

Find Your Next Digital Retail Strategy

*Navigating AI, Omnichannel and
Retail Media*



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Agenda



Know

**Digitalization drives
disruption and
opportunities**



Act

**Retail Media is the
Win-Win-Win for Retail,
consumers & industry**



Grow

**Retail Media is
creating relevance for
Shopper and Industry**

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Digital Retail is growing



Total Retail



Digital Retail



+4,5%

FMCG revenue growth HY1 total in %

+4,4%

FMCG online growth HY1 in %



+0,2%

T&D revenue growth HY1 total in %

+7,8%

T&D online growth HY1 in %

Source: NIQ/GfK Retail Panel | HY1 2025 vs. HY1 2024 | FMCG without Fresh incl. Tobacco



New, digital formats are on the raise



S-Commerce

Social Commerce

Example UK: TikTok Shop share in FMCG is now at 3.9%

Example DE: 2% market share (ranked #13) across FMCG since March 31st 2025

Source: Digital Purchase / FOX Intelligence I



Market Places

Market Places

5 out of top 5 Online-Retailers in AT (also) run a market place

Online Meets Discount:
- Temu ranked #4 with a 6% market share 08/2025 in AT
- Shein ranked #5 with a 3% market share in 08/2025 in AT



New Commerce

New creative formats

- Live Commerce
- Quick Commerce
- Digital Wallet
- Metaverse / Virtual Commerce
- Conversational 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)

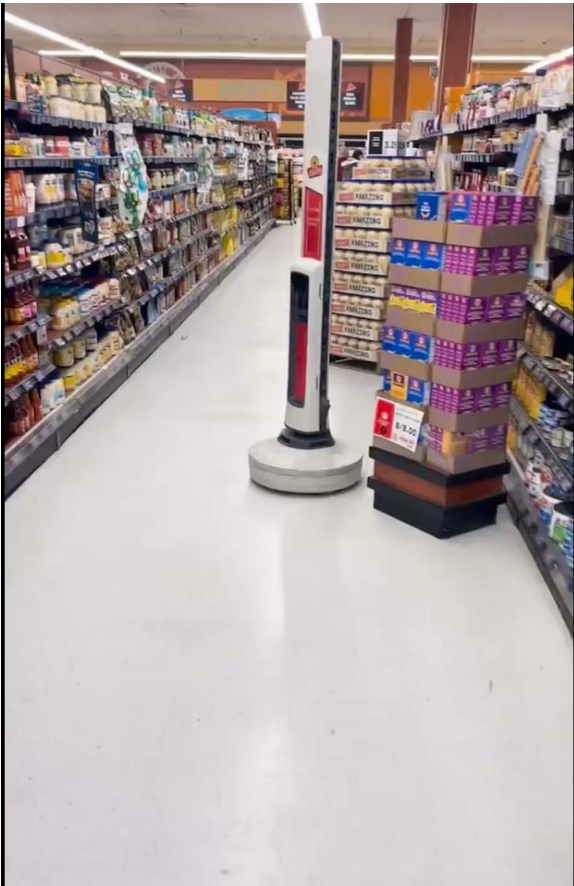
Some automation can delight – some can annoy - consumers

Security



“Warning, this is security, your presence has been detected. The owner and police have been informed.” (Tesco)

Inventory



Shelf



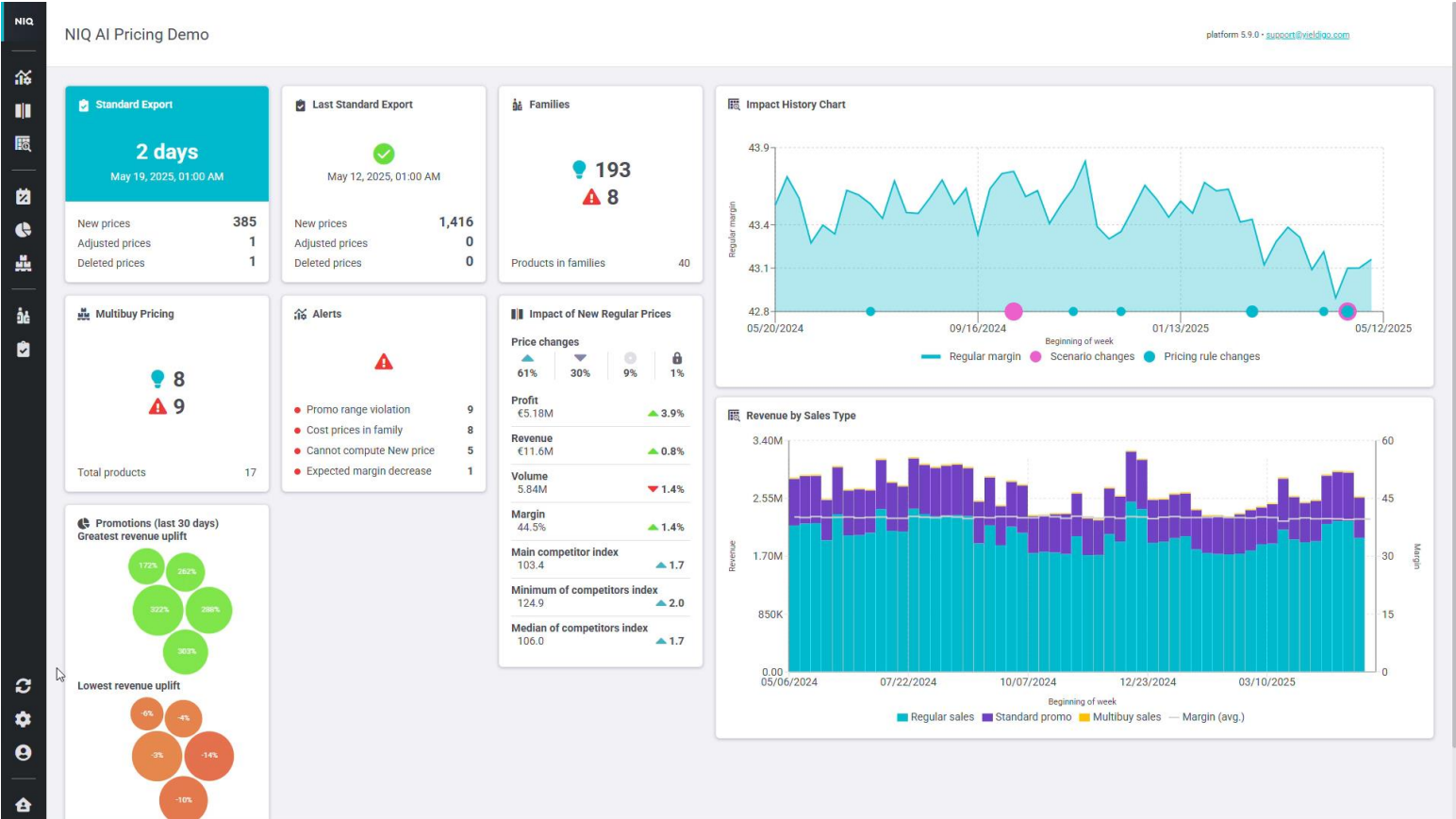
Smart Carts



Source: LinkedIn, Tesco, Tally, NRF

NIQ leverages AI for Retailers in multiple ways

Most demanded solution:
Dynamic Pricing



NIQ leverages AI for Retailers and Industry in multiple ways

(>600 attributes / Characteristics in Western Europe)

Launching soon
in Austria

NPI

NIQ Product Insights

NIQ reveals everything about every product with the industry's most granular attribution data

Stated Attribution

Captures standardized attributes on the label across a set of products by analyzing claims, warnings & certifications

- Cruelty Free
- Free From Sulfates
- Naturally derived
- Free From Paraben & Phthalates
- Vegan
- Recycled Packaging

92% of our formula is naturally derived, meaning it's unchanged from nature or keeps over 50% of its original structure after some processing. This includes water and ingredients from plant, mineral and fermentation sources.

- Naturally derived
- Plant-based
- Not Tested on Animals
- Biodegradable

Ingredients: WATER (AQUA), COCANDROPYL BETAINES*, SODIUM METHYL LAUROYL TAURATE*, GLYCERIN*, SODIUM CHLORIDE, FRAGRANCE (PARFUM), COCAIDE, MEA*, SODIUM BENZOATE, CITRIC ACID, LAURIC ACID*, SODIUM METHYLTAURATE, STEARIC ACID*, COCOS NUOPEA (COCONUT) OIL*, CITRULLUS LANATUS (WATERMELON) FRUIT EXTRACT*, HYDROLYZED HYALURONIC ACID, CETRIMONIUM CHLORIDE, ALPHA-ISOMETHYL IONONE, GERANIOL, LINALOOL.
*PLANT-BASED INGREDIENTS

Agenda



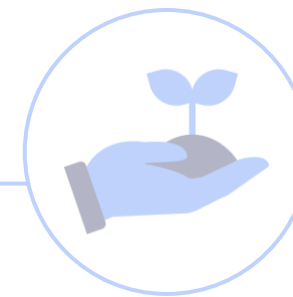
Know

Digitalization drives
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Retail Media is the
**Win-Win-Win for Retail,
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Grow

Retail Media is
creating relevance for
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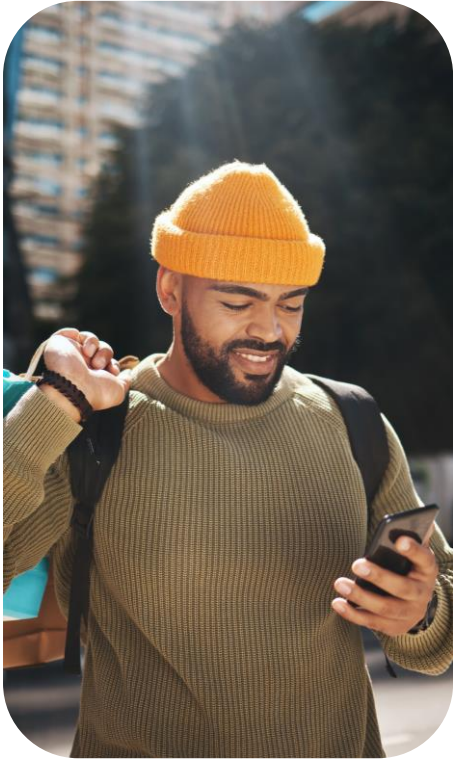
Digitalization is a key driver across most Retail Priorities in 2025



Purpose



Differentiation



Retail Media



AI &Automation



Omnichannel

95% of shoppers participate in 1 or more loyalty programs
(avg = 5.3 per consumer; extract)



TESCO

2024: 76%
2023: 53%



LIDL

2024: 66%
2023: 45%



Penny

2024: 55%
2023: 43%



SPAR

2024: 54%
2023: 39%



Auchan

2024: 36%
2023: 23%



COOP

2024: 29%
2023: 21%

Source: NIQ CMI Shopper Trends mid-year wave (2024)

Retail Media

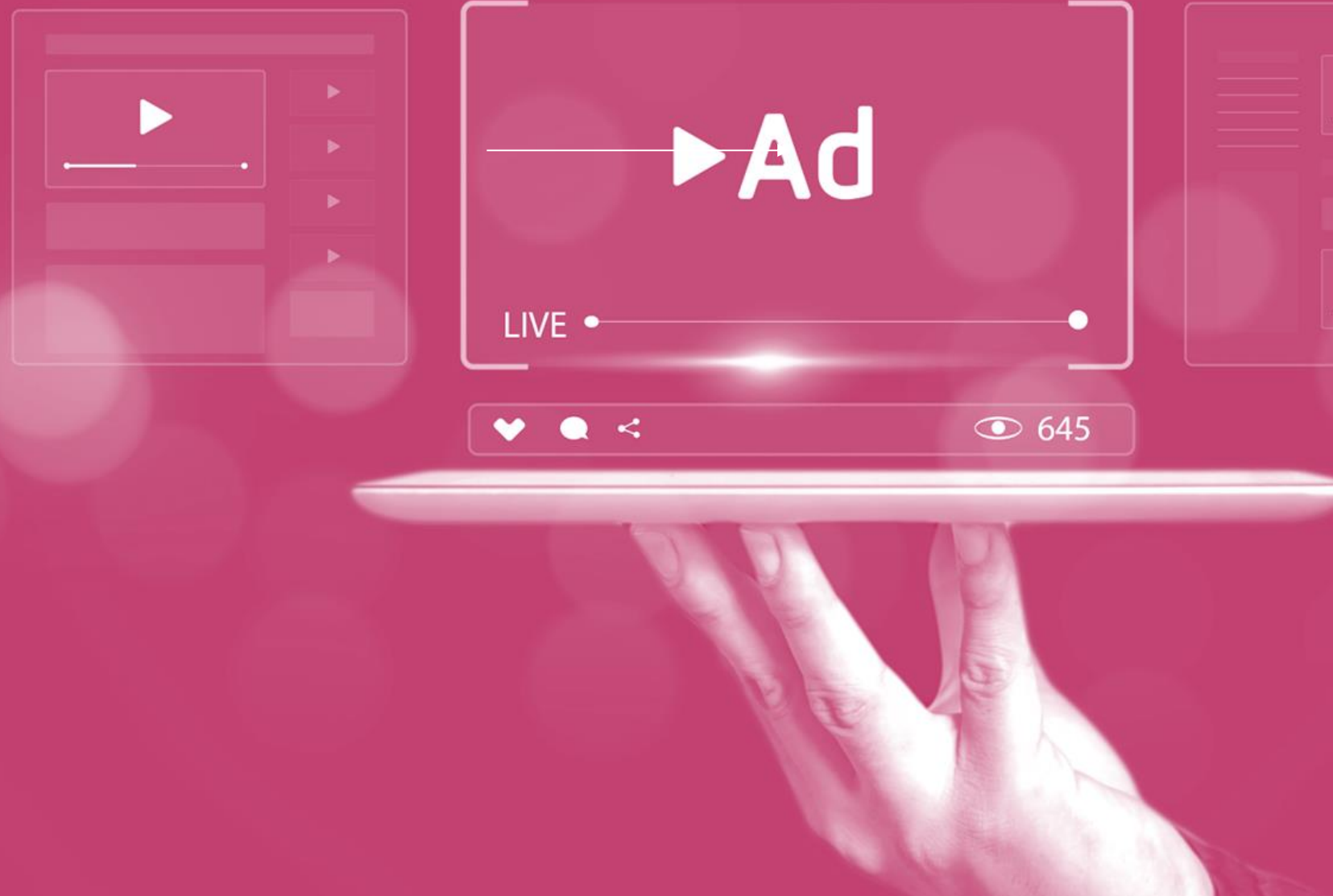
31.3 B USD

Retail Media Ad Spend in 2028

7.4 B USD

Retail Media Ad Spend in 2021

Source: IAB, 2024



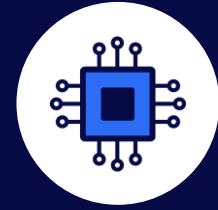
Retail Media is not a „Hobby“



Data

- Size of your data / value
- Maintain control on data
- Clean / loyalty program
- Integrated through systems
- Enriched
- Relevant Ai / real time

Technology



- Streamlined
- Self serve enabled
- Flexibility
- State of the art & refreshed segmentations
- Diverse supports (spas, displays, DOOH, ON / OFF, in-store)



Personalization at scale

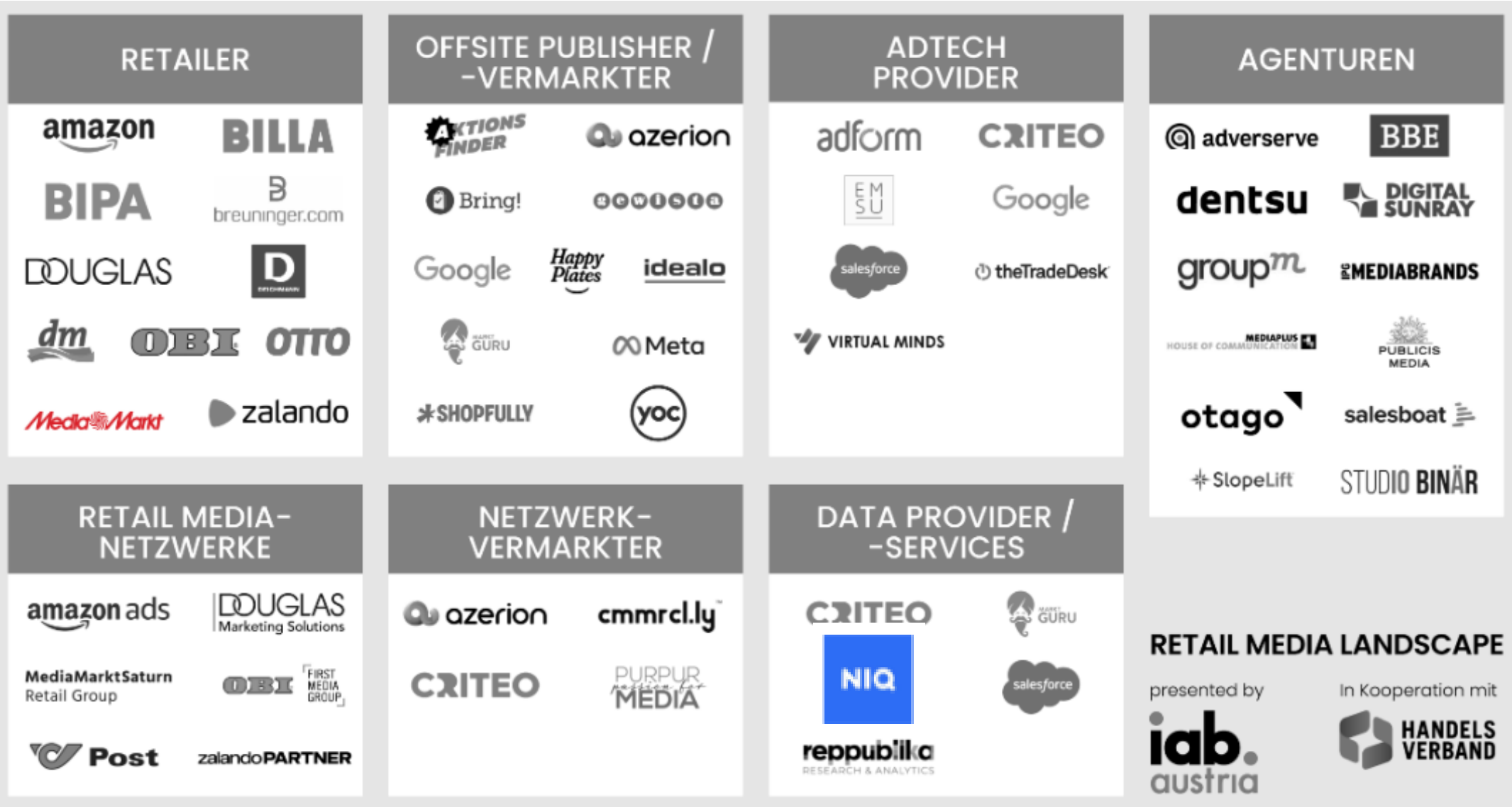
- Deliver conversion through
- True personalization
- Omnichannel on / off site
- Behavior based targeting
- Scoring

Teams



- Sizeable teams / remove manual work
- Fighting silos
- Insight teams: context, category management, market performance
- Sellers
- Measurement: more than ROAS

NIQ is proud to be part of the first Retail Media Landscape in Austria



NIQ supports Retailers and Manufacturers along the way



NIQ Activate supports Retail Media

Empowering
retailers and
suppliers to act on
their insights to
stay ahead of
competition

NIQ *Activate*

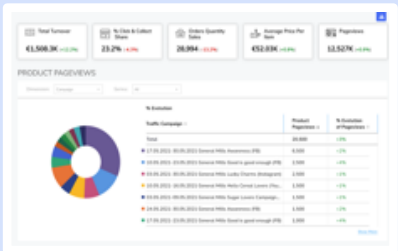
NIQ Activate Supplier Collaboration



*Supply Chain
Analytics*



*Category &
Customer Analytics*



*Retail Media
Intelligence*



*Assortment &
Promotion Analytics*



*Personalized Offer
Management*

Market & First-Party Data

AI & Generative AI

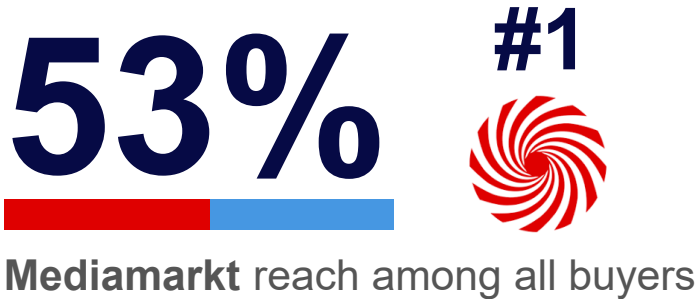
Retail Media Success Factor: Omnichannel Reach



Vacuum Cleaner

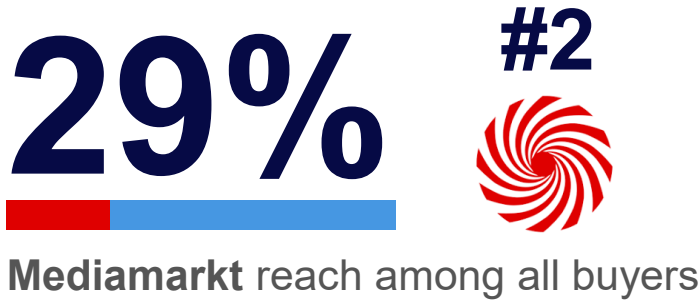


In-store visitors



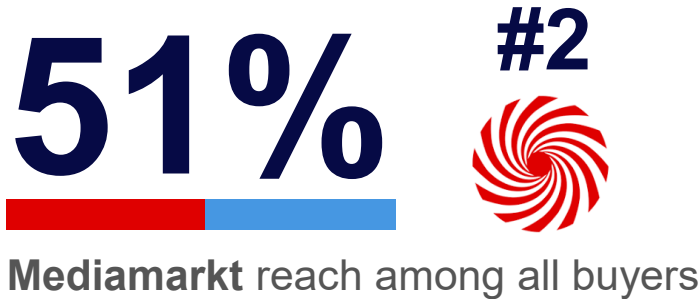
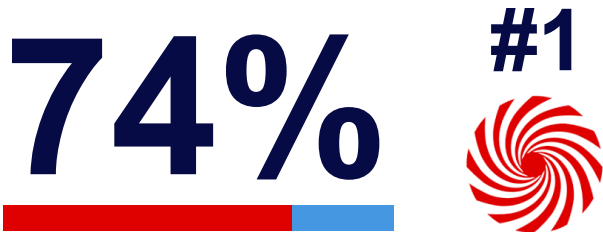


Online visitors





TV's



Source: gfknewron Consumer | Actual buyers of vacuum clenaers / TVs in Austria July 2024 to June 2025

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MediaMarkt

SATURN

RETAIL MEDIA

***THE KEY TO SUCCESS IN
OMNICHANNEL RETAIL***

René Reisinger

16.09.2025

Definition of Retail Media (AT)

“Retail Media bezeichnet die digitalen Werbeflächen, Retail-Daten und In-Store-Möglichkeiten, die Einzelhändler oder Marktplätze Marken für Werbekampagnen zur Verfügung stellen. Diese Kampagnen zielen darauf ab, die Markenbekanntheit zu steigern, den Umsatz zu erhöhen und neue Produkte zu präsentieren.

Das wachsende Angebot an Retail Media umfasst digitale Möglichkeiten in Off-Site, On-Site und In-Store Umgebungen. Zudem beinhaltet Retail Media das Targeting, die Optimierung und die Messung digitaler Kampagnen.”

Advantages of Retail Media

1 ***Omnichannel***

***multiple touchpoints
onsite, offsite and POS***

2 ***Full Funnel***

***full marketing funnel
product offering***

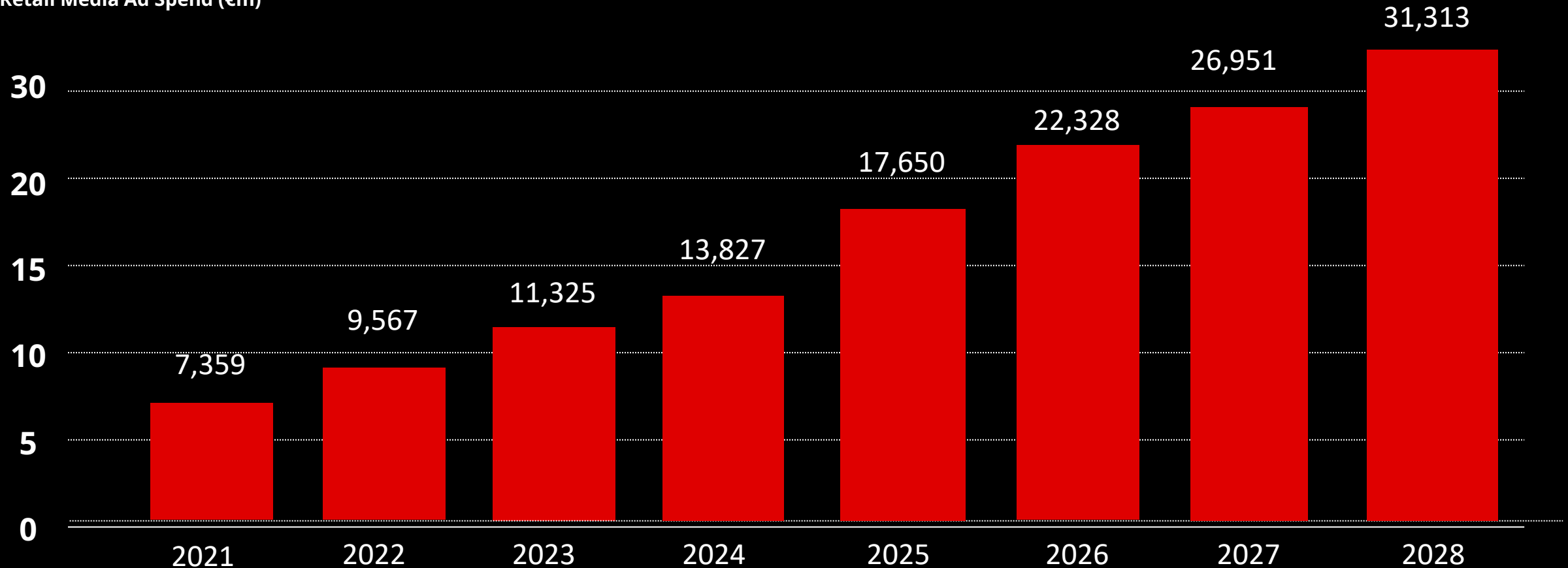
3 ***SPoC***

***one point of contact instead
of multiple publishers or
networks***

Retail Media in Europe

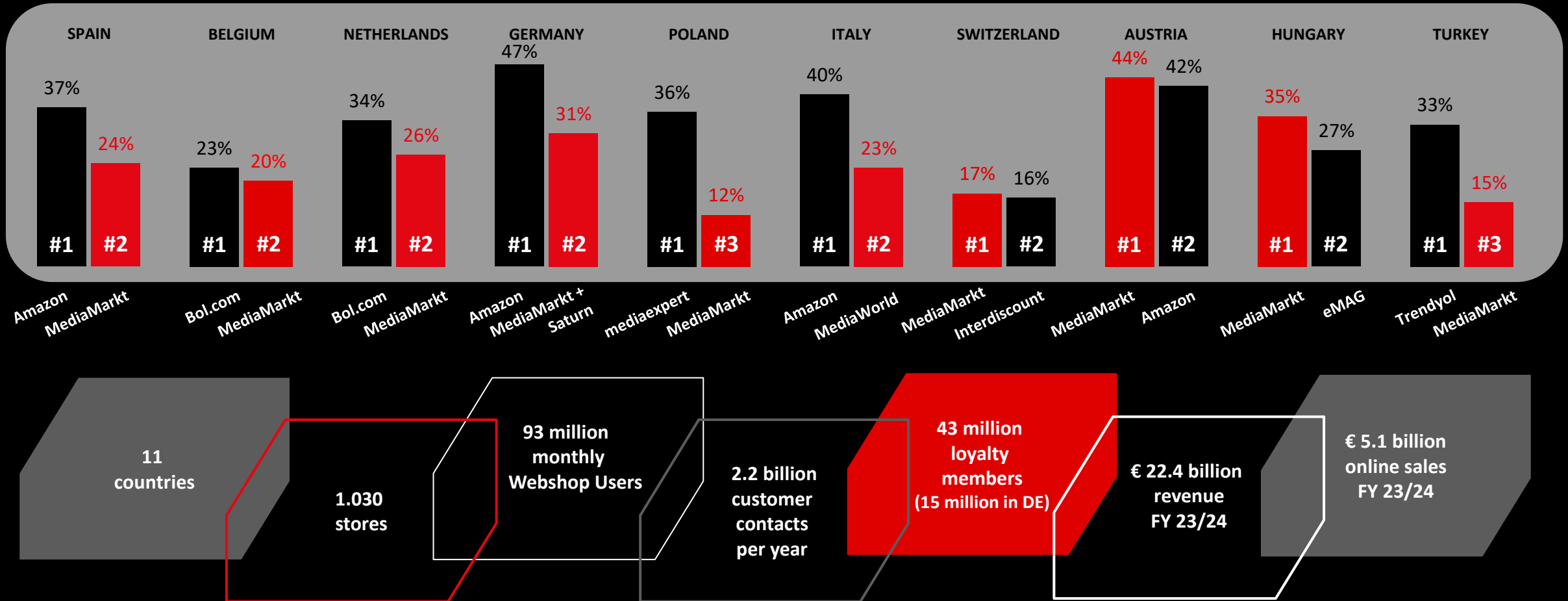
will be worth €31bn in 2028

Retail Media Ad Spend (€m)



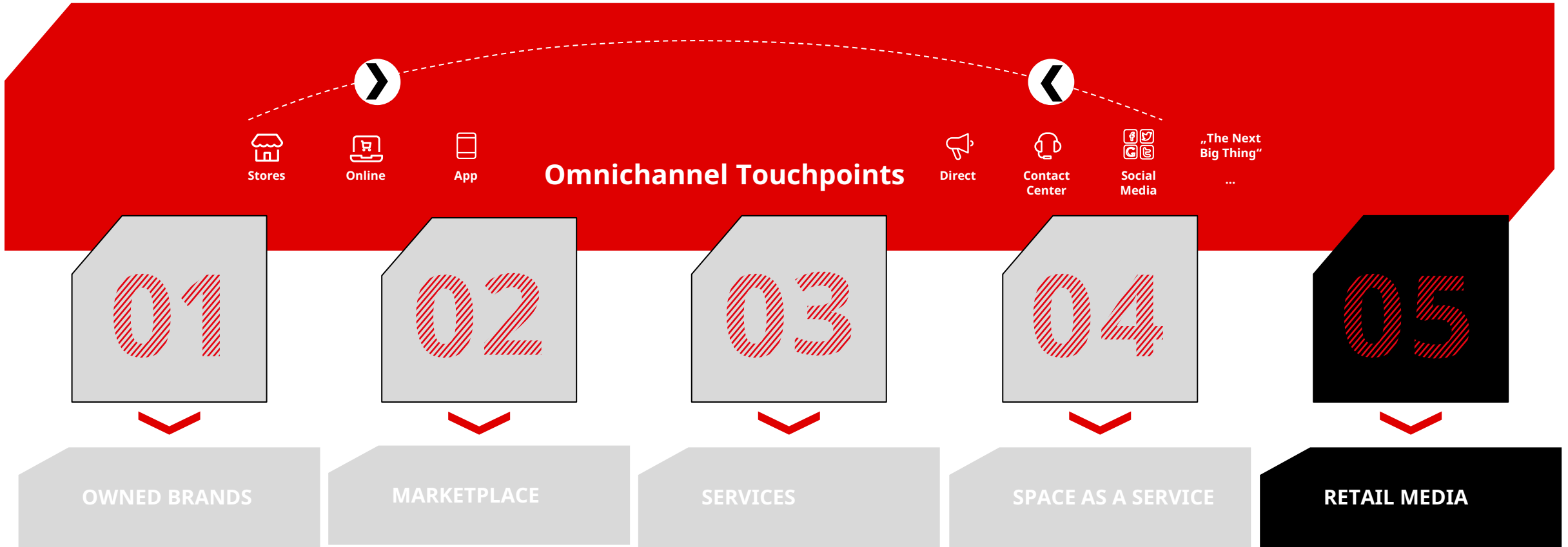
MediaMarktSaturn

in Europe | Q1 FY24/25



Source: Nielsen Brand Health Tracking for MMS; Online Survey Q4 FY23/24; n per country =1.212 - 1.813; Q: In which of these consumer electronics retailers or online-shops do you prefer to buy goods? This may or may not be the same one where you purchase products most often.

Retail Media is an important growth lever in our MediaMarktSaturn Strategy



Omnichannel Supply Chain & Tech-Stack

4 reasons why our **Retail Media** drives **your success**



REACH

Omnichannel access to 2 billion customer contacts.

PERFORMANCE

Full-funnel product performance, from awareness to purchase.

IMPACT

Maximize ROAS through targeted, measurable campaigns.

DATA EMPOWERMENT

Transparent KPIs and precise targeting with first-party data.



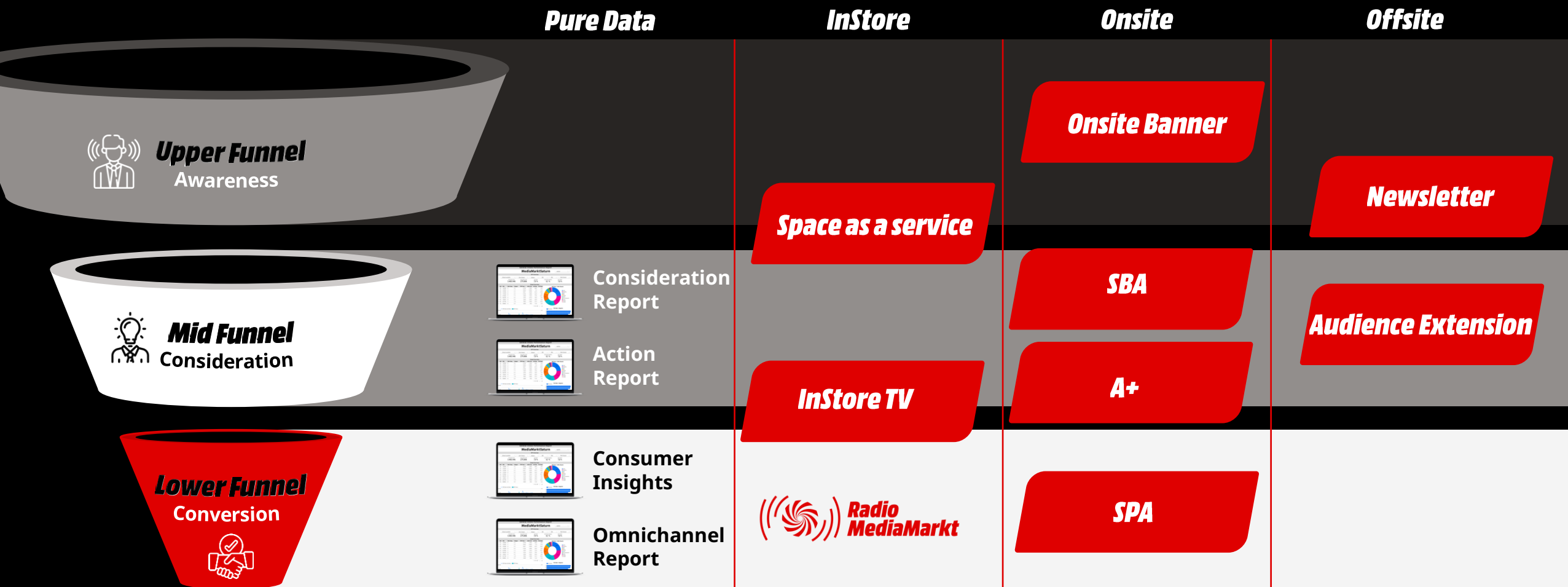
Our Superpower is Omnichannel!

80 %
research online

2.2bn
customer
contacts

70 %
buy offline

Our focus is on creating a full **marketing funnel** product offering



Sponsored Brand Ads (SBA)

**Make your brand
the destination**

1

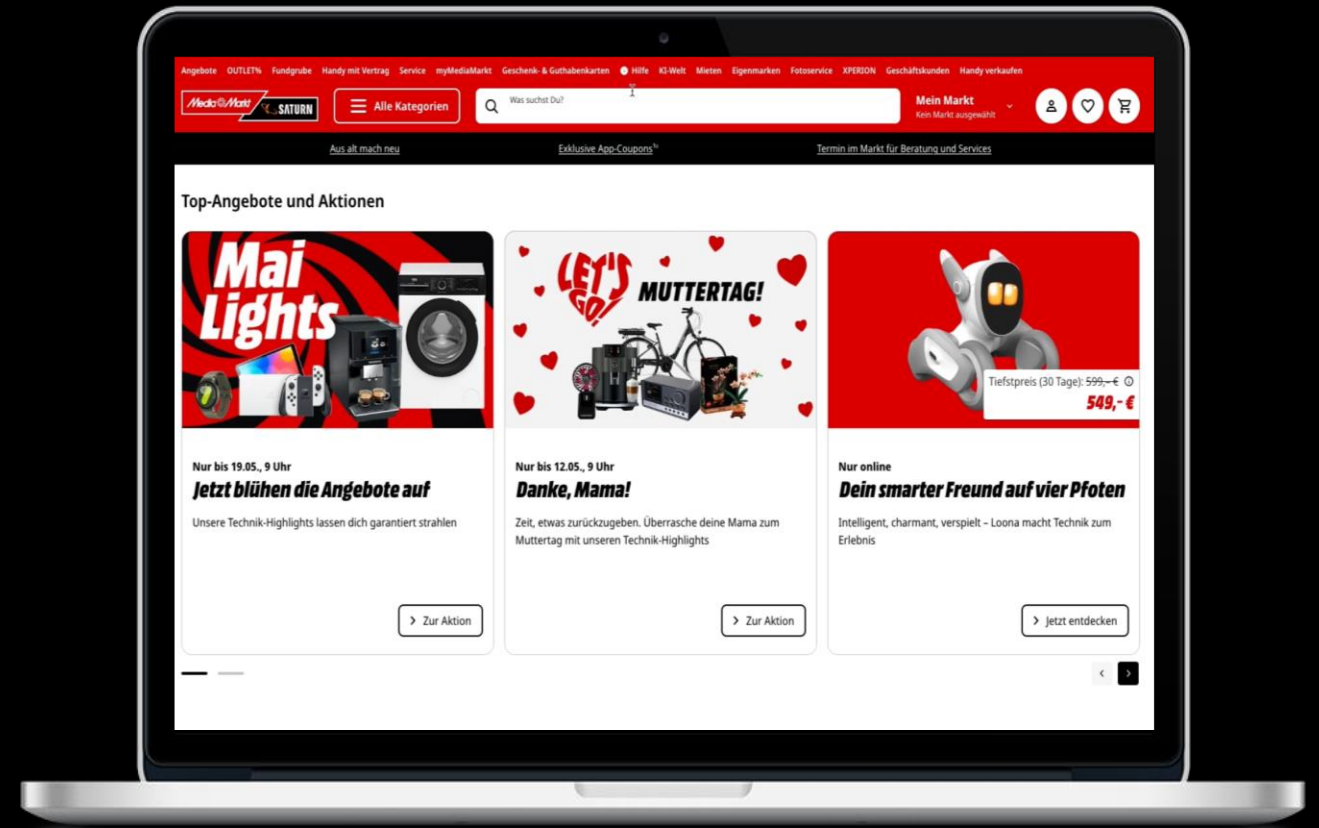
Stand out on key
category pages.

2

Showcase your
unique brand look.

3

Capture attention
early in the journey.



Miele



SAMSUNG



dyson



PHILIPS



Sponsored Product Ads (SPA)

Maximum visibility.
Measurable results.

1

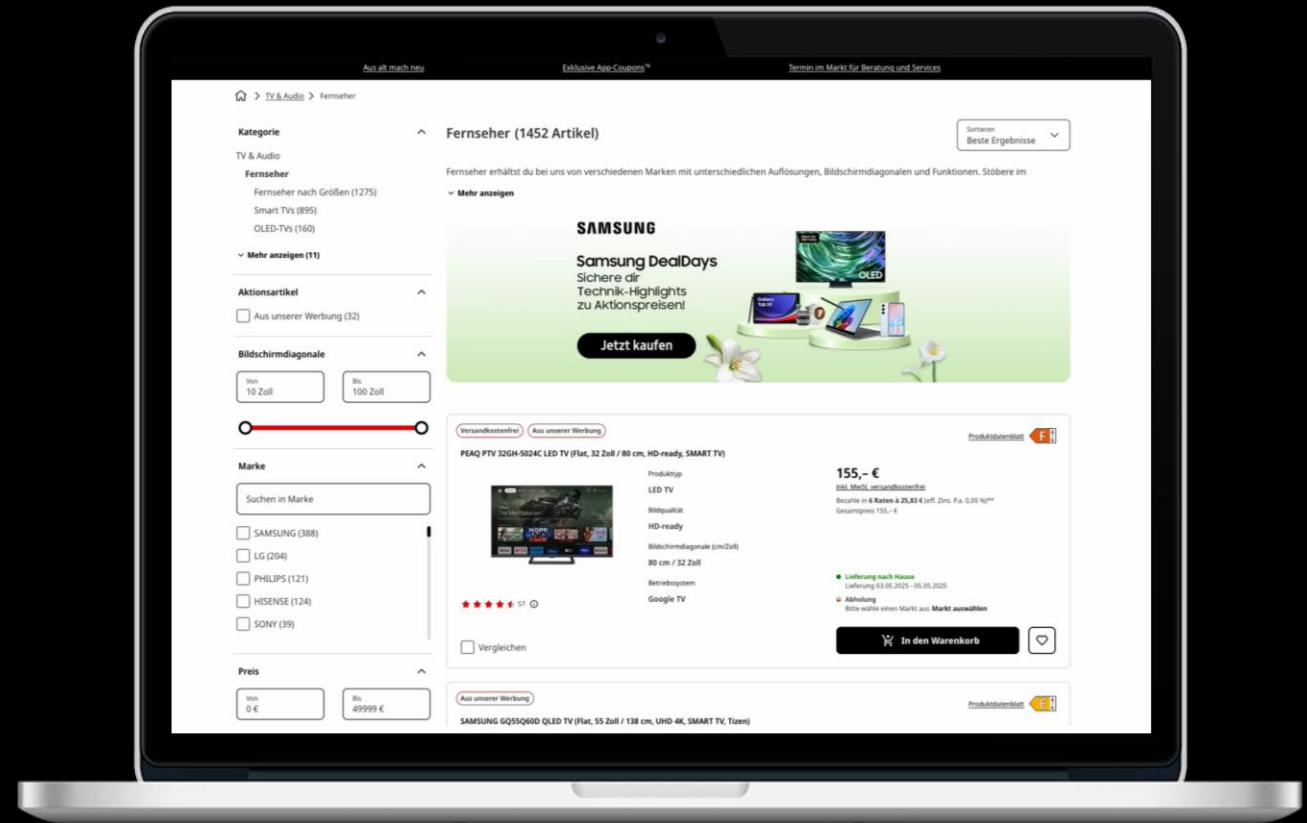
4x more clicks with top-of-page placement.

2

Scale your ads smartly.

3

Drive performance with efficiency.



Miele



SAMSUNG



dyson

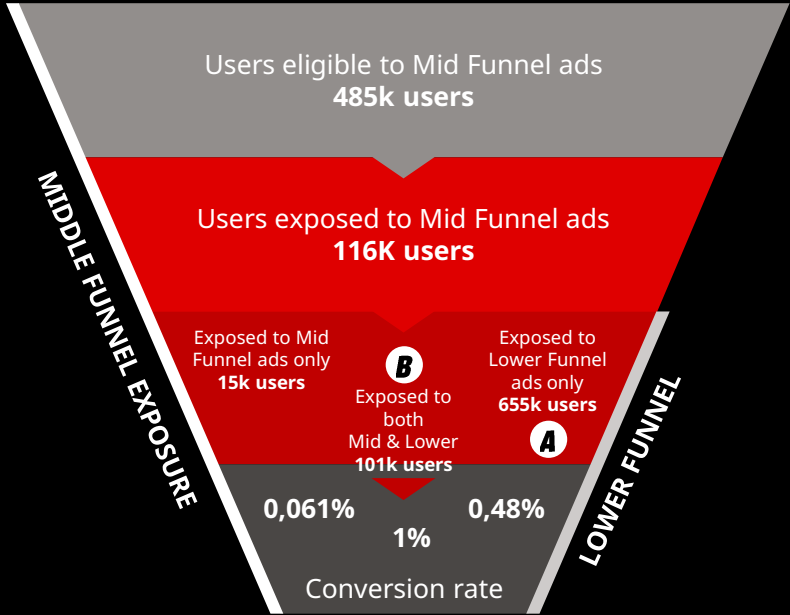


PHILIPS



The **combination of SBA & SPA** improves performance with a **conversion uplift of 109%!**

User flow from eligibility to conversion



X2 CONVERSION

Performance by user group

A

Users exposed to
Lower ads only

B

Users exposed to
Mid & Lower ads

UPLIFT


**Conversion
rate**

0,48%

1%

+109%
100% statistical
significance


**Revenue
per user**

0.31€

0.85€

+171%

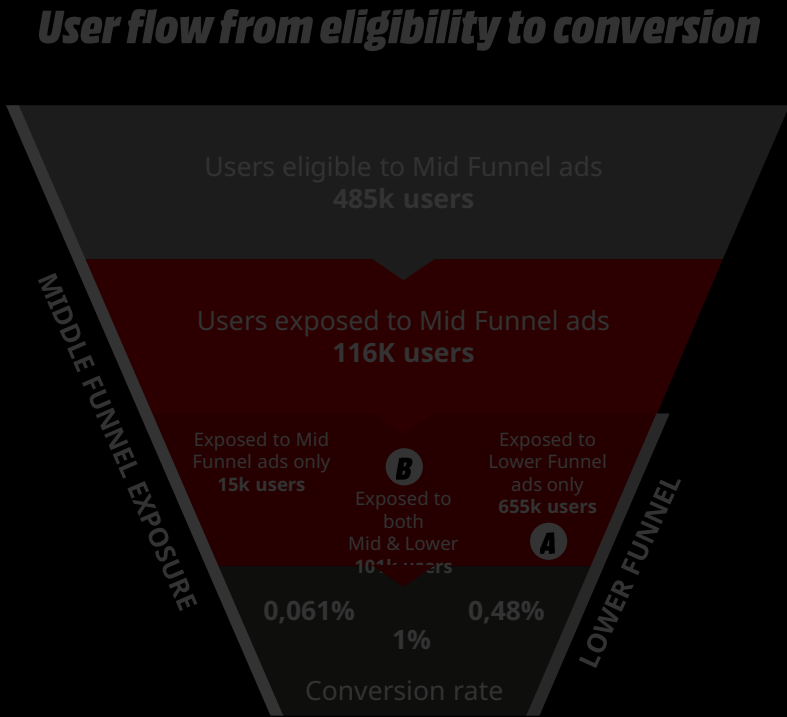

**Lower
Ads CTR**

0,13%

0,18%

+0,55%

The **combination of SBA & SPA** improves performance with a **conversion uplift of 109%!**



X2 CONVERSION

Performance by user group

A

Users exposed to Lower ads only

B

Users exposed to Mid & Lower ads

UPLIFT

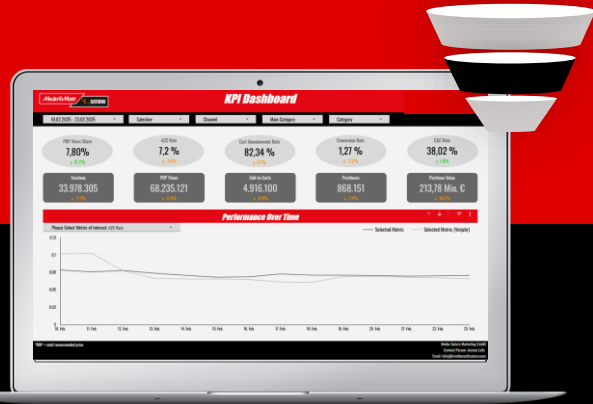
 Conversion rate	0,48%	1%	+109% 100% statistical significance
 Revenue per user	0.31€	0.85€	+171%
 Lower Ads CTR	0,13%	0,18%	+0,55%

We implement campaigns that pay off:

600 – 2.000 %

***ROAS for Sponsored
Product Ads***

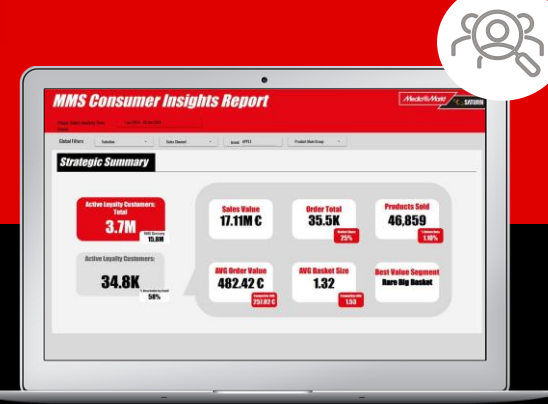
*With our **DATA-DRIVEN SOLUTIONS,**
we identify & leverage areas of optimization*



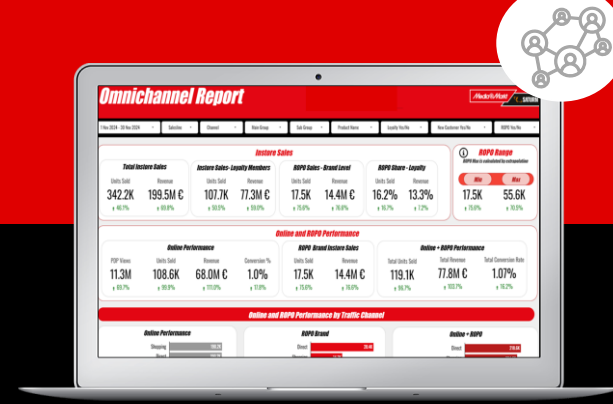
***CONSIDERATION
REPORT***



***ACTION
REPORT***



***CONSUMER
INSIGHTS
REPORT***



***OMNICHANNEL
REPORT***

Onsite Banner Ads

First impression.
High traffic.

1

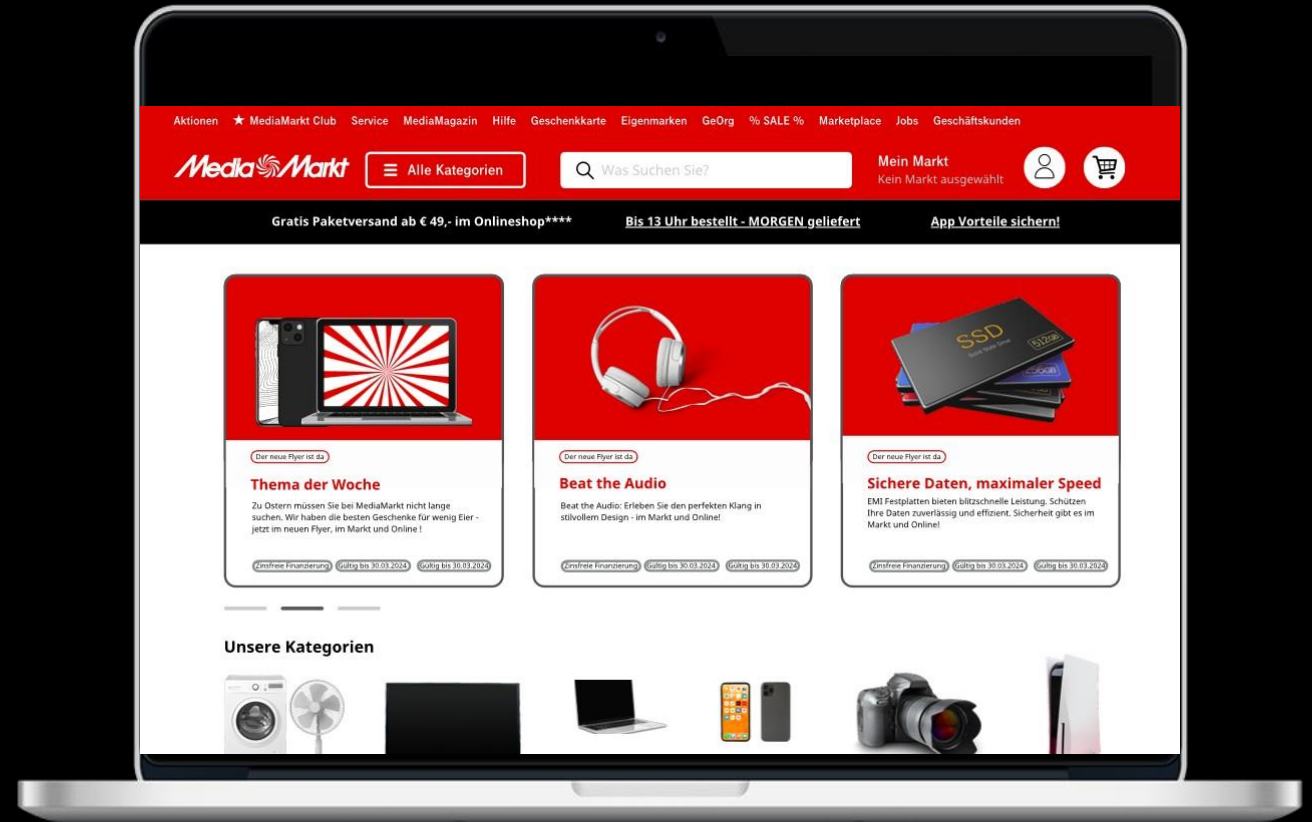
Front page, top of page

2

> 71 million visitors
per year

3

Make your brand
stand out



Miele



SAMSUNG



dyson

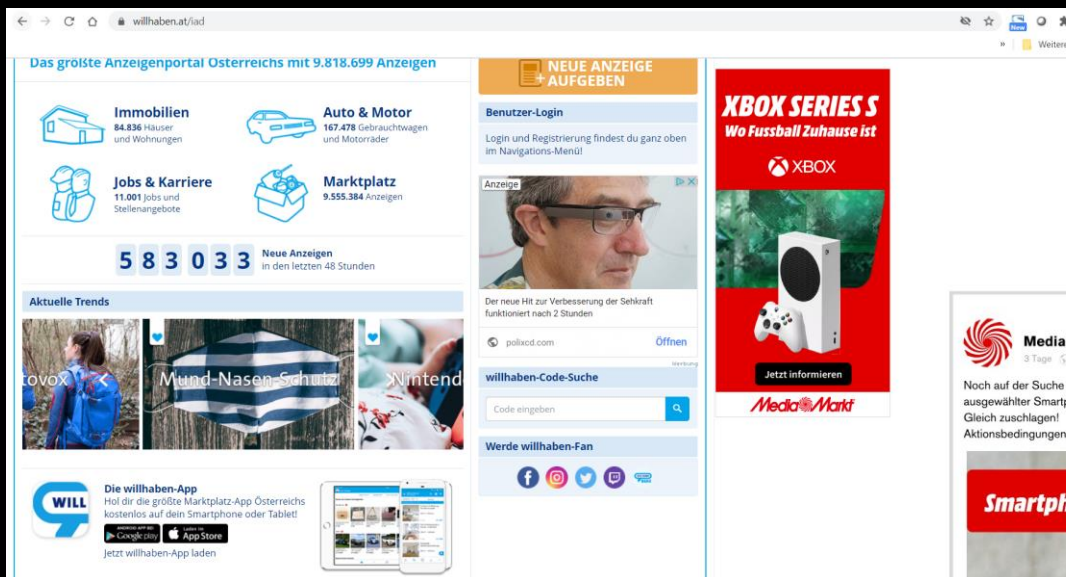


PHILIPS



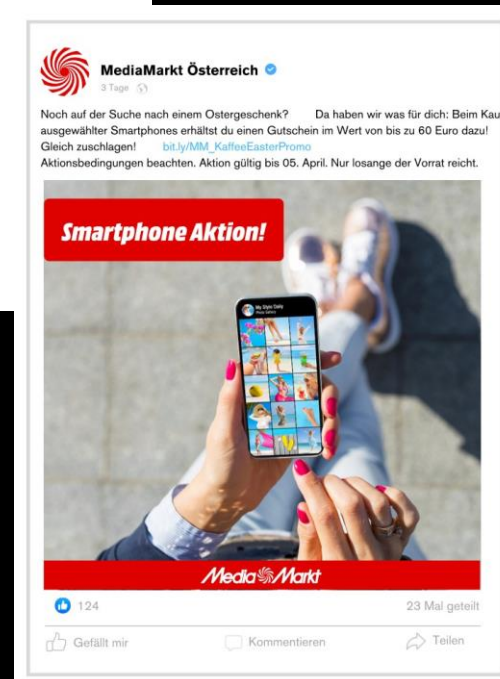
Audience Extension

**First party data
segmentation**



**Defineable lookback
window**

Premium sitelist (ÖWA Top)



**Guaranteed impression
goal**

**Addable platform
specific interests**

We create omnichannel synergies with



InStoreAds



Enhance the brand and product awareness in offline settings.

AWARENESS

MULTI-SCREENS

Take advantage of displaying your ads across multiple TVs at the same time, maximizing the impact with a high ad density.

Bridge your online strategy with the highest-converting stage of the sales funnel: the store.

OMNICHANNEL SYNERGY

2.2m

**Store visitors
(monthly average)**

6

**Loops
per hour**

56

Stores

4.000

Screens

**We create
omnichannel synergies
with**



InStoreAds

InStore & DAB+

Own editorial department

Production included

Last auditive CTA InStore



***Radio
MediaMarkt***



„Space-as-a-Service“ ***is key to enhance our shopping experience*** ***SHOPFLOOR SOLUTIONS***



Boutiques



***Experience
Zones***



***Entrance
Statements***



Events



Store-in-Store

- ***Consistent experiences across all touchpoints***
- ***Experience is omnipresent***

„Space-as-a-Service“
is key to enhance our shopping experience
SHOPFLOOR SOLUTIONS



René Reisinger

Senior Specialist Retail Media

MediaMarkt Austria



***Please reach out to me
for any questions!***

GO! LET'S GO! LET'S GO! LET'S GO!
GO! LET'S GO! LET'S GO! LET'S GO!
GO! LET'S GO! LET'S GO!
GO! LET'S GO! LET'S GO!

Let's connect

René Reisinger



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NielsenIQ