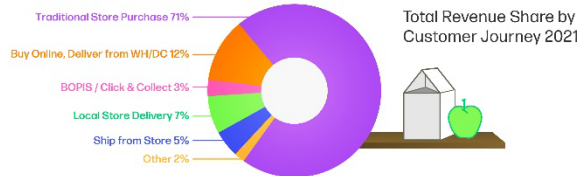


Grocery's Tech Transformation

RAPID GROWTH & RAPID TRANSFORMATION Consumers Choosing Both Online & Store Shopping



2022 Sales Growth by Channel



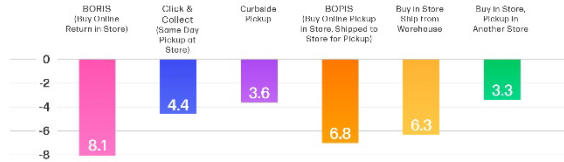
2022 New Store & Remodel Growth



THE CHALLENGE

Retailers Are Losing 3-8 Points of Margin in Digital Journeys.

Average Margin Point Loss From Traditional Store Visit When Not Optimized



Only a portion have fixed the issues.

Percent of Retailers Who Have Optimized Digital Journeys For Profitability Today



Long Overdue Tech Transformation Accelerating

Growth in Installs the Next Two Years



Rapid Response to Labor Shortages

843% Increase in Electronic Shelf Labels

178% Increase in Self-Checkout Technologies



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