



## Find Your Next Digital Retail Strategy

*Navigating AI, Omnichannel  
and Retail Media*

**insight  
summit**  
2025

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The background of the slide is a light gray color. It is decorated with numerous 3D-rendered spheres in various shades of blue and purple. These spheres are scattered across the slide, with a particularly dense cluster on the right side. The spheres have a glossy, reflective surface, giving them a three-dimensional appearance.

“The primary role of retail is to ensure that the distribution from manufacturer to consumer runs smoothly.”

*Professor Rob van der Kind*

# Changing consumer behavior impacting retail

# Heading into 2025 Intentional shoppers prioritize



**Value for  
money**



**Quality over  
quantity**



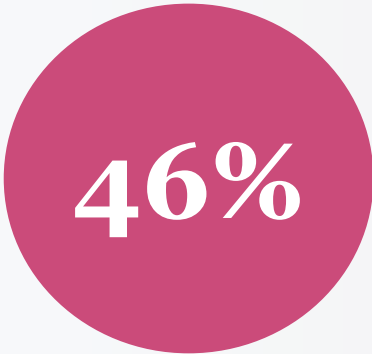
**Necessity &  
pragmatism**



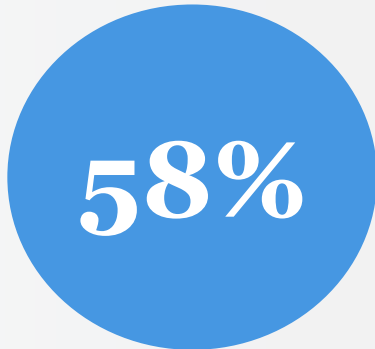
Intentional consumers are willing to pay a premium for convenience and life satisfaction



say they're likely to *spend a little extra* to make *one moment or day* of the week *more special or enjoyable*



are likely to *spend more on* product *formats that are convenient* to use



agree that to them important thing about a product (brand) is that it offers *good value for money*"

Value for money

- #1 Durable
- #2 High quality
- #3 Makes life easier
- #8 Inexpensive

Source: NIQ 2024 Mid-Year Consumer Outlook, Europe.

Source: NIQ Consumer Life Global 2024, E1J1M1, R8, R9 (global = 18 countries)  
Qn – Importance when considering the value of a product or service, 9 ranking items

# Promotional events encourage quality over quantity

**43%** agree

+5 pts vs 2023

*Postponed a purchase until it was on sale or special offer*

Quality  
over  
quantity

**38%** agree

+4 pts vs 2023

*Spend more than they planned during a promotion*

Source: gfknewron Consumer Period Jan – Dec 2024. Based on 19 tech and durables product categories

Countries: AT, BE, BR, CL, FR, DE, GB, GR, IN, IT, JP, NL, PL, RU, ES, CH, TR \* Did you spend more or less than you initially planned on your new product

# Innovation & disruptive upgrades drives demand

Necessity

Main purchase driver

## Smartphones



**52%**  
*replacing  
faulty product*

## Robot Vacuum



**43%**  
*getting  
additional  
product*

gfknewron Consumer, Jan – Dec 2024, Robot vacuum: AT, BE, BR, CL, FR, DE, GB, GR, IN, IT, JP, NL, PL, ES, CH, TR. Smartphones: as per Robot vacuums minus IN and TR

# The intentional shopper doesn't need to look around

**36%** *-/+ vs. LY*

Change stores because of interesting advertising or promotions

Avg consumer shops at

**2,8**

Different shops for groceries

**58%** *+7% vs. LY*

Consistently visit the same store

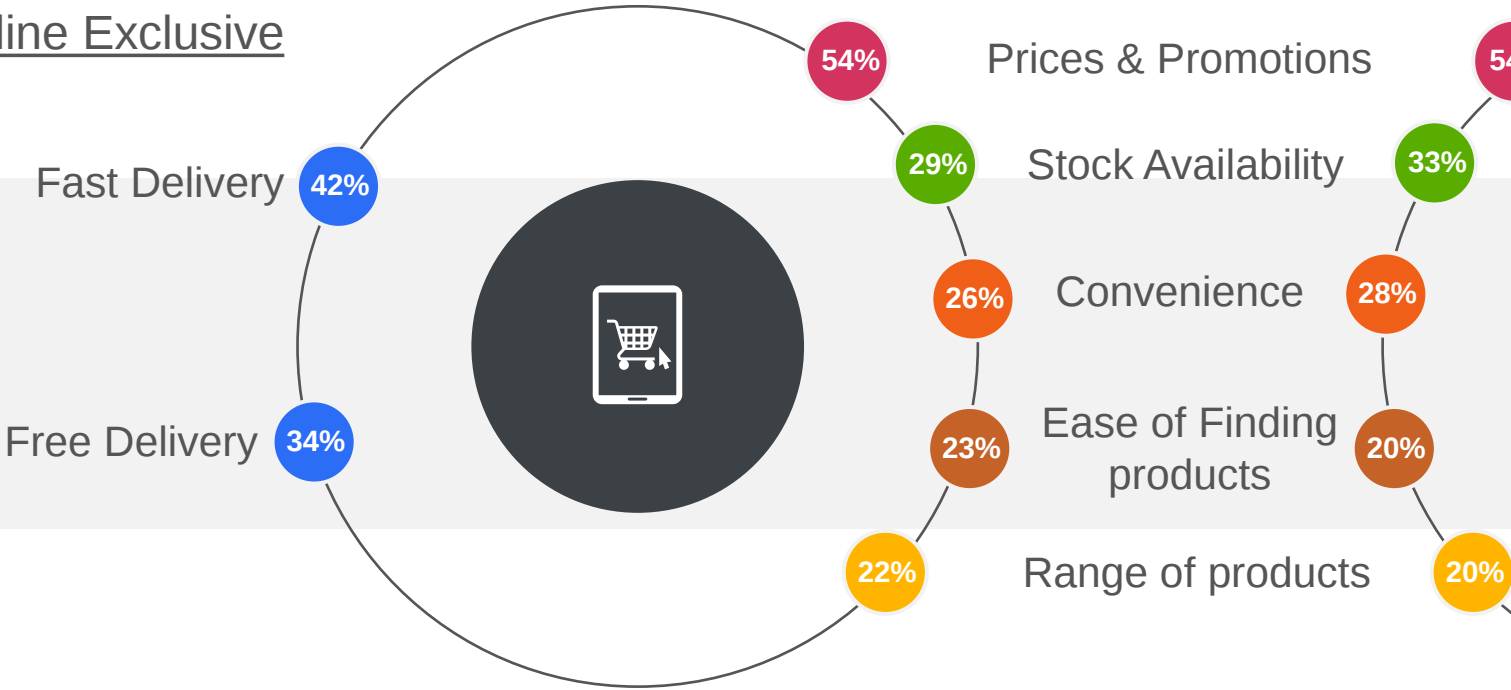


Source: NIQ 2025 Shopper trends NL

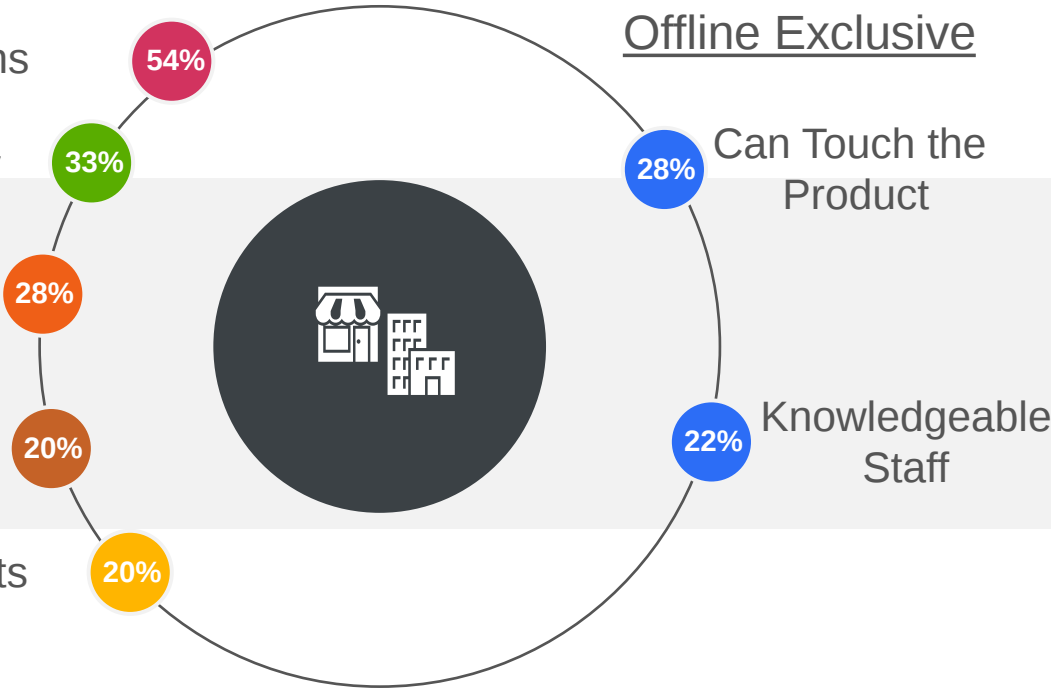


# The intentional shoppers blurs the line between online and offline

## Online Exclusive



## Offline Exclusive

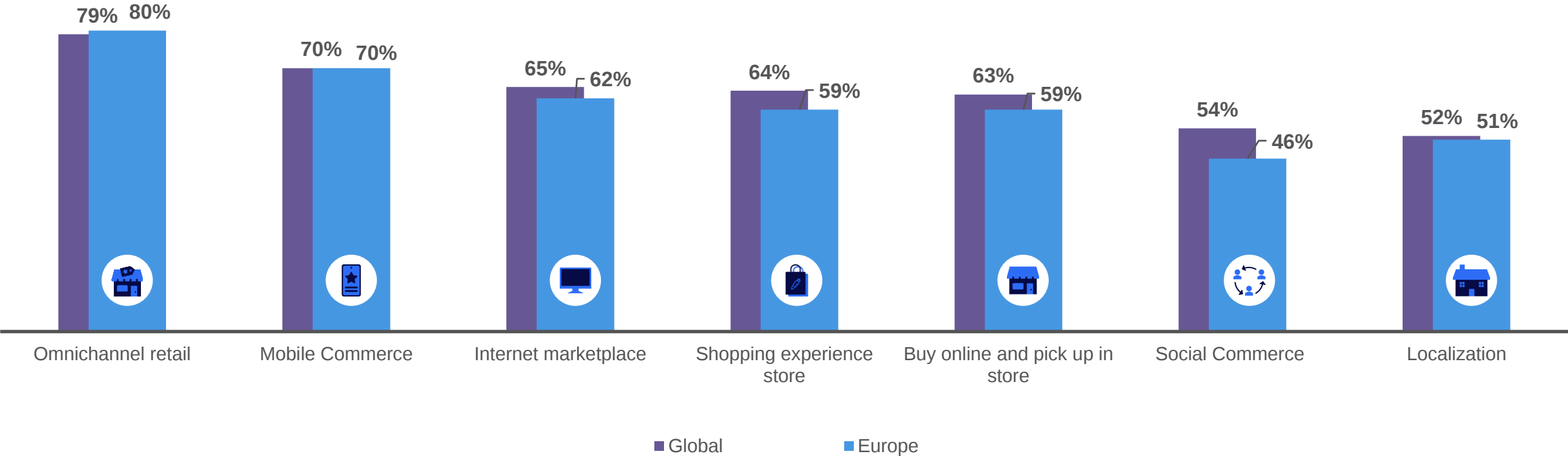


## Common Reasons

# So, what about Omnichannel

# Omnichannel retail remains to be the focus

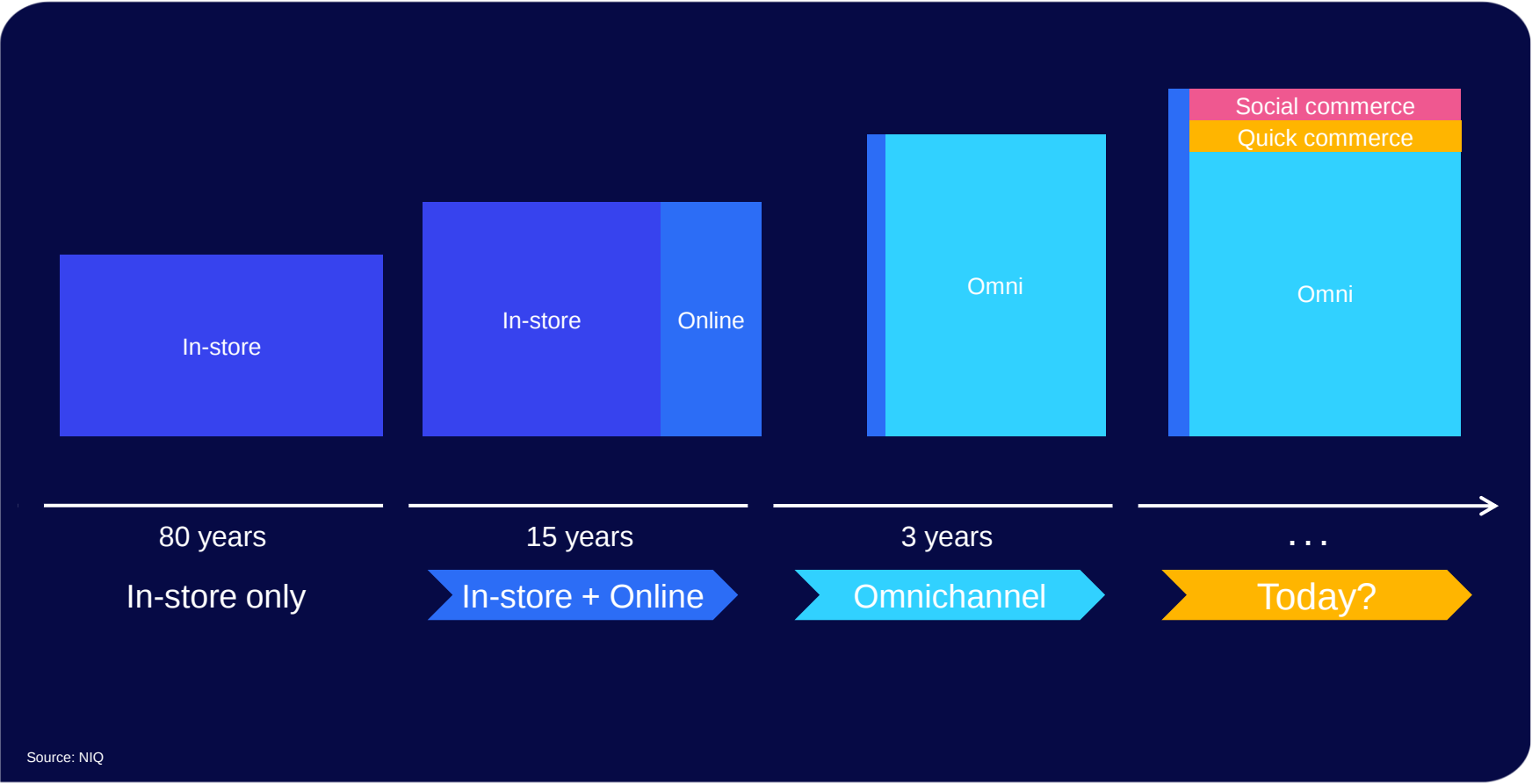
Retail expectations on successful formats



R1: In your opinion, how successful do you think each of these formats will be in the next 2-3 years? [Chart includes Top 2 Boxes], Base: Europe n = 444, Total n = 796, scale where 1 is "Not successful at all" and 5 is "extremely successful" - GfK Retail (R)evolution 2023

# The pace of change is accelerating rapidly (to put it mildly)

What is the omni landscape today?

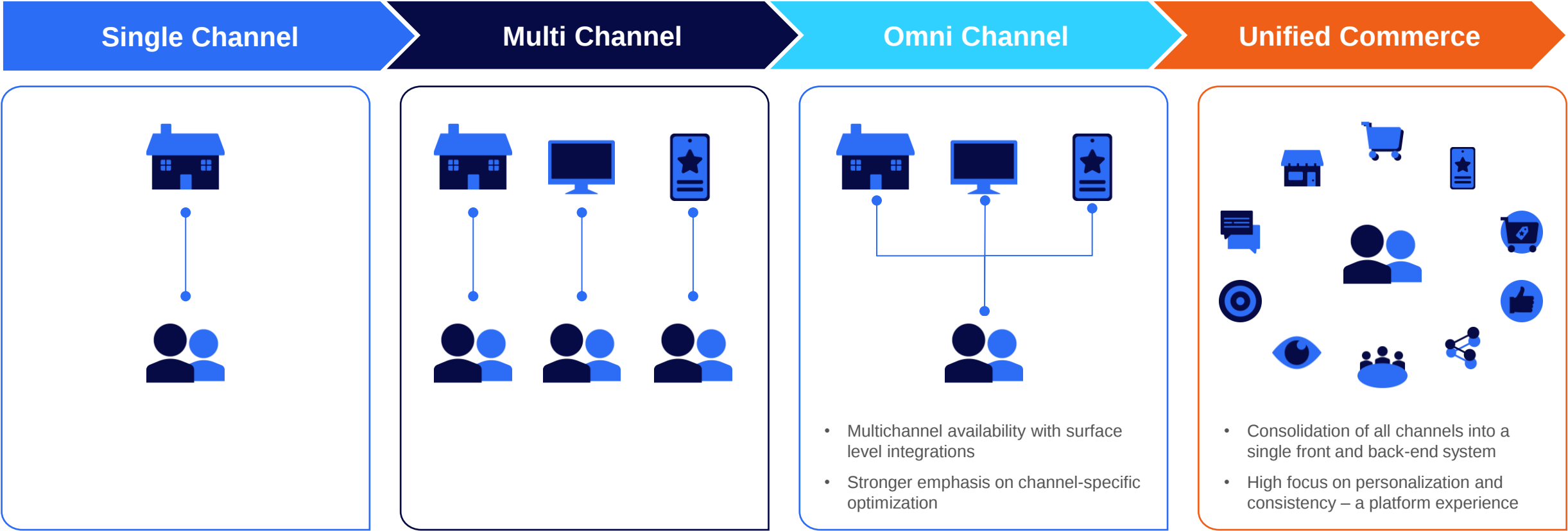


Today, there are several seven omni touchpoints which we must keep top of mind



“the evolution of omni will undoubtedly accelerate at an increasingly fast rate”

# Consumer touchpoints evolution





# Offline expands to meet needs of omnichannel shopper



Be where your consumers are



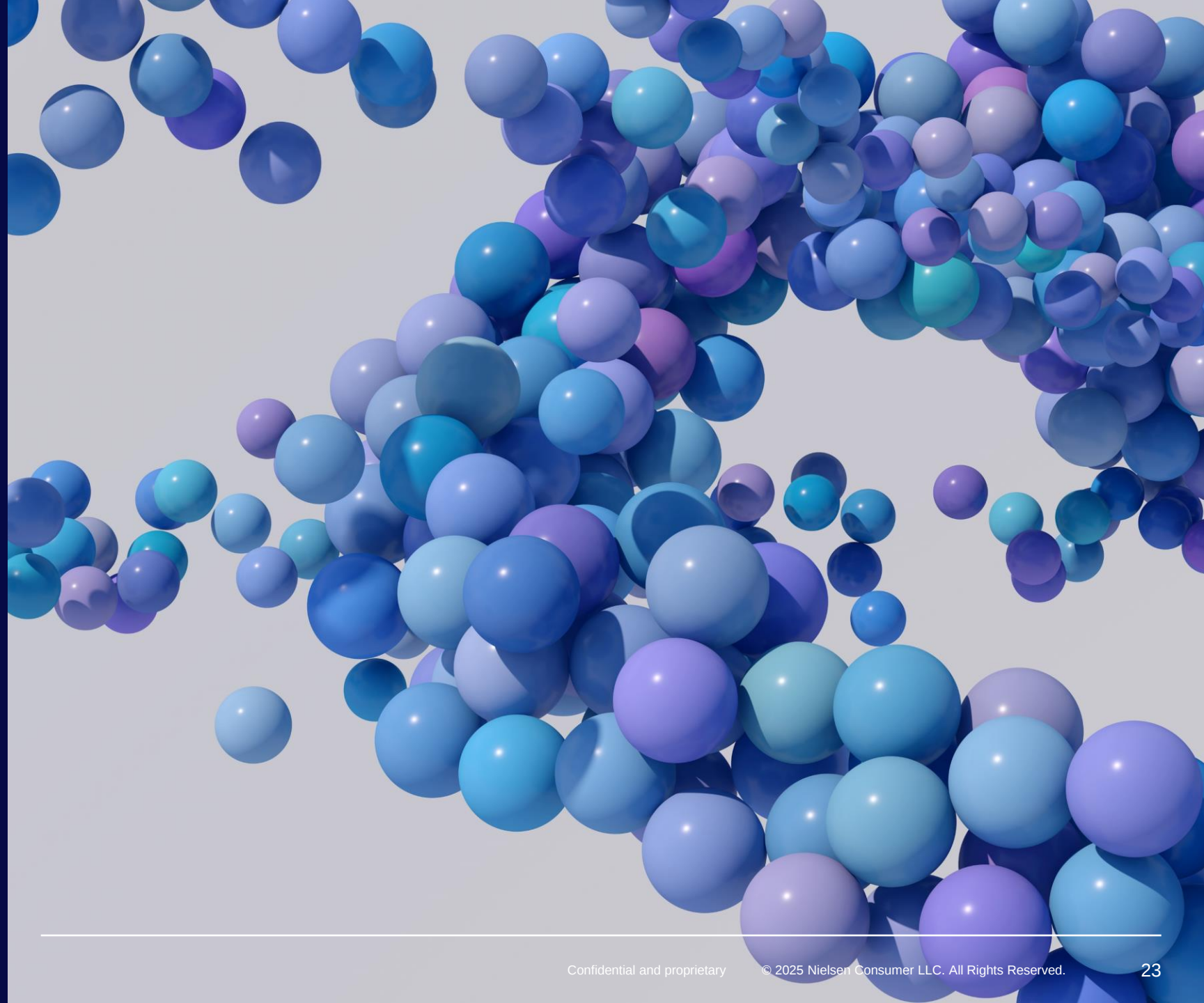
Mainstream or micro-market



Custom formats for unique personas



# What about 'new' online competition?



# New, digital formats are on the raise



## Market Places

### Market Places

- Top online retailers also runs a market place
- Online Meets Discount: Temu Shein are challenging key market leaders



## S-Commerce

### Social Commerce

- Example UK: TikTok Shop share in FMCG is now at more than 4%



## New Commerce

### New creative formats

- Consumer to consumer
- Live Commerce
- Quick Commerce

| Kriterium                 | Schwinn 800IC ★ | Sportstech SX600 ★ |
|---------------------------|-----------------|--------------------|
| Preis                     | ★★★★☆           | ★★★☆☆              |
| App-Kompatibilität        | ★★★★☆           | ★★★★★              |
| Stabilität & Verarbeitung | ★★★★★           | ★★★★☆              |
| Widerstandseinstellung    | ★★★★☆           | ★★★★☆              |
| Lautstärke                | ★★★★☆           | ★★★★☆              |
| Zusatzfunktionen          | ★★★★☆           | ★★★★★              |

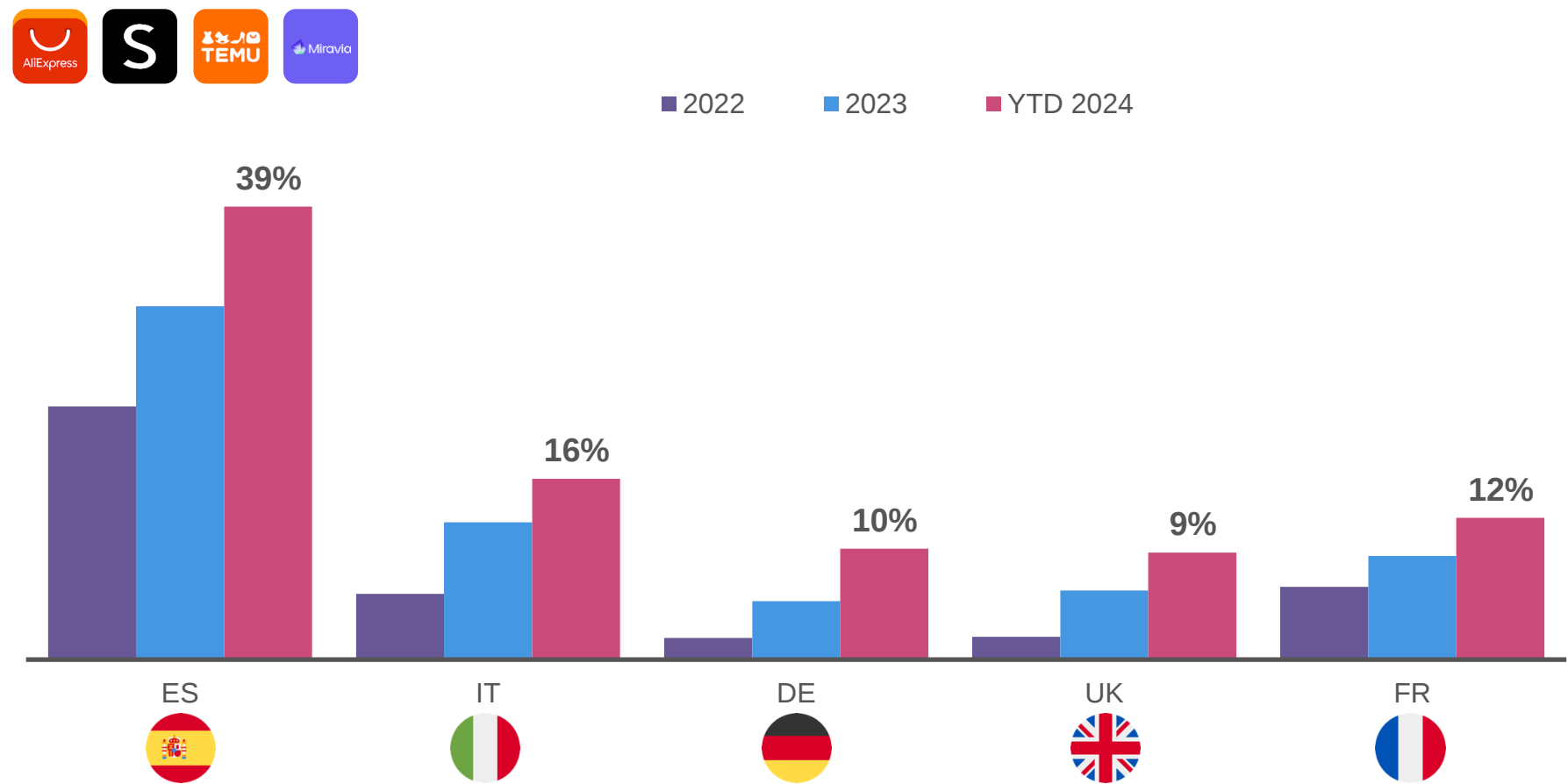
## AI-Commerce

### AI (curated) shopping

- Personalized recommendation Based on deep need assessment
- First links to actual shopping (e.g. Perplexity)



# Chinese marketplaces expand to redefine Europe's retail landscape

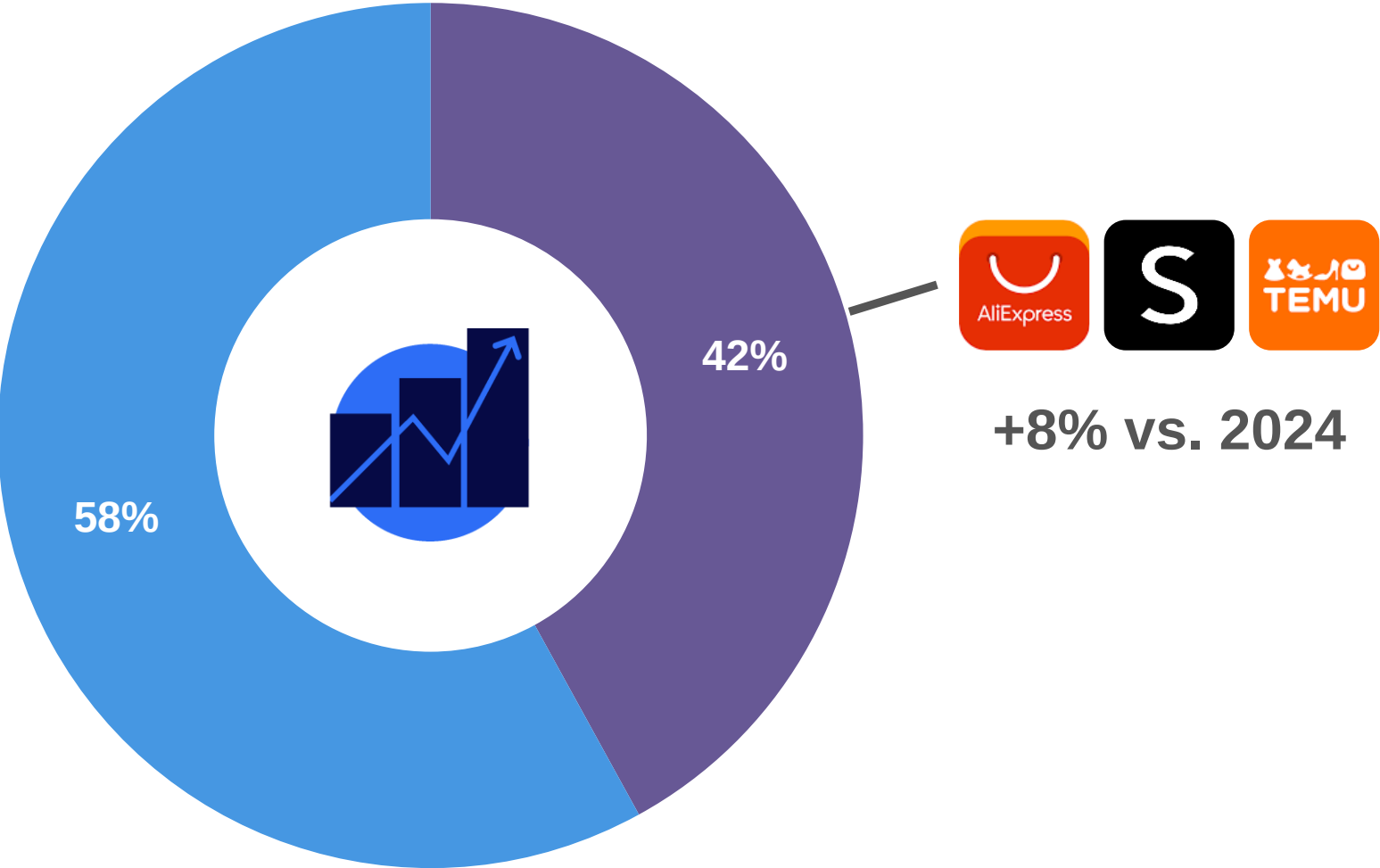


### Temu's local to local model

- Shops based in EU countries such as Germany, France, Spain, Italy, and the UK have been able to trade independently on the marketplace since the end of July.
- Retailers are responsible for their product range, inventory management, and the dispatch of the products they sell. Temu, however, sets the consumer prices for the goods

Source: NIQ Digital purchases - e-commerce consumer panel; West Europe = UK, DE, FR, IT, ES; Data ending 4 August 2024. Volume share in total e-commerce of goods (excluding FMCG & Fashion)

# Chinese marketplaces expand to redefine the Dutch (online) retail landscape

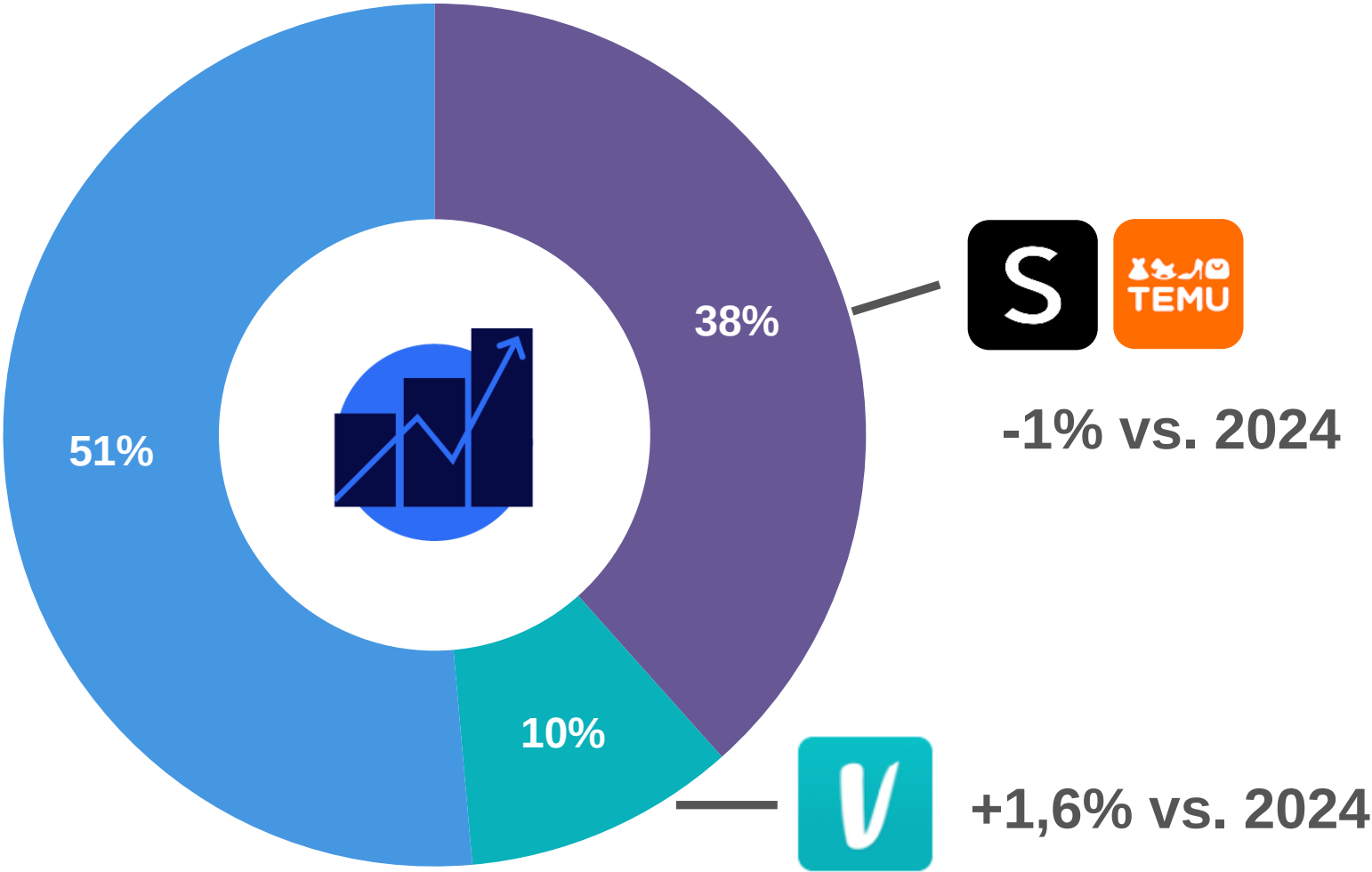


**NIQ** Digital Purchases

Source: NIQ Digital purchases - e-commerce consumer panel; NL, MAT data ending June 2025

Volume share in total e-commerce of goods (excluding FMCG & Fashion)

# Marketplaces and CTC expand to redefine the Dutch (online) fashion retail landscape



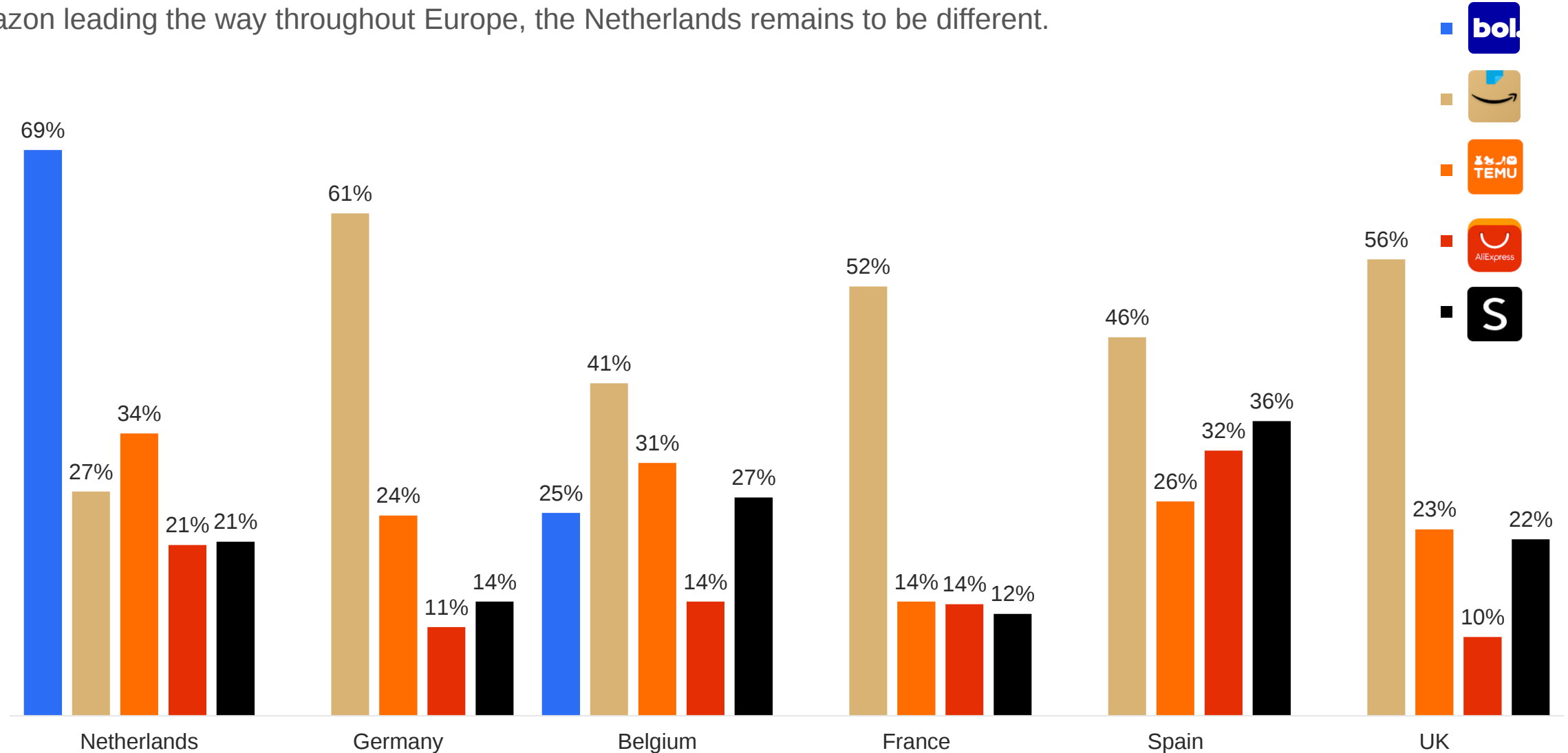
**NIQ** Digital Purchases

Source: NIQ Digital purchases - e-commerce consumer panel; NL, MAT data ending June 2025

Volume share in total e-commerce of Clothing and shoes

# Penetration varies across countries

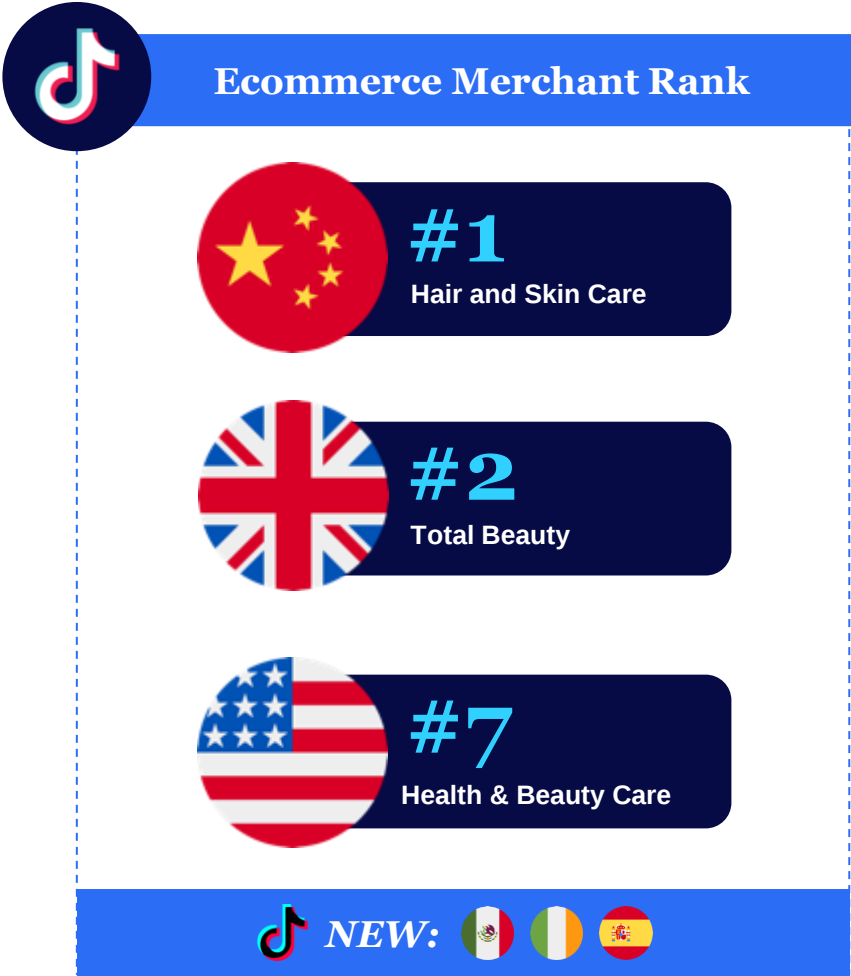
Amazon leading the way throughout Europe, the Netherlands remains to be different.



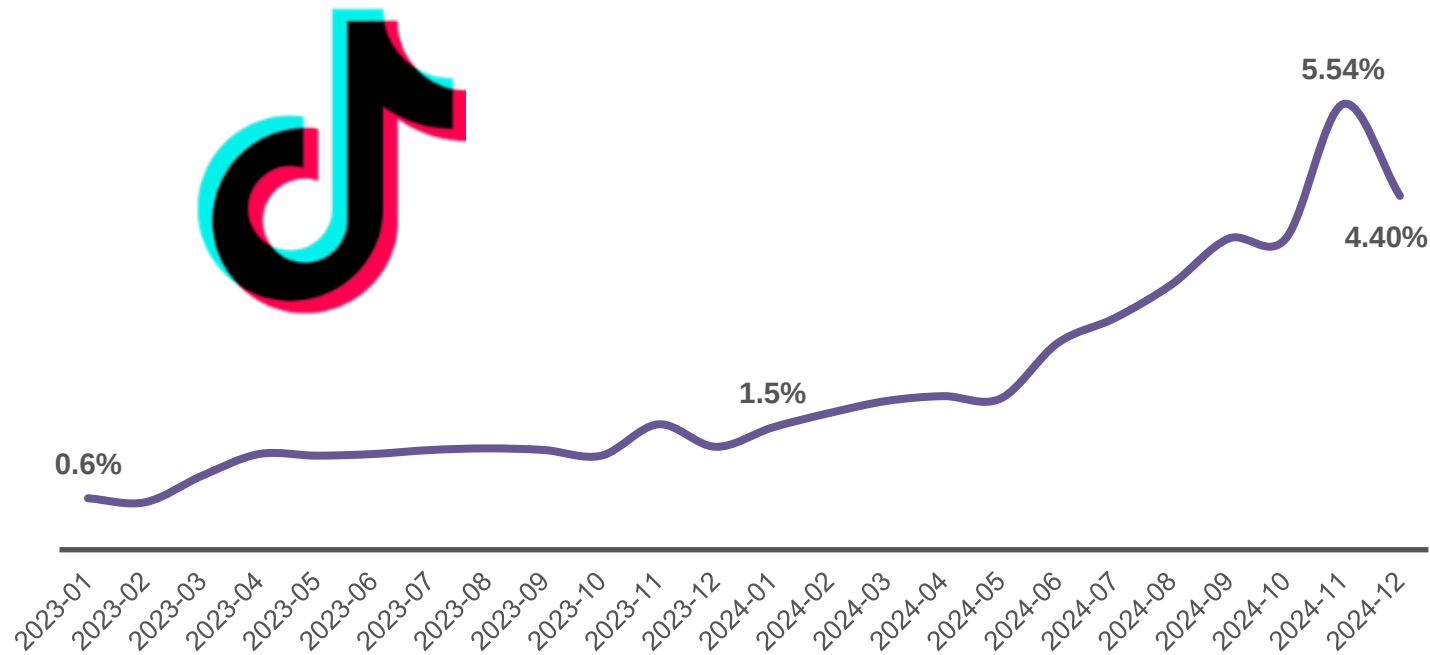
"apps and games , automotive , luggage and bags , home and kitchen , jewellery , diy and tools , cds and vinyl , health and personal care , business, industry and science , dvd and blu-ray , mobile phone plans and operator accessories , stationery and office supplies , large appliances , computer and electronics , musical instruments and dj , garden and outdoors , toys and games , pc and video games , books , software , lighting , watches , loyalty program , sports and outdoors" Period, last 12 months – June 2025

# Social Commerce Goes Global

Consumers across the world are embracing social commerce as TikTok Shop leads the charge



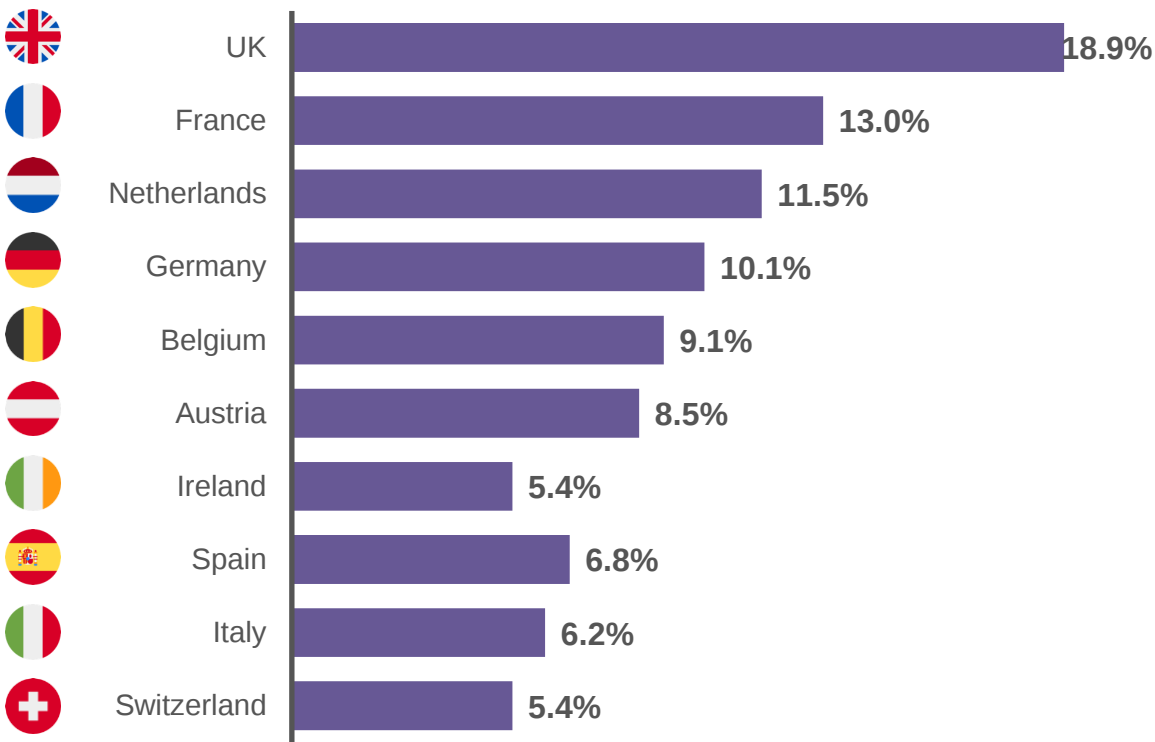
Tik Tok Market share in Value - FMCG



Source: NielsenIQ Personal Care Online Total (Traditional EC+TikTok) - ChinaQ3 2024  
Source: NielsenIQ Digital Shelf E-receipt Consumer Panel, Full Year 2024 (Personal Care) - TikTok Shop Customer base ending Latest 12 months ending 09/02/25  
Source: NielsenIQ Total US E-commerce Measurement Powered by Rakuten Intelligence | 52wks ending 11/30/24 vs LY Health & Beauty Care

# Ecommerce & FMCG : pure player generalists strengthen their grip on Western Europe, with Amazon dominating half the Markets

E-com Share of Trade - FMCG  
2024

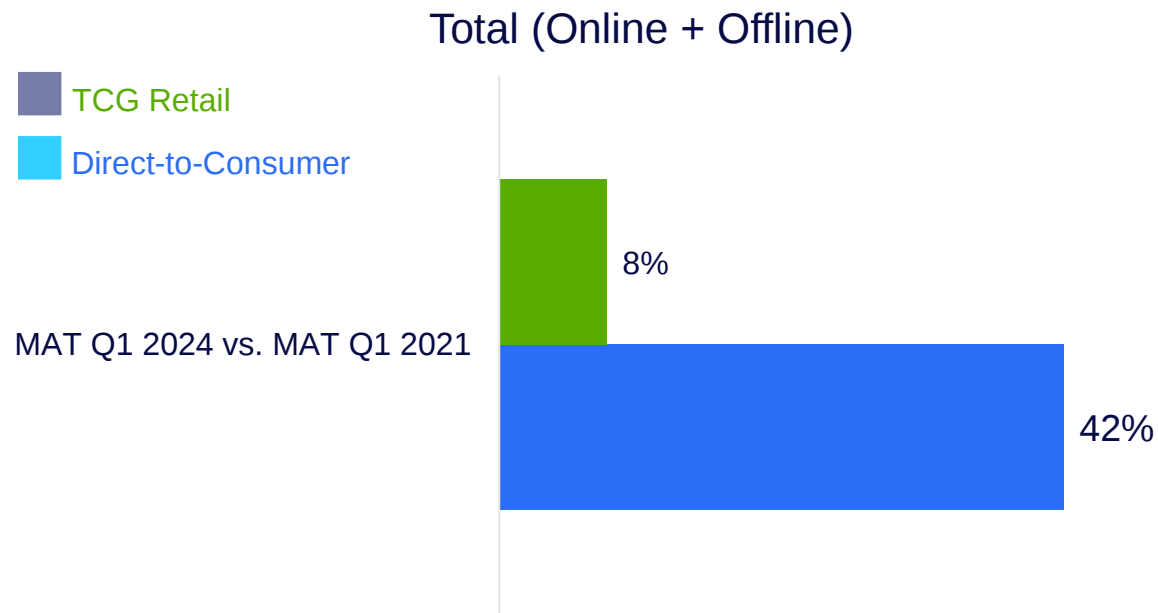


Leading Retailer in ACV – 100% Online - FMCG  
MAT December 2024



Source: NIQ Omnisaales | Total FMCG 2024 vs 2023 (except UK MATOct 2024)

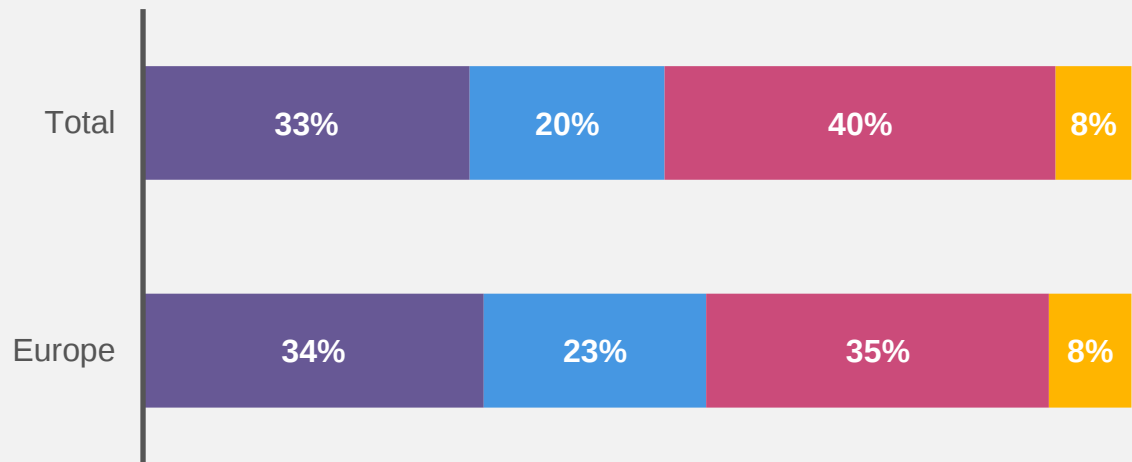
# Direct-to-consumer gains ground in T&D retail



gfknewron Consumer | T&D | Purchase Channel | Sales Units growth %

Source: gfknewron Consumer | all tracked PGs, BE, BR, DE, FR, GB, IN, IT, JP, NL, RU, ES; Purchase channel

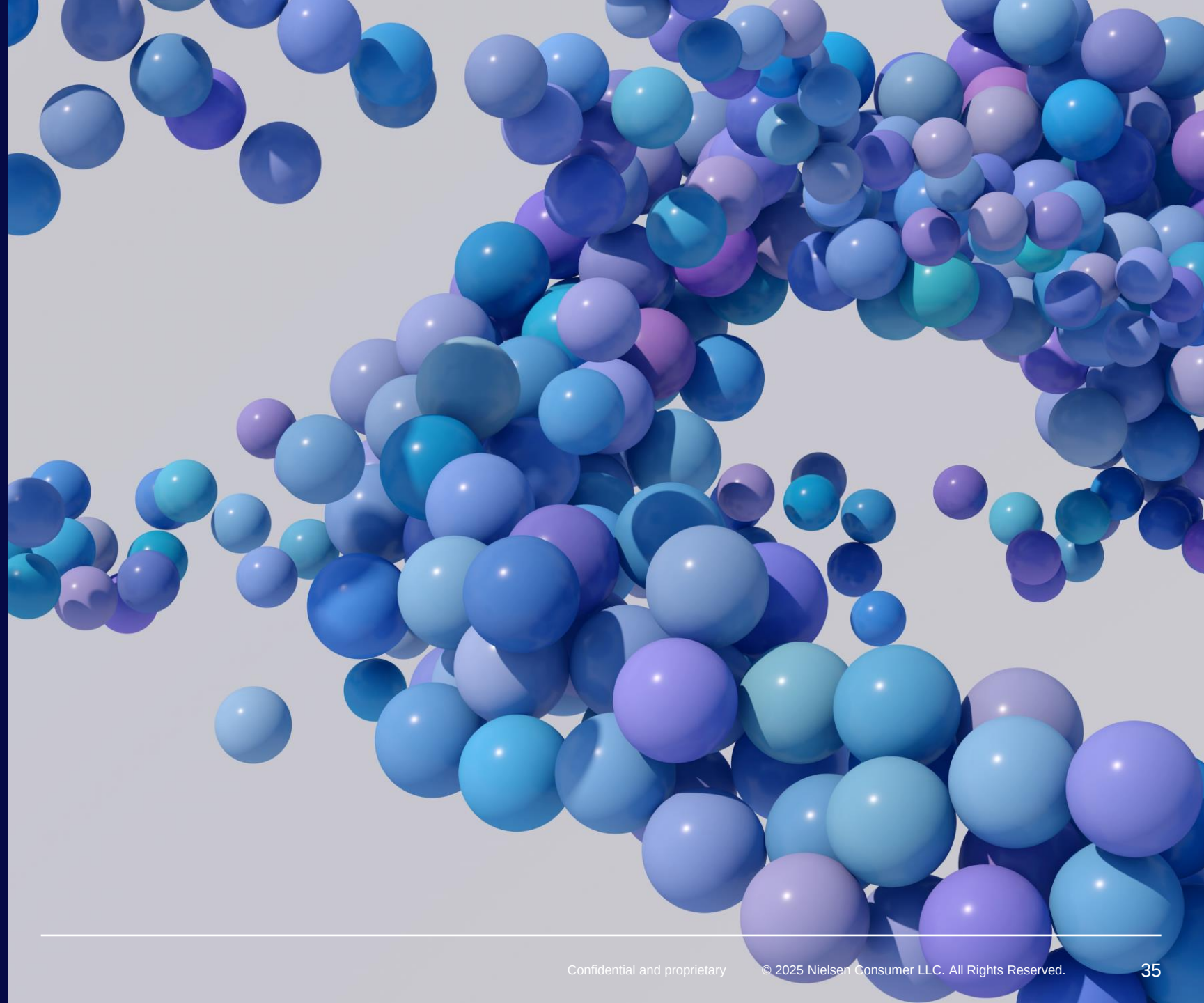
# Relationship between manufacturer and retailer evolves



- Worried as direct sales success might harm my business
- Undecided, not yet sure about success of direct sales
- Not worried. Our relationship with manufacturers has evolved and we can offer them additional services and better consumer reach.
- I do not know

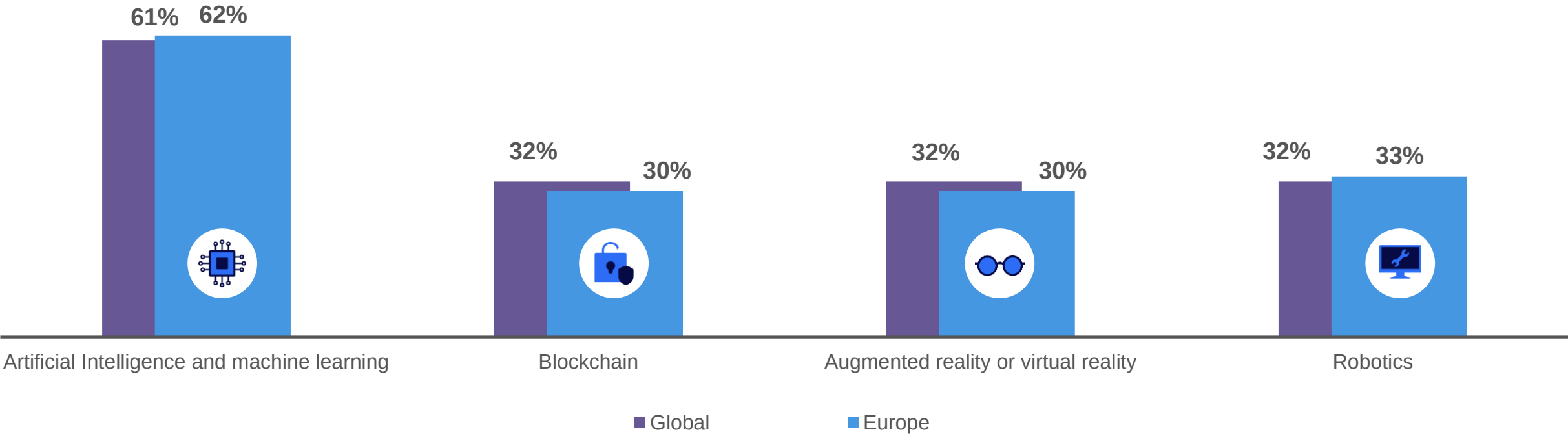
• R3: In recent years, more manufacturers have started exploring opportunities for direct sales. How do you feel about them entering the retail space and what do you think about their chances of success? Base: Europe n = 444, Total n = 796  
GfK Retail (R)evolution 2023

# How about *AI* within retail?



# What about the impact of technology?

AI leads

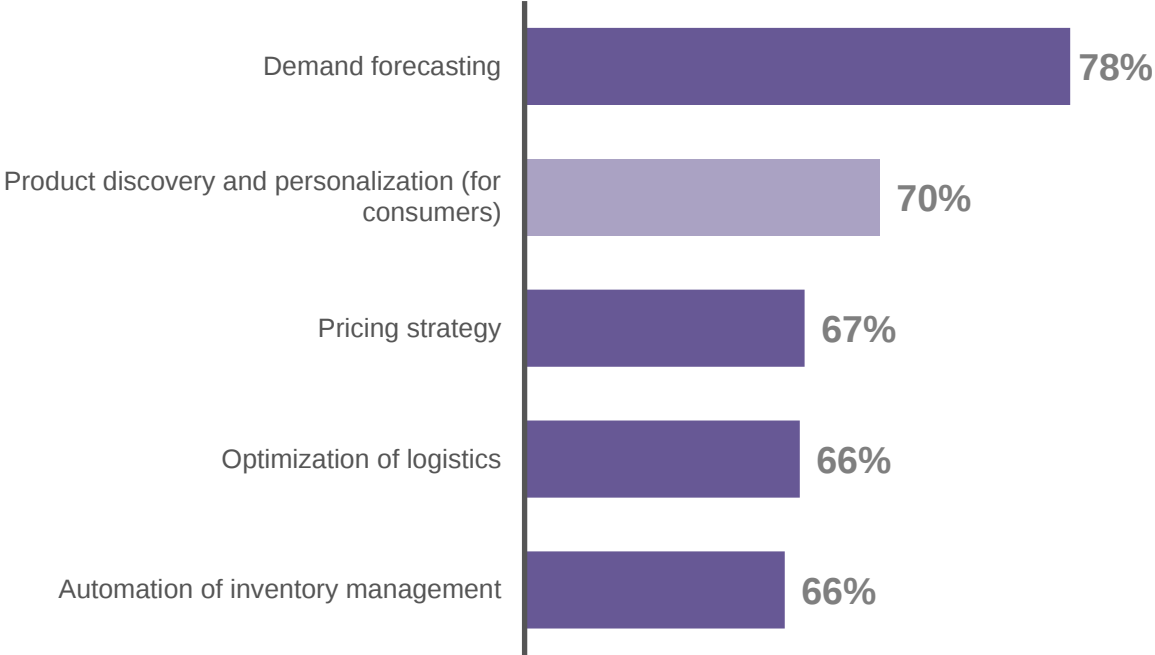


- T1: To which extent will your company focus on the following technologies in the next 2-3 years? [Chart includes Top 2 Boxes]
- Base: Europe n = 444, Total n = 796, scale where 1 is “No strategic focus at all” and 5 is “very high strategic focus”
- GfK Retail (R)evolution 2023

# 72% of retailers currently using AI and robotics reduced costs and 69% increased their revenue

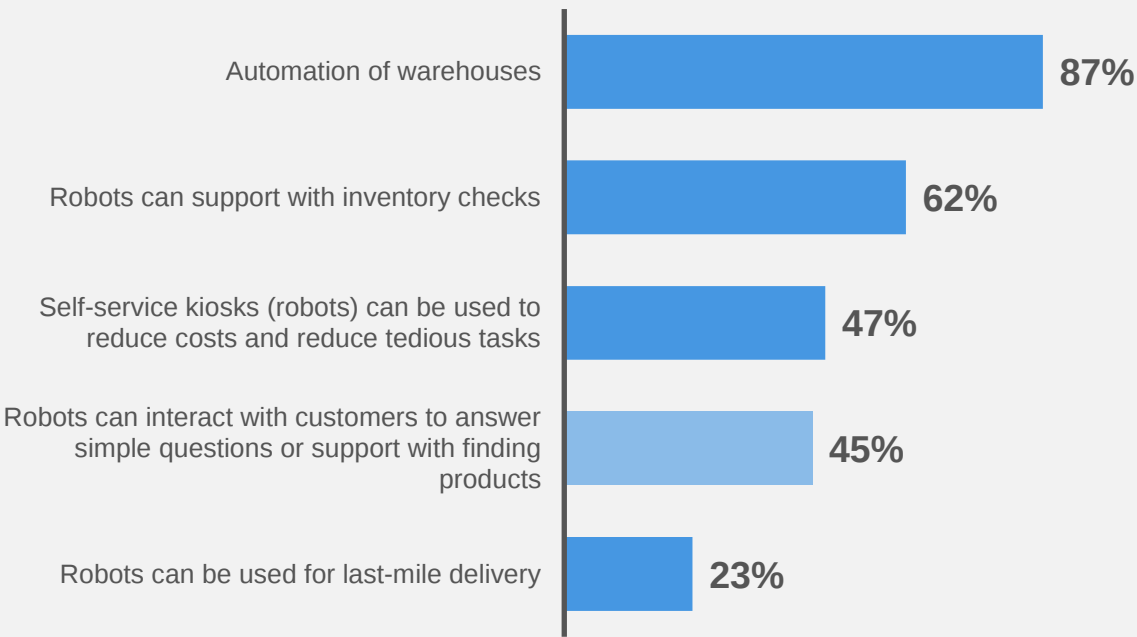
AI enabling retailers to achieve *operational excellence* and elevate *personalization*

Expected benefits of AI and ML



Retailers integrating robotics to reduce operational costs

Expected benefits of robotics

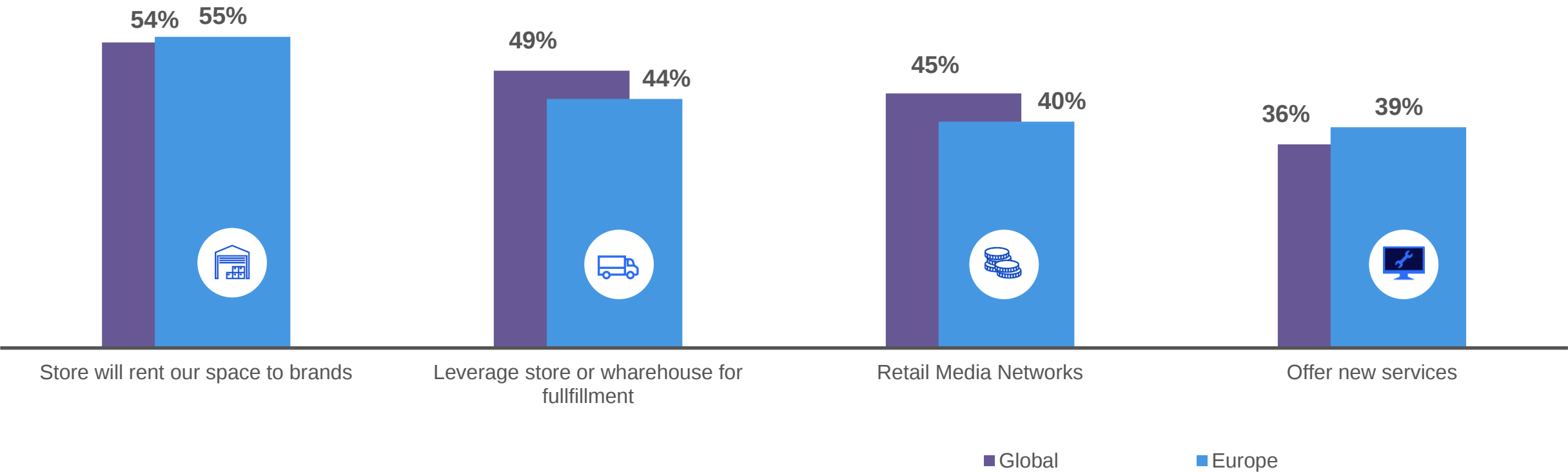


Source: Retail Revolution (NIQ/GfK)

# And finally.. Retail Media

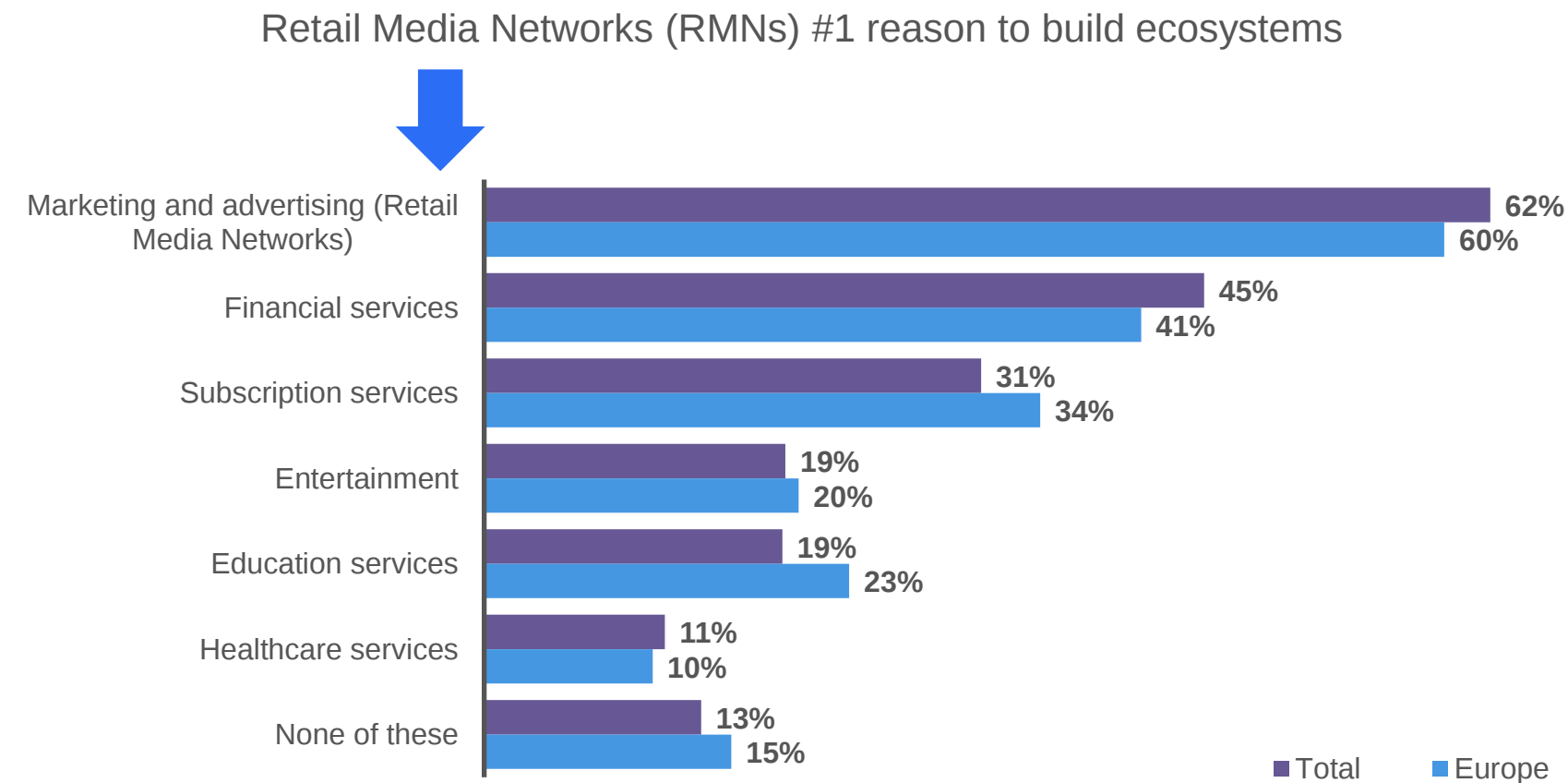
# Retail focus on creating alternative revenue streams

Although do they really see the value of Retail Media?



R2: Which of the following additional revenue streams do you think will be important in the next 2-3 years? [Multiple choice] Base: Europe n = 444; Total n = 796

Retailer put their strategic focus on building an **ecosystem** that will help to **sell services along with products** to grow the consumer base.



**23%** of U.S. ad spending in 2025

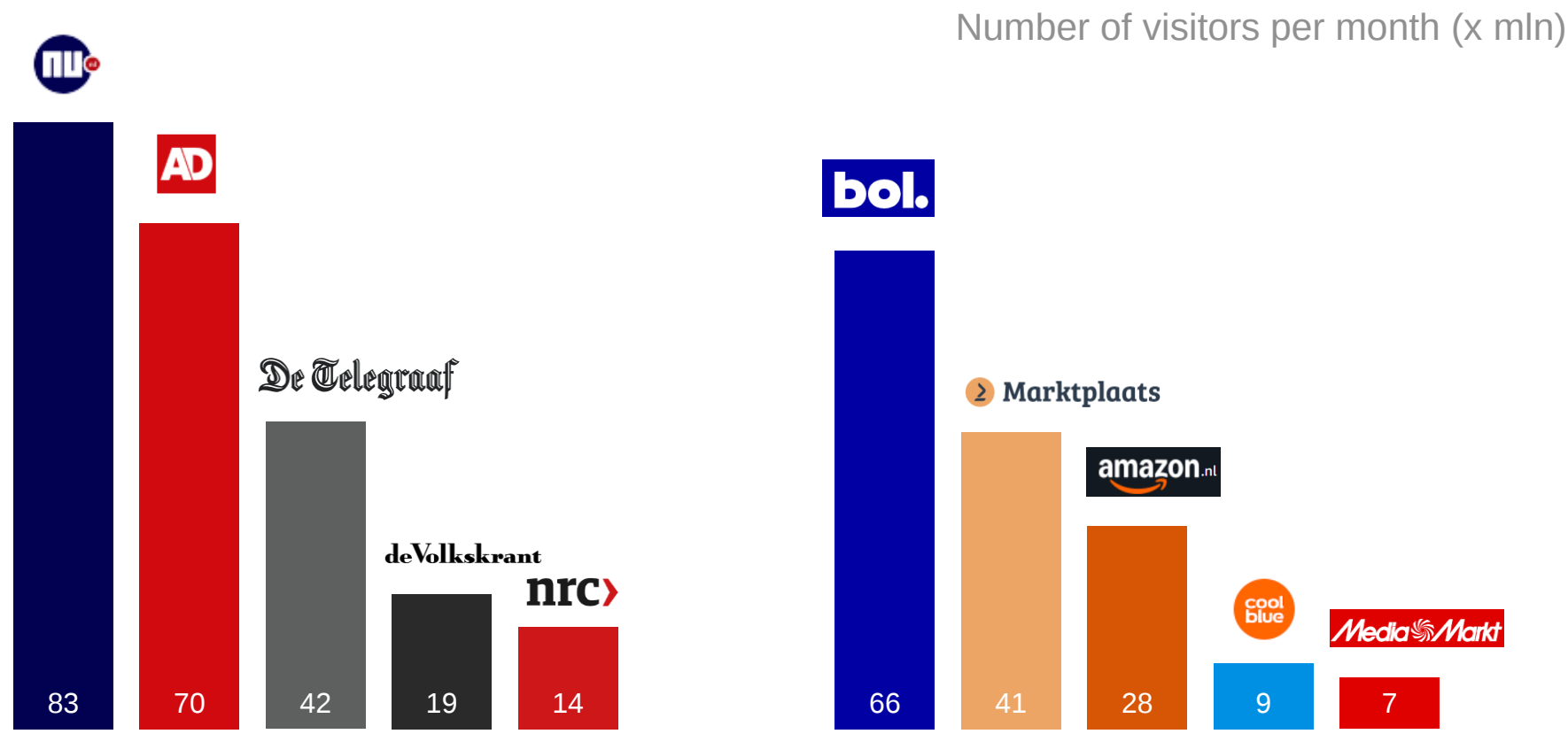
**Retail Media Networks (RMNs)**  
In 2025, retail media ad spending will represent over 23% (more than a fifth) of all digital ad spending in the U.S. As retail media investments reach record levels, retailers will focus on not only selling product placement ads (i.e., display), but also monetizing e-commerce search results.

Source: 1) US Ad Market Outlook Report, March 2024, Advertiser Perceptions

E2: Which additional services have you recently started or will start to build your ecosystem? [Multiple choice]  
Base: E2 only if E1 "Build ecosystems that help you sell services along with products to grow consumer base" has a high strategic focus (rated 4 or 5), Europe n = 287, Total n = 448  
GfK Retail (R)evolution 2023

# Traditional media online versus Retail

Retail site offers a big reach low in the purchase funnel



Source, similarweb April 2025

# To conclude

# Key takeaways

## The intentional consumers drives change in the retailer landscape

- The differences between de channels blur
- New upcoming trends are embraced

## Loyalty is key

- Promotions are important to service the existing clients
- Private label emphasize the value for the consumer

## Omnichannel is past, ecosystems the future

- New entries from China but also other competitors in search of their share of wallet
- Competition from partners is growing

## Opportunities for retailers

- Look for their new role within the ecosystems
- Reduce cost by embracing new technology.
- New technology helps unveil other opportunities

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# Thank you!