VIRTUAL WAVE

From finding better deals to better selection, Smartphone Surfers know technology is there to help them, but they haven't moved on to the next venture because they do not know what is there. To advance their shopping, brands and retailers should focus on:

- Connecting how tech innovation can help alleviate pain points. Proactively communicate why DTC shopping, virtual reality and cryptocurrency benefits consumer choice and budgets.
- Investing in social media managers. Social commerce in conjunction with influencer marketing as Smartphone Surfers are the biggest users of their phones and key platforms. TikTok just introduced its first shopping platform in the US.

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Numerator

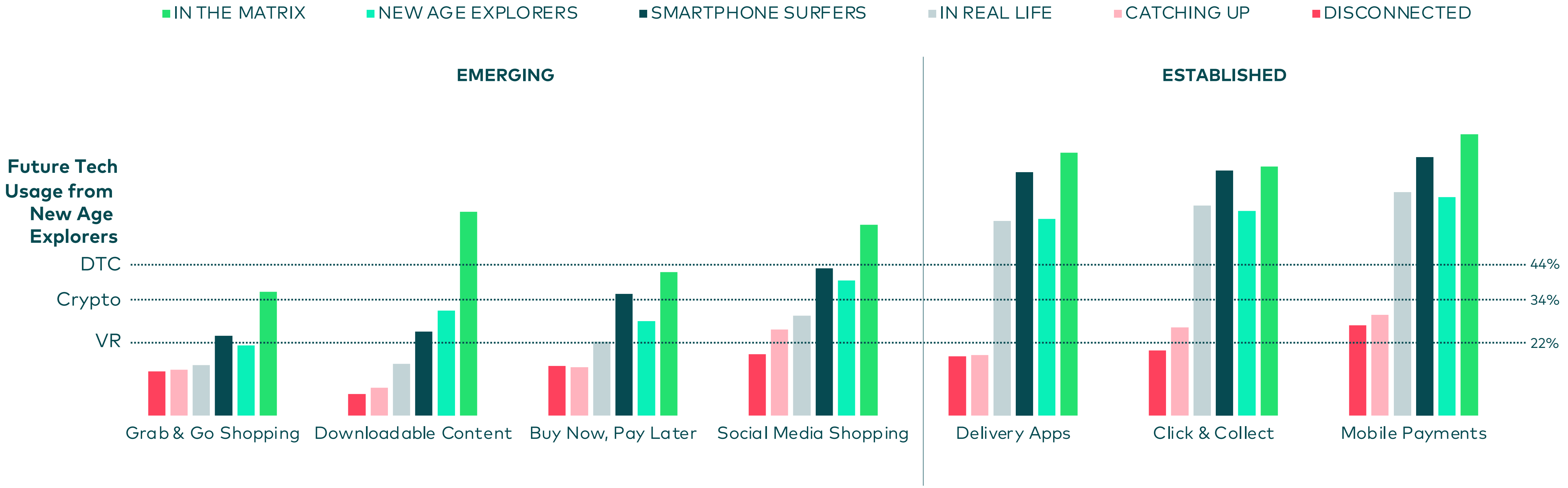
ENTER THE MATRIX

Winning over the lucrative In the Matrix and New Age Explorer segment will be key to succeeding in big technological bets.

New Age Explorers are skipping established & emerging tech and going directly to future tech even falling behind more tech-averse households.

TECH USAGE BY SEGMENT

Of those aware but have not used the technology | % of Respondents



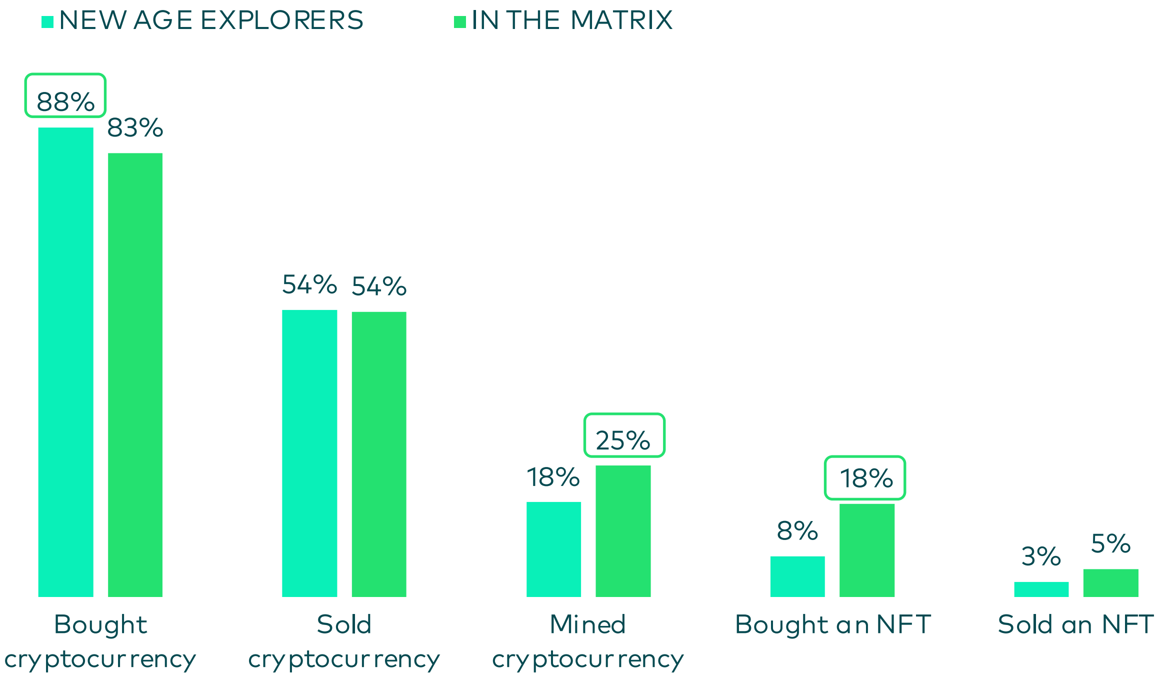
Numerator OMNIFUTURE | n=10,144
Q. Of the technologies you are familiar with, which have you used?

Numerator

Although New Age Explorers have used cryptocurrency & blockchain tech, their use is more superficial compared to In the Matrix.

USERS OF CRYPTOCURRENCY AND NFT EXPERIENCES

Of those engaged in cryptocurrency | % of Respondents



A PRIMER TO NON-FUNGIBLE TOKENS

If you were a bit grossed out by the word fungible, we were too. However, NFTs give brands an opportunity to do something that has been nearly impossible in today's internet and that is how to **properly monetize a virtual world** that is strife with internet piracy. By creating a 'fingerprint' on virtual items being sold, consumers can prove genuine ownership of their purchase.

Read more on Forbes.

Numerator OMNIFUTURE | n=10,114
Q. Which of the following have you done, if any?

New Age Explorers engage in the new to stay on trend, but they know to not dive off the deep end.

NEW AGE EXPLORER SHOPPING & SPENDING SENTIMENTS

% of New Age Explorers | Indexed to All Respondents

1 in 4

consider themselves to be **impulse buyers**.

(120 Index)

33%

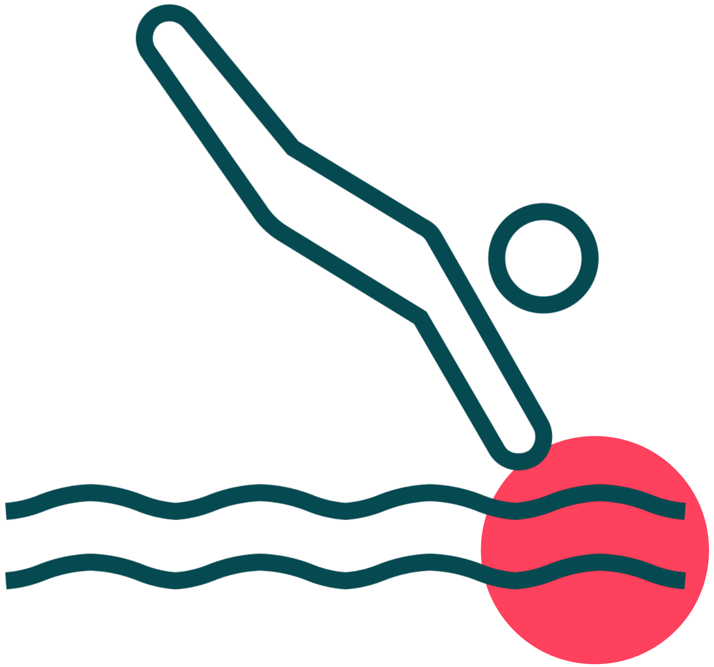
like to **try new things** when shopping.

(134 Index)

32%

say it is important to plan their finances **for the future**.

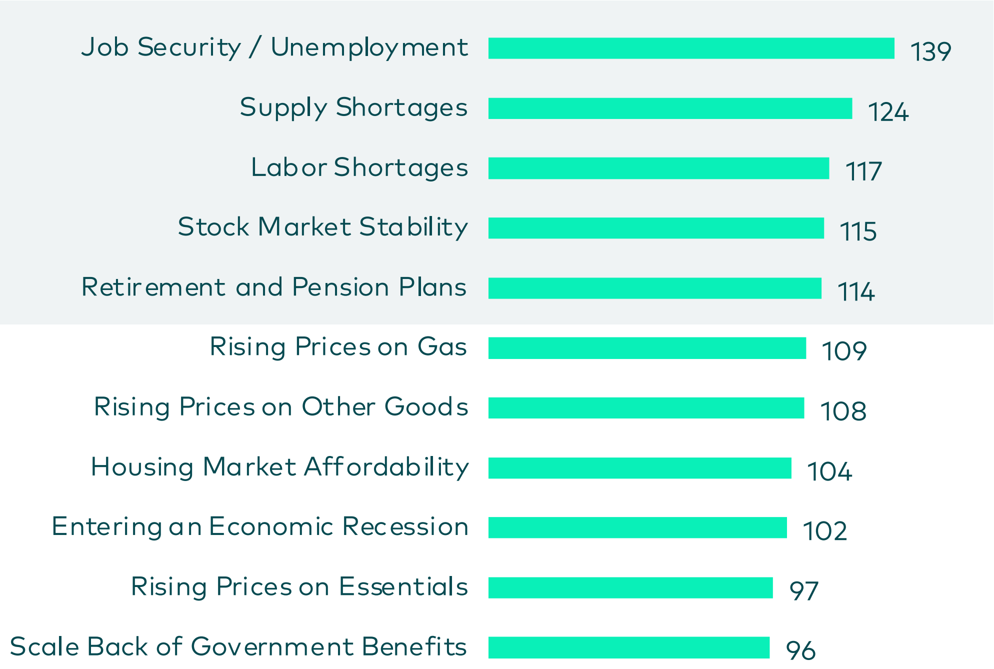
(126 Index)



Facing financial headwinds with cryptocurrency and an economic slowdown, New Age Explorer's bank accounts are likely running lean.

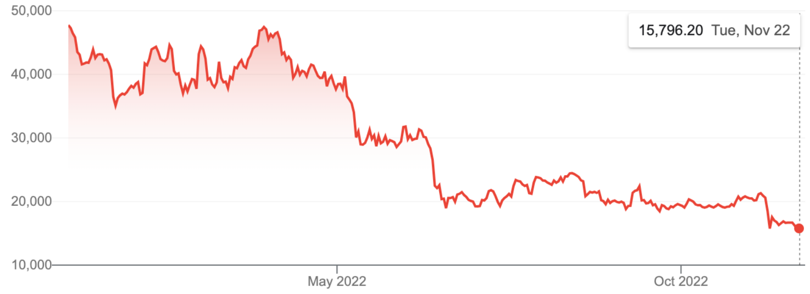
CONCERNS REGARDING THE ECONOMY

September – October 2022 Aggregated | % of New Age Explorers



BITCOIN VALUE TO USD

Year to Date Ending 11/22/2022



TOP OVERINDEXING CAREERS FOR NEW AGE EXPLORERS

Indexed to All Respondents | Showing Careers >2%

Engineer (210)

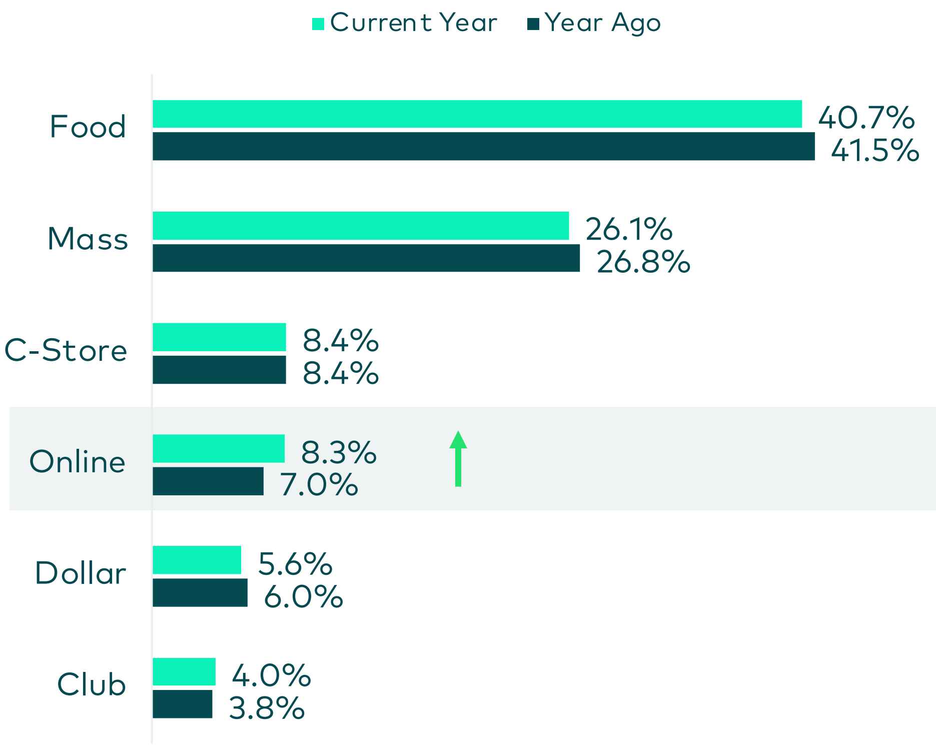
Design (169)

Construction (153)

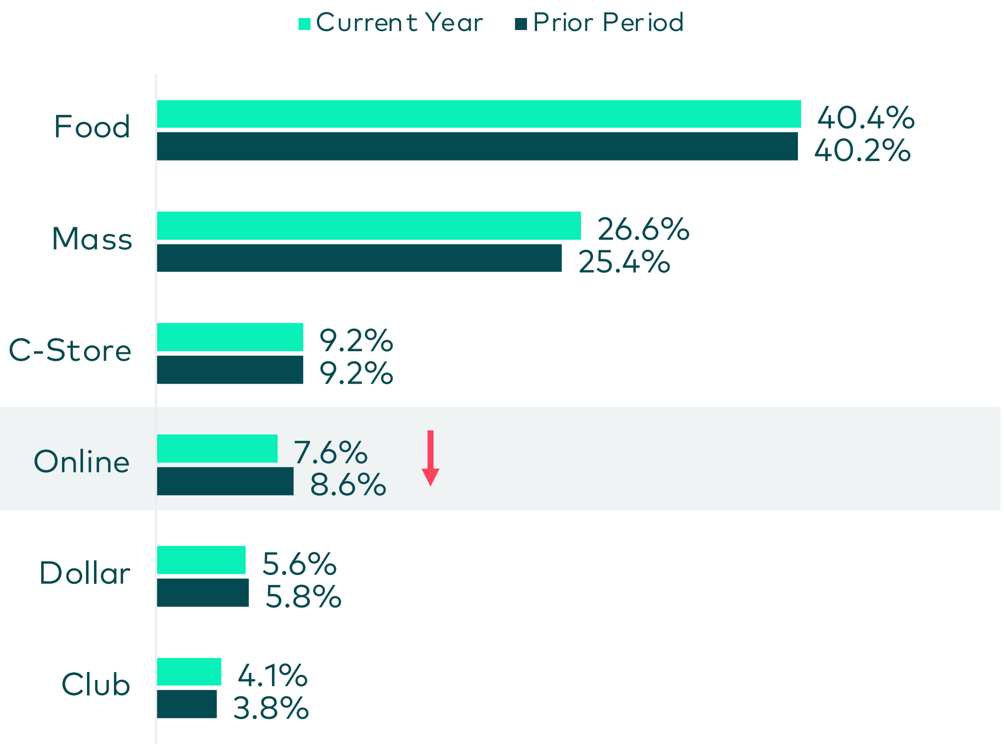
Banking (150)

Mass and club stores can win New Age Explorers as they are shifting units back to their stores.

SHARE OF UNITS IN LATEST 12 MONTHS VS YEAR AGO
% of Units | CPG Categories | Indexed to All Respondents



SHARE OF UNITS IN LATEST 3 MONTHS VS PRIOR PERIOD
% of Units | CPG Categories | Indexed to All Respondents



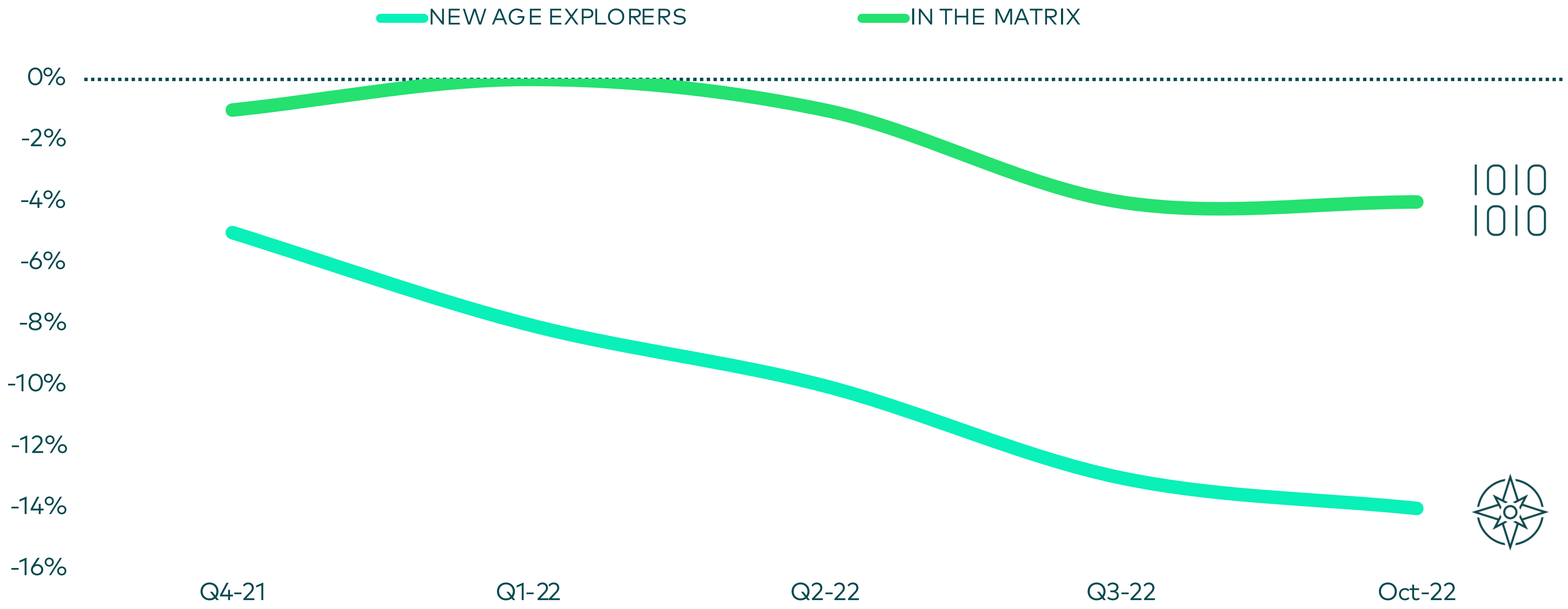
Numerator OMNIFUTURE | Numerator Insights n=10,144

Numerator

In the Matrix households are fairing much better than New Age Explorers because of their elevated income.

UNITS PER HOUSEHOLD VS YEAR AGO BY OMNIFUTURE SEGMENT

Discrete Quarters | Latest 52 Weeks Ending 10/30/2022



48%
are in the top 30th percentile

39%
are in the top 30th percentile

Numerator

Driving virtual reality penetration with this group to have them act as influencers is critical given their high income and interest in video gaming.

IN THE MATRIX: THE FIVE VIDEO GAME FACTS

61%
consider themselves a gamer

1 in 4
own a Nintendo gaming console

30%
enjoy playing action/adventure games

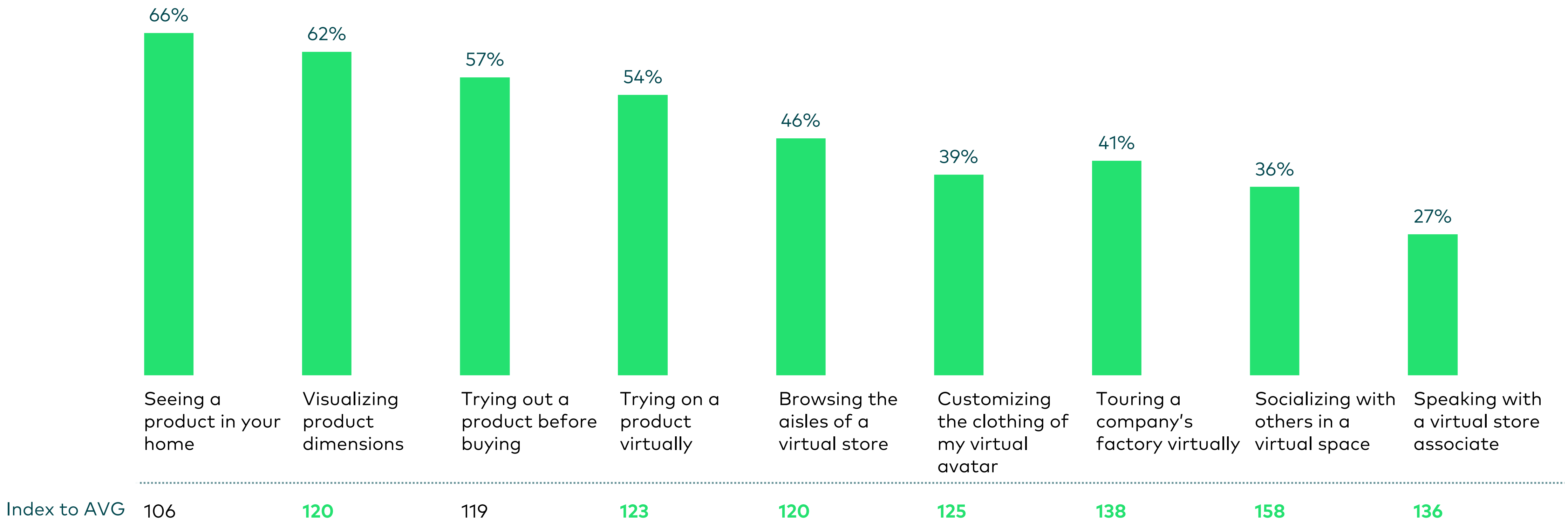
74%
have used virtual reality before

8.3%
Purchased an Oculus in the past year

In the Matrix households are the most receptive to all types of virtual reality offerings. The ones that stand out focus on exploring and personalization.

INTEREST IN VIRTUAL REALITY EXPERIENCES

Of those who are aware of Virtual Reality | % of In the Matrix | Indexed to All Respondents



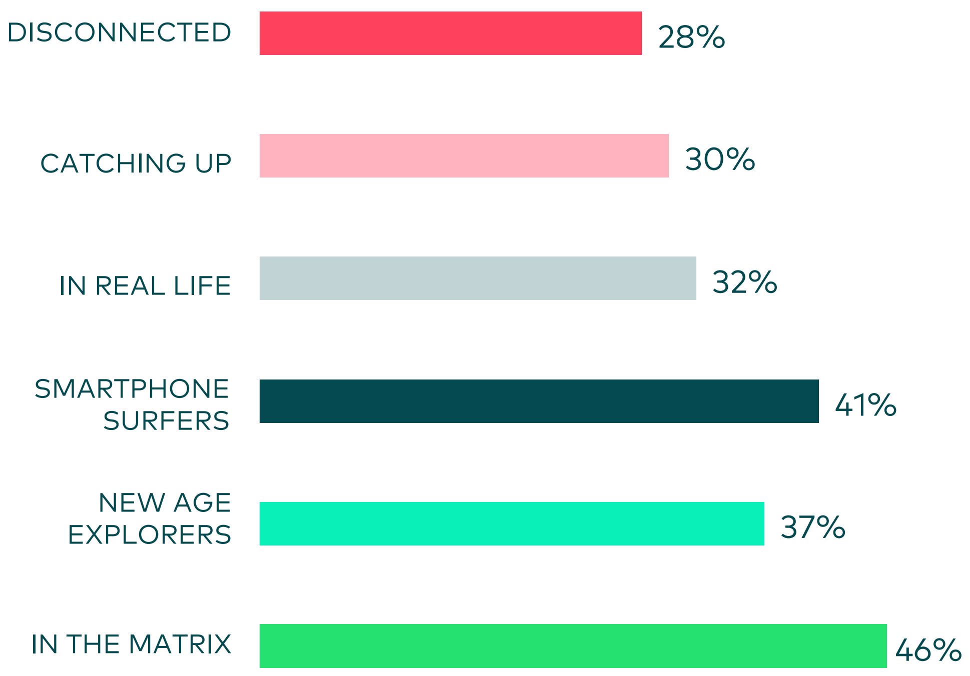
Numerator OMNIFUTURE | n=10,144
Q. Which of the following virtual reality / augmented reality experiences would you be interested in?

Numerator

Beyond gaming, they are also parents. Brands should be working with them as they raise the next generation like the case with Pampers.

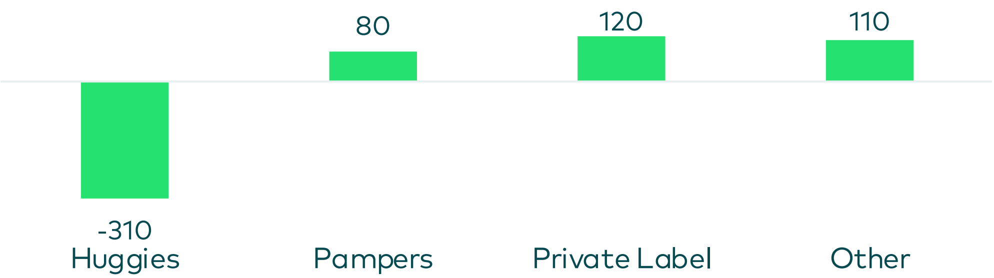
HOUSEHOLDS WITH CHILDREN BY SEGMENT

% of Respondents



BPS CHANGE SHARE OF UNITS FOR DISPOSABLE DIAPERS

Latest 12 Months Ending 10/31/2022 vs Year Ago | For In the Matrix



INSPIRING THE FUTURE WITH TECH

Pampers learned that 4 million children under the age of three have never been read to in their lifetime and wanted to solve that solution.

They partnered with Snapchat to offer families books using augmented reality.

ENTER THE MATRIX

Inspiration for Growth

CARRY THE NOOBS

New Age Explorers are an excited but vulnerable group. They suffer from what seems to be an impulsive leap into tech and face financial headwinds. With this segment, brands and retailers should focus on:

- Encouraging them to slow down and drive penetration in established & emerging tech. Providing discounts and promotion codes for click & collect trips and delivery apps could help drive engagement.
- Considering driving awareness of buy now, pay later options on ecommerce sites to help alleviate the upfront consumer burden of purchasing larger ticket items by offering little to no-interest plans.

LEVEL UP WITH YOUR CONSUMER

Brands and retailers must learn the needs and drivers of those In the Matrix because they are the most receptive to all types of technology including future tech. Virtual reality is a strong potential as they also consider themselves gamers and are more able to afford upfront costs. Several initiatives to win this segment include:

- Partnering with video game companies in situations that make sense or capture a large audience. Fortnite continues to accelerate that trend with virtual concerts and partnerships.
- Giving a unique and transparent view into your business by offering up virtual tours of your headquarters or factories.
- Connecting with the entire family. Think about how tech can bridge familial gaps and strengthen relationships to drive equity.

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Numerator

The data brands need to act decisively — directly from consumers.

Get unparalleled insights into modern consumer shifting behaviors as well as the attitudes, opinions and promotions that influence them.