Numerator

NEW FRONTIERS

Finding the Growth: Understanding the Omnichannel Marketplace

FROM: [redacted]
SENT: Thursday February 23, 2017 at 11:01AM
TO: shalin.shah@Numeratorinc.com
SUBJECT: Numerator's Take on Sales

Hey Shalin,

Reaching out to see what perspectives and Insights Numerator might have regarding the state of the retail environment across not only the [redacted] category but
many … over
the pa… d we
need …

Is it P… c
factors? Curious to understand Numerator's perspective as a new player in the industry. Let me know what you guys think and if there's any already existing information that Jared might be socializing.

Thanks,
[redacted]

There seem to be some serious declines

FROM: [redacted]
SENT: Wednesday March 16, 2017 at 4:54PM
TO: bret@Numeratorinc.com
SUBJECT: Hot Question on NA Business

Hi Bret,

Share reports went out today and all categories are looking soft - Not just [redacted] but the whole category.
Needless to say, we got slammed with questions. The
[redacted] a…
immediately, … ed tonight to
ask for his v…

My team an… ay need
your help in the following hours/days because it's just not an easy answer.

Regards
[redacted]

All categories are looking soft

Syndicated POS Data Fails to Capture Channel Shift

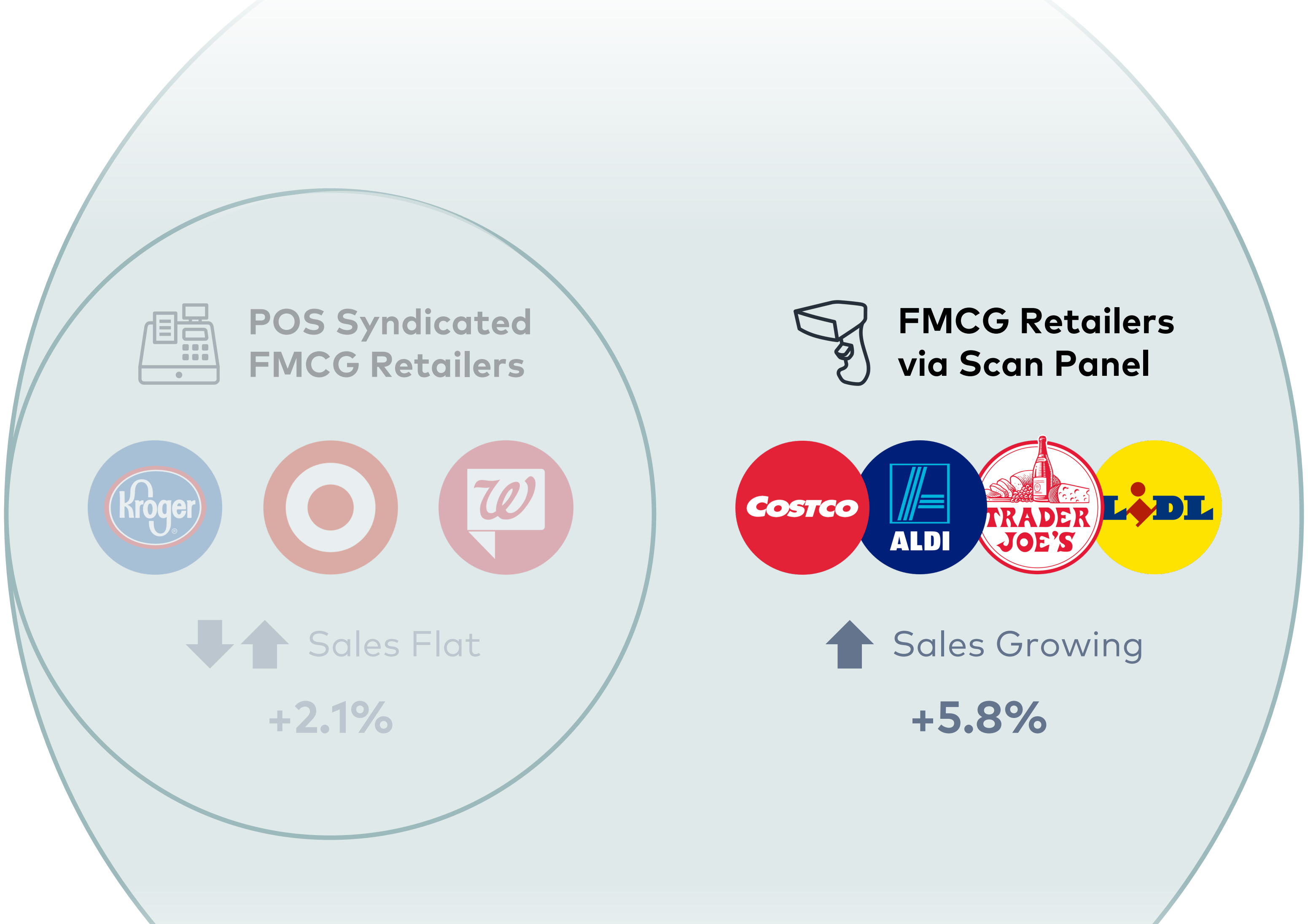
POS Syndicated FMCG Retailers

Sales Flat

+2.1%

Data source: Numerator Insights, Basket Sales Growth, YE June 2018 over previous
Bubble 1: xAOC estimate (a subset of FMCG); B&M panel

Syndicated POS Data Fails to Capture Channel Shift



Data source: Numerator Insights, Basket Sales Growth, YE June 2018 over previous
Bubble 1: xAOC estimate (a subset of FMCG); B&M panel
Bubble 2: FMCG; B&M panel

Syndicated POS Data Fails to Capture Channel Shift

POS Syndicated FMCG Retailers

Sales Flat

+2.1%

FMCG Retailers via Scan Panel

Sales Growing

+5.8%

Omnichannel via Numerator OmniPanel

Sales Growing

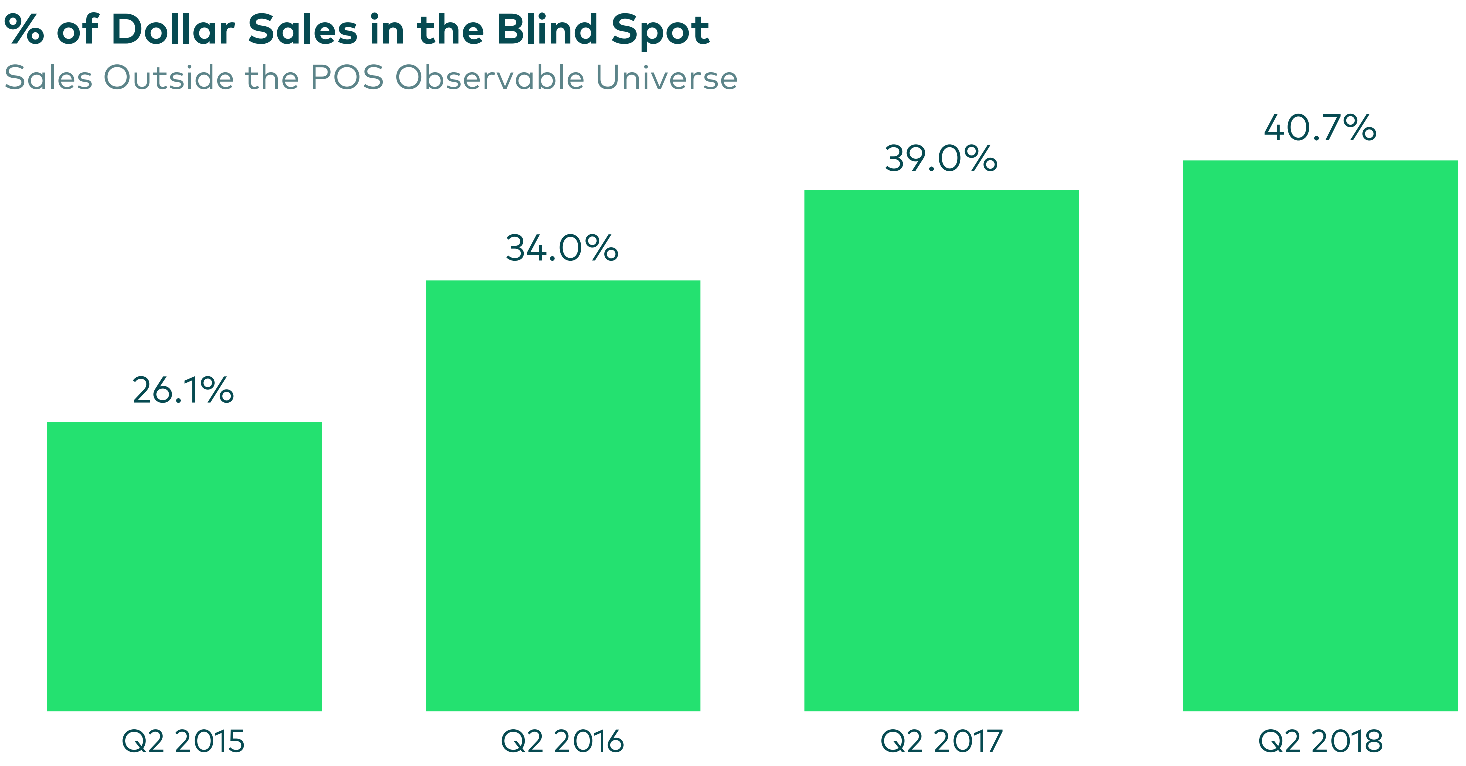
+6.6%

Data source: Numerator Insights, Basket Sales Growth, YE June 2018 over previous
Bubble 1: xAOC estimate (a subset of FMCG); B&M panel
Bubble 2: FMCG; B&M panel
Bubble 3: FMCG, eCom, Spec, Restaurants; Omni Panel for eCom, all others

Blind Spot growth is consistently increasing

As companies continue to look for growth pockets, the areas to which they are largely blind continue to get larger...

...and continue to outpace the growth of what is visible.



"Observable Universe" Growth

+2.1%

Dollar sales growth vs year ago, YE Jun 2018 for legacy channels tracked by POS data

"Blind Spot" Growth

+11.7%

Dollar sales growth vs year ago, YE Jun 2018 for untracked channels

Data source: Numerator Insights, Basket Sales

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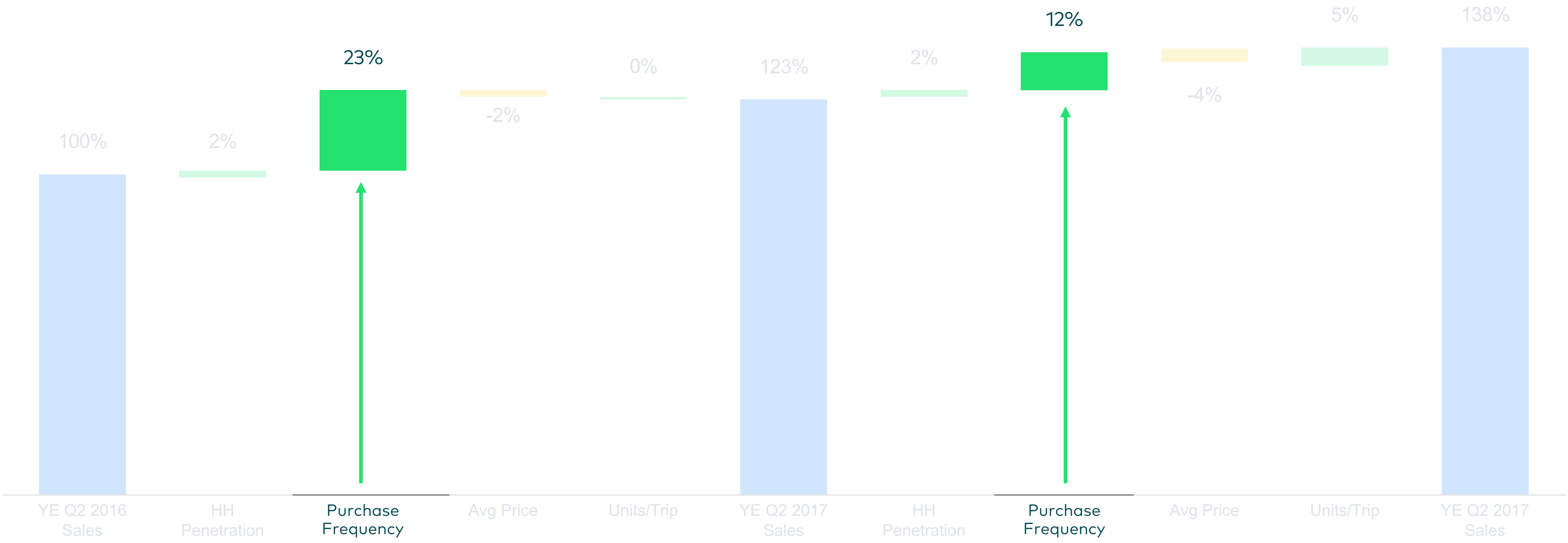
More Trips Are Key to This Growth

Shoppers making more trips to ecommerce retailers continues to be the largest factor in online sales growth for CPG products



Data Source: Numerator Insights

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The “Blind Spot” seems big and scary.
Here are 4 ways to think about it…

ECOMMERCE EFFECT

Online sales are growing... double digits

PRIVATE LABEL PARADOX

Private Label is a troubling blind spot

SHARE OF STOMACH

Americans are eating out, more than ever

DIMINISHING BARRIERS TO ENTRY

Big brands are being challenged by big ideas

The Ecommerce Effect
(aka The Amazon Effect)

Amazon Drove 80% of All Online Growth for CPG

Data source: Numerator Insights, Item $ Sales in eCommerce channel across 5 major Product Sectors (Baby, Grocery, Health & Beauty, Household or Pet) amazon Prime

amazon Prime Pantry

amazon Prime now

amazon fresh

amazon locker

amazon Subscribe&Save

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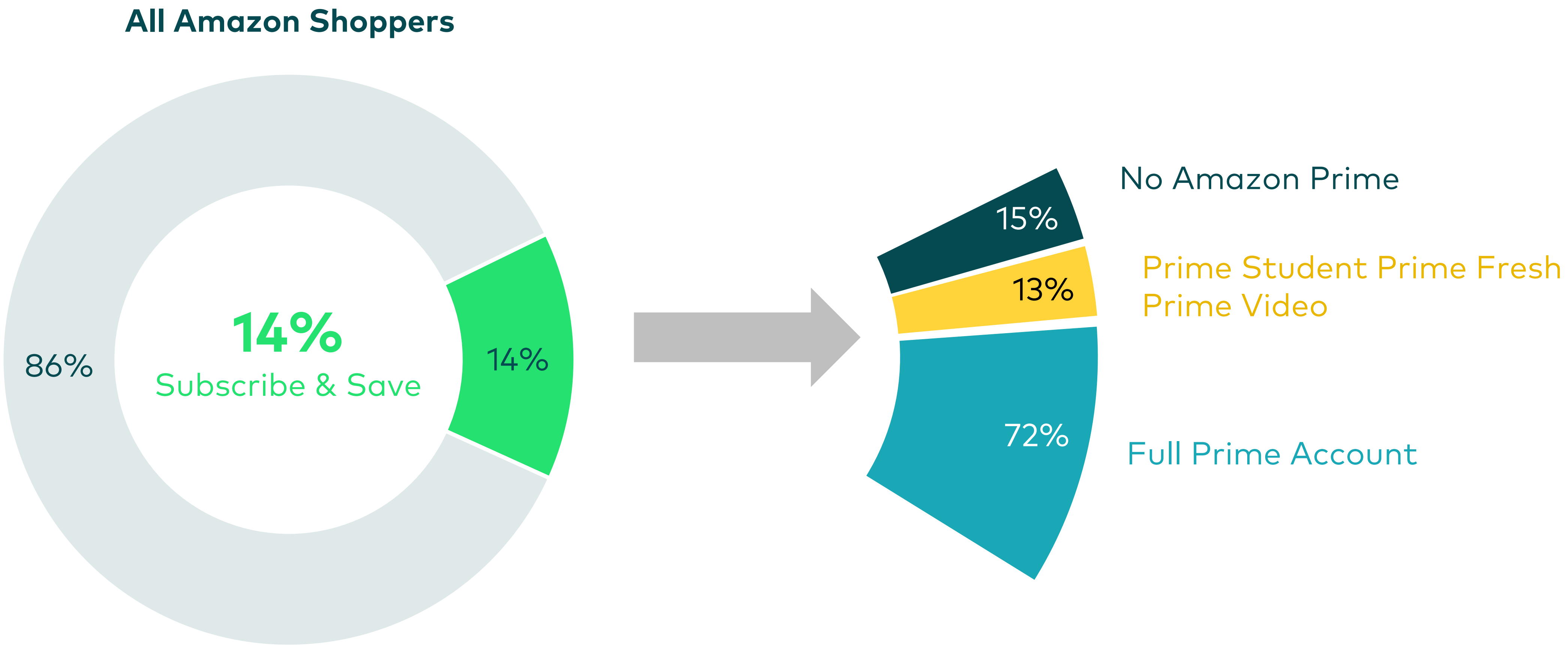
14% of Amazon Shoppers Use Subscribe & Save



Numerator Insights; 03/01/2017- 02/28/2018; Subscribe & Save Shoppers: 6,711; Amazon Shoppers; 49,328

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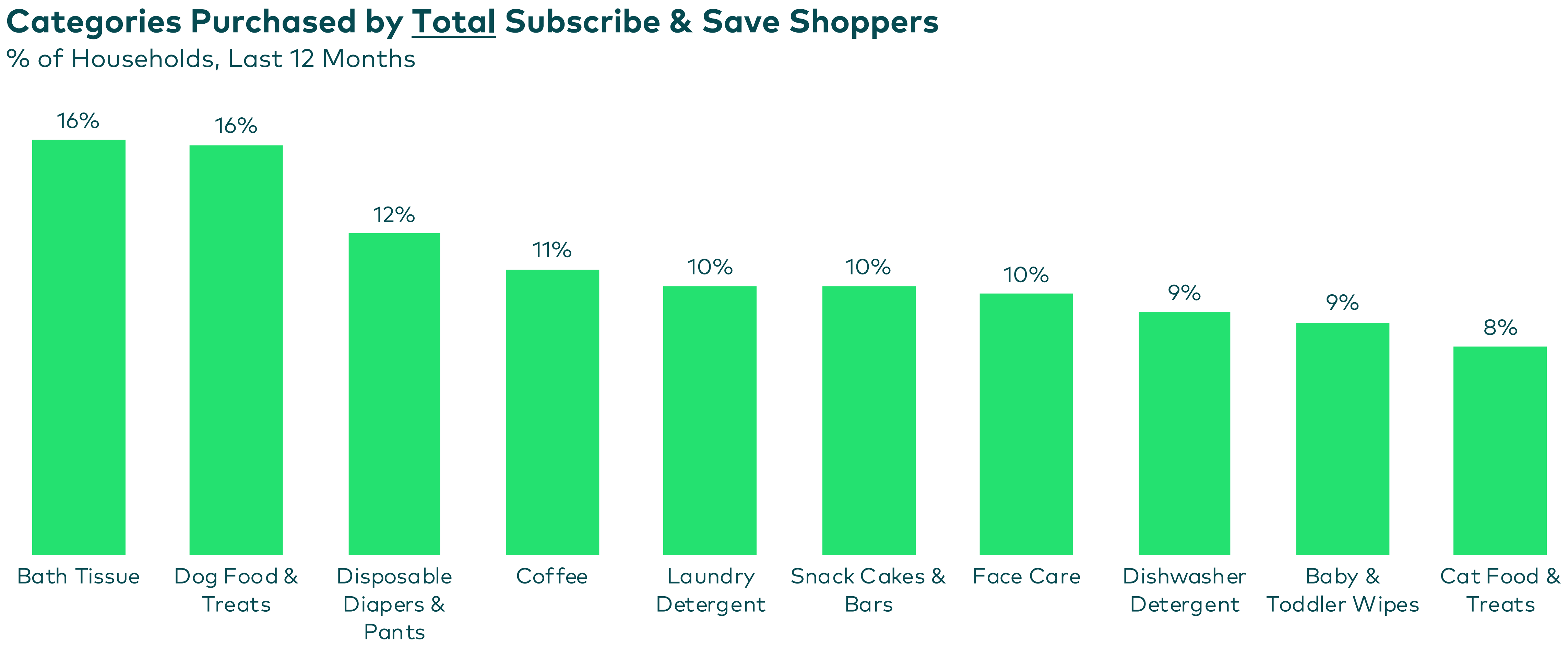
S&S Users More Valuable Than the Avg. Amazon Shopper

% HH, Index vs. All US Households	ALL AMAZON	PRIME	SUBSCRIBE & SAVE
AGE	**35-44** 20.4%, 110 index	**45-54** 23.3%, 116 index	**35-44** 25.5%, 137 index
INCOME	**Over $125k** 16.4%, 106 index	**Over $125k** 21.7%, 139 index	**Over $125k** 25.2%, 162 index
HH SIZE	**2 Persons** 33.1%, 101 index	**4 Persons** 13.9%, 110 index	**3 Persons** 18.9%, 112 index

Numerator Insights; 03/01/2017- 02/28/2018; Subscribe & Save Shoppers: 6,711, Prime Shoppers: 23,720; Amazon Shoppers: 49,761

Bath Tissue, Dog Food, Diapers: Most Popular Categories



Numerator Insights; 03/01/2017- 02/28/2018; Subscribe & Save Shoppers: 6,964

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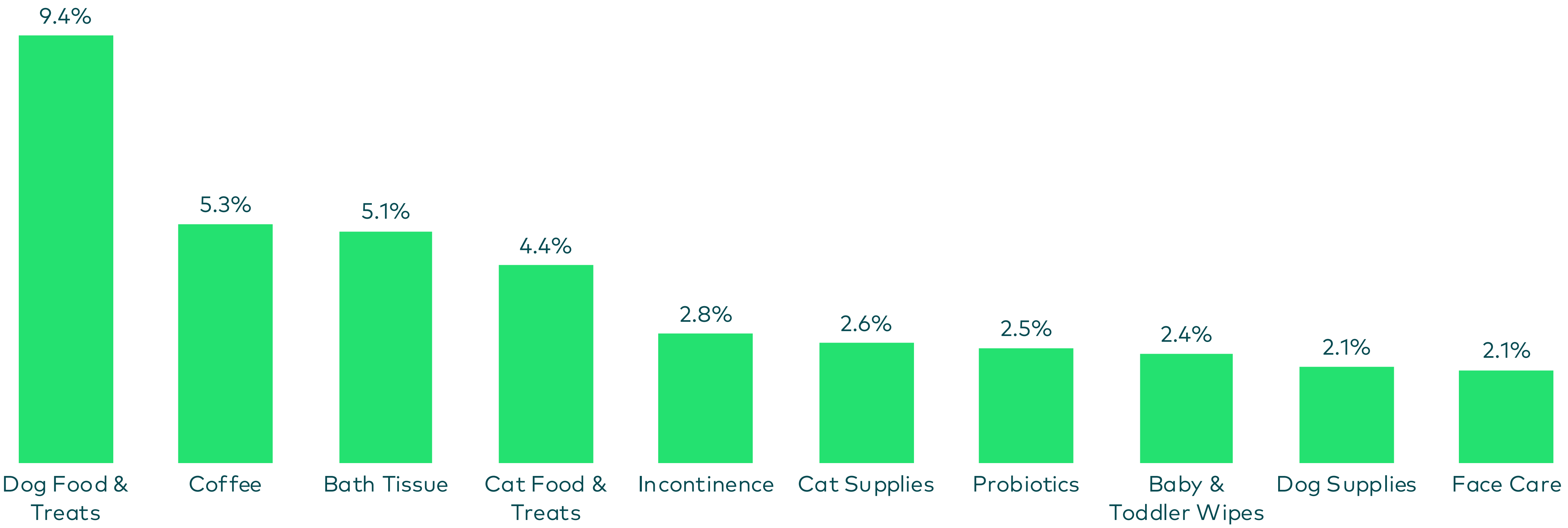
Shoppers Entered Subscribe & Save Mainly Through Pet

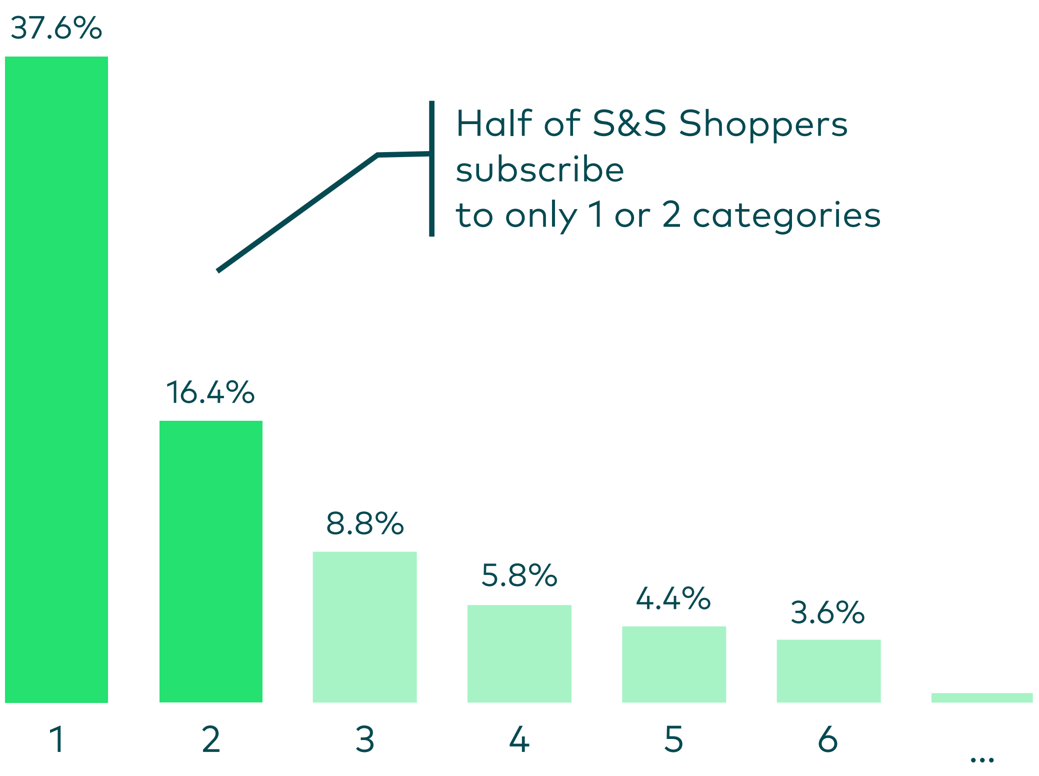
First Category Purchased by New Subscribe & Save Shoppers
% of Households, Last 6 Months



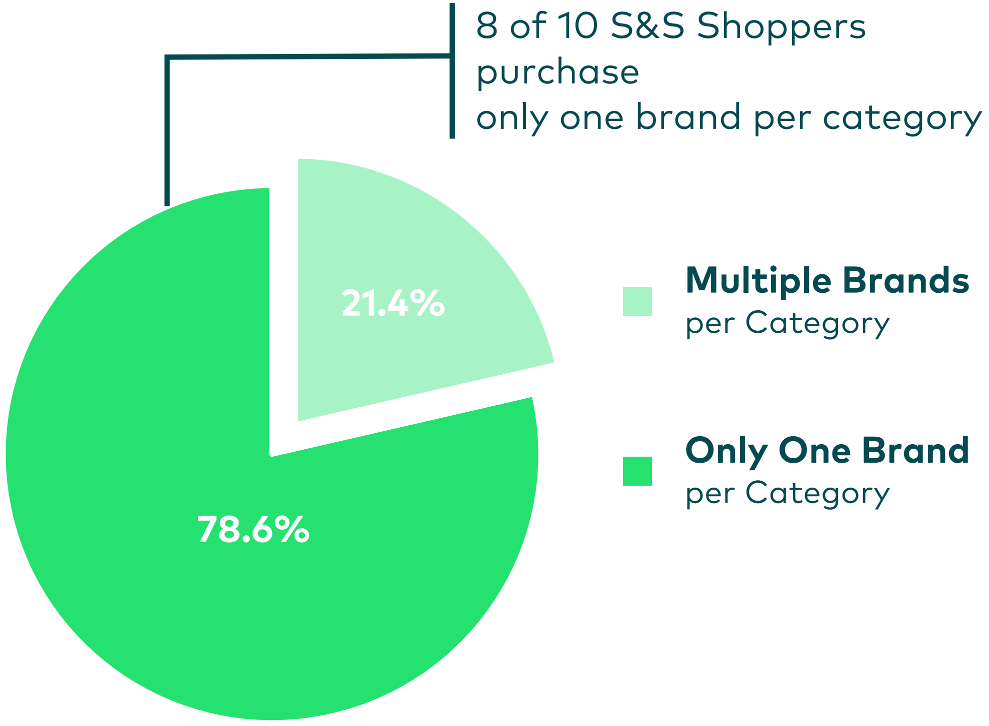
Numerator Insight; 03/1/2017- 02/28/2018; New Subscribe & Save Shoppers in the recent 6 months: 997 with qualified first purchases

Shoppers Are Brand Loyal When Using Subscribe & Save

Number of <u>Categories</u> Subscribed-To
% of Households, Last 52 Weeks

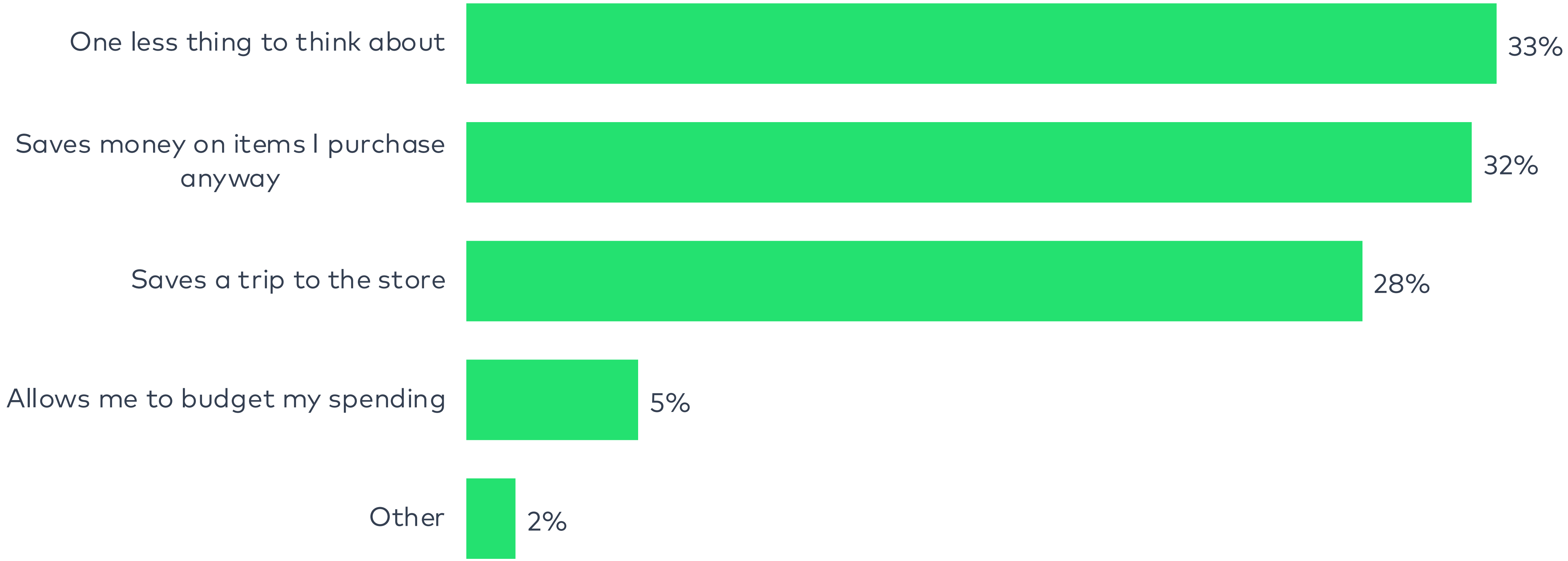


Number of <u>Brands</u> Subscribed-To
% of Households, Last 52 Weeks



Shoppers Use Subscribe & Save for Convenience

What is the biggest advantage of using Amazon Subscribe & Save?
% of Shoppers Responding



What Do You Dislike About Amazon Subscribe & Save?

PRICE FLUCTUATION

“ I don't like how the **prices fluctuate.**

“ That the **prices change** that you have to pay attention to it or the price may go up on an item and you won't know until it's actually time to ship it to you so I have to check it as soon as they notify my shipment is being prepared so that I don't overpay.

“ Some prices are higher than in-store. **Can't use coupons**. Some items not available to subscribe to. Items I subscribe to are sometimes out of stock on next delivery date.

NOT ENOUGH FLEXIBILITY

“ You might forget about it and **not need the item anymore.**

“ Having **too many or not enough** diapers if my kids use more than normal or less than normal.

“ I need **more choices of time intervals for delivery**. For example; Pet Food, my pets don't eat all the food I ordered in the time interval. I have to cancel orders.

Numerator Survey Analysis; Custom Study; 514 Subscribe and Save Users; 03/20/2017-03/22/2018

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How does Subscribe & Save affect Retailers?

Pet, Mass, and Club Channels: All Affected by Subscribe & Save

% Change in Share of Wallet, Key Channels
All Categories, Subscribe & Save Shoppers who joined in the recent 6 months

	PET	BABY	FOOD	HOUSEHOLD
CATEGORIES	• Dog Food & Treats • Dog Supplies • Cat Food & Treats • Cat Supplies	• Disposable Diapers • Baby & Toddler Wipes	• Coffee • Snack Cakes & Bars	• Bath Tissue • Dishwasher Detergent • Laundry Detergent
CHANNELS with Biggest Loss in Share of Wallet	**Specialty Pet** -4.0%	**Mass** -7.1%	**Club** -1.2%	**Mass** -4.7%

Numerator Insights; Brand Insights Module; Pre-period: 03/05/2017- 08/31/2018; Post-period: 09/01/2017-02/28/2018; New to Subscribe and Save Shoppers: 1,245

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Amazon continues to innovate

BRIEF

Amazon moves Prime Pantry to subscription model

AUTHOR
Daphne Howland
@daphnehowland

PUBLISHED
March 12, 2018

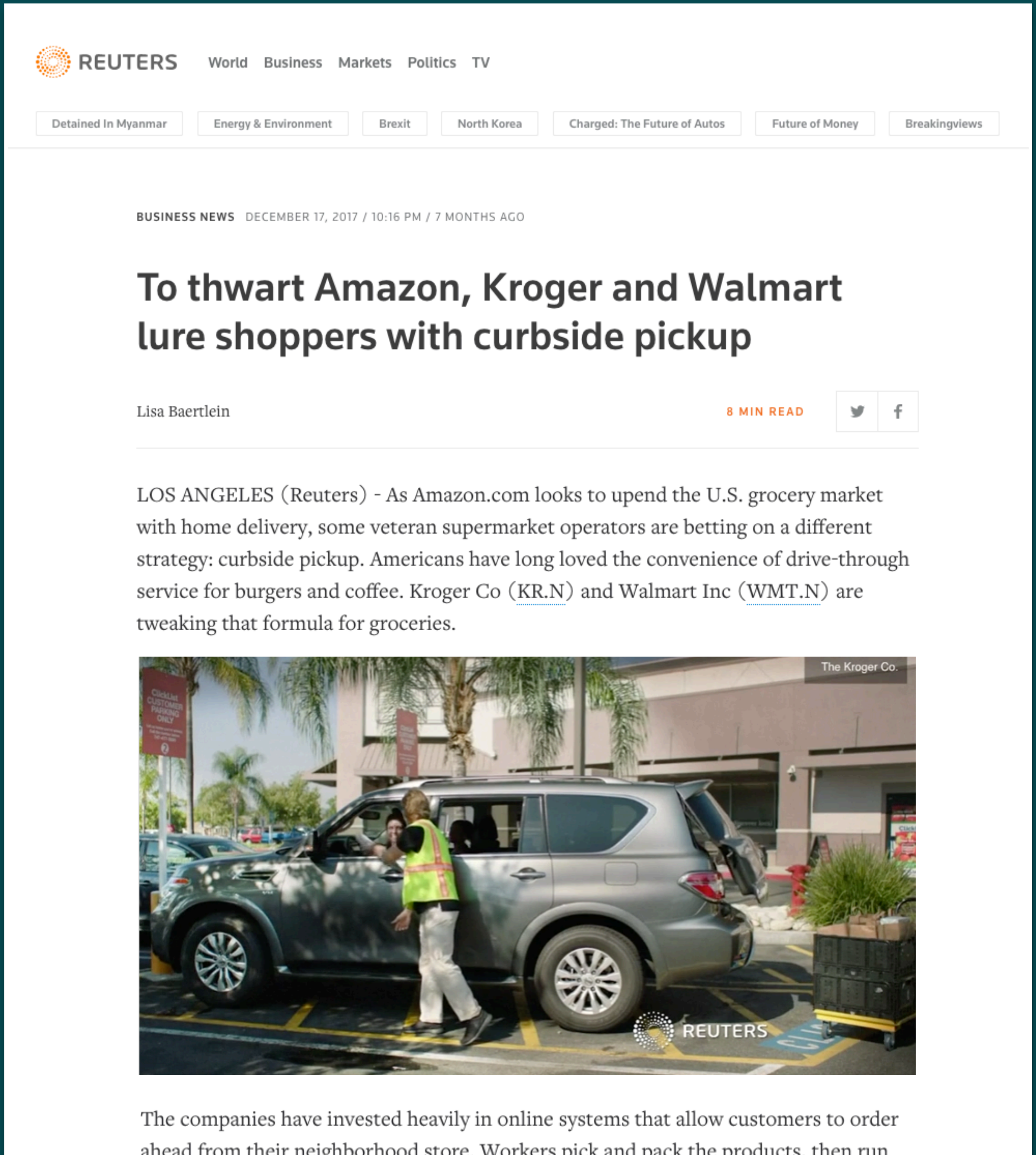
SHARE IT

Dive Brief:

- Amazon is gradually shifting its U.S. Prime Pantry program for household items to a subscription model, an Amazon spokesperson confirmed to Retail Dive in an email.
- Prime members opting for the program can sign up for a free 30-day trial, after which they will automatically be charged $4.99/month (on top of their $99 annual Prime fee) to continue the service (which can be canceled at any time), the spokesperson said. Subscribers receive

How have retailers responded?

Click & Collect



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BUSINESS NEWS DECEMBER 17, 2017 / 10:16 PM / 7 MONTHS AGO

To thwart Amazon, Kroger and Walmart lure shoppers with curbside pickup

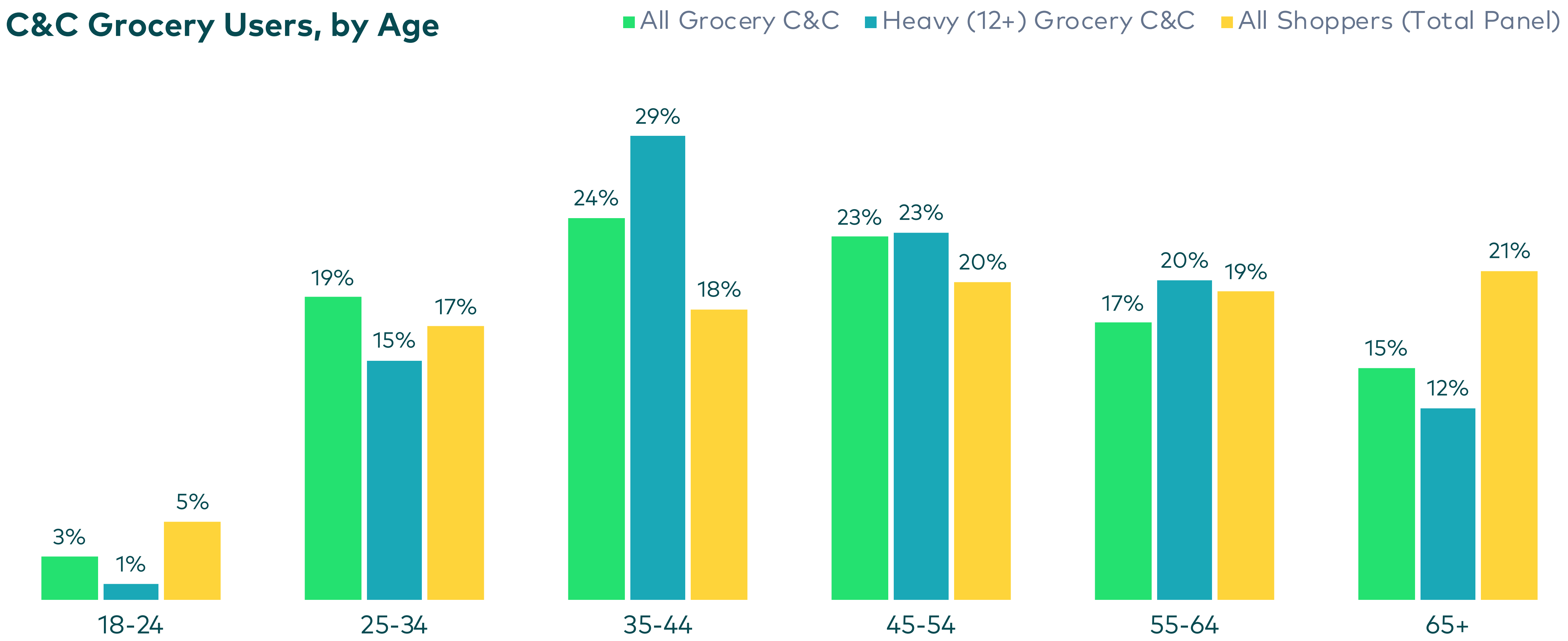
Lisa Baertlein

8 MIN READ

LOS ANGELES (Reuters) - As Amazon.com looks to upend the U.S. grocery market with home delivery, some veteran supermarket operators are betting on a different strategy: curbside pickup. Americans have long loved the convenience of drive-through service for burgers and coffee. Kroger Co (KR.N) and Walmart Inc (WMT.N) are tweaking that formula for groceries.

The companies have invested heavily in online systems that allow customers to order ahead from their neighborhood store. Workers pick and pack the products, then run

Age Demographic Is the Same as Amazon



Source: Numerator Insights, 12M Ending March 2018, Bought Grocery Sector (Food & Beverage) Products through C&C, All Buyers n=4,759, 1-time buyers n=2718, 2-time buyers n=702, 3+ time buyers n=1,339, 12+ time buyers n=265
Channels include Grocery, Mass, Club

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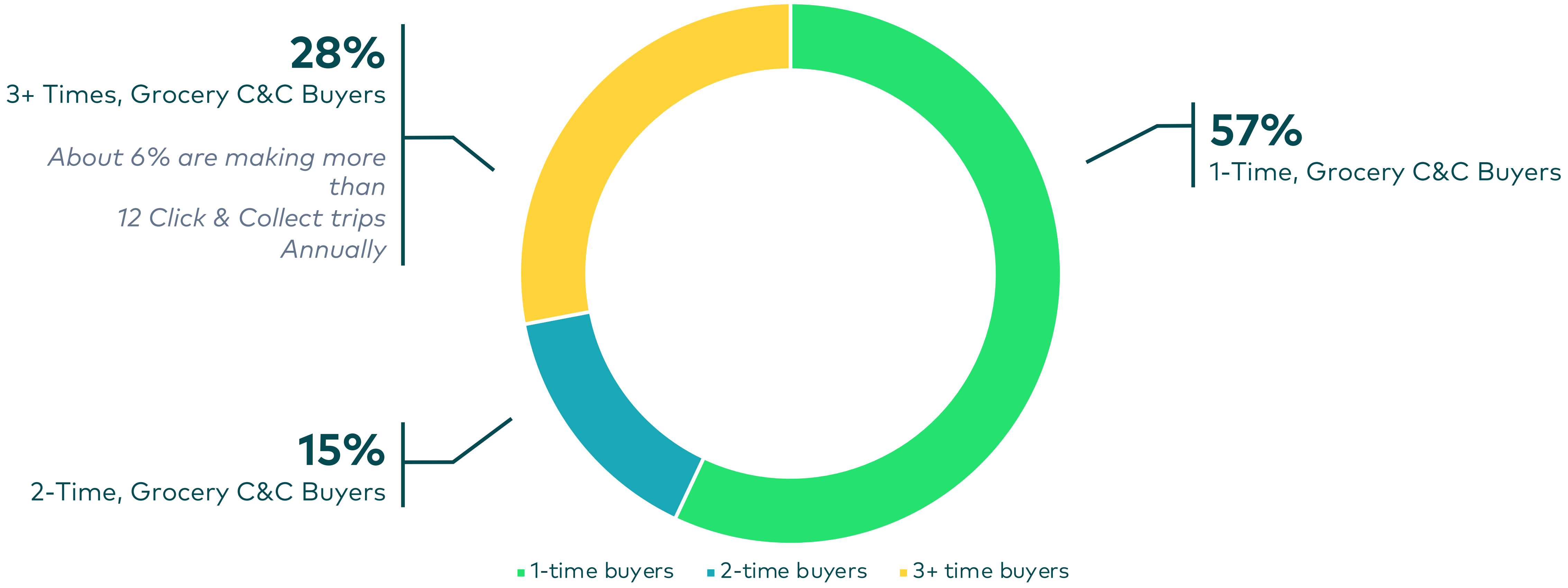
Click & Collect Usage Is Infrequent for Purchases in Grocery

C&C Grocery Users, by Frequency



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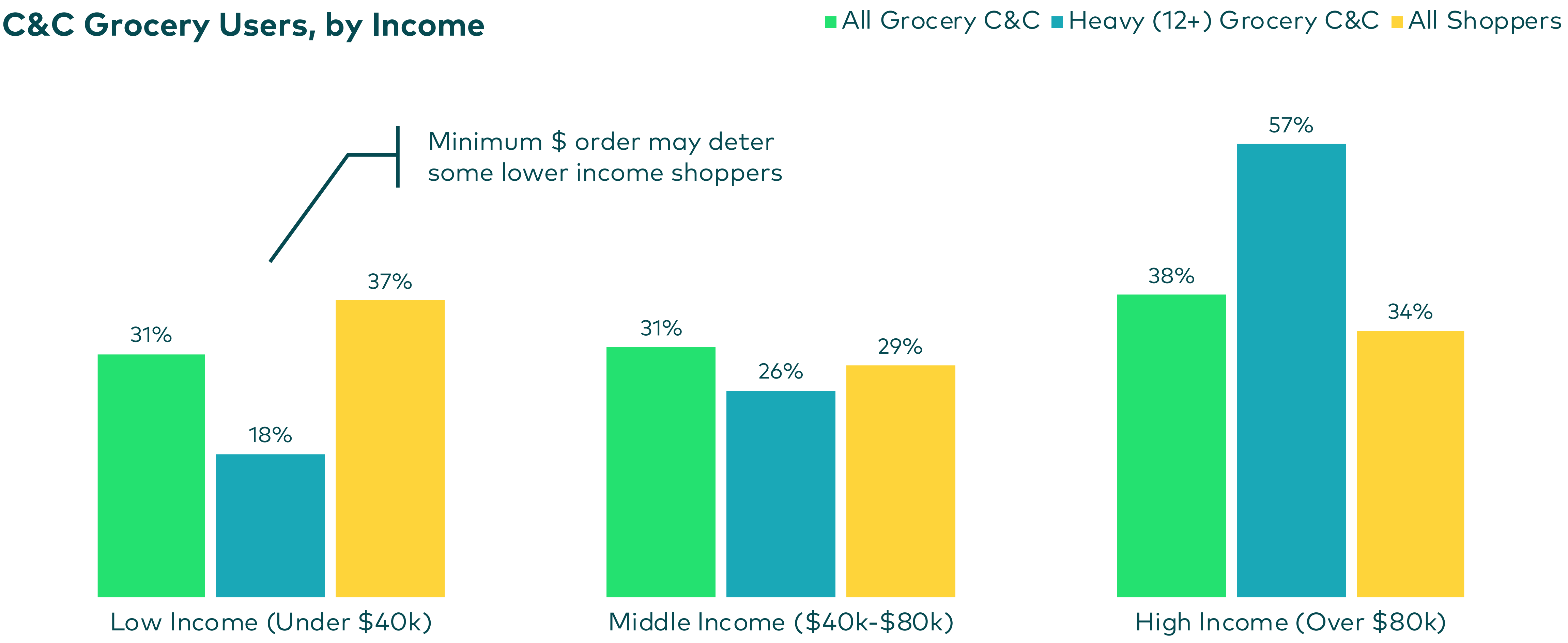
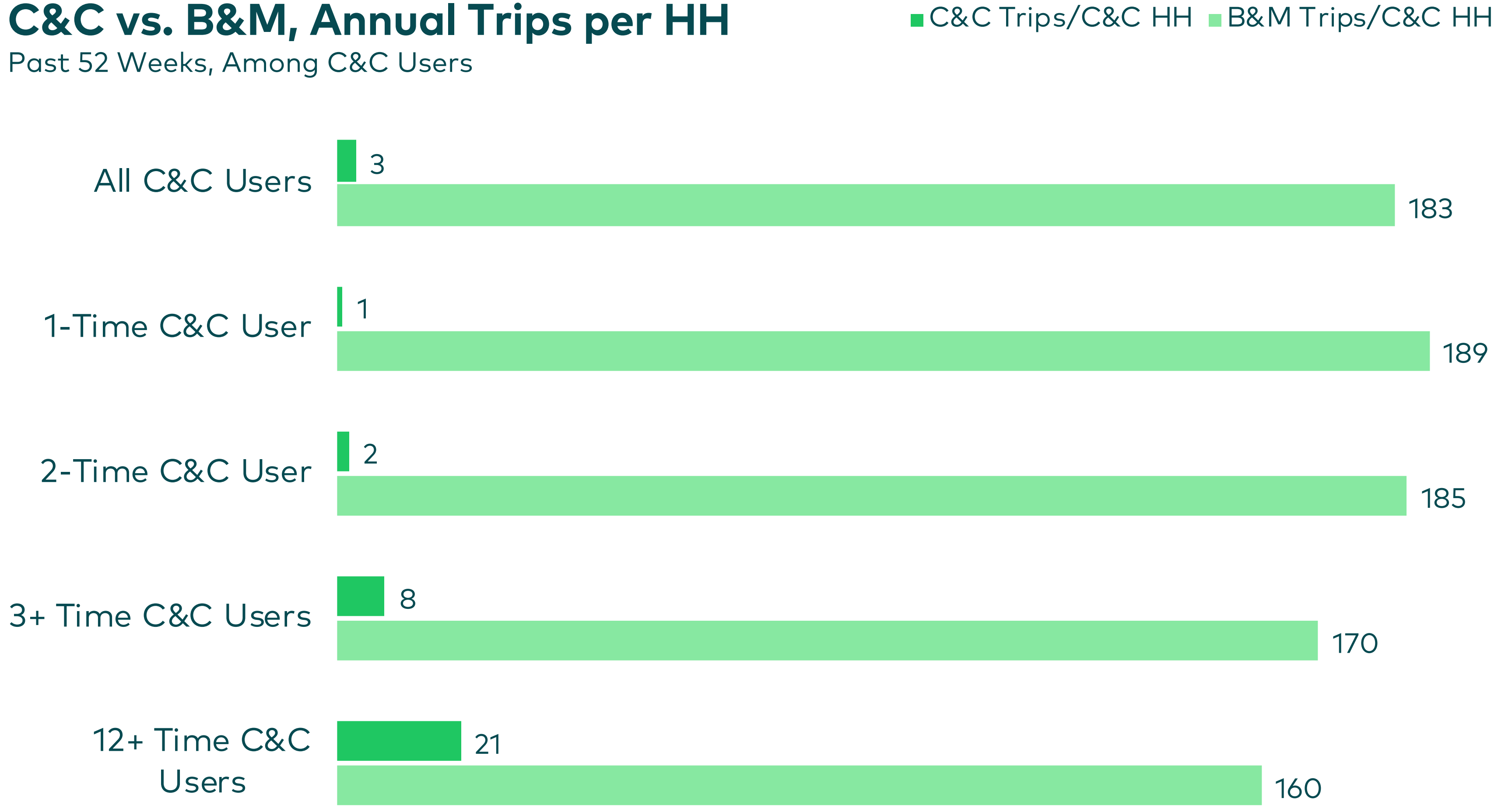
Click & Collect Shoppers Skew Higher Income



Source: Numerator Insights, 12M Ending March 2018, Bought Grocery Sector (Food & Beverage) Products through C&C, All Buyers n=4,759, 12+ time buyers n=265
Channels include Grocery, Mass, Club

Click & Collect Trips Replace B&M Trips, Over Time

C&C vs. B&M, Annual Trips per HH
Past 52 Weeks, Among C&C Users



OF B&M TRIPS, PER C&C TRIP
57
189
93
20
8

Source: Numerator Insights, 12M Ending March 2018, Bought Grocery Sector (Food & Beverage) Products through C&C, All Buyers n=4,759, 1-time buyers n=2718, 2-time buyers n=702, 3+ time buyers n=1,339, 12+ time buyers n=265
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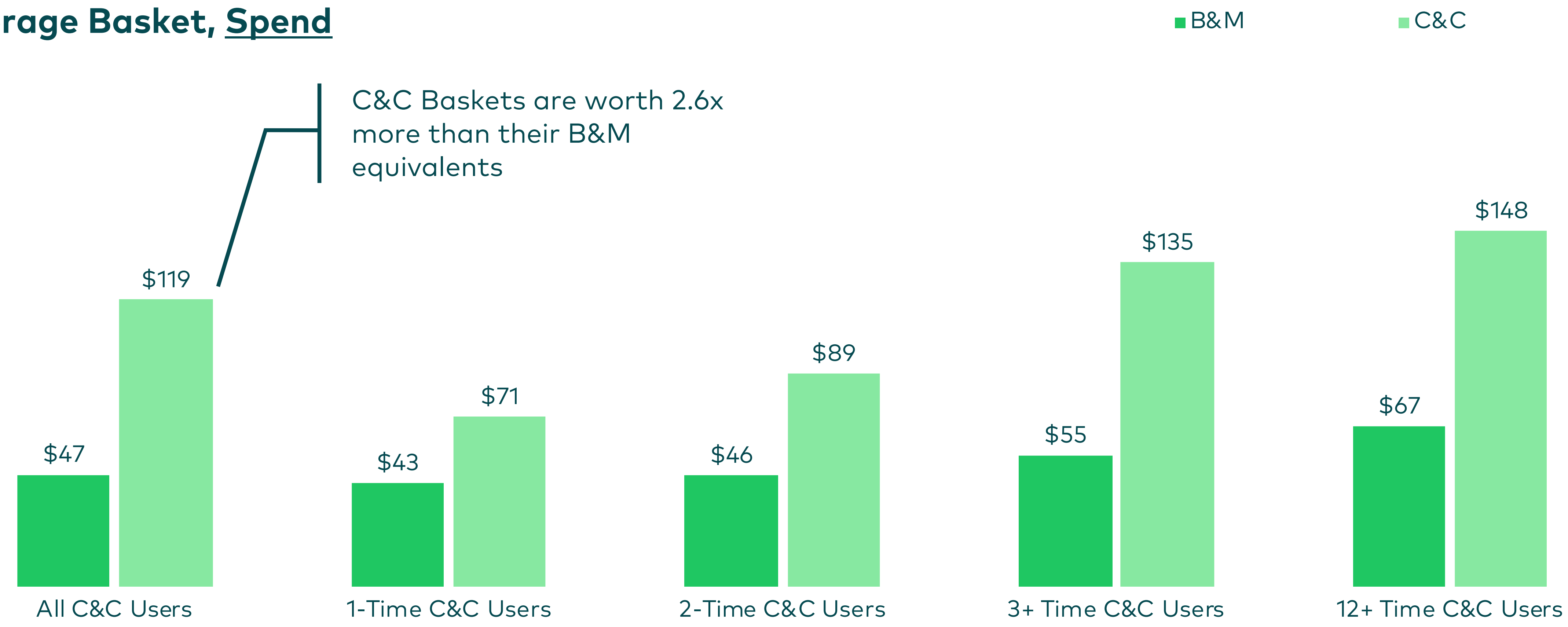
Click & Collect Transactions Have Higher Basket Value

Average Basket, Spend



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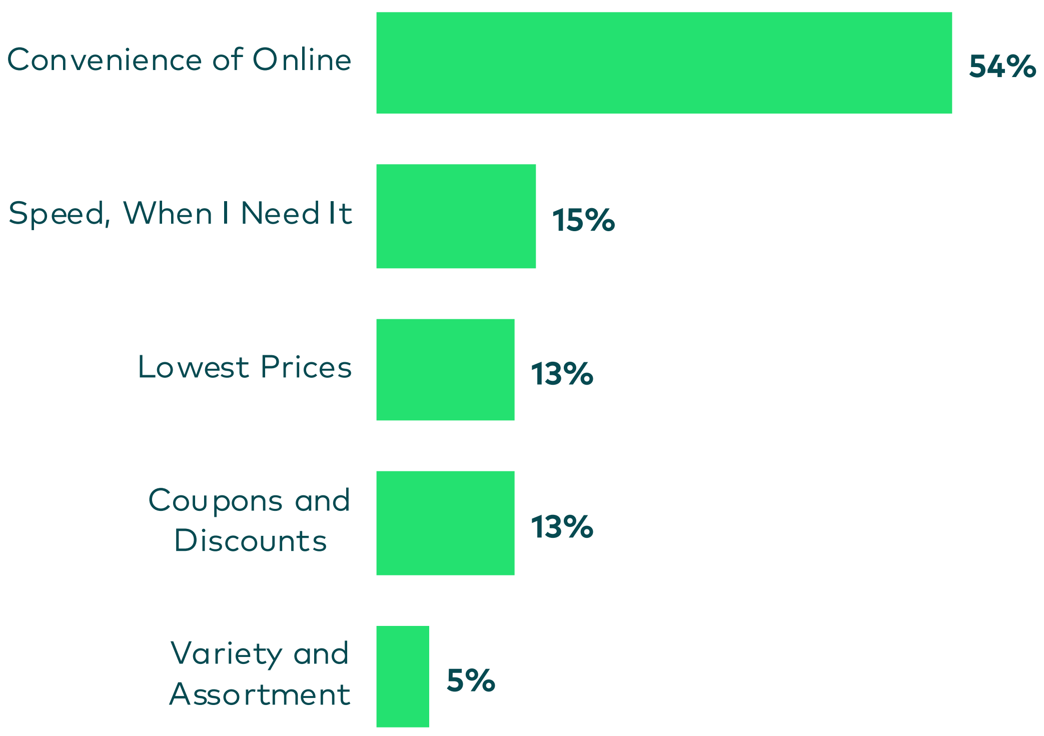
Channels include Grocery, Mass, Club

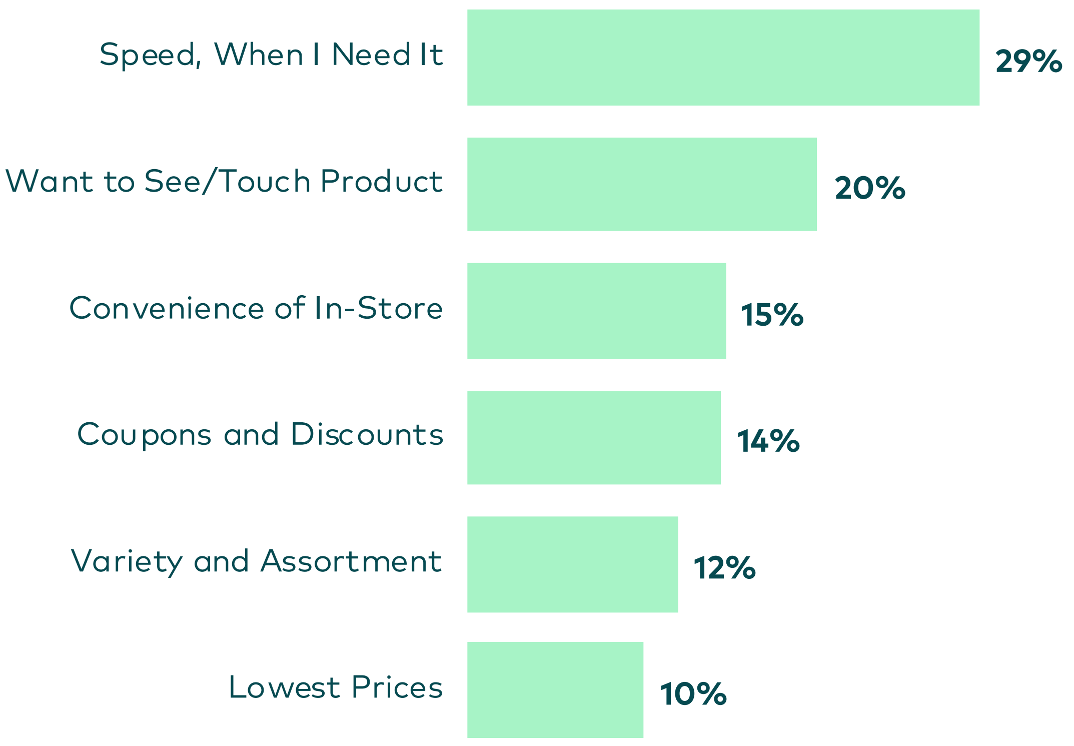
The Convenience of Click & Collect Is Its Main Driver

While urgency of product needs and general preference to see/touch products is typically driving C&C Users to In-Store experiences

Drivers: Click & Collect over In-Store



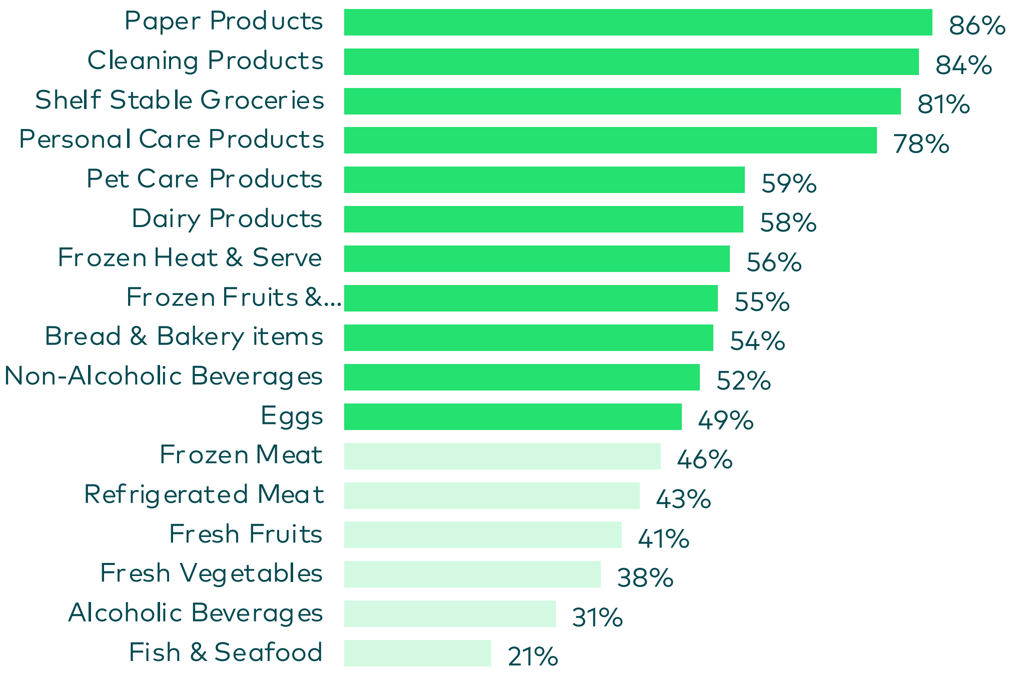
Drivers: In-Store over Click & Collect



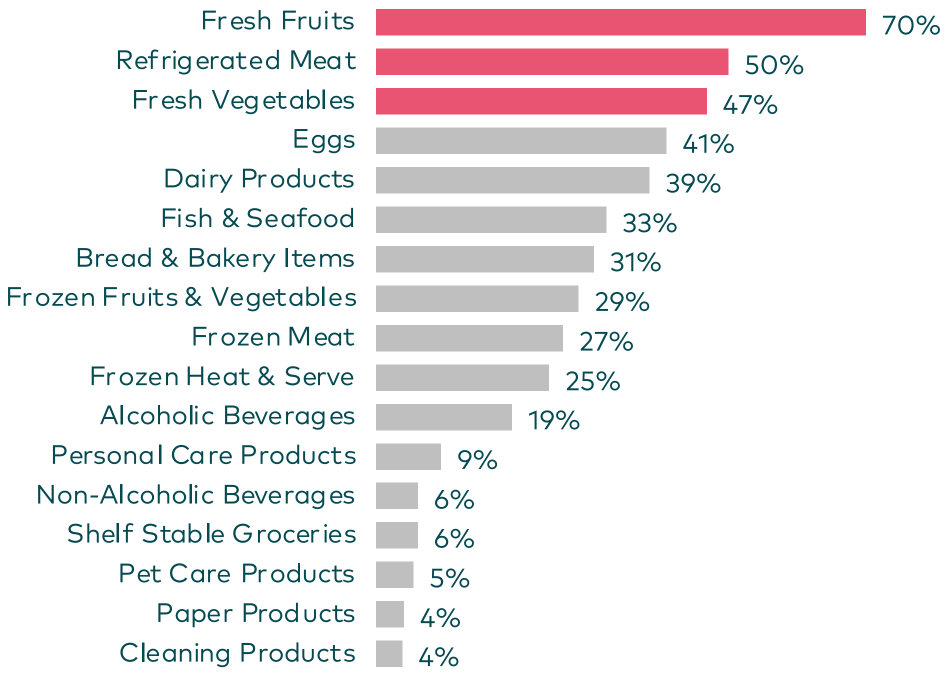
Source: Numerator Insights Custom Survey, Past Month C&C Users, n=456

There Are Certain Categories that Still Drive B&M Trips

Sure, I'll Buy That Online!



Hmm, Want to See It In-Store First



What would get you to try a food item online that you haven't tried before?

71%
Sample or Free Trial

57%
Sale or Promotion

36%
Positive Reviews or Ratings

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Understanding Bricks → to → Clicks is table stakes

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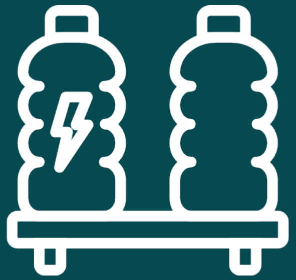


Private Label
is a growing blind spot

Private Label is Big, Pervasive, and Growing

100% of U.S. households buy Private Label

Shoppers make a Private Label purchase once every 5 days

$146 Billion spent across all channels

Almost $1,200 annually per household across all categories
That's 20% of annual spending

$2.82 Average Unit Price for Private Label

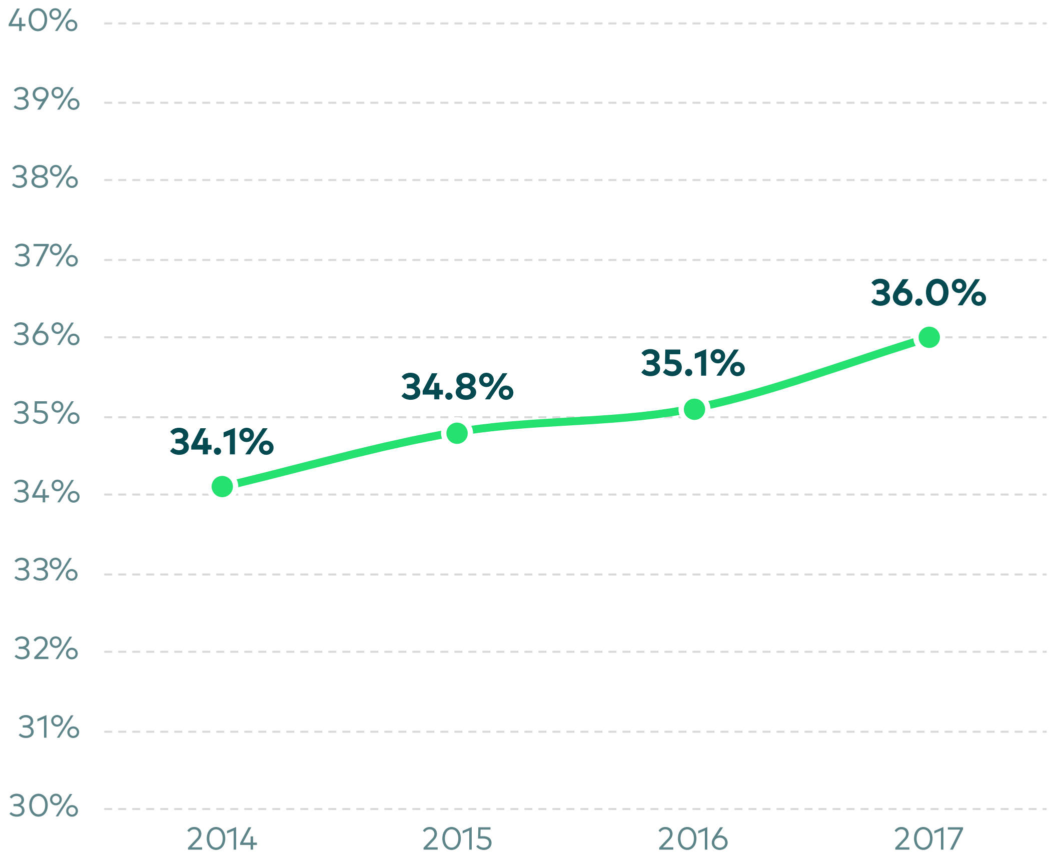
Average Basket Unit Price
$3.45 (Index: 81)

Numerator Insights: 1/1/2017-12/31/2017

More Categories Being Adopted for Private Label Purchases

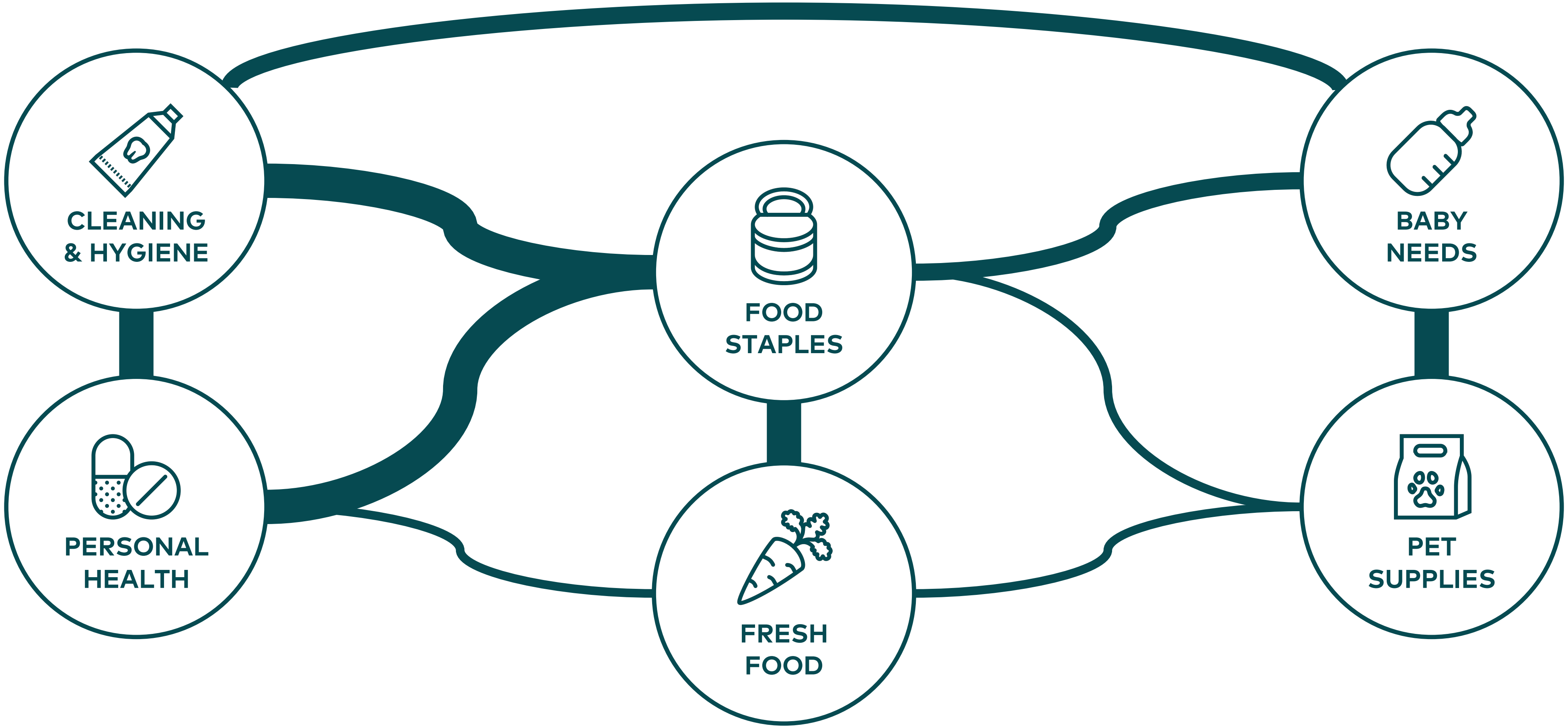
- A typical U.S. household will buy roughly 150 categories in a year
  - Across Grocery, Health & Beauty, Household Goods, Pet, and Baby
- Last year, those same households bought Private Label in about 54 categories
  - 36% of categories
- Over the past 3 years, shoppers have added 3-4 new categories where they choose to buy Private Label products

Categories with a Private Label Purchase



Private Label Categories Build Upon One Another

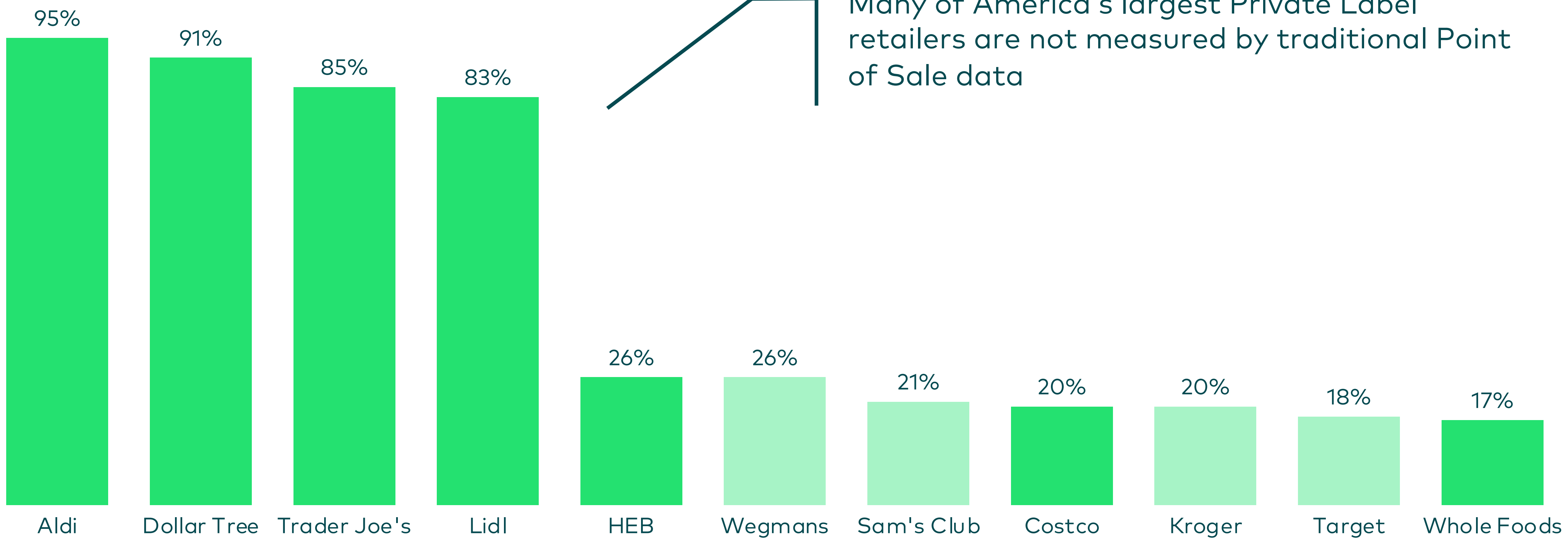
- Shoppers enter Private Label through Food Staples, then related categories follow



Numerator Insights: 1/1/2017-12/31/2017. Principal Components Analysis across all Private Label buyers and categories. Not shown: Toys, Apparel, Housewares, Diet/Nutrition

Private Label Is a Significant Blindspot

Private Label, as % of Total Store Sales, Top 50 US Retailers



Many of America's largest Private Label retailers are not measured by traditional Point of Sale data

Numerator Insights: 1/1/2017-12/31/2017

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Walmart and Aldi Lead in Private Label – Target Falls

- Aldi tops Kroger, now the 2nd largest seller of Private Label in the U.S
- By 2021, Aldi will top Walmart and become the largest seller of traditional FMCG Private Label products in the United States
- Target drops from 2nd to 4th, as other retailers accelerate their growth in Private Label

TOTAL PRIVATE LABEL SALES, FMCG			
RANK	2015	2016	2017
#1	Walmart	Walmart	Walmart
#2	Target	Kroger	ALDI
#3	Kroger	ALDI	Kroger
#4	ALDI	Target	Target
#5	Costco	Costco	Costco

Numerator Insights: 1/1/2017-12/31/2017

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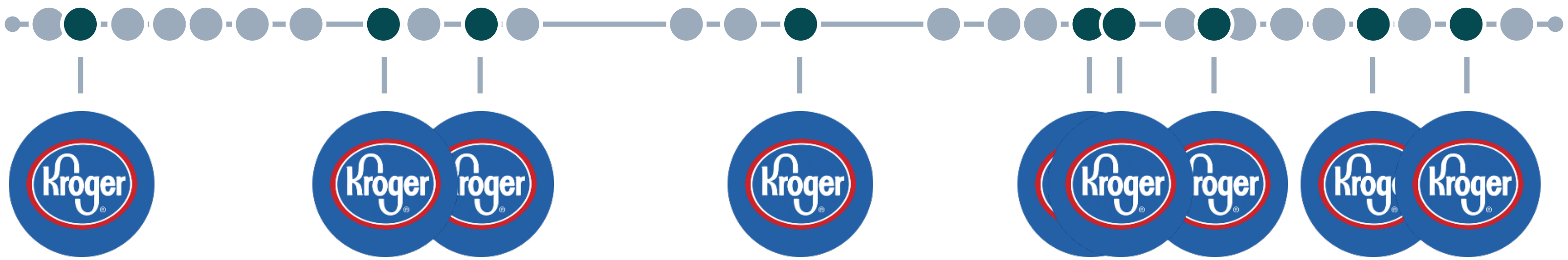
Does buying Private Label make us more or less loyal to a retailer?

KAREN'S POPCORN JOURNEY

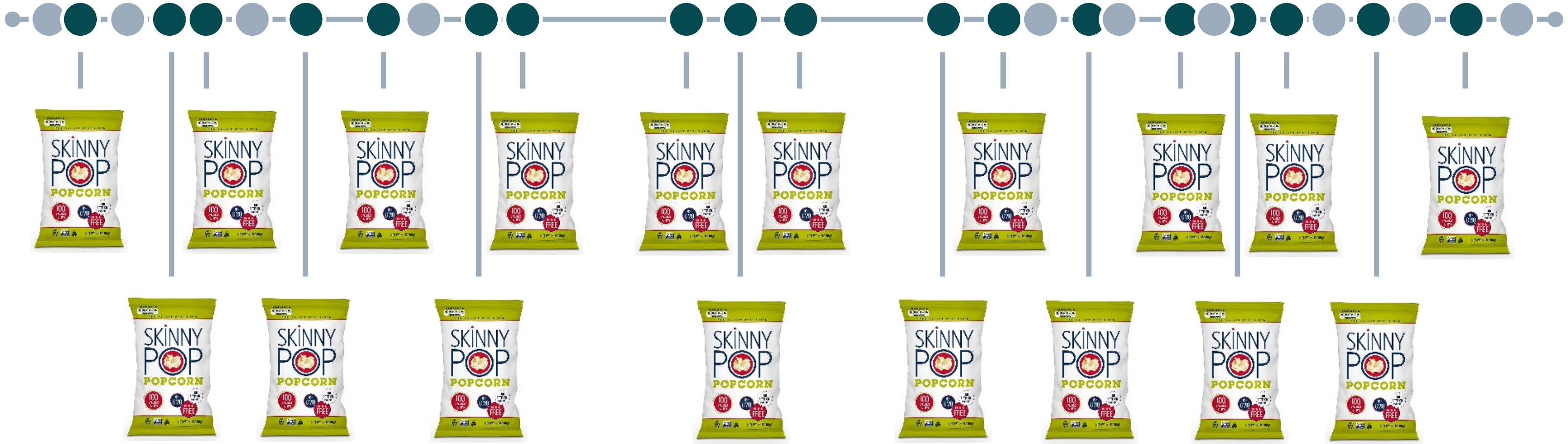
A look at how Private Label purchases have impacted one panelist's behavior

Karen purchases popcorn regularly, frequently at Kroger

JAN 2016 DEC 2017



She generally buys branded popcorn, Skinny Pop most often



Numerator Insights: 1/1/2016-12/31/2017. Analysis looks at 1 household (n=1) over a 2 year timeframe within RTE Popcorn

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KAREN'S POPCORN JOURNEY

A look at how Private Label purchases have impacted one panelist's behavior

May 2017, Karen bought Private Label popcorn for the first time

JAN 2016 MAY 2017 DEC 2017

First Private Label buy in this category, at Kroger

Second and third P.L. purchases, at Trader Joes

Numerator Insights: 1/1/2016-12/31/2017. Analysis looks at 1 household (n=1) over a 2 year timeframe within RTE Popcorn

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KAREN'S POPCORN JOURNEY

A look at how Private Label purchases have impacted one panelist's behavior

Kroger's Share of Wallet increased after Karen tried Private Label

JAN 2016 MAY 2017 DEC 2017

Kroger's Share of Wallet for Popcorn *before* buying Private Label

26%

Kroger's Share of Wallet for Popcorn *after* buying Private Label

37%

	BEFORE 1st PURCHASE	AFTER 1st PURCHASE	INDEX
Average Unit Price at Kroger	$3.66	$3.07	84
Average Unit Price at Other Retailers	$5.23	$3.23	62
Share of Spend	26%	37%	142

Numerator Insights: 1/1/2016-12/31/2017. Analysis looks at 1 household (n=1) over a 2 year timeframe within RTE Popcorn

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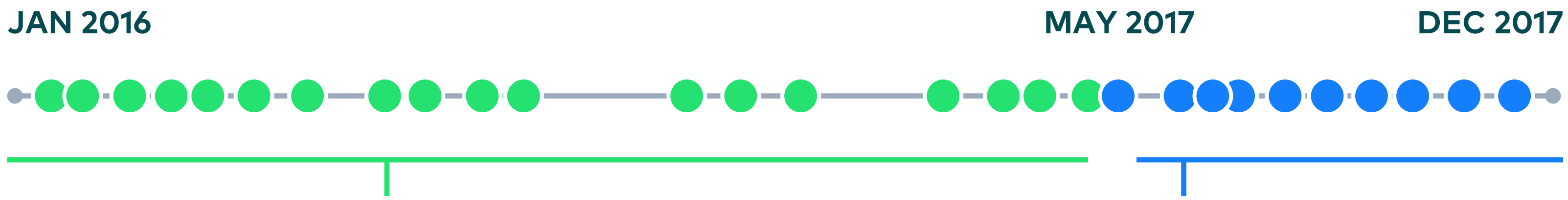
KAREN'S POPCORN JOURNEY

A look at how Private Label purchases have impacted one panelist's behavior

But, Average Unit Price decreased, and her overall spend declined



Kroger's Share of Wallet for Popcorn
before *buying Private Label*
26%

Kroger's Share of Wallet for Popcorn
after *buying Private Label*
37%

	BEFORE 1st PURCHASE	AFTER 1st PURCHASE	INDEX
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Average Unit Price at Other Retailers	$5.23	$3.23	62
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Numerator Insights: 1/1/2016-12/31/2017. Analysis looks at 1 household (n=1) over a 2 year timeframe within RTE Popcorn

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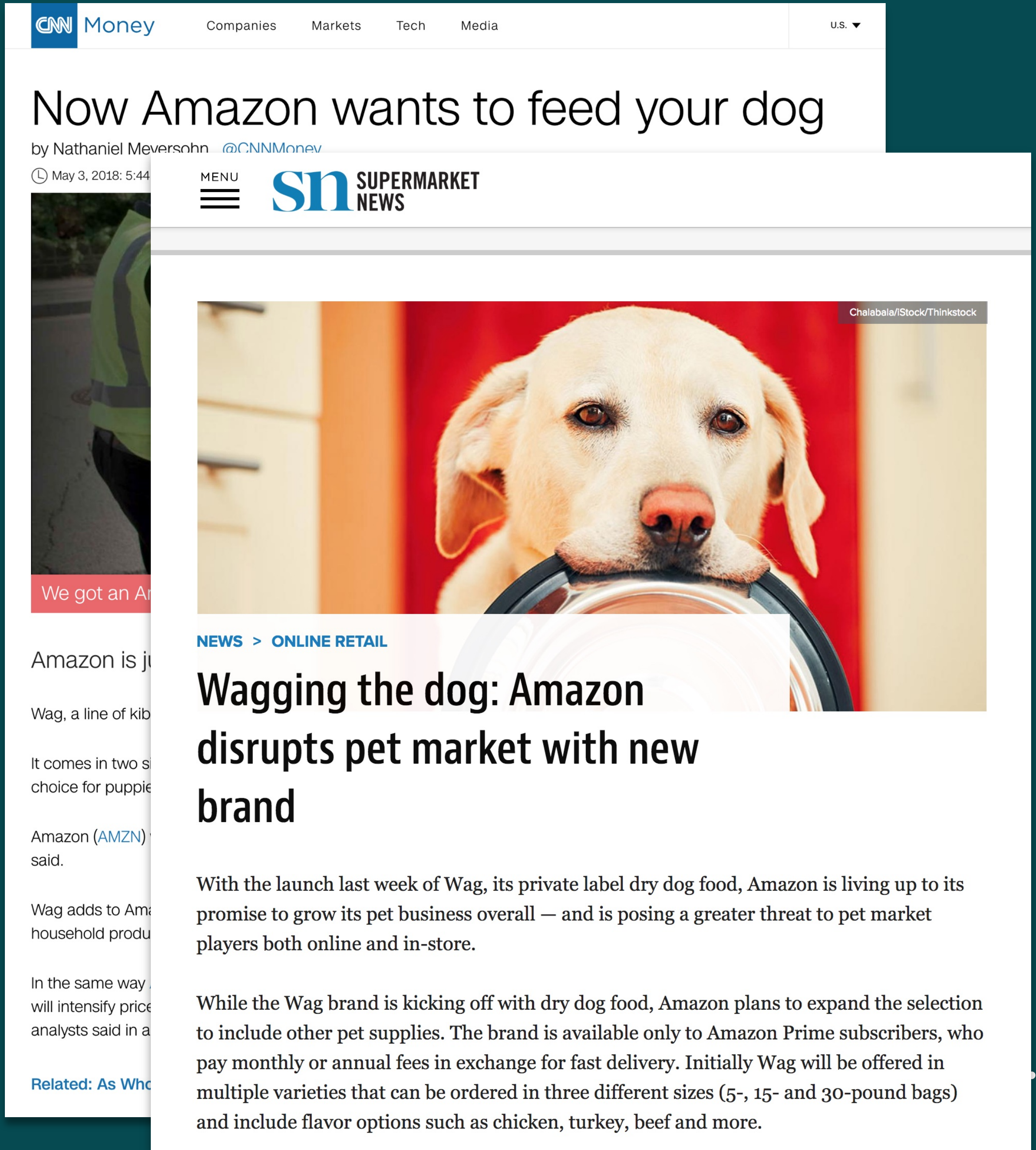
Numerator can scale this across all our panelists and measure the true impact of Private Label

Numerator Insights: 1/1/2016-12/31/2017. Analysis looks at 53,000 households over a 2 year timeframe across all categories in Grocery, Household, Pet, Baby, and Health & Beauty

Ecommerce Effect

meet

Private Label Paradox


CNN Money Companies Markets Tech Media U.S.

Now Amazon wants to feed your dog

by Nathaniel Meyersohn @CNNMoney

May 3, 2018: 5:44

We got an A

Amazon is j

Wag, a line of kib

It comes in two s
choice for puppie

Amazon (AMZN)
said.

Wag adds to Ama
household produ

In the same way
will intensify price
analysts said in a

Related: As Who

MENU sn SUPERMARKET NEWS

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NEWS > ONLINE RETAIL

Wagging the dog: Amazon disrupts pet market with new brand

With the launch last week of Wag, its private label dry dog food, Amazon is living up to its promise to grow its pet business overall — and is posing a greater threat to pet market players both online and in-store.

While the Wag brand is kicking off with dry dog food, Amazon plans to expand the selection to include other pet supplies. The brand is available only to Amazon Prime subscribers, who pay monthly or annual fees in exchange for fast delivery. Initially Wag will be offered in multiple varieties that can be ordered in three different sizes (5-, 15- and 30-pound bags) and include flavor options such as chicken, turkey, beef and more.

Americans are eating out more than ever before

The Washington Post

“That was the other shoe to drop,” said John Newton, the director of market intelligence at the American Farm Bureau Federation. “The on-the-go consumer leads to farmers getting a smaller share of the food total.”

Americans are eating out more than ever

The share of total food dollars spent away from home, at restaurants or other food service establishments.

Source: USDA ERS

On top of that, over the past decades, Americans have also embraced an incredible range of processed and prepared foods, from frozen pizzas and rotisserie chickens to meal-replacement bars, meal kits and riced vegetables. That trend is likely to accelerate, USDA predicts, because

Americans have nearly tripled their spend on eating out

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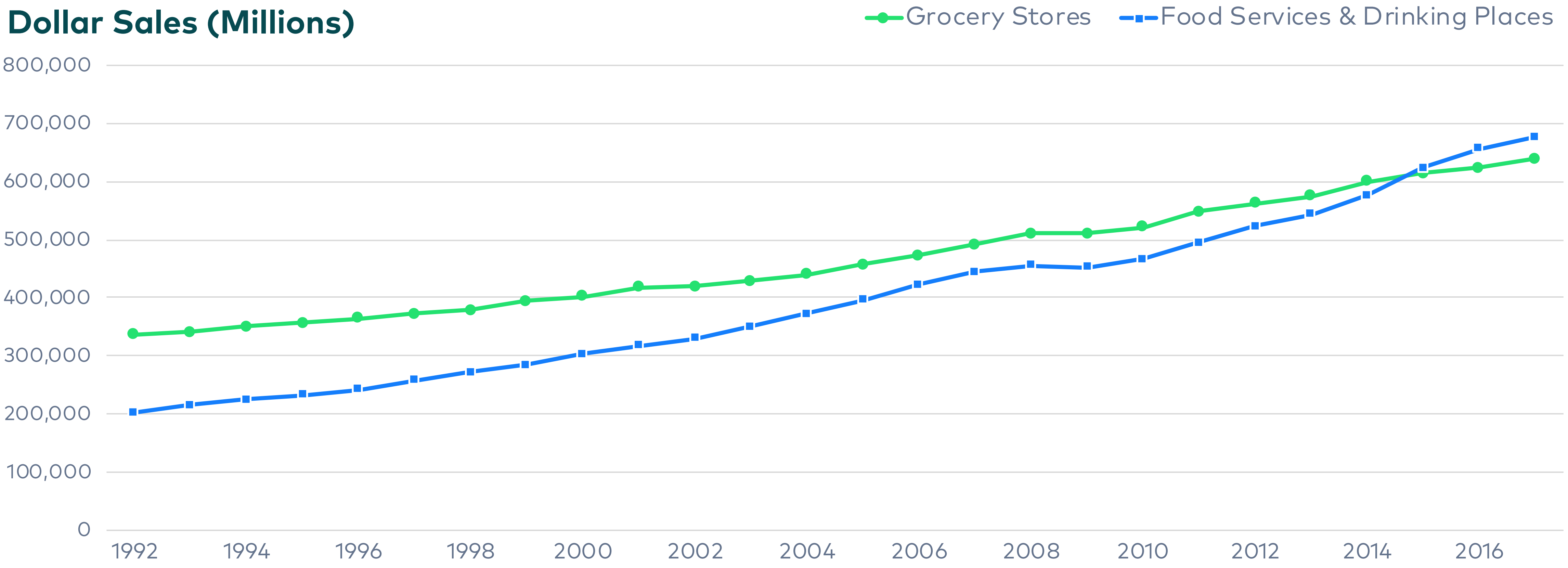
Restaurant Is Outpacing Grocery, No Signs of Stopping



Source: US Census, Retail Trade Report

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ELENA, ONE OF AMERICA'S BUSIEST SHOPPERS

- During one hectic day, a real panelist purchased from Drug, Club, Grocery (twice), QSR, and made an Online Food Delivery Order… the total day's spend was $149
- Each retailer only obtained a portion of the dollars they could have earned

FRI, 7:00AM
Lunch meat, Cold Medicine and Tissues
$34.36

FRI, 10:00AM
Toilet Gel and Apparel
$21.54

FRI, 10:30AM
Combo Meal with a Pepsi
$5.49

FRI, 5:00PM
Grocery Staples: Bread, Milk, Cereal and Chips
$49.71

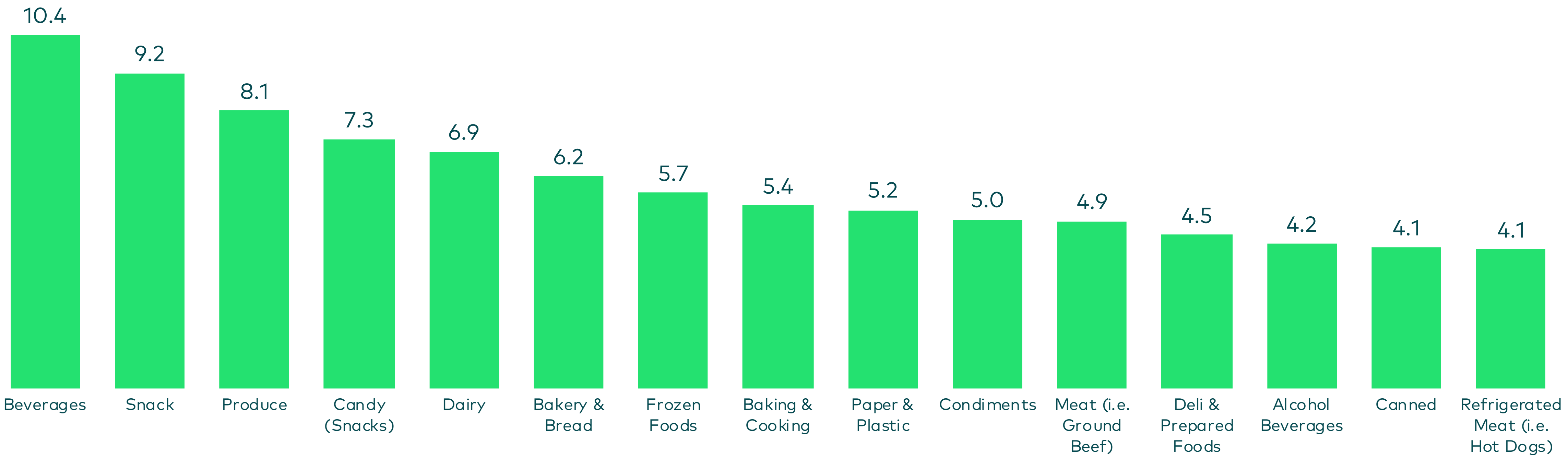
FRI, 6:00PM
Beer & Wine
$32.75

FRI, 7:00PM
McDonald's Delivery
2 Cheeseburger meal
$5.09

Traditional Grocery Alone Is a Battle for Share of Stomach

- Shoppers visited more than 10 different retailers for their non-alcoholic beverages and more than 4 different retailers for their refrigerated meat

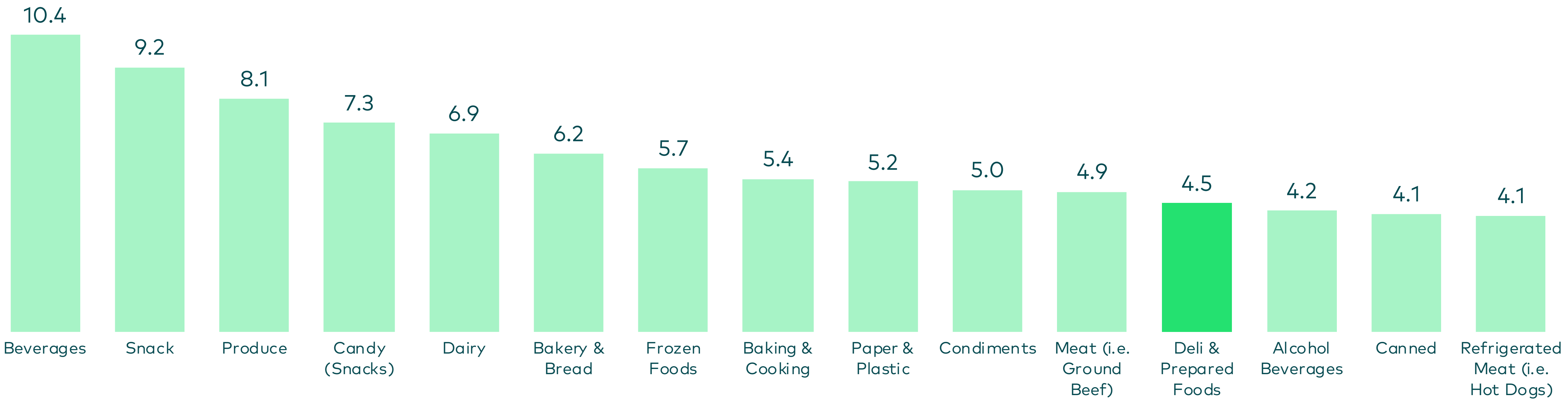
Avg. Unique Retailers per Department



Let's use Immediate Consumption purchases as an example

- Whether a fountain beverage or an entire meal, Deli and Prepared Food shoppers are looking for a convenient solution
- The challenge in this Department is the competitive options that span across multiple channels

Avg. Unique Retailers per Department



Numerator Insights: 52wks 6.9.2018; Static Panel n=94,858

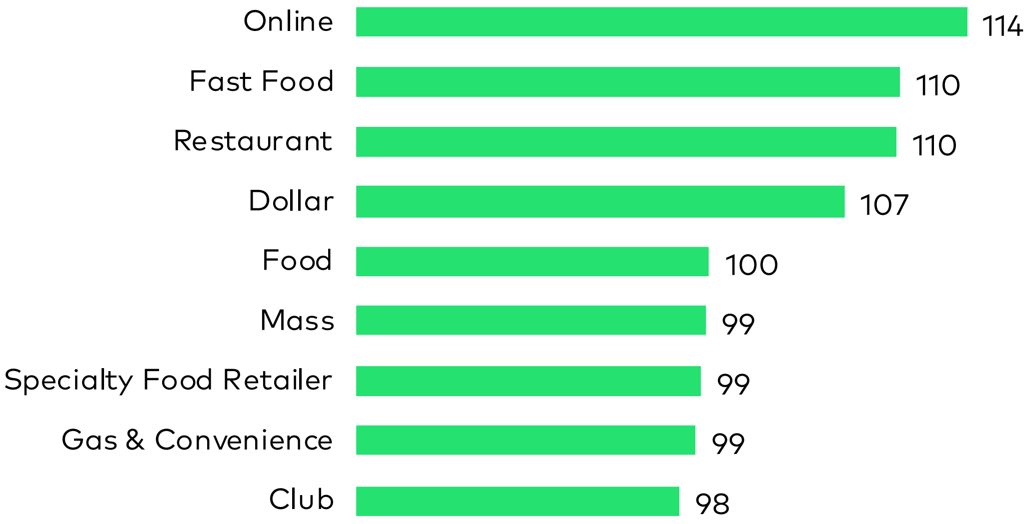
Numerator

Prepared Shoppers ARE Buying in the Blind Spot

- Over the past year, ***Prepared Shoppers*** have increased their Food & Beverage purchases outside of traditional channels
- This interaction leads to a lower share of wallet for Grocery retailers, and increases trips for key occasions at immediate consumption outlets like Fast Food/QSR

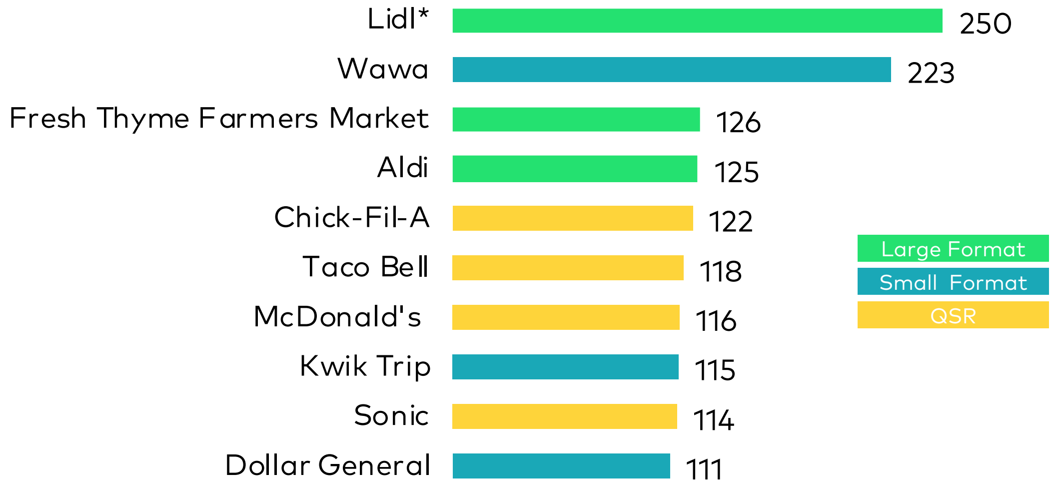
Food & Beverage Trips by Channel

Prepared Shoppers: Index vs. Year Ago



Food & Beverage Spend by Retailer

Prepared Shoppers: Index vs. Year Ago



Numerator Insights: 52wks 6.9.2018; Prepared Food Shoppers n=91,206 | *Lidl actual index 170,240 due to HH count vs. YA at same time

Numerator

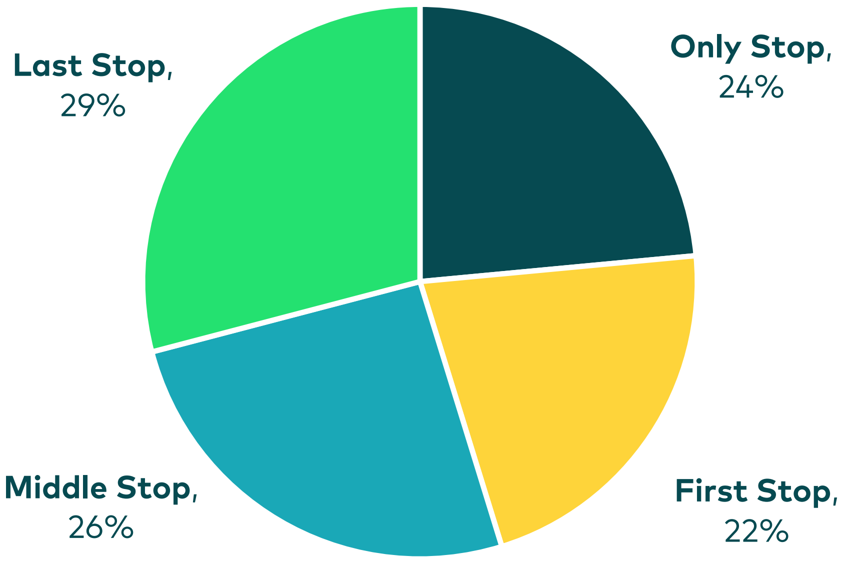
So in this competitive world,
how could YOU grow your share?

Inject a highly successful category (Energy Drinks) into an untapped channel (QSR)

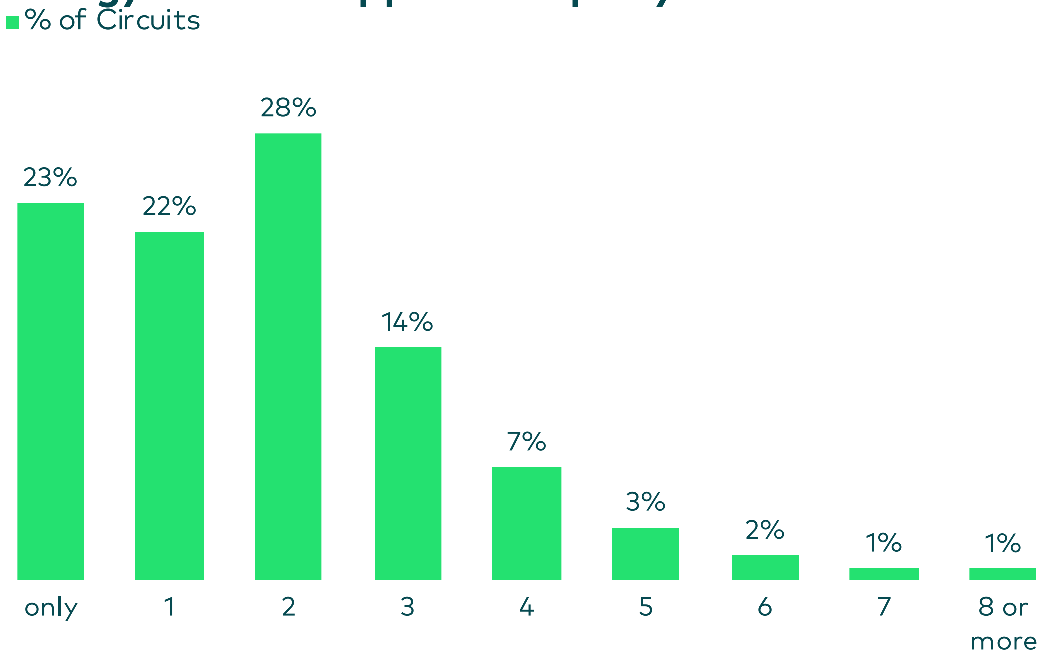
Energy Drink Trips Are Rarely Made On Their Own

- More than 70% of Energy Drink sales comes from C-Stores and over ¾ of those trips have another retail stop in the same day
- The majority of circuits only have a few stops

% of Circuits by Position of Trip

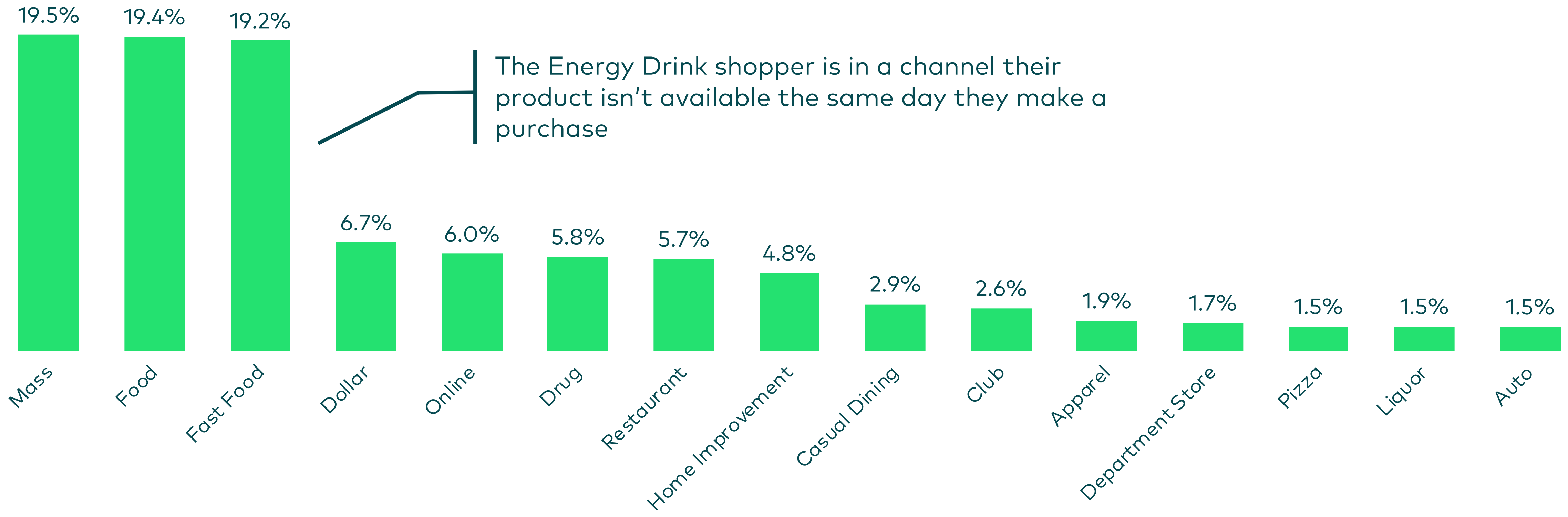


Energy Drink Shoppers' Stops by Circuit



Just as Likely to Visit Fast Food, as They Are Mass or Food

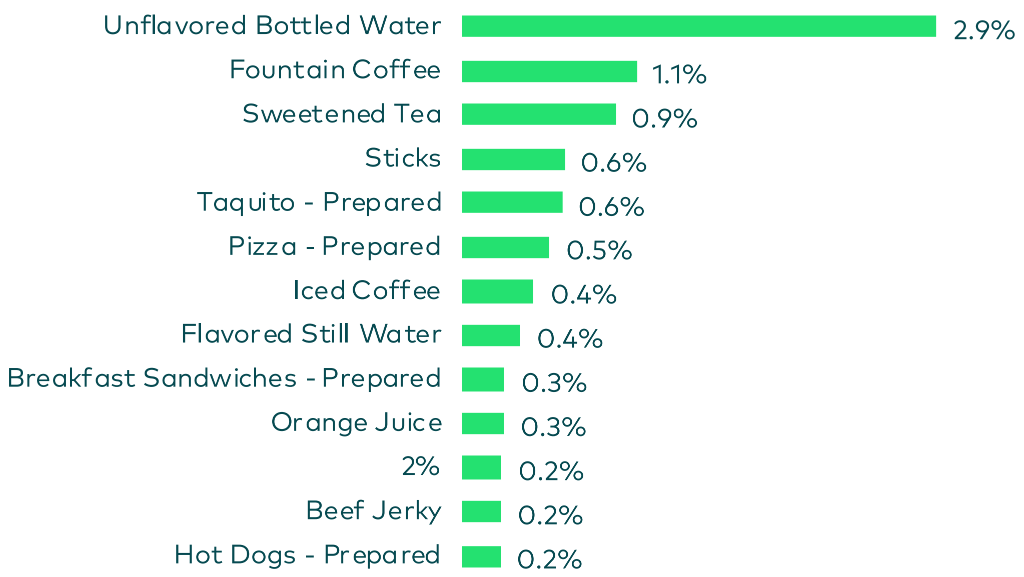
% of Trip Circuits by Channel



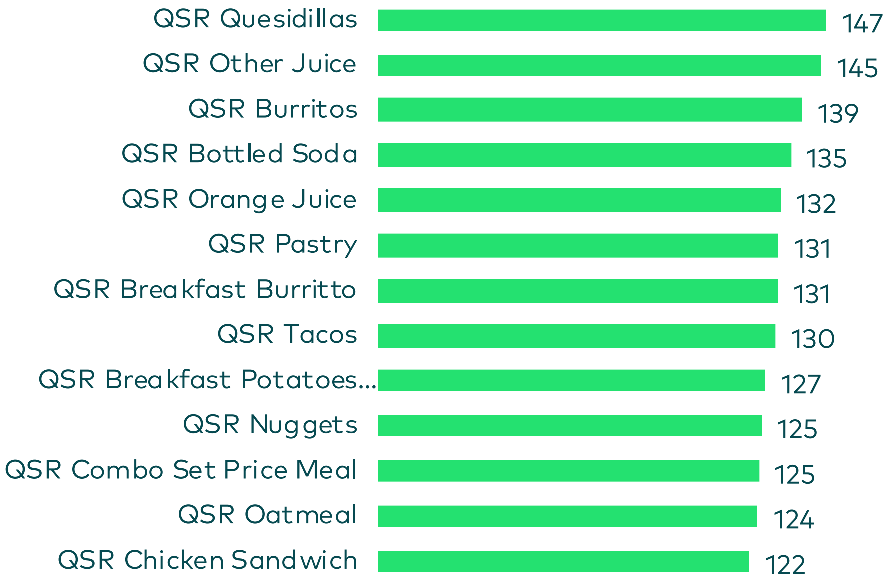
The Baskets Reveal the Potential for QSR to Convert Trips

- Beverage and prepared food options represent the highest share of Energy Drink baskets in Convenience
- These same shoppers are also interacting with similar categories when in QSR

Energy Drink Basket Affinity in Convenience



Energy Shopper QSR Cross-Purchase Index



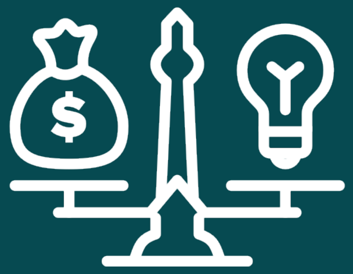
Numerator Insights: Energy Drink C-Store Shoppers – 52wks 5/6/18; n=11,376

Numerator

The value of just 1% of
Energy Drink Shopper Spend in Convenience

$137 mm

Retailers and brands risk losing out on growth opportunities if they are not monitoring their true Share of Stomach



Big Brands are being challenged by Big Ideas

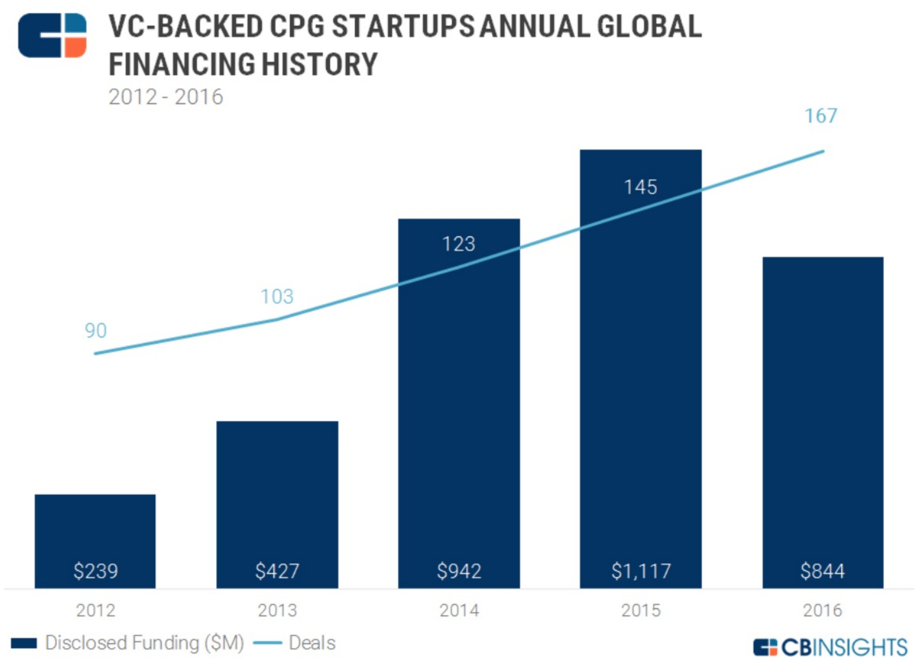
Numerator

Venture Capital for CPG Startups Has Tripled in 4 Years

CBINSIGHTS

CPG Startups Hit A New Deal High

VC-backed CPG companies raised 167 investment rounds in 2016 worth $844M in total disclosed funding, compared to 145 deals worth over $1.1B in 2015. Helping drive this growth, we saw deals flow to startups offering all-natural food and beauty products, personalization, and direct-to-consumer distribution models.



QUARTERLY VC-BACKED DEALS AND DOLLARS

COMPANIES TO WATCH

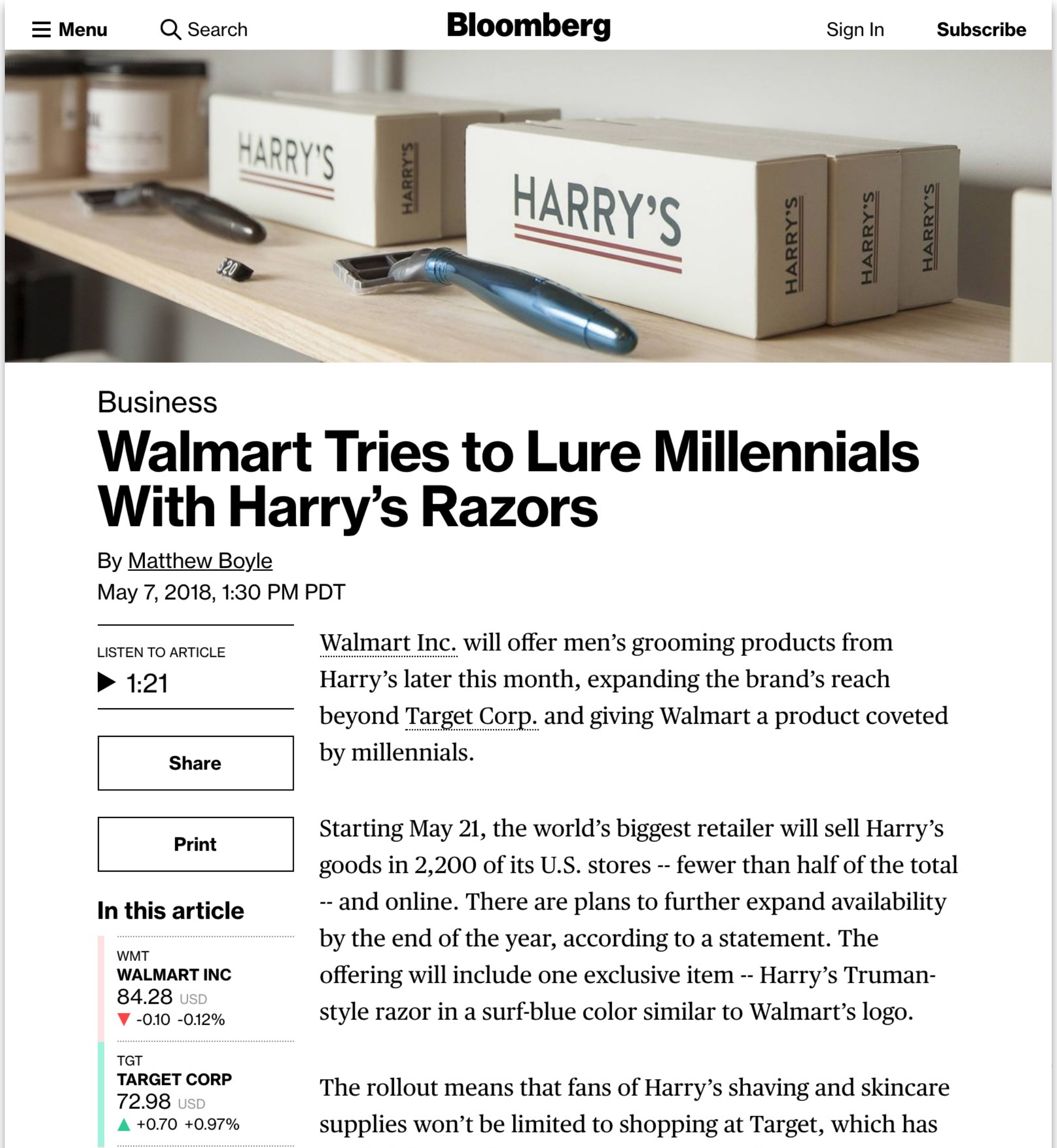
THRIVE MARKET — **$111M** Series B

ripple — **$30M** Series B

BEYOND MEAT — **$23M** Series F

Subscription Service...

Expands to B&M



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Business

Walmart Tries to Lure Millennials With Harry's Razors

By Matthew Boyle
May 7, 2018, 1:30 PM PDT

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▶ 1:21

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WMT
WALMART INC
84.28 USD
▼ -0.10 -0.12%

TGT
TARGET CORP
72.98 USD
▲ +0.70 +0.97%

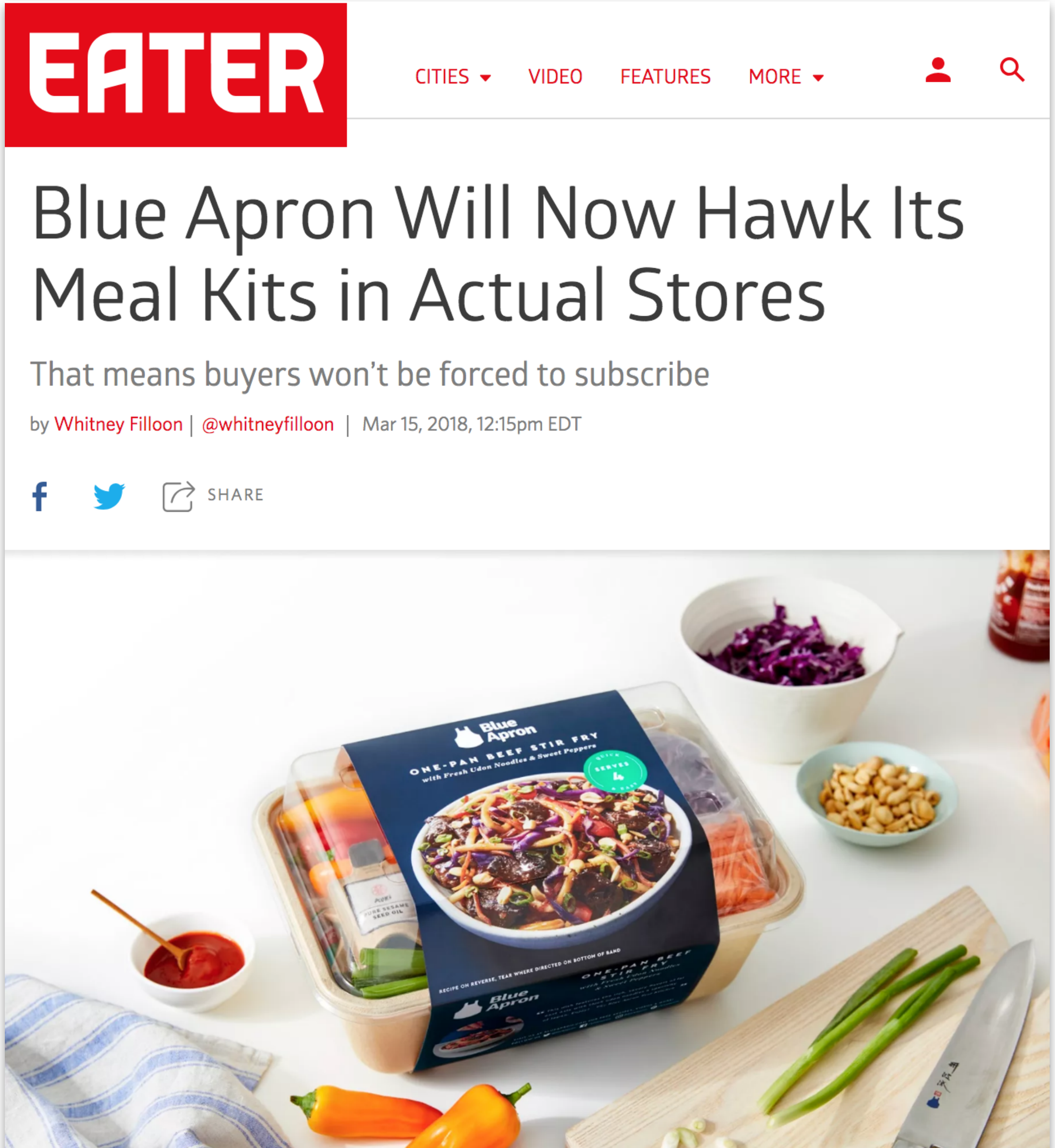
Walmart Inc. will offer men's grooming products from Harry's later this month, expanding the brand's reach beyond Target Corp. and giving Walmart a product coveted by millennials.

Starting May 21, the world's biggest retailer will sell Harry's goods in 2,200 of its U.S. stores -- fewer than half of the total -- and online. There are plans to further expand availability by the end of the year, according to a statement. The offering will include one exclusive item -- Harry's Truman-style razor in a surf-blue color similar to Walmart's logo.

The rollout means that fans of Harry's shaving and skincare supplies won't be limited to shopping at Target, which has

Subscription Service...

Expands to B&M


EATER
CITIES VIDEO FEATURES MORE

Blue Apron Will Now Hawk Its Meal Kits in Actual Stores

That means buyers won't be forced to subscribe

by Whitney Filloon | @whitneyfilloon | Mar 15, 2018, 12:15pm EDT

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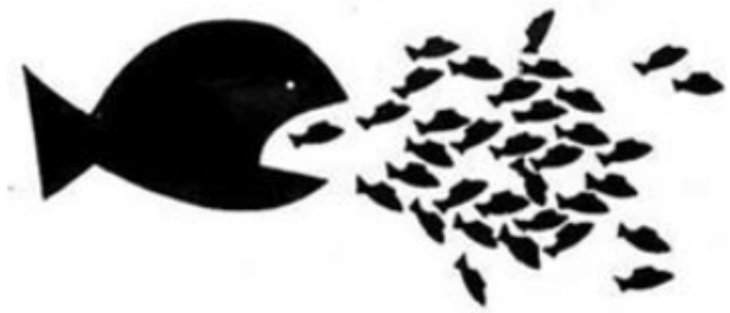
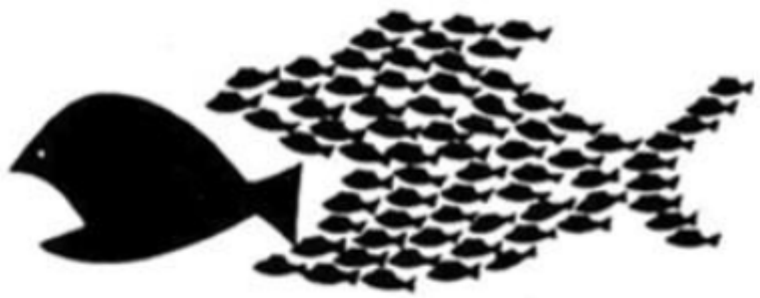
There Is a Paradigm Shift in the Market

1960 – MID 2000's



MID 2000's – TODAY



Source: BCG Consulting

Numerator

Numerator Helps Filter the Signal from the Noise

CASE STUDY

CHALLENGE:

Large CPG manufacturer wanted to understand if a smaller food company was differentiated enough to add significant value to their business through an acquisition

NUMERATOR ASSETS LEVERAGED:

Shopper Profile
Learn more about a key buyer group, including where they shop and why they buy.

Existing Brand Source of Volume
Understand if a brand sales change was due to category growth or stealing share.

Shopper Metrics
Core panel metrics across channels and demographics.

Surveys
Hear what buyers have to say about your brand and what they have to say about competing brands.

RESULTS:

$100 million dollar acquisition and increased distribution at retailer

Shoppers Skew Towards Young, High-Income, Urbanites

CASE STUDY

AGE

25-34

HHs: 22%, Index: 131

INCOME

$125k+

HHs: 30%, Index: 185

URBANICITY

Urban

HHs: 40%, Index: 121

From Numerator Insights:

Shopper Profile

Driving growth through premiumization

CASE STUDY

48%

of growth from
Category Incrementality

52%

of growth from
Brand Shifting

43%

Higher Buy Rate
than average

From Numerator Insights:
Shopper Metrics and Brand Volume Sourcing

Positive Product Reviews with High Repurchase Intent

CASE STUDY

> Great product and I believe they care about the environment and what is put into its products and is eventually consumed

> I liked the design and overall aesthetic of the bottle

> Price is a little high but worth it for the quality

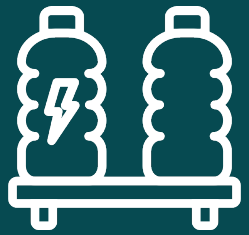
> Good ingredients

93%

of shoppers expressed Intent to Repurchase

From Numerator Insights:
Survey

Omnichannel means
every channel



Think outside of
Point of Sale data

$$\text{Value} = \frac{\text{Benefit + Convenience}}{\text{Price}}$$

The rules…
have changed

Numerator

NEW FRONTIERS

Learn how your consumer's behavior is shifting

hello@numerator.com