



Find Your Next Digital Retail Strategy

*Navigating AI, Omnichannel
and Retail Media*

**insight
summit**
2025

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Heading into 2025

The state of consumers is *determined*

Resilience is evident as consumers face a mixed bag of socioeconomic change. While some pressures have lifted, there is looming uncertainty around geopolitical crises, economic stability and environmental health.

Spending is being directed to where it matters most in the great.

RESILIENT

VIGILANT

INTENTIONAL

Changing consumer behavior impacting retail

2025 – The intentional shoppers



**Value for
money**



**Quality over
quantity**



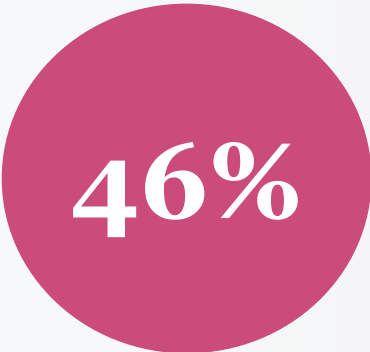
**Necessity &
pragmatism**



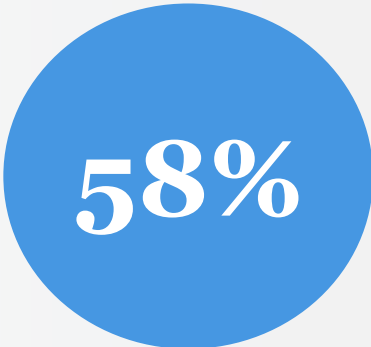
Intentional consumers are willing to pay a premium for convenience and life satisfaction



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

Initial purchase trigger

Smartphones



56%
*replacing
faulty product*

Robot Vacuum



40%
*getting
additional
product*

gfknewron Consumer, July 2024 – June 2025, Robot vacuum & Smartphone: AT,BE,GR,GE,GB,IT,NL,PO,SP,CH

The intentional shopper doesn't need to look around

22% *-4pt vs 2024*

Change stores because of interesting advertising or promotions

Change brands because of promo

22%
+6pt vs 2024

56% *+1% vs. LY*

Consistently visit the same store

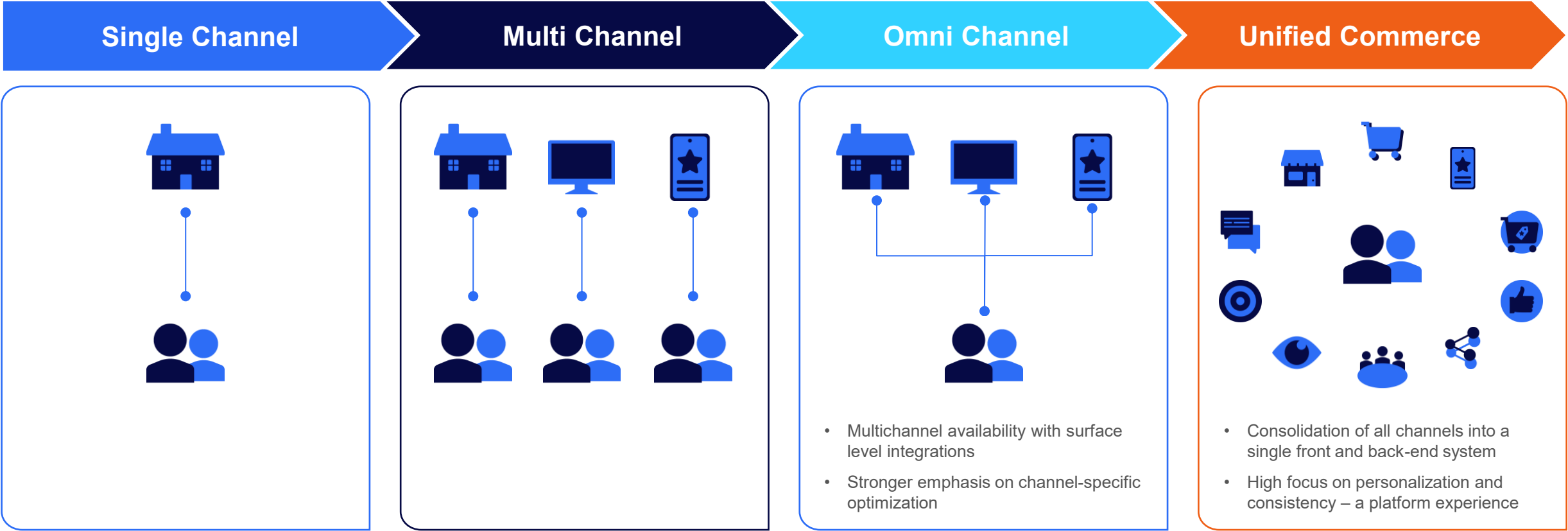


Source: NIQ 2025 Shopper trends BE



What about omnichannel?

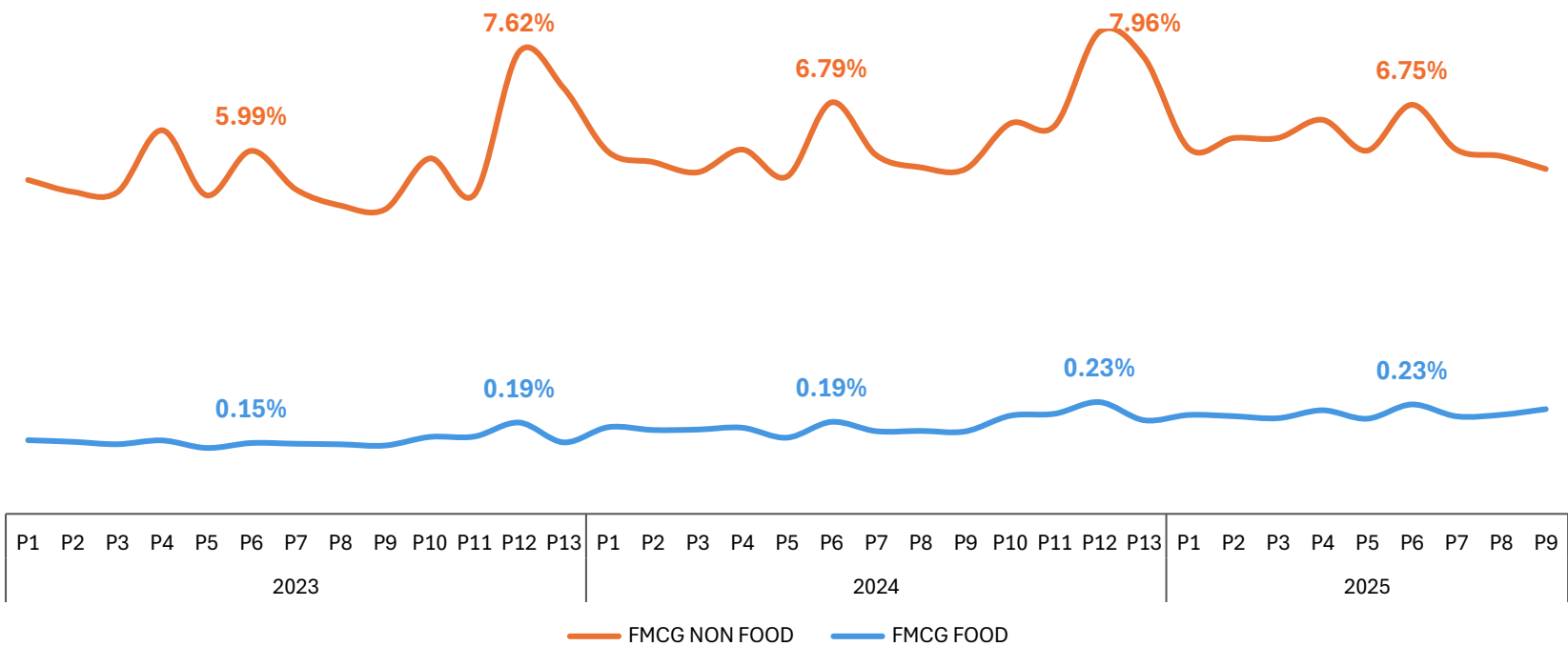
Consumer touchpoints evolution



E-commerce reaches 8.8% importance in Belgium. With growth potential compared to neighboring countries

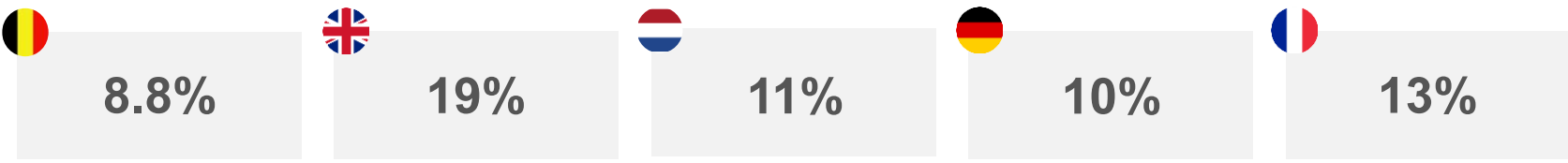
Value Share of Trade - Ecom Pure Players (Amazon+Bol)

BE pure players VS. B&M+pure players FMCG – Food & Non-Food – 4-weekly



Value Share of Trade - Ecom All panel players

BE Ecom within B&M+Ecom FMCG – FY2024 – Food & Non-food



Source: NIQ Belgium RMS Scantrack, | Omnisales BE | Global Retail trends report for neighbour countries MAT October 2024 | All benchmarks EXCLUDING Perfumery

T&D online share nearly reaches 42%

But we didn't reach covid levels yet

	Jan – Jun
41.6%	2025
40.4%	2024
40.6%	2023
39.4%	2022
42.3%	2021
39.8%	2020
28.3%	2019
26.0%	2018
24.1%	2017

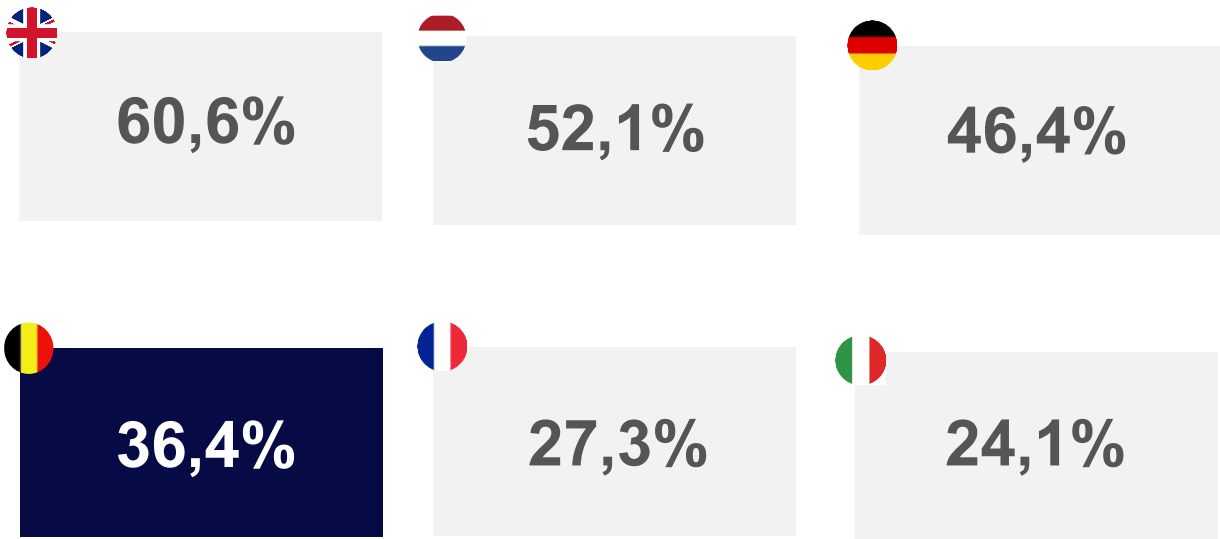


Source: GfK Retail Panel

Also within T&D there is still some potential for growth in Belgium

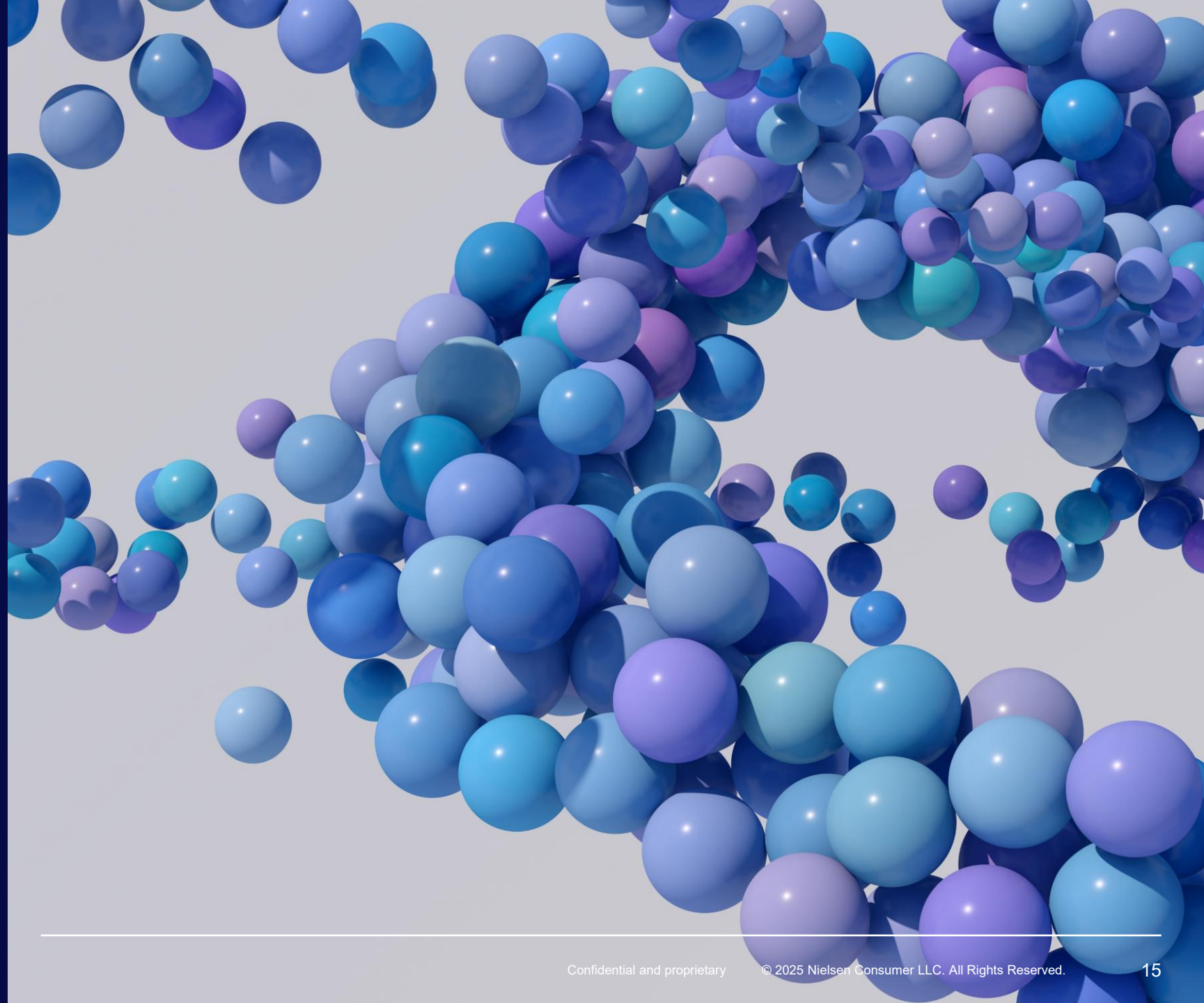
Jan – Jun
2025

41.6%



Source: GfK Retail Panel

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

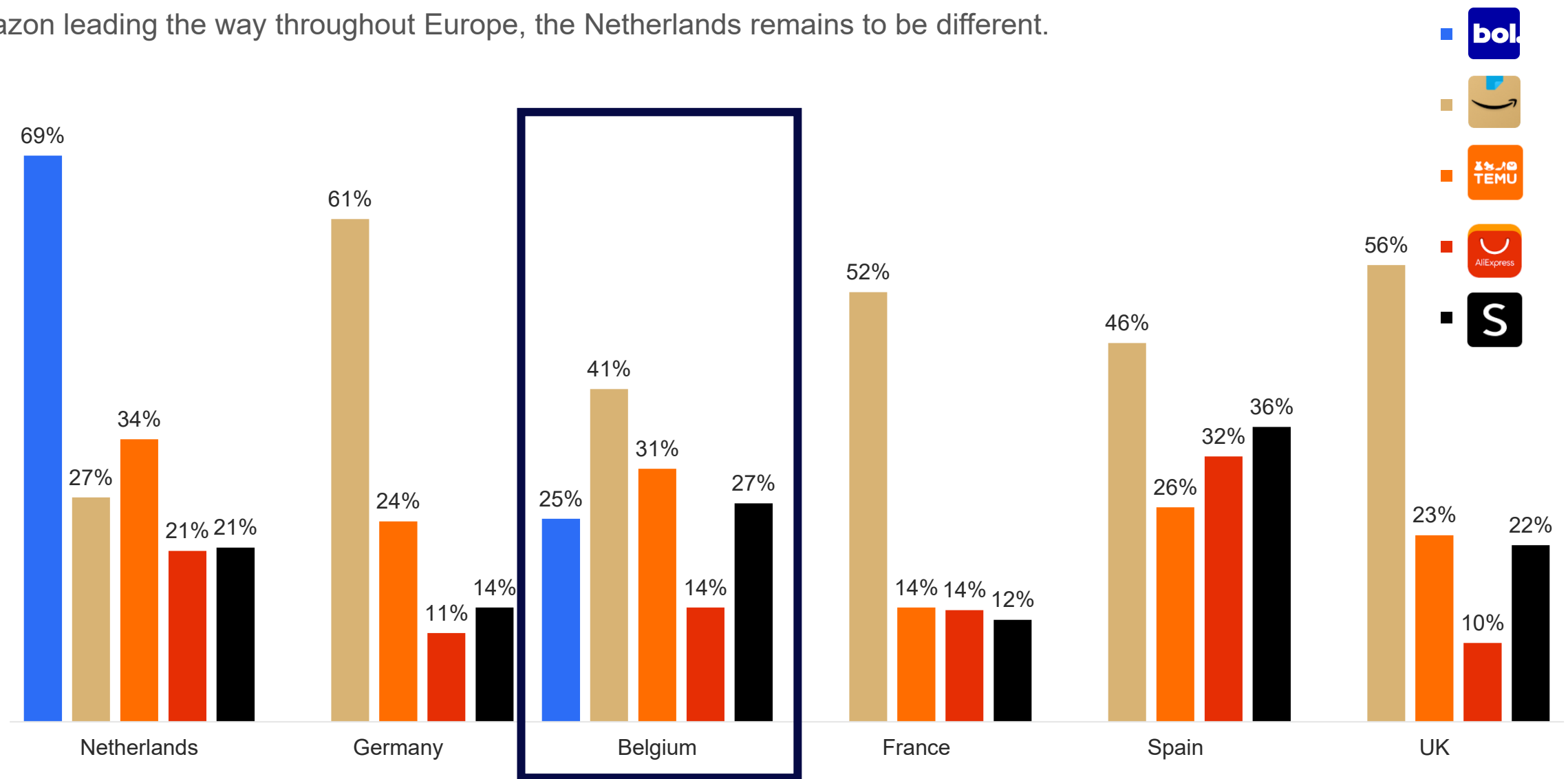
- Personalized recommendation Based on deep need assessment
- First links to actual shopping (e.g. Perplexity)

Present

Future

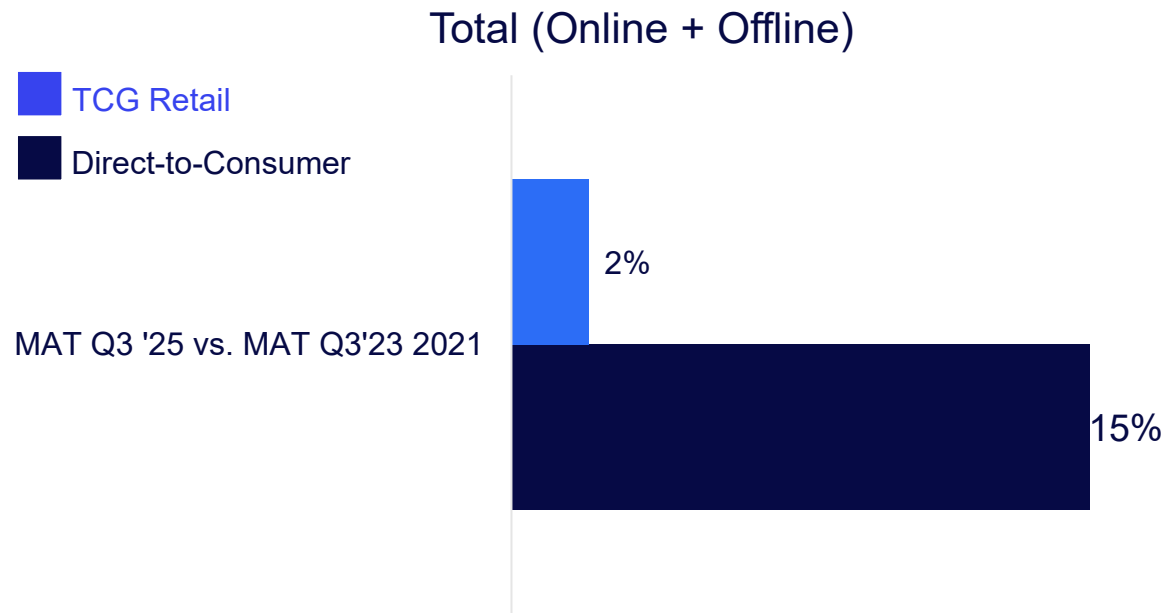
Penetration varies across countries

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

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



gfknewron Consumer | T&D BE | 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

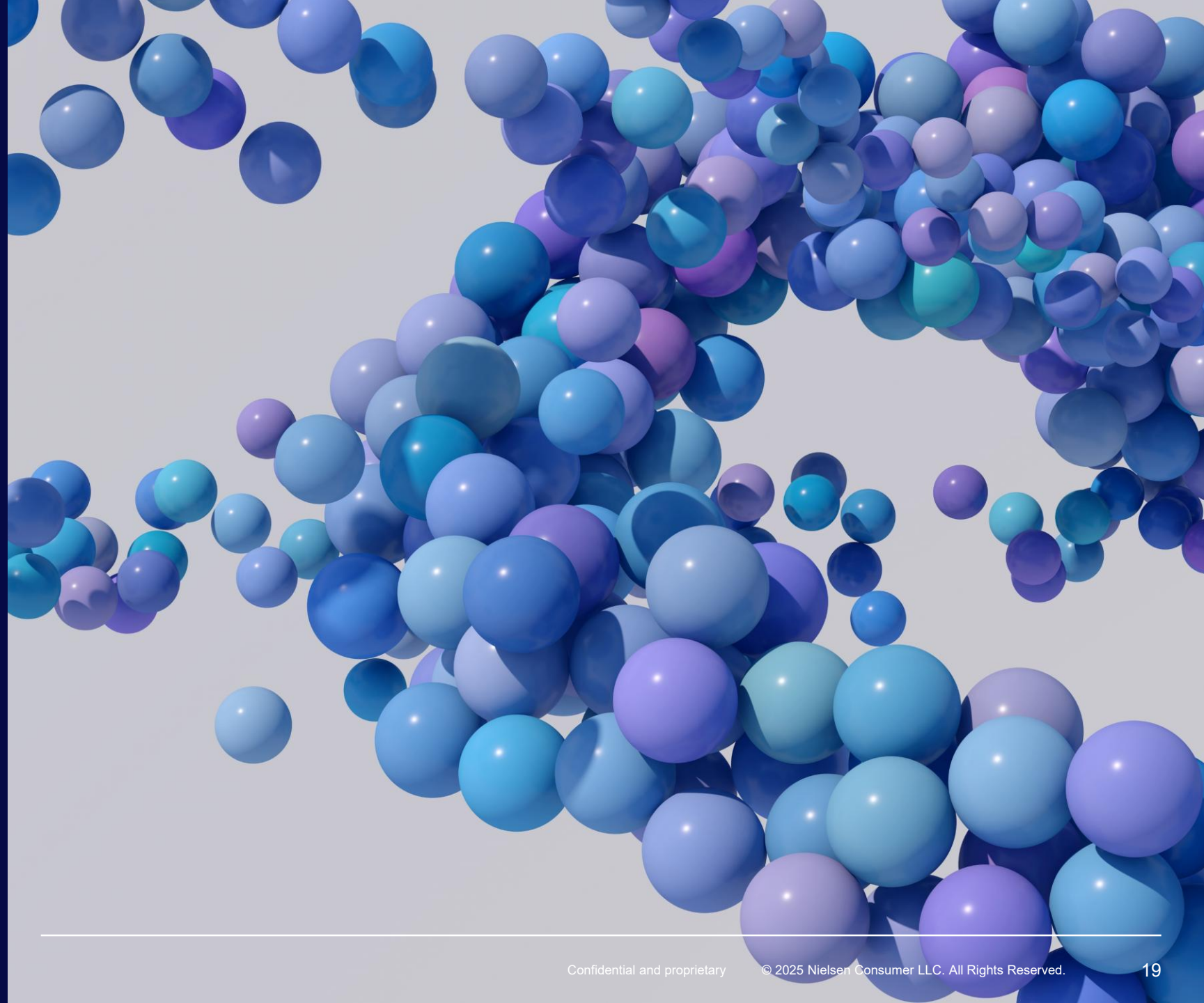


Direct-to-consumer channels
=
~~friend or enemy?~~

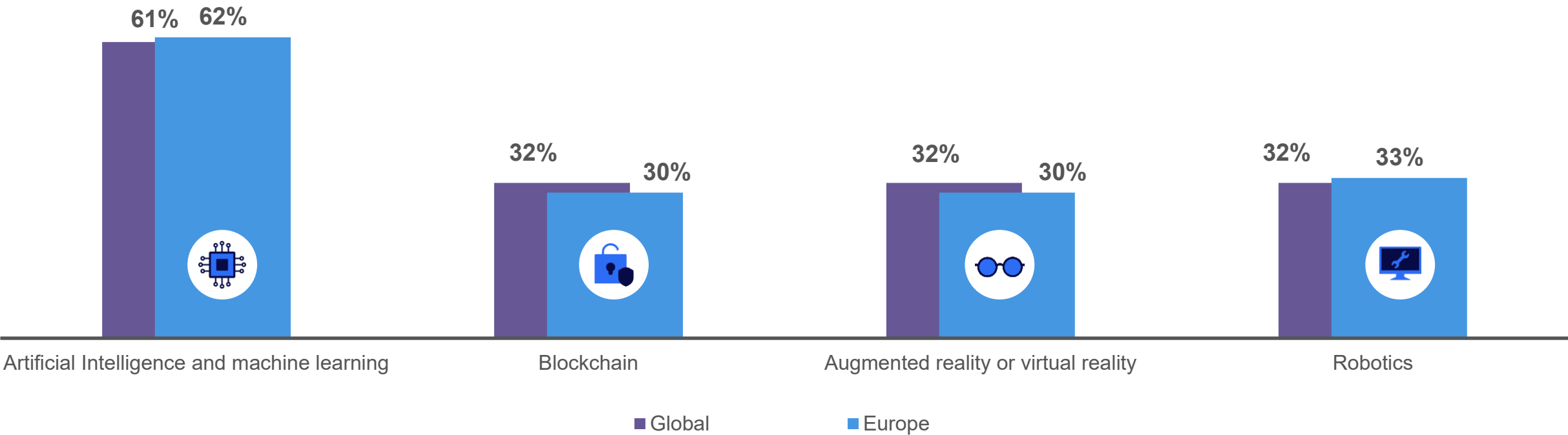
Don't let them become your enemy!
Nurture the opportunities

Source: Insight Summit 2024 – Presentation by Els Breugelmans

How about *AI* within retail?



What about the impact of technology?

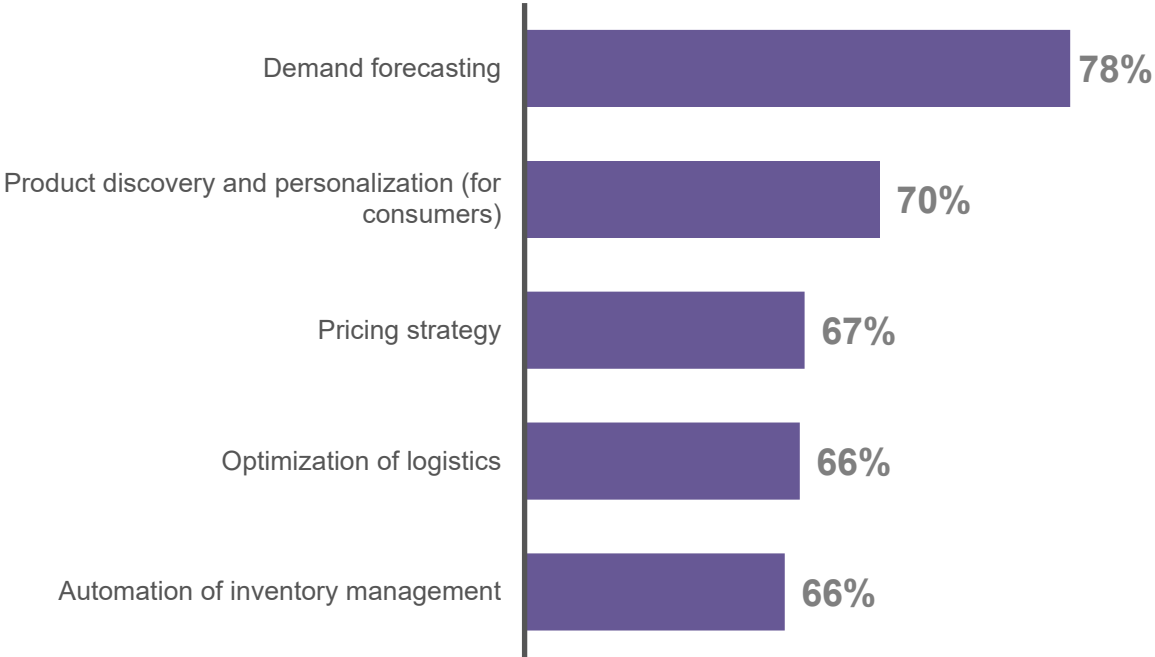


- T1: To which extent will your company focus on the following technologies in the next 2-3 years? [Chart includes Top 2 Boxes]
- Base: Europe n = 444, Total n = 796, scale where 1 is “No strategic focus at all” and 5 is “very high strategic focus”
- GfK Retail (R)evolution 2023

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

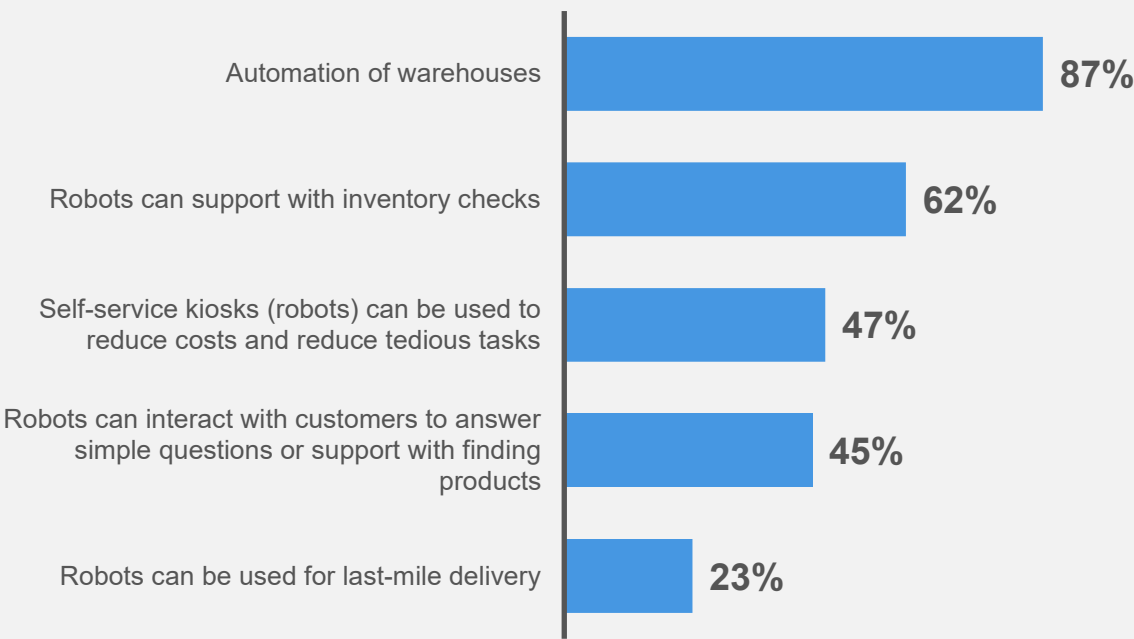
AI enabling retailers to achieve *operational excellence* and elevate *personalization*

Expected benefits of AI and ML



Retailers integrating robotics to reduce operational costs

Expected benefits of robotics



Source: Retail Revolution (NIQ/GfK)

From feature to foundation: How AI evolved from enhancing devices in 2024 to powering ecosystems in 2025

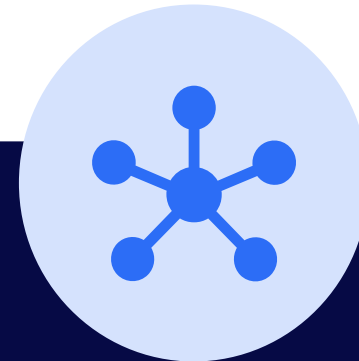
At IFA 2024, AI was primarily used to **enhance existing products**. It was additive – something that made devices smarter, more efficient, or more user-friendly, but not transformative in how the product functioned or interacted with the user.



- **Task-specific AI:** AI was embedded in individual features - like noise cancellation, image enhancement, or energy optimization.
- **On-device intelligence:** AI ran locally, often limited by hardware constraints
- **User-initiated:** Most AI features required user input or activation.



By IFA 2025, AI is evolving into a **core enabler of connected ecosystems**. It is no longer just a feature – it powers ambient intelligence and multi-device/function collaboration enabling it to anticipate, adapt, and collaborate.



- **Ambient intelligence:** AI operated in the background, learning from context and behavior to automate decisions.
- **Multi-LLM* systems:** Devices integrate multiple AI offerings (e.g., Copilot, Gemini, Perplexity) to handle different tasks.
- **Cross-device orchestration:** AI connected and coordinated across devices, forming a cohesive, responsive environment.

AI is rewriting discovery and search

AI is disrupting SEO & ad spaces

Content needs to be redesigned to help with discovery for the new generative engine optimization (GEO)

Trust in AI/agent shopping is still low

Manufacturers and retailers must look at every channel and take a holistic approach to trust to identify how they can earn it.

Community Commerce

Focus on long-term strategies like community commerce. Create a space for like-minded consumers to interact directly and grant them exclusive access as a reward.



What about 2026?

**In a decade marked by disruption,
volatility has reshaped the consumer
mindset**

Every euro spend is deliberate

Each purchase is intentional

Caution is the only constant

How can business plan to win in 2026?

Brand trust

95%

of consumers say trusting the brand they are buying from is very or somewhat important

Seamless commerce

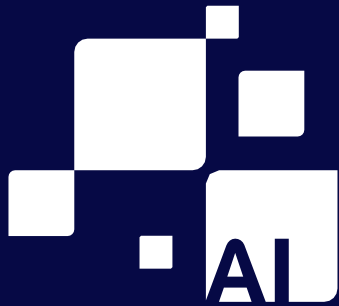
+15%

*Global e-commerce growth in FMCG
MAT Q1 2025*

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

Seamless commerce

Today, there are seven omni touchpoints brands must keep top of mind:



With technological advancements such as Artificial Intelligence (AI), the evolution of omni will undoubtedly accelerate at an increasingly fast rate.



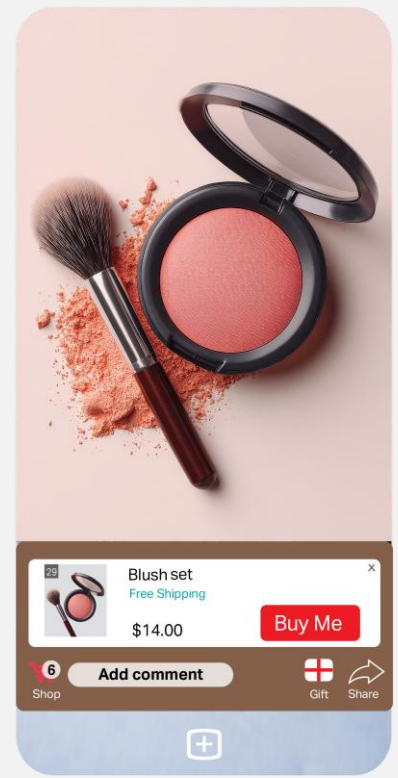
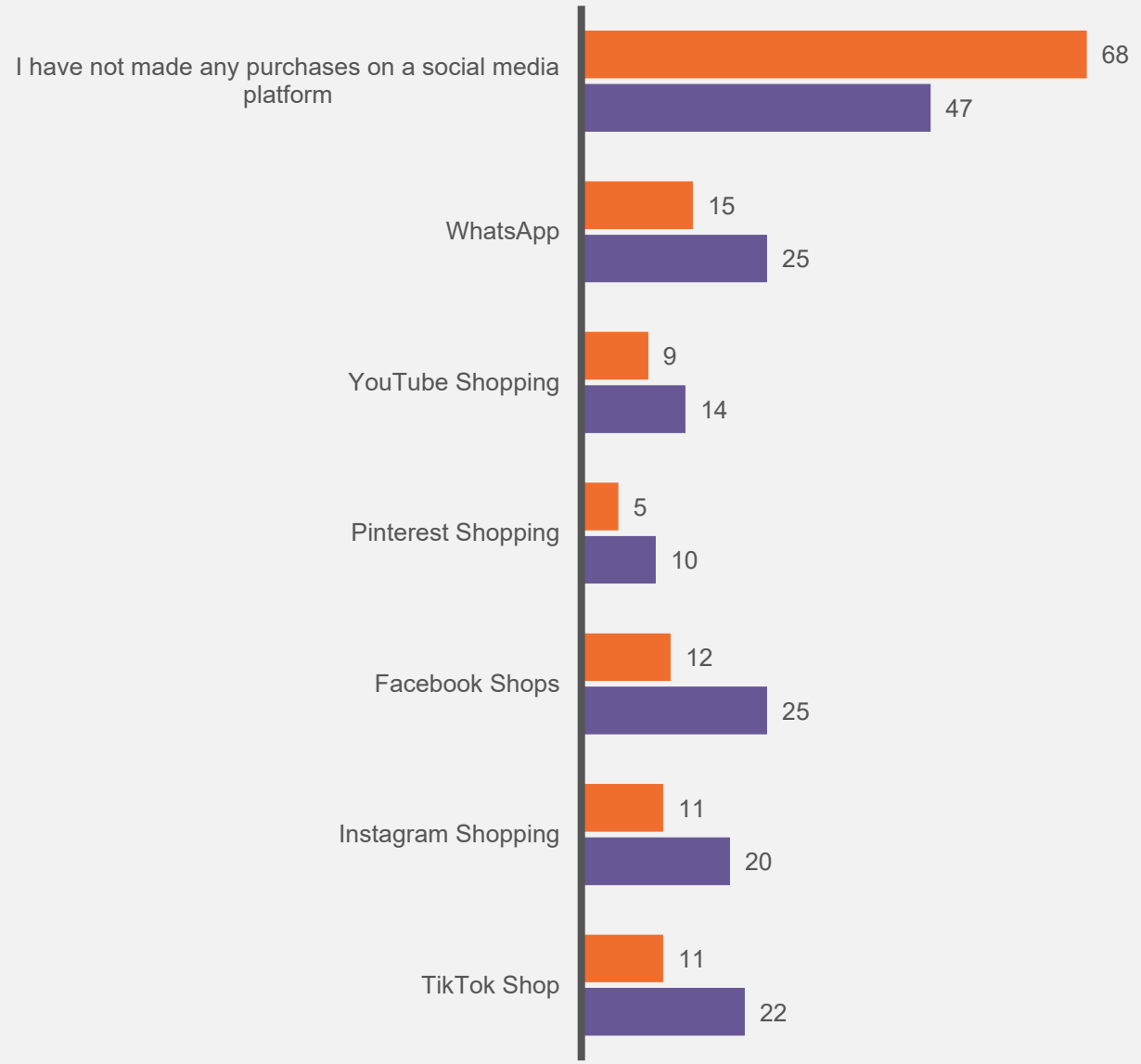
Source: NIQ

Social shopping is gaining steam

Western Europe has some catching up to do!

A lack of trust in the security of payment information is what typically holds consumers back.

Have you ever purchased a product directly through any of these social media platforms?



Western Europe region
Total global

The transformational power and potential of retail media networks

+\$1.3T
of enterprise value from
retail media in US by 2026

for retailers



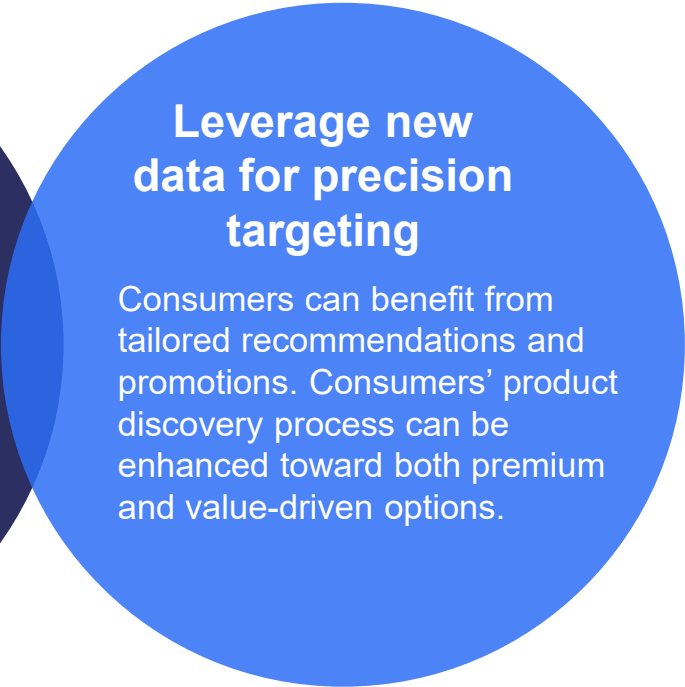
Dual promotion of both branded and private label offerings can enhance total category engagement, brand learnings, and growth potential.

for consumers



Optimal conversion on consumer interests is driven by shopping experiences tailored to unique preferences.

for manufacturers



RMNs enable brands to tell their stories and provide exclusive offers, helping to defend market share.

To conclude

Key takeaways

The intentional consumers drives change in the retailer landscape

- Value for money does not mean inexpensive
- Promotional events encourage quality over quantity
- Innovation & disruptive upgrades drive demand

Omnichannel is past, we have a seamless commerce

- Difference between channels disappear
- Growth potential for online both in T&D and FMCG
- « New » online competition is gaining ground

Impact of AI

- AI is rewriting discovery and search
- AI evolved from enhancing devices to powering ecosystems

The background of the slide is composed of numerous 3D-rendered spheres in various shades of blue and purple. These spheres are scattered across the frame, with some appearing in small groups and others as individual points. The lighting creates soft highlights and shadows on the spheres, giving them a realistic, three-dimensional appearance. A white rectangular box with rounded corners is positioned in the center-left of the slide, containing the text 'Thank you!'.

Thank you!