

The background of the slide is a light gray color, overlaid with a large, abstract graphic of numerous blue and purple spheres of varying sizes. These spheres are clustered together, creating a sense of depth and movement. The spheres have a glossy, 3D appearance with highlights and shadows. The overall composition is modern and tech-oriented.

# NielsenIQ

## From Warm-Up to Win

*A Data-Driven Approach to  
Successful Promotions*

**insight  
summit**  
2025

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*Consultant Market Intelligence, NIQ*



HYROX  
GENT





1. Market Data (GFK / Applia)

2. Redemption Data

3. Sell-in Data

4. Sellout Data

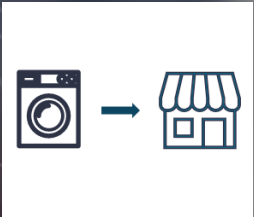
5. Supply Data

6. Online Retail Data

7. Instore Retail Data

8. Data Owned Touchpoints

...



| Revenue              |                      |          | Revenue Share        |                      |        |
|----------------------|----------------------|----------|----------------------|----------------------|--------|
| €152.8m              | €148.6m              | -€4.2m   |                      |                      |        |
| €32.5m               | €32.6m               | +€100.2k | 21.3%                | 21.9%                | +0.7pp |
| €17.8m               | €17.2m               | -€604.9k | 11.7%                | 11.6%                | -0.1pp |
| €15.5m               | €17.5m               | +€2.1m   | 10.1%                | 11.8%                | +1.7pp |
| €31.2m               | €27.7m               | -€3.6m   | 20.4%                | 18.6%                | -1.8pp |
| €12.1m               | €9.9m                | +€791.4k | 7.9%                 | 6.6%                 | +0.7pp |
| €9.1m                | €15.5m               | +€2.6m   | 5.9%                 | 10.4%                | +2.0pp |
| €12.8m               |                      |          | 8.4%                 |                      |        |
| Jan 2024<br>Aug 2024 | Jan 2025<br>Aug 2025 |          | Jan 2024<br>Aug 2024 | Jan 2025<br>Aug 2025 |        |



| bol.com       |      |     |     |     |       |     |     |     |     |
|---------------|------|-----|-----|-----|-------|-----|-----|-----|-----|
| ★ 4.5         | 65.7 | N/A | N/A | N/A | N/A   | 4.5 | 62  | 4.6 | 50  |
| EAN           | ★    | 🗨   | ★   | 🗨   | ★     | 🗨   | ★   | 🗨   | ★   |
| 4242005364374 | N/A  | N/A | N/A | N/A | ★ 4.4 | 5   | N/A | N/A | N/A |
| 4242005364503 | N/A  | N/A | N/A | N/A | ★ 4.9 | 18  | N/A | N/A | N/A |
| 4242005303335 | N/A  | N/A | N/A | N/A | ★ 4.5 | 123 | N/A | N/A | N/A |
| 4242005367245 | N/A  | N/A | N/A | N/A | ★ 4.6 | 119 | N/A | N/A | N/A |
| 4242005314720 | N/A  | N/A | N/A | N/A | N/A   | N/A | N/A | N/A | N/A |
| 4242005447121 | N/A  | N/A | N/A | N/A | ★ 4.3 | 9   | N/A | N/A | N/A |



# Motivation

Why Promotions?



# Market Perspective

# NIQ

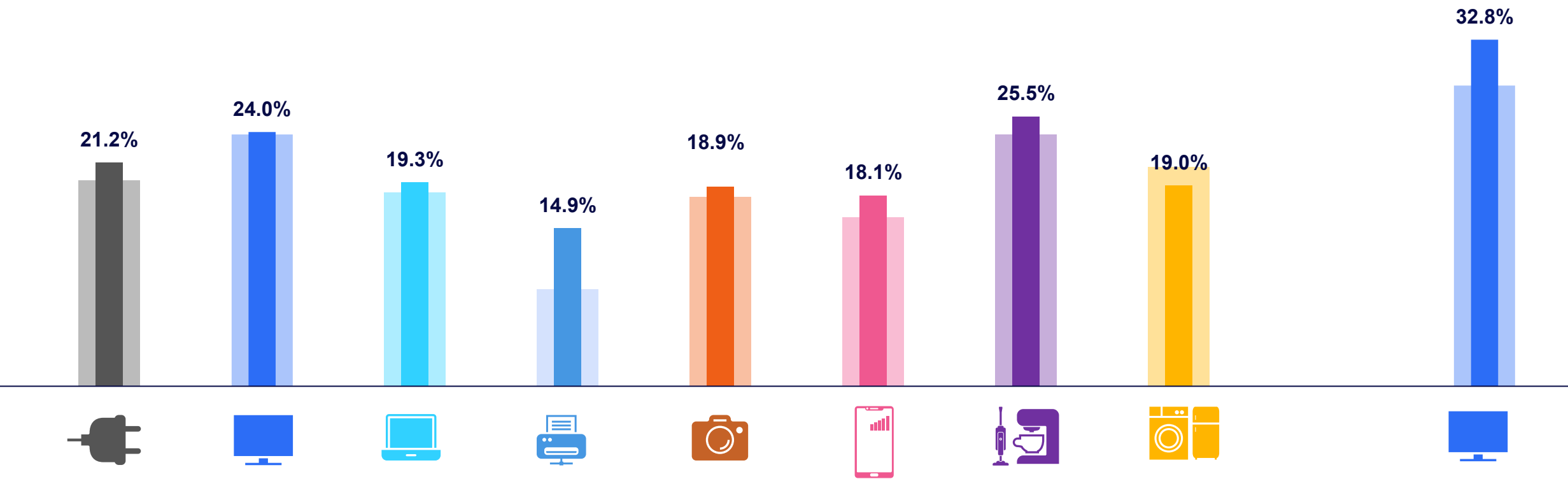
powered by  intelligence

# Promotional intensity hits a new all-time-high for the fourth year in a row

## Promotional pressure on major domestic appliances stabilizing

BE | TCG | Panelmarket | Sales Value EUR (NSP) | Sales Units % >= 10% discount vs LY

■ YTD -1 ■ YTD



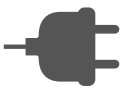
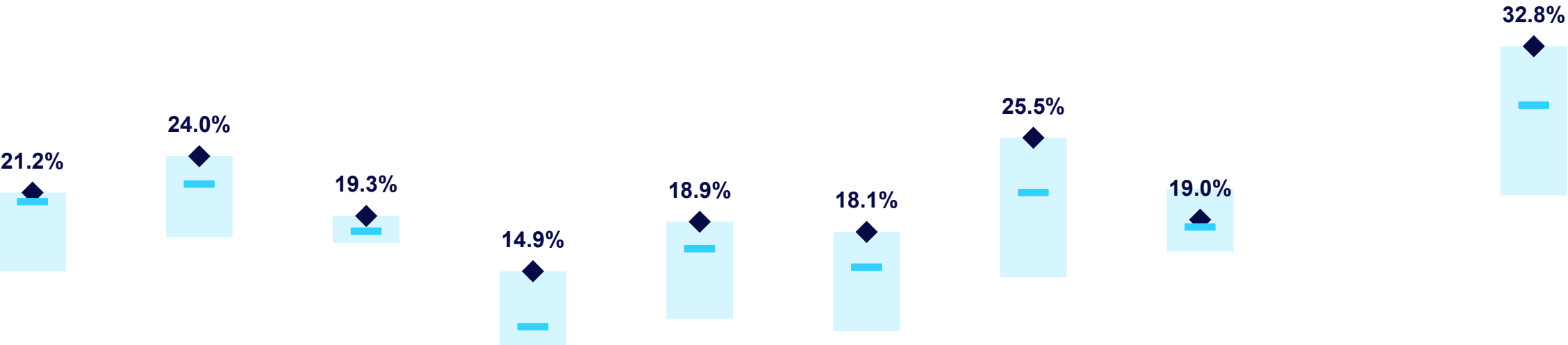
Source: GfK POS data

# Belgian shoppers continue their hunt for the best promotions

Promotional landscape continues to gain traction, driven by domestic appliances, CE & IT

BE | TCG | Panelmarket | Sales Value EUR (NSP) | Sales Units % >= 10% discount vs 5Y AVG & Range

MIN RANGE YTD 5Y AVG

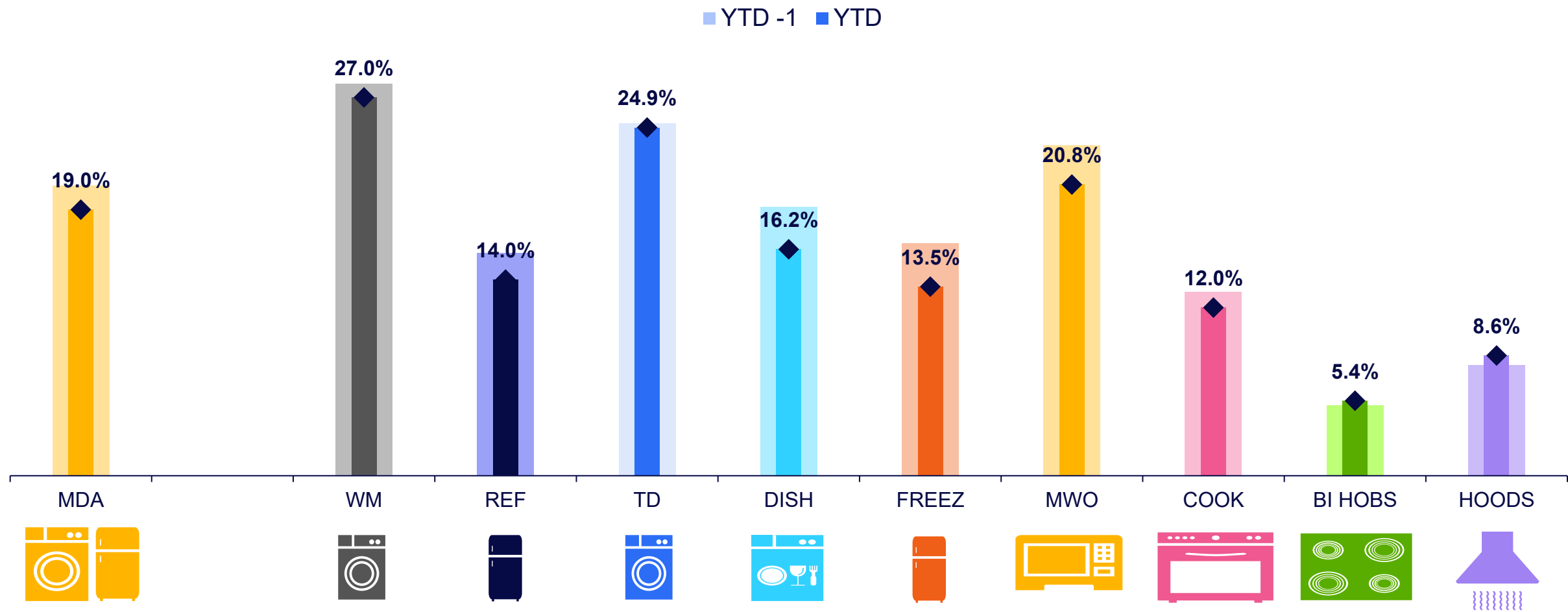


Source: GfK POS data

# MDA sees a stabilization, while Laundry remains near all-time-highs

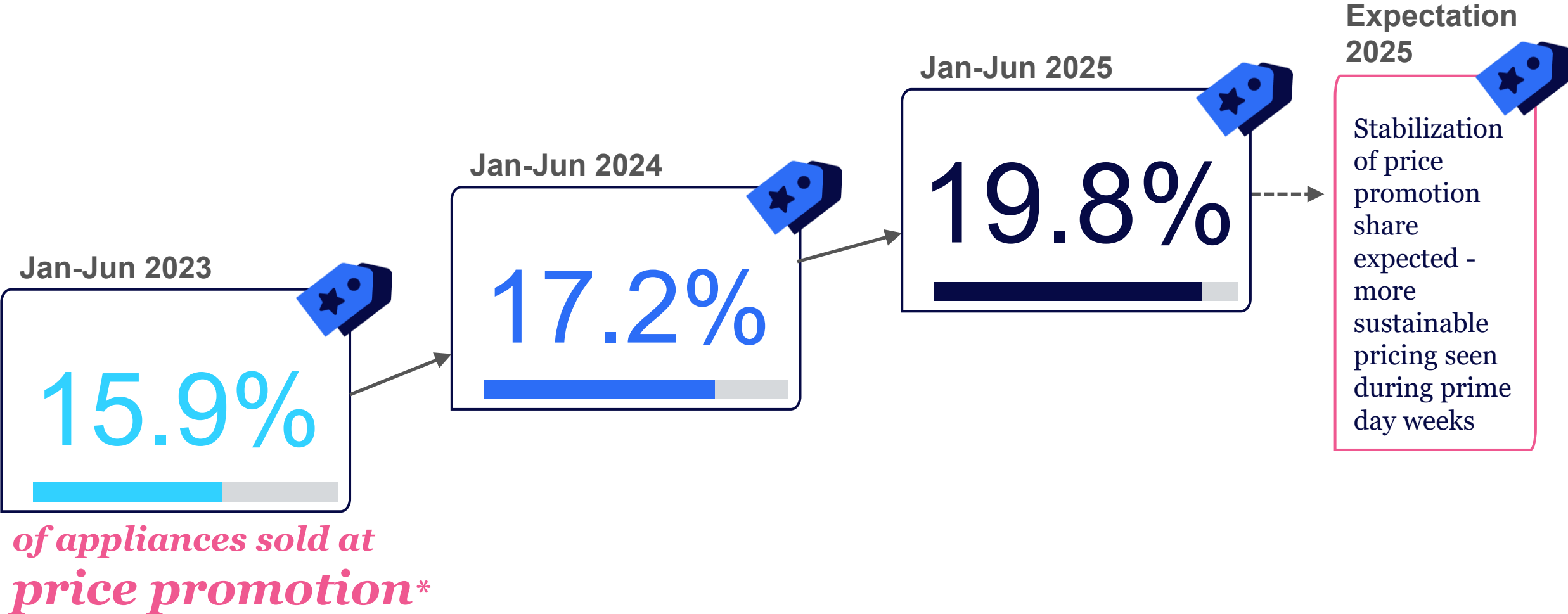
## Kitchen appliances experience a pullback for the first time since pandemic

BE | **MDA** | Panelmarket | Sales Value EUR (NSP) | **Sales Units % >= 10% discount vs LY**



Source: GfK POS data

Price promotions continued strong in J-Jun 2025 after a record price promotion year. Volume demand is clearly driven via promotional months in key countries.



Source: GfK Market Intelligence, MDA, all tracked countries, **\*Sales unit %, price cut >10%, 5EU,CZ,HU,TR,BR**

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# BE & UK top the neighbour list in terms of deeper discounts

Other neighbours primarily play lower MDA discounts <= 15%



# Deeper discounts are primarily observed in Laundry

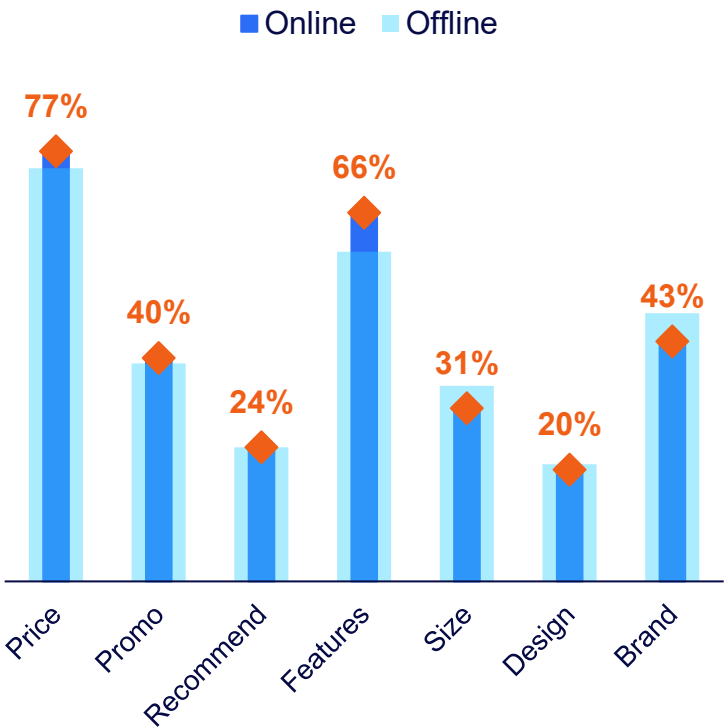
Washing Machines discounts have increased significantly, but stabilizing vs 2024



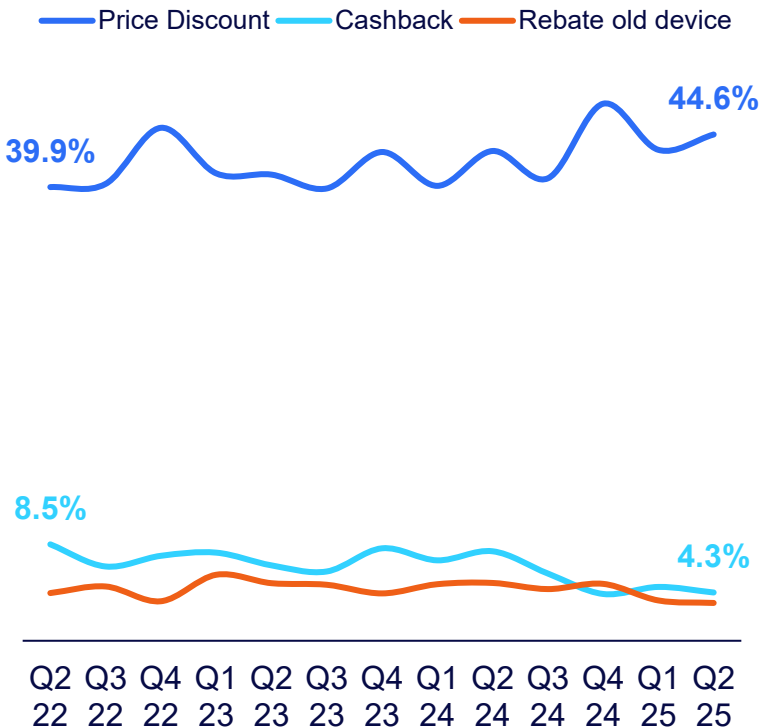
# War on price has led to cashback being an underutilized, yet successful, promo mechanism

**In-store cashbacks** remain key driver, while a strong pullback is visible on online cashbacks

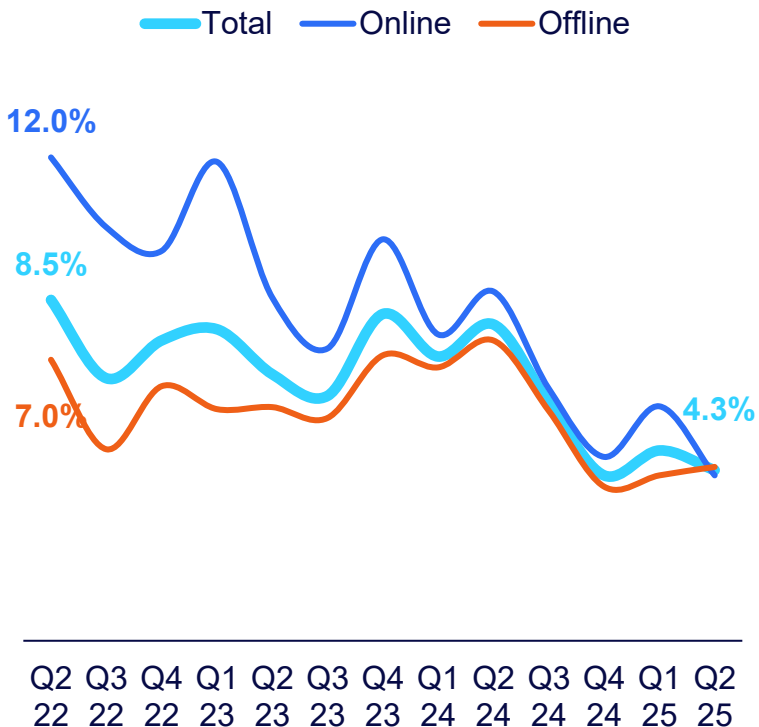
Purchase Drivers Consumers (MAT)



Promotion Purchase Drivers



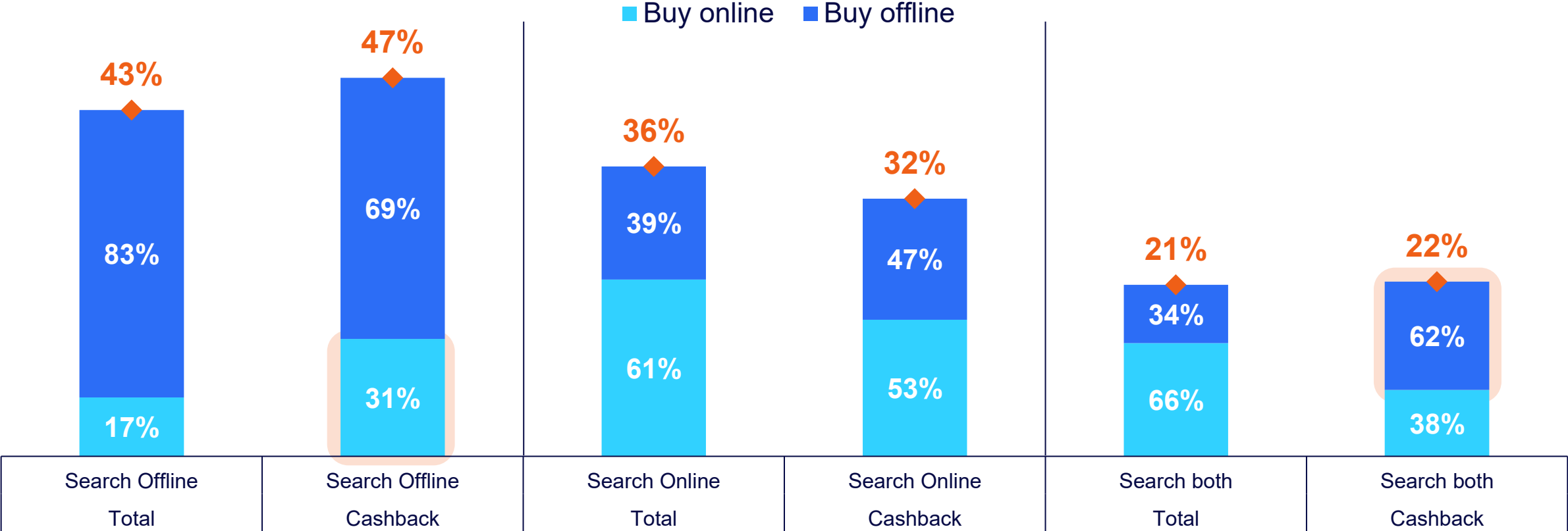
Cashback: Online vs Offline



Source: gfknewron Consumer

# Cashback shoppers who search in-store tend to purchase more online

However, if they look both on-/offline they tend to make their purchase in-store



Source: gfknewron Consumer

# Brand Perspective



**SIEMENS**

# Motivation for Consumer Promotions

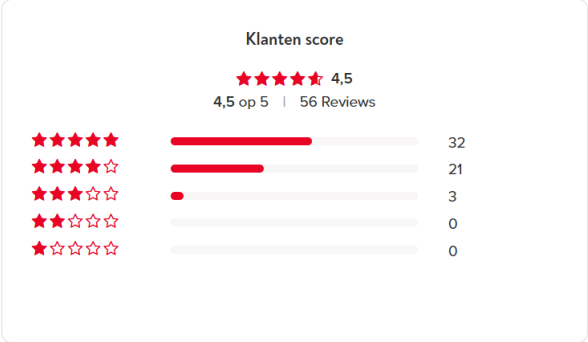
## Brand Perspective



Market / Inhouse share



Product Launches



Review Generation



Shopper Insights



Upsell



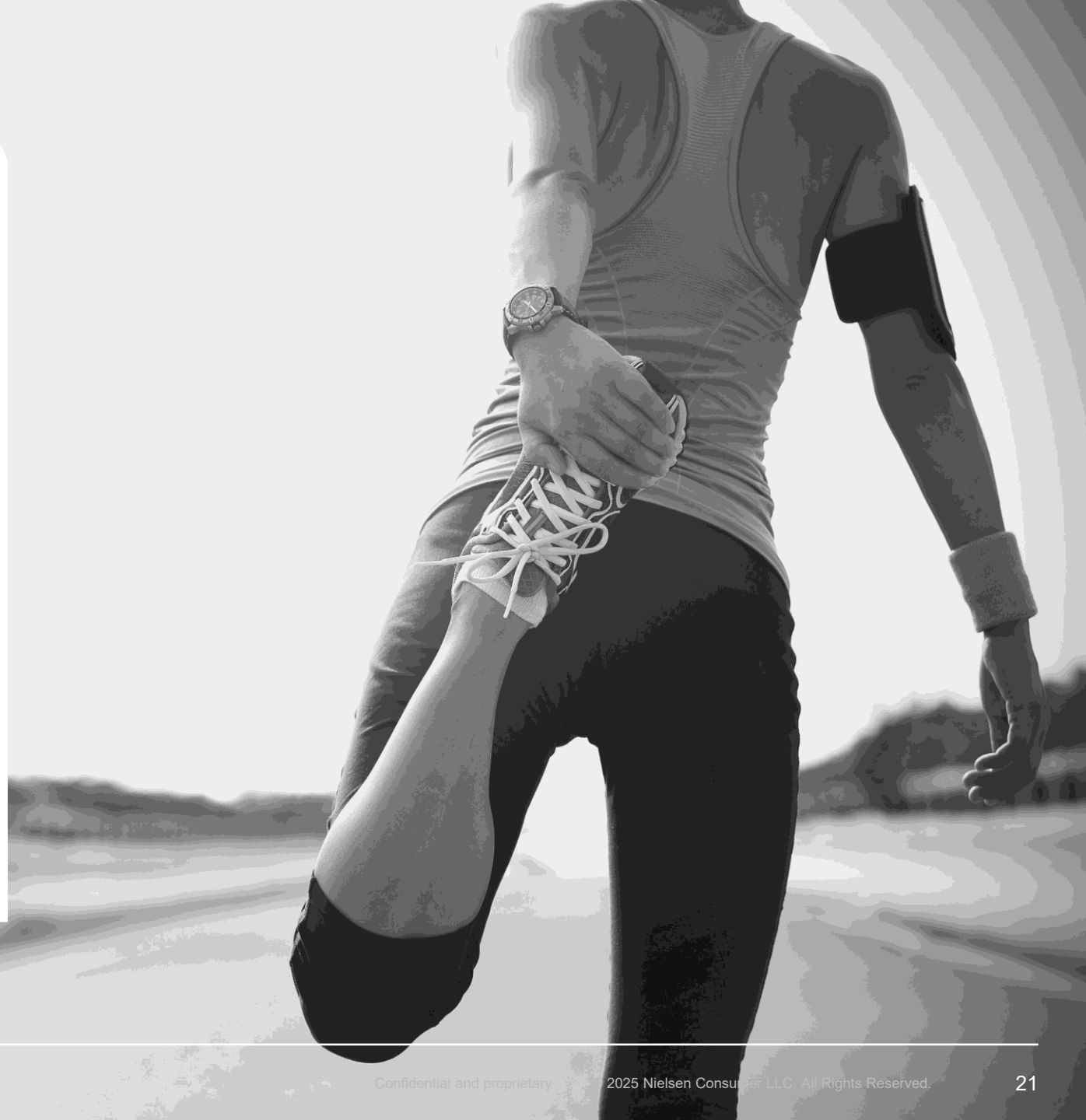
Stock Clearance



# FOMO

# Warm-up

Prepare for Success



# Setting Objectives

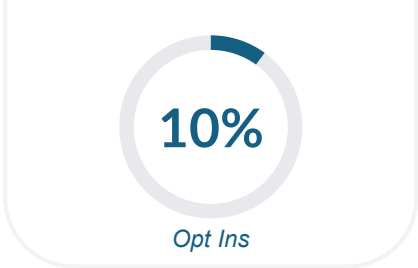
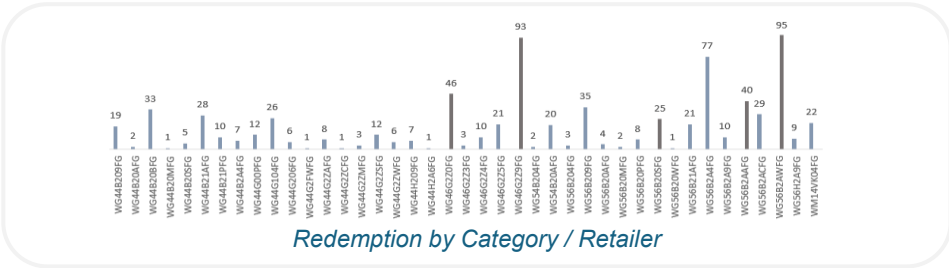
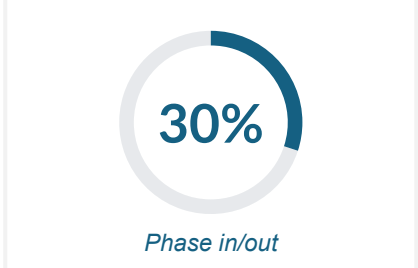
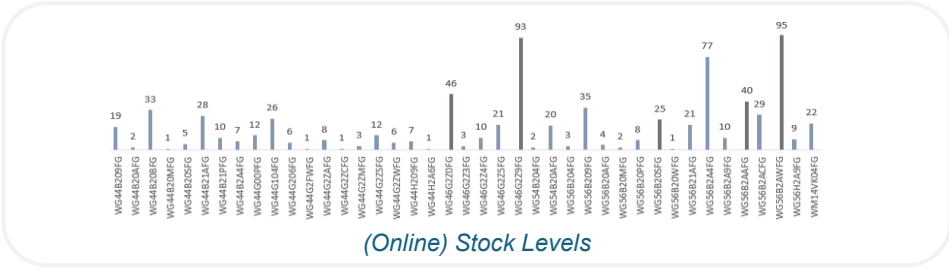
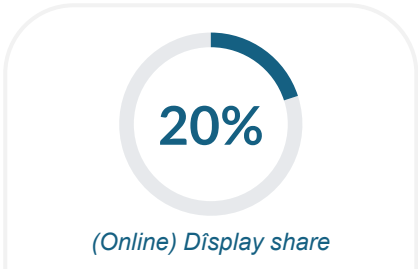
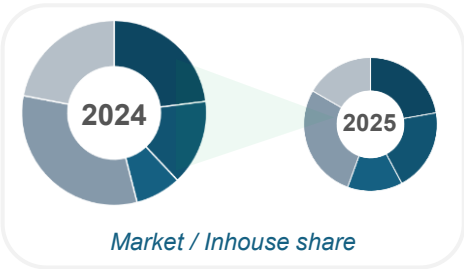
“If you don’t have a goal or a vision, you will just drift around and end up anywhere.”

*- Arnold Schwarzenegger*



# Setting Targets

## Key Performance Indicators



# Race

Adjust where Needed

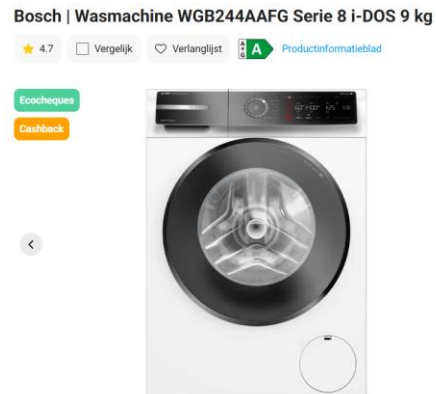


# Operational Excellence

Starting is one thing, executing with focus is everything



***Instore  
Merchandising***



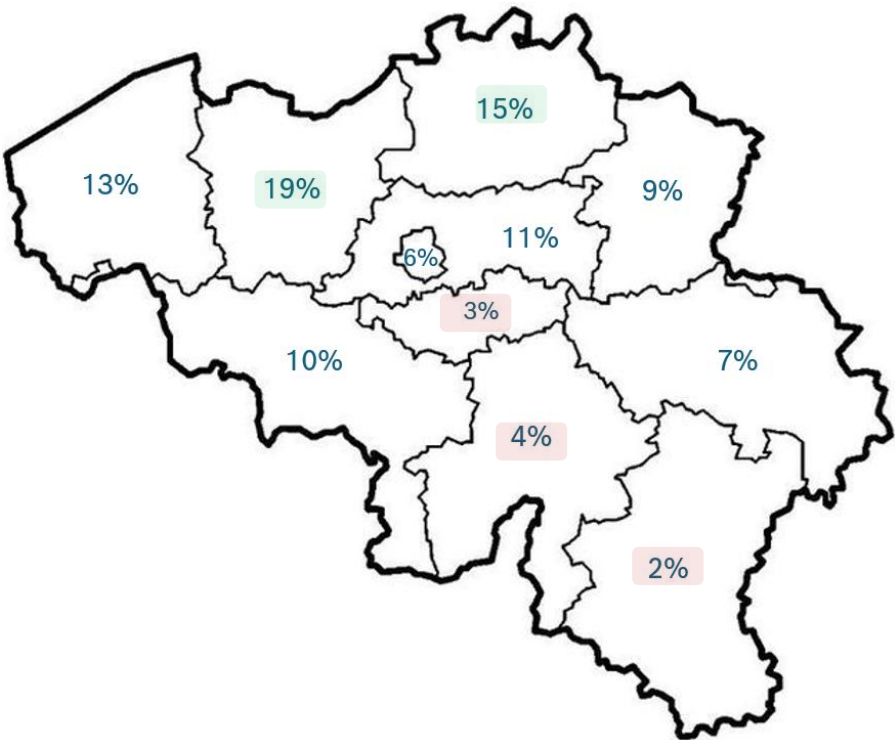
***Online  
Visibility***



***Informing  
Store Staff***

# Sales Steering

Regional steering based on redemption data



Flanders



Wallonia



Brussels

# (Online) stock at Retailers

Follow up of (online) stock at retailers to avoid missed Sales

Average availability

83%

Insights & recommendations

⚠️ 2 products are missing across all retailers - consider intervention >>

⚠️ 2 products have been OOS for 5+ days - high impact risk >>

How is “2025 CB BOSCH WASSEN” distributed across retailers? (Oct 3, 2025) ⓘ

Export

Search...

+

Record(s): 10

|                  |      |            |               |               | Ret. A       | Ret. B       | Ret. C       | Ret. D       | Ret. E       |
|------------------|------|------------|---------------|---------------|--------------|--------------|--------------|--------------|--------------|
| Product name     | ASIN | MPC        | EAN           | All retailers | Availability | Availability | Availability | Availability | Availability |
| Product name     | ASIN | MPC        | EAN           | 83% ▾         | N/A ▾        | N/A ▾        | 100% ▾       | 60% ▾        | 100% ▾       |
| Bosch WGB244AAG  |      | WGB244AAG  | 4242005493760 | 100%          | N/A          | N/A          |              | N/A          |              |
| Bosch WGH25605FG |      | WGH25605FG | 4242005462681 | 100%          | N/A          | N/A          |              | N/A          |              |
| Bosch WGH24404FG |      | WGH24404FG | 4242005459070 | 100%          | N/A          | N/A          |              | N/A          | N/A          |
| Bosch WGG244FMFG |      | WGG244FMFG | 4242005439478 | 100%          | N/A          | N/A          | N/A          |              | N/A          |
| Bosch WGG244ZPFG |      | WGG244ZPFG | 4242005439119 | 100%          | N/A          | N/A          |              | N/A          | N/A          |
| Bosch WGH2440AFG |      | WGH2440AFG | 4242005434213 | 100%          | N/A          | N/A          | N/A          |              | N/A          |
| Bosch WGG246F6FG |      | WGG246F6FG | 4242005426157 | 100%          | N/A          | N/A          |              | N/A          | N/A          |
| Bosch WGG244ZMFG |      | WGG244ZMFG | 4242005438594 | 100%          | N/A          | N/A          | N/A          |              | N/A          |
| Bosch WNG24400BY |      | WNG24400BY | 4242005375202 | 0%            | N/A          | N/A          | N/A          |              | N/A          |
| Bosch WGB2440MFG |      | WGB2440MFG | 4242005396375 | 0%            | N/A          | N/A          | N/A          |              | N/A          |

Listed, available

Listed, not available

Not listed

N/A Not tracked for this retailer

# Targets

Don't lose sight of the target(s),  
adjust where necessary.



# Finish

Evaluate Performance





# CONTEXT MATTERS

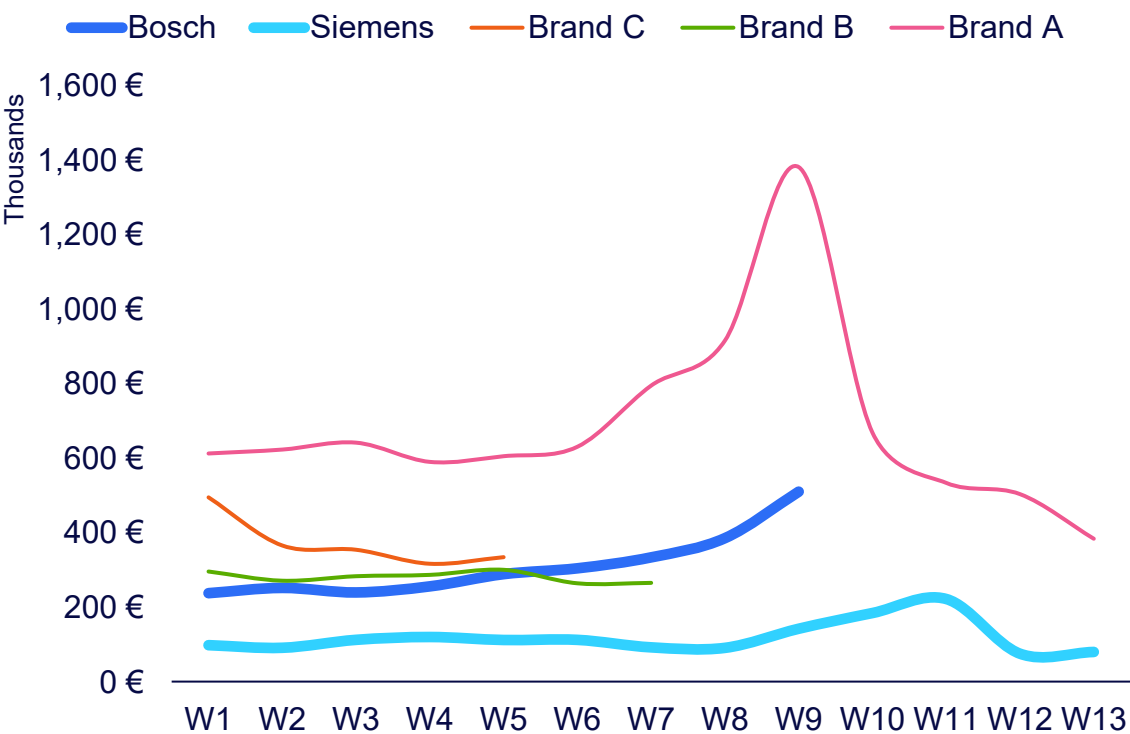
- Competitor Activities
- Stock / Delivery Issues
- Quality Issues
- Relationship Seller / Buyer
- Retailer Activities
- ...

# BSH claimed the #1 spot in terms of incrementality

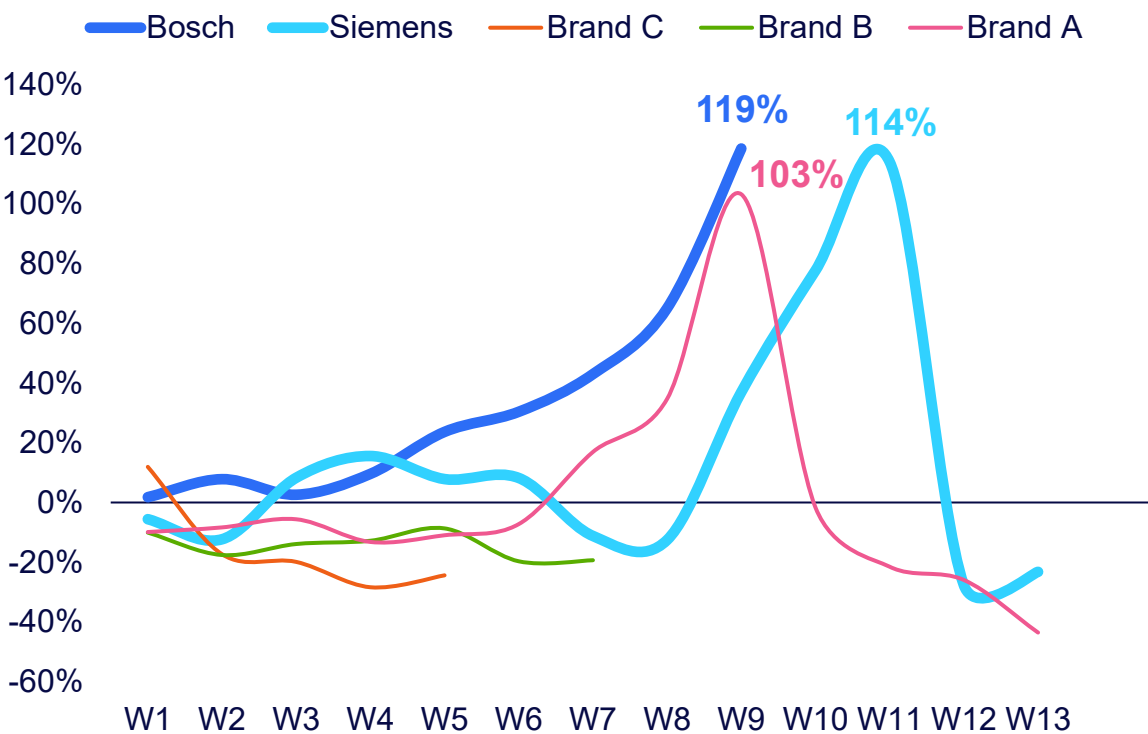
During BF, uplifts of **>100%** were realized vs average week across both brands

BE | **Washing Machines** | Panelmarket | **Weekly Revenue & Uplift vs Average Week in 2024**

Weekly Revenue since start Q4 Cashback



Weekly Uplift CB vs Average Week 2024

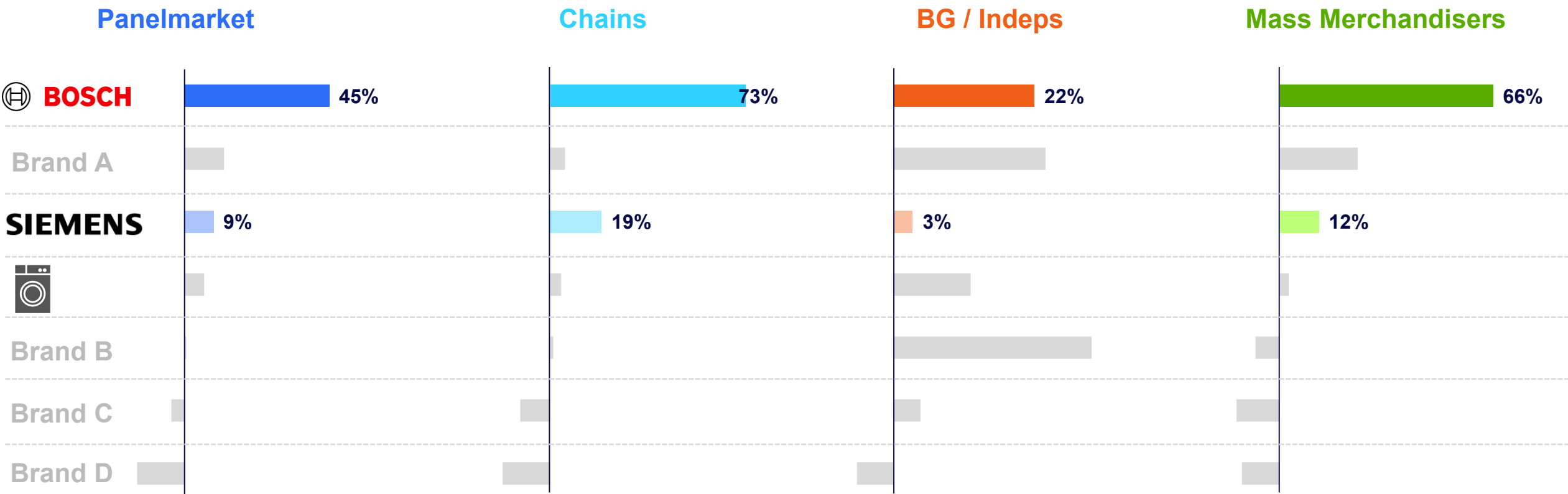


Source: gfknewron Market

# BSH's campaign was positive across the board

Significant outperformance is visible in Chains & Mass Merchandisers

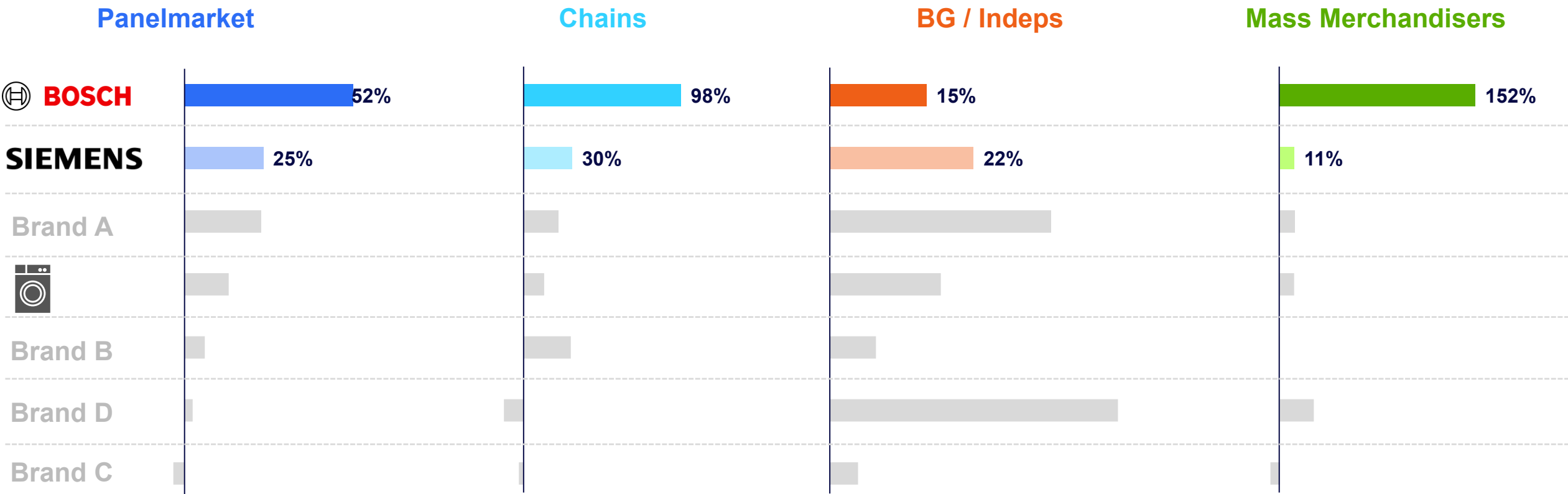
BE | Washing Machines | Panelmarket | Sales Value Growth vs Last Year | Oct-Nov24 vs Oct-Nov23 | Front Loading only



Source: gfknewron Market

# Campaign success was primarily driven by >= 9 KG

BE | **Washing Machines** | Panelmarket | Sales Value Growth vs Last Year | Oct-Nov24 vs Oct-Nov23 | Front Loading only >= 9kg



Source: gfknewron Market

# Opportunities

Improve Performance



# Future Opportunities

How to move from Good to Great



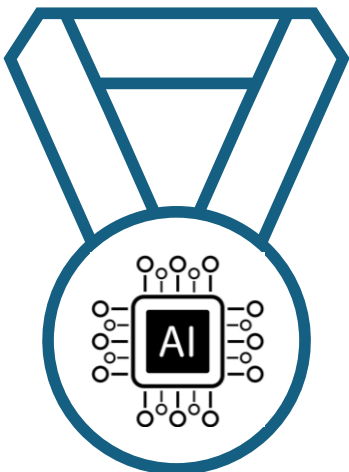
Increased  
Retailer  
Collaboration



Promotion  
Shopper Profiling



Learnings  
Competitor  
Promos



Increased use of  
Artificial  
Intelligence



Promotion Data in  
Market Data

**Thank you!**

**NielsenIQ**