



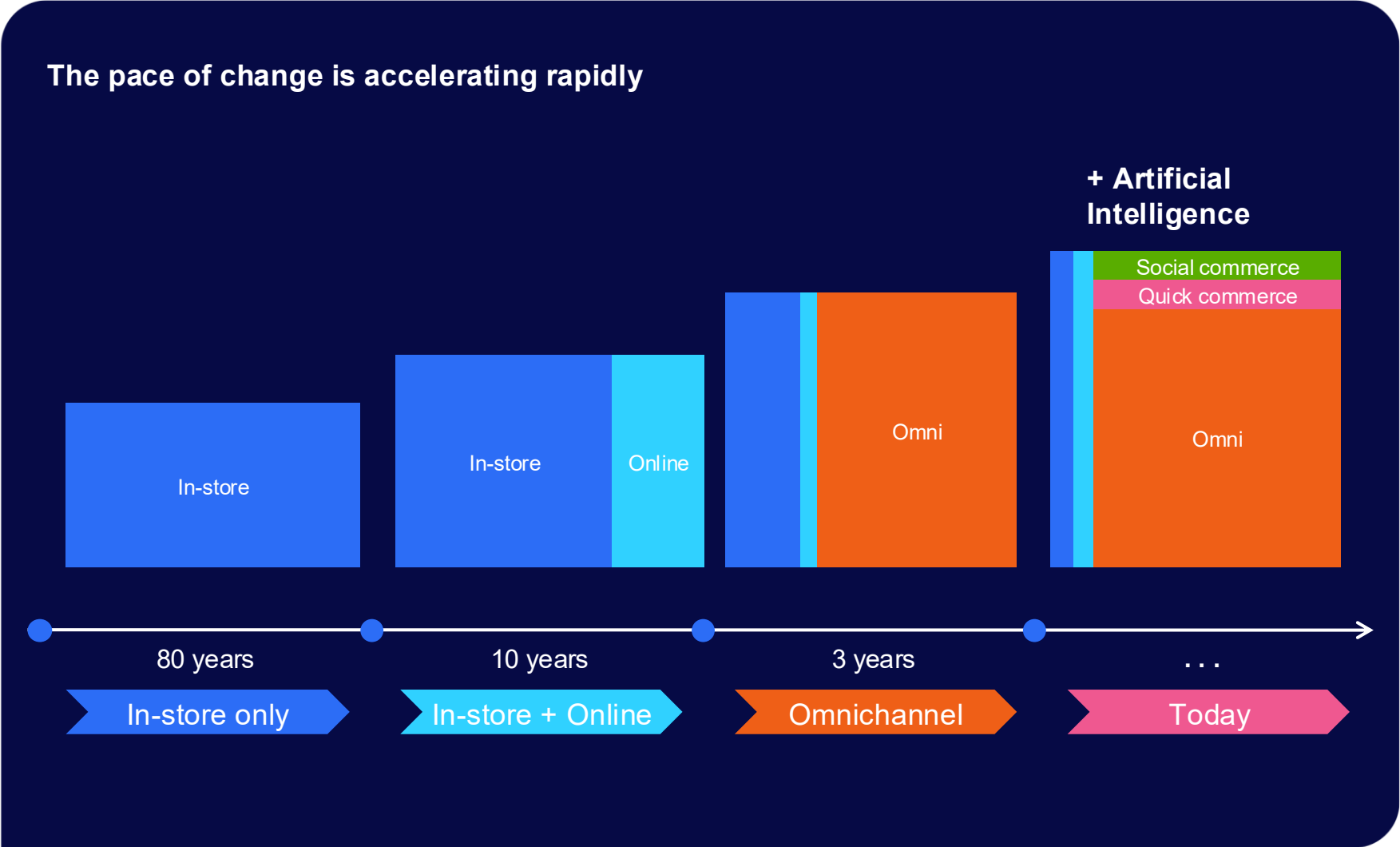
Future of the Digital Shelf

2026



The omni landscape today

eCommerce, omni, and digital innovation have increased the pace of change in retail

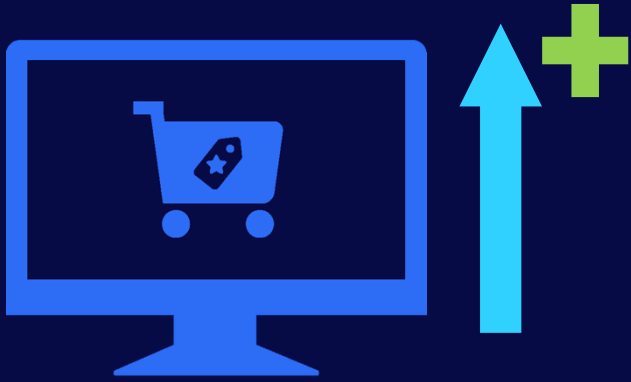


Source: NIQ

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



Source: NIQ



Online Sales Represented

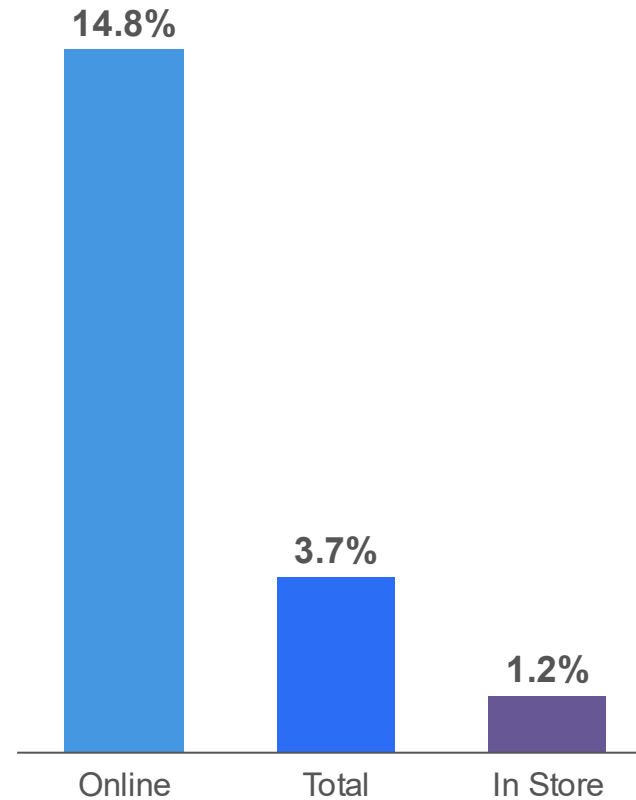
74.2%

of Total CPG
Dollar Growth

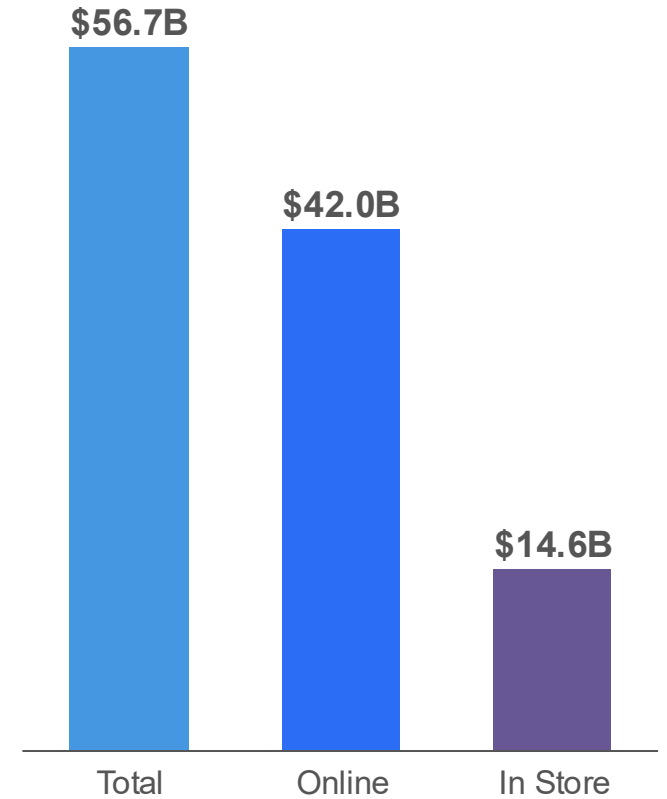
Online sales driving most of the growth in retail

Online outpacing total CPG growth by 4X

2025 CPG Sales growth rate vs YA

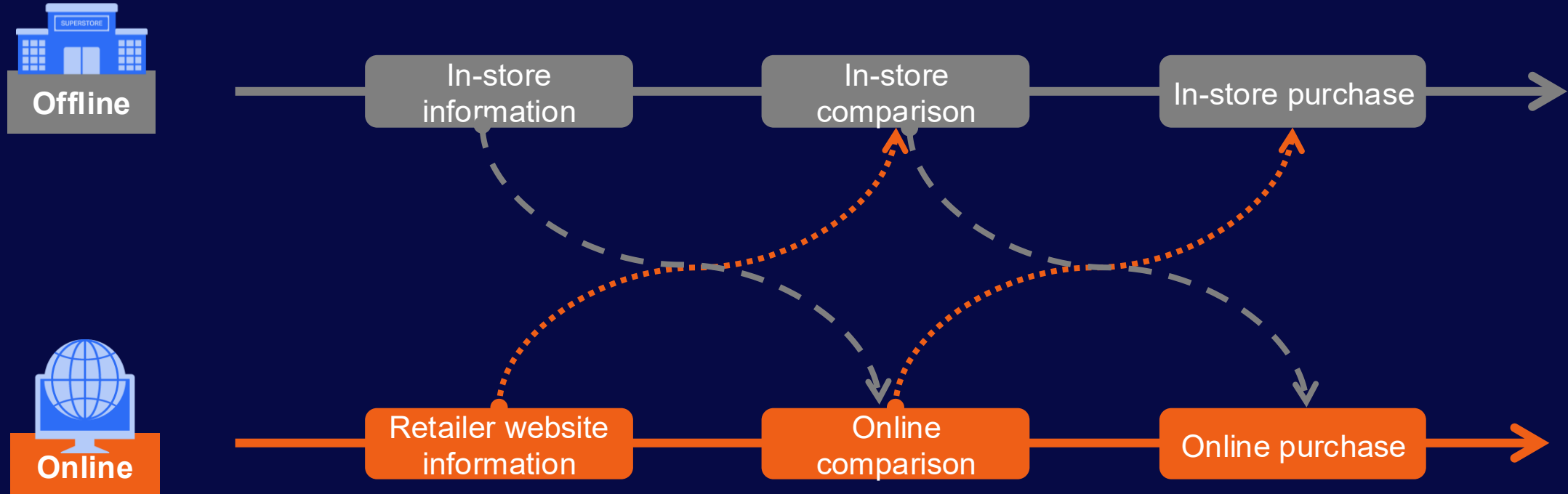


2025 CPG Dollar Sales Growth vs YA



Source: NielsenIQ Omnisales, \$ %Chg YA and \$ Chg YA for All CPG Departments in Total US | Latest 52 wks w/e 12/27/25

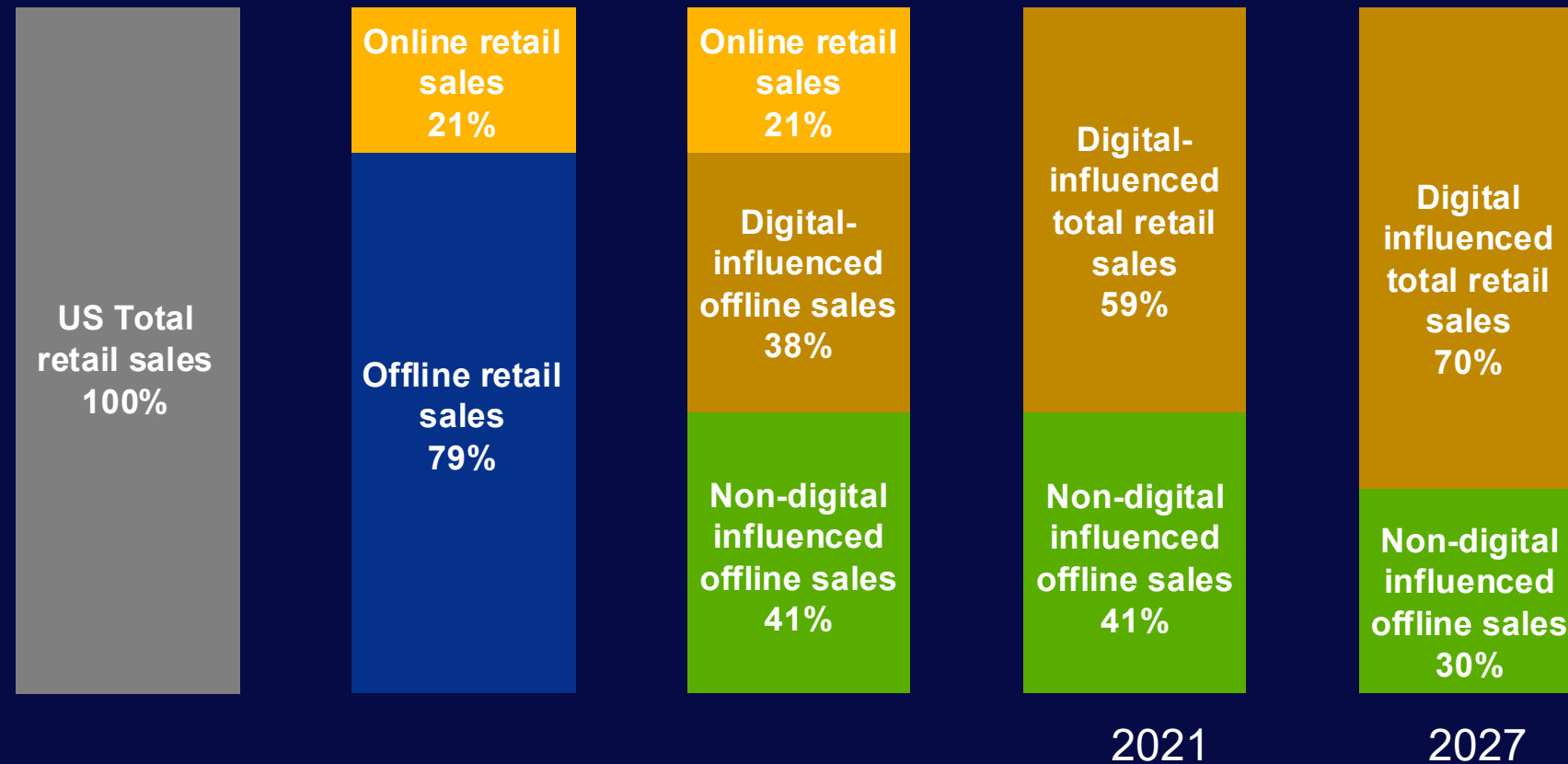
Digital shelf is not just for eCommerce



It is key for driving *awareness & conversion*

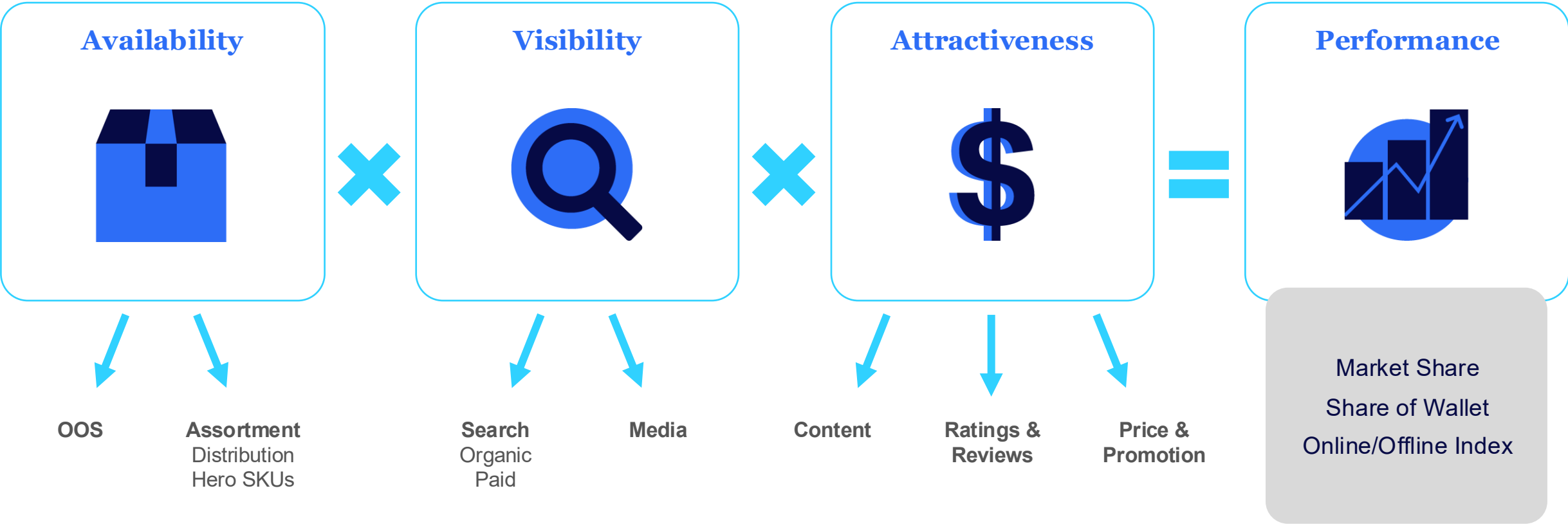
Digital is posed to influence majority of sales in just a few years

Share of Total US Retail Sales



GenZ
ranks *online reviews* as the most important factor when shopping

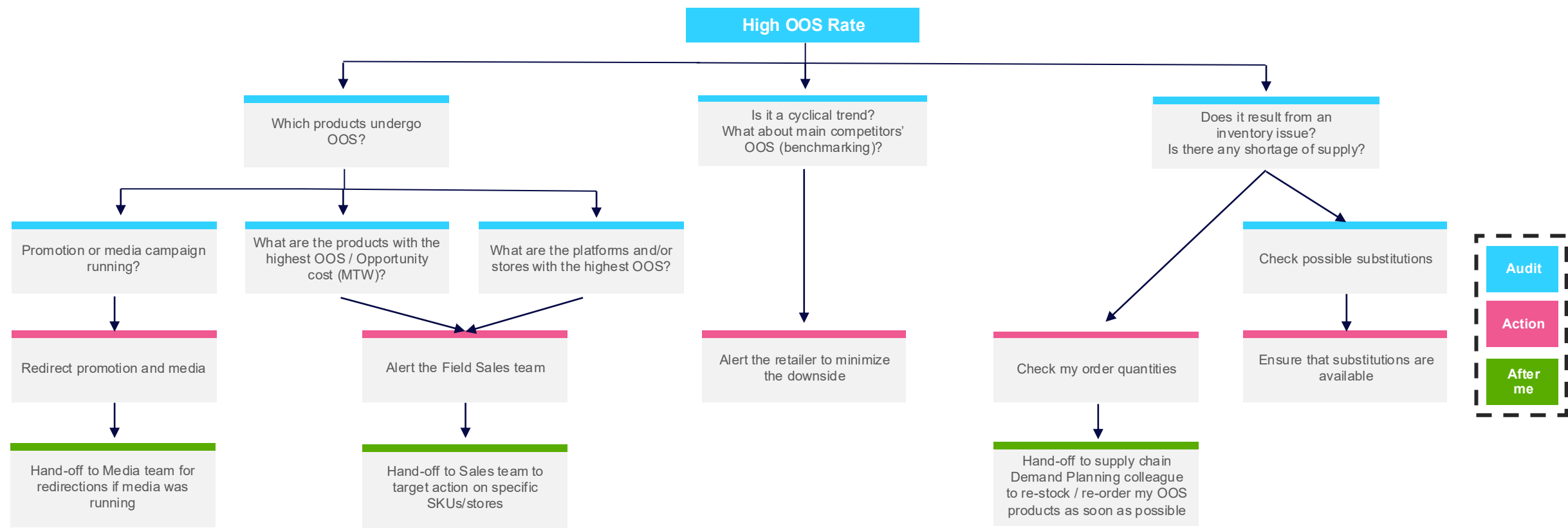
Digital Shelf fundamentals remain the key focus for the future of this space



80% of in-basket products appear in the top 10 results generated by a keyword search

Source: NIQ

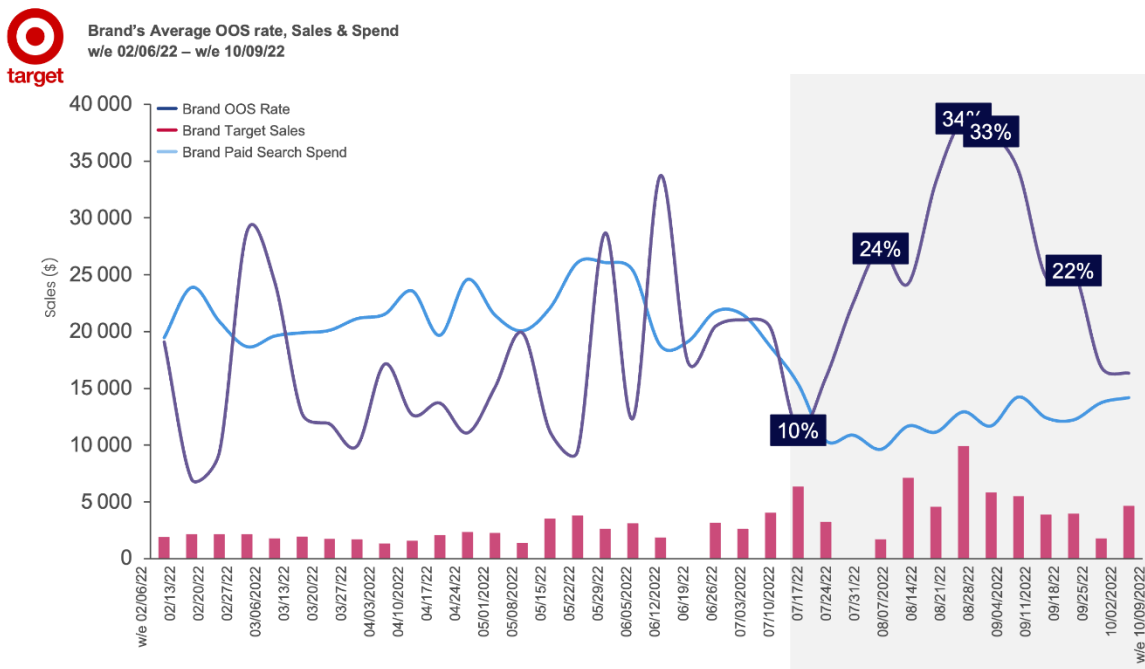
OOS monitoring process and playbook ensures future success



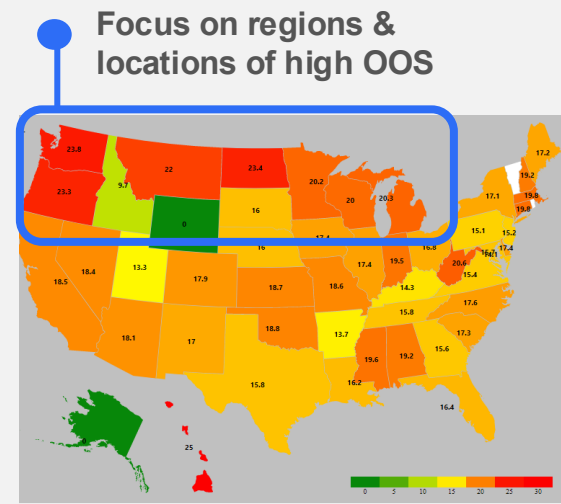
Source: NIQ Digital Shelf

Availability connects closely with paid search investments

Improve performance & maximize ROI



How can I maximise my ROI on paid search?



Brand's Average OOS rate - By Region
w/e 02/06/22 – w/e 10/09/22

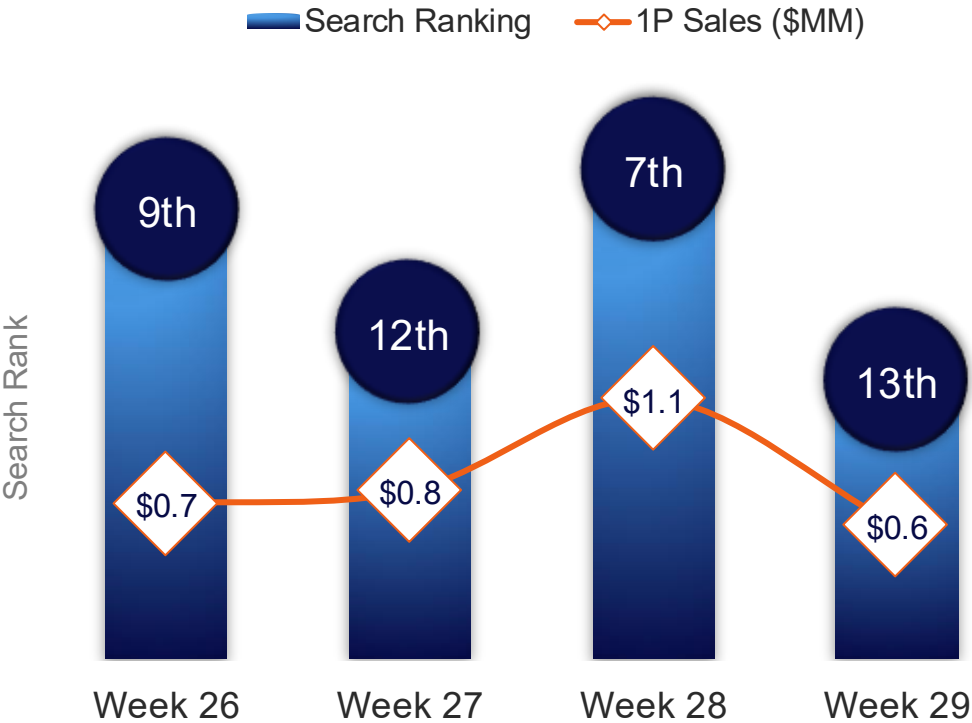
Product & location level to close availability gap

States	Avg OOS Rate %
Hawaii	25.0
Washington	23.8
North Dakota	23.4
Oregon	23.3
Montana	22.0
West Virginia	20.6
Michigan	20.3
Minnesota	20.2
Wisconsin	20.0
Connecticut	19.8

Entering the top ten search results can have a significant impact on sales

Avg. Search Rank and 1P Sales for wet wipes brand and keyword

flushable wipes container 🔍



%, \$MM, Week 26 to Week 29 2025, Amazon US

Source: NIQ Digital Shelf



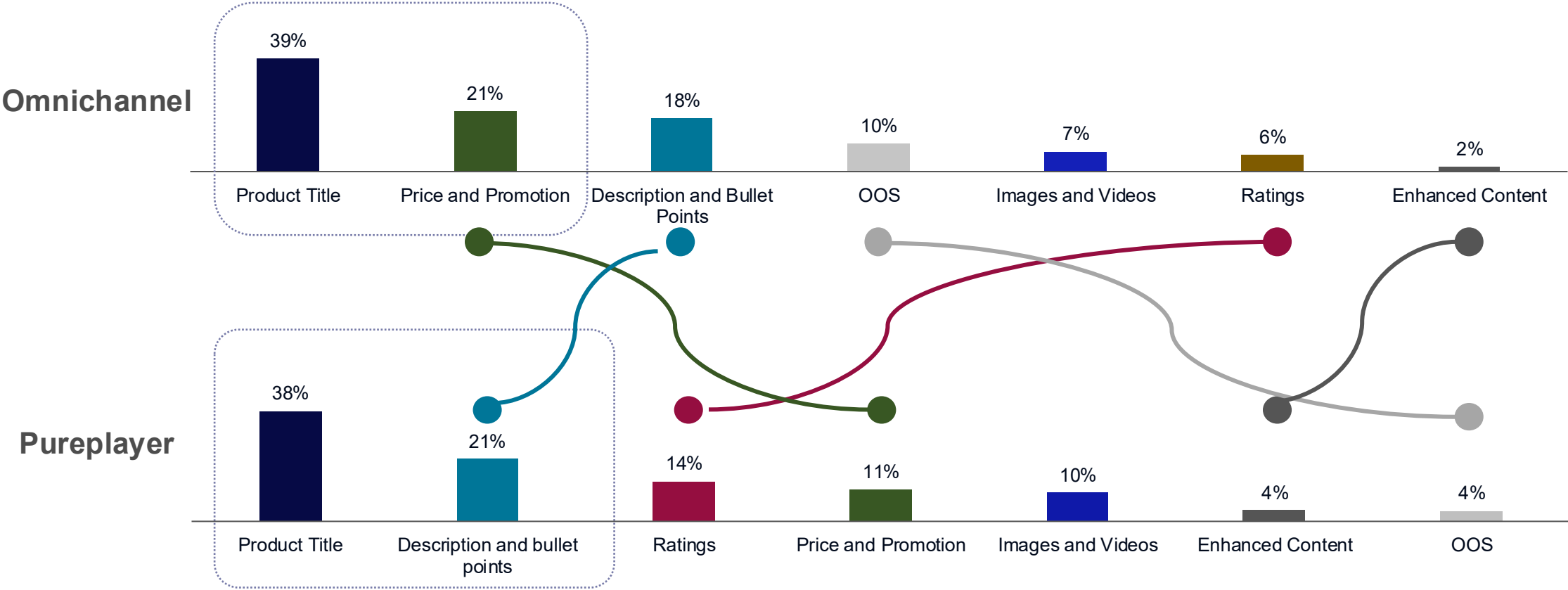
Click-through-rates strongly correlates to search ranking

Avg. Click-Through-Rate vs. Search Ranking



Search is not a one-size-fits-all optimization exercise

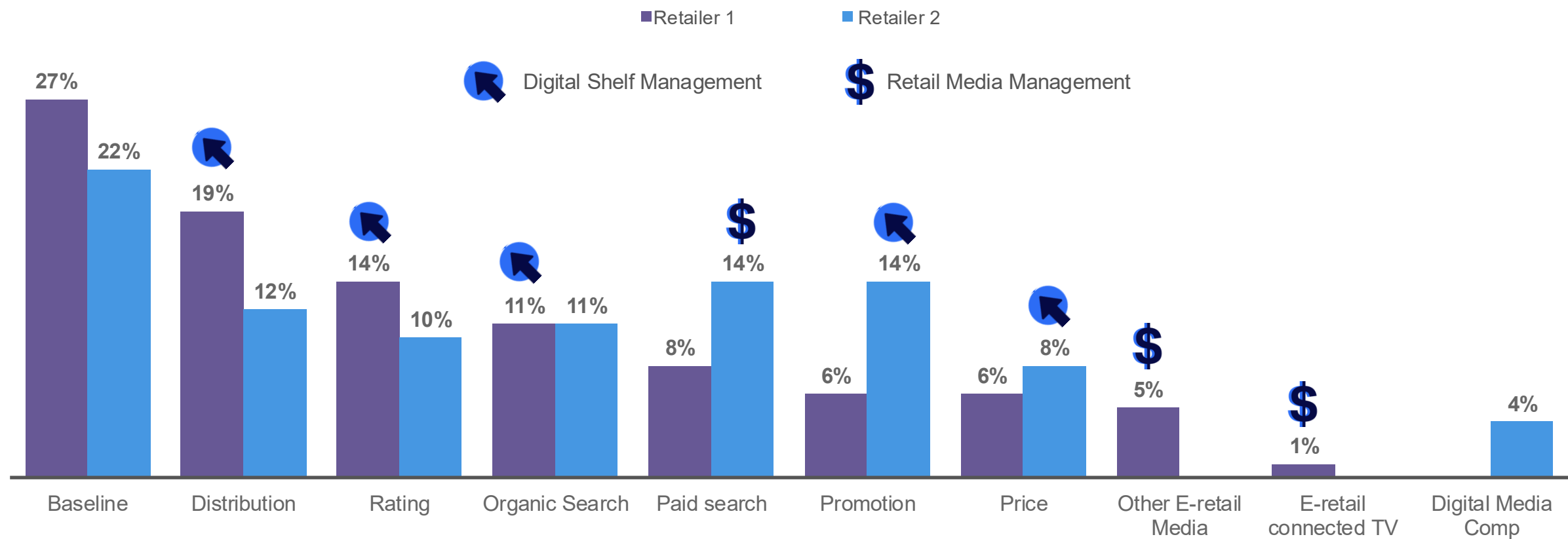
Index of Most Important Digital Shelf Levers Driving Top Organic Search Spots in the Category X by Type of Retailer
June 2025



Source: NIQ Digital Shelf – Results based on information from select markets and retailers

Retail media alone does not guarantee success, multiple other drivers contribute to eCommerce performance

Anonymized Case Study - Business Drivers Level of Importance (%) on Sales



Source: NIQ Digital Shelf – Anonymized Case Study

Setting budgets for retail media can be complex without the right datasets in place

Retailers grew their Retail media revenue in 2025



Budget is coming from different teams



Data & analytics remain a big challenge for budget setting

- 36% struggle to prove incrementality
- 29% call out analytics & reporting limitations
- 22% face limited data

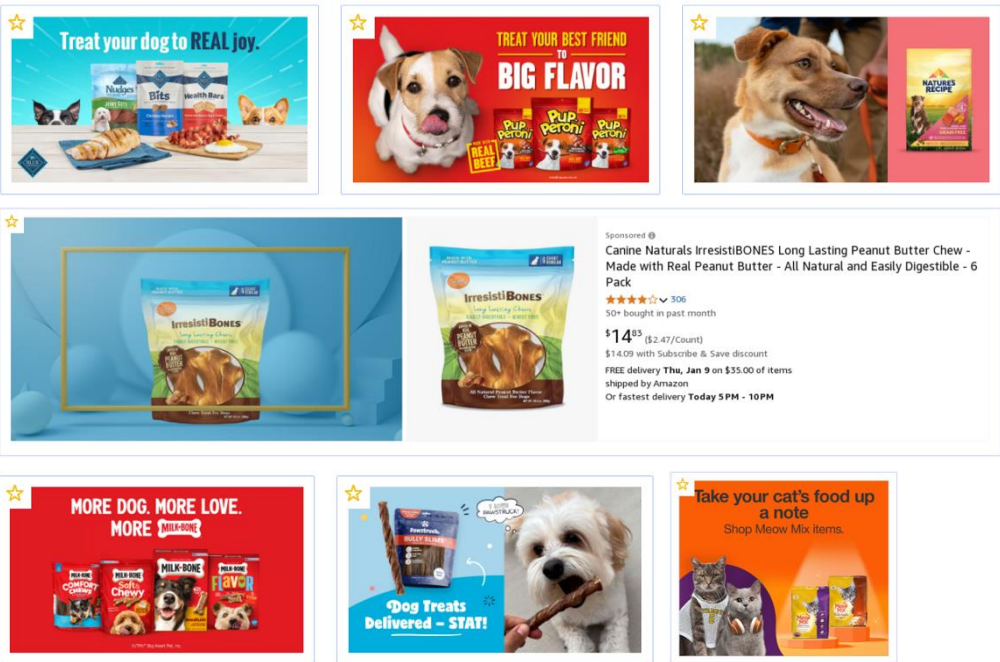
Source: Walmart Q4 2025 and Target Q3 2025 earnings. Forrester Survey 2025, Skai - State of Retail Media 2025

Share of voice datasets can help brands benchmark RM investment to performance

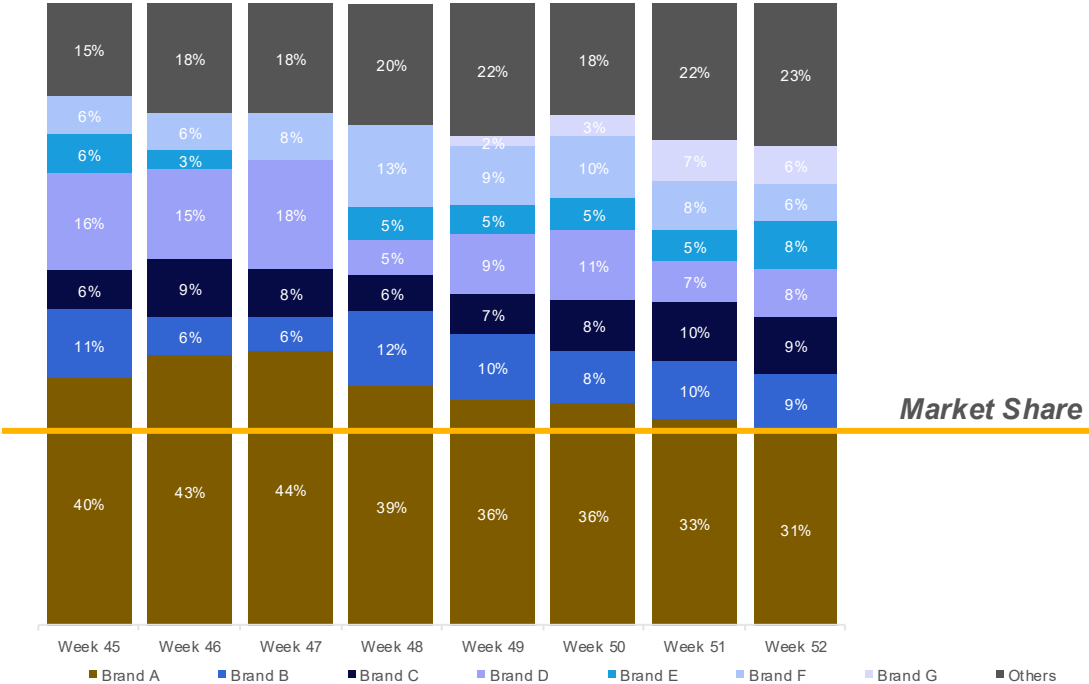
Track retail media banners every day



To understand your fair share of investment



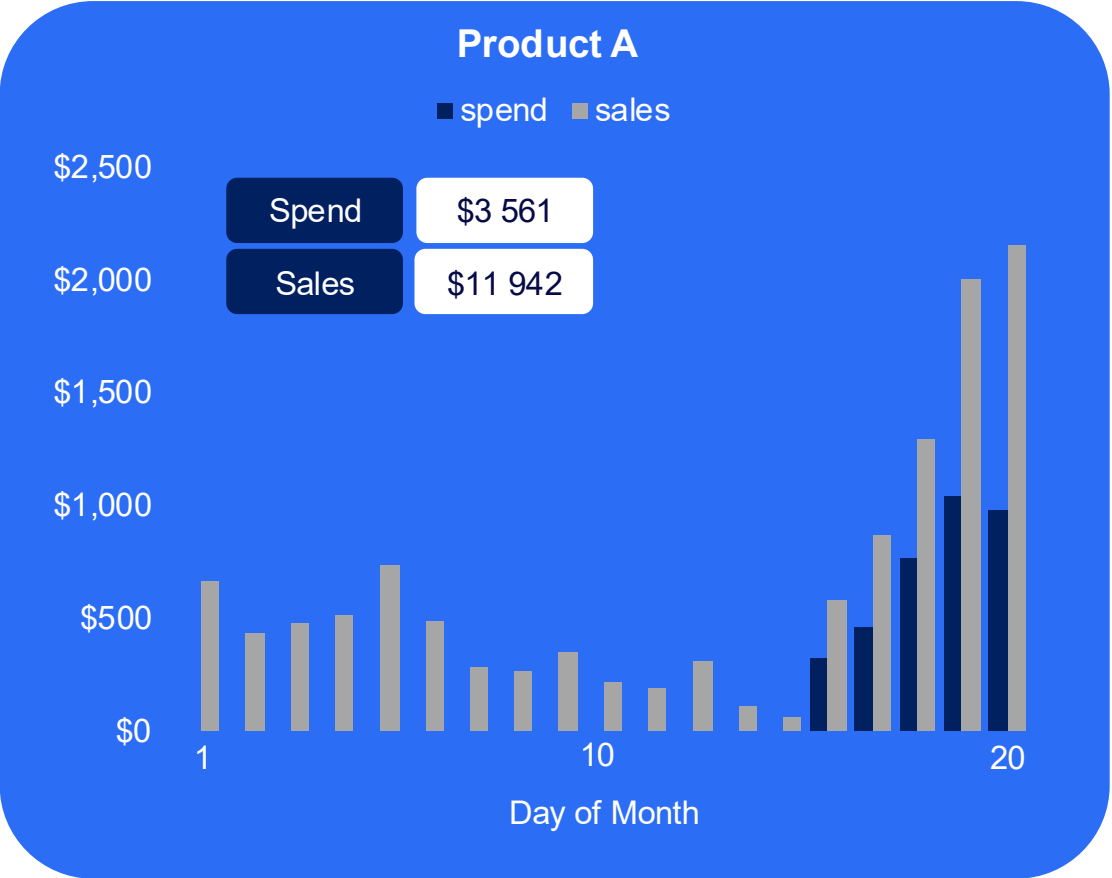
Share of Display in a Pet Category for two US retailers
Week 45 – Week 52 2024



Source: NIQ Digital Shelf

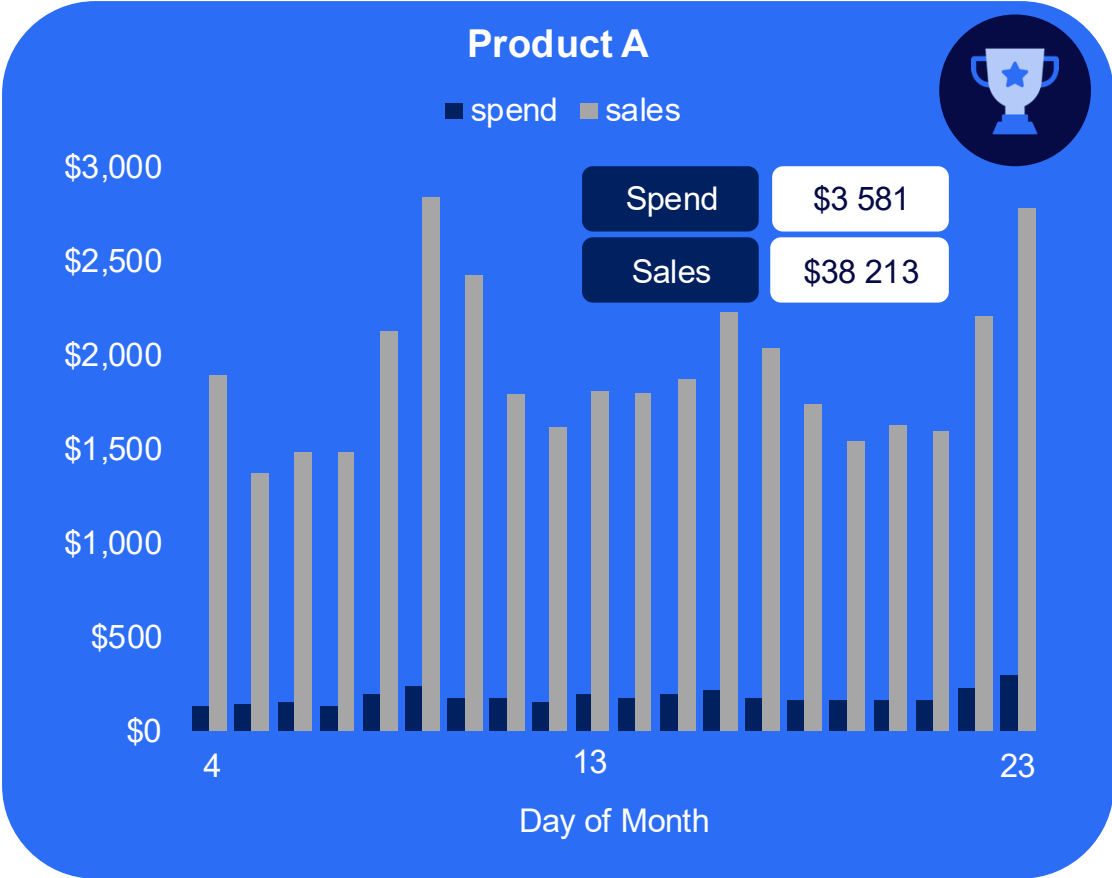
Data can help brands strategize and decide on best execution to adopt

Burst Strategy



VS

Spread Strategy



Source: NIQ Digital Shelf

Retail Media needs to be integrated into Joint Business Planning

Collaboration & Partnership

Execution Accountability



- 1. OOS & Distribution
- 2. Campaign compliance

Knowledge Sharing



- 1. Keywords volume
- 2. Key Audiences
- 3. Case Studies

Optimizing True ROAS



- 1. All KPIs in calculation
- 2. Strategic media allocation

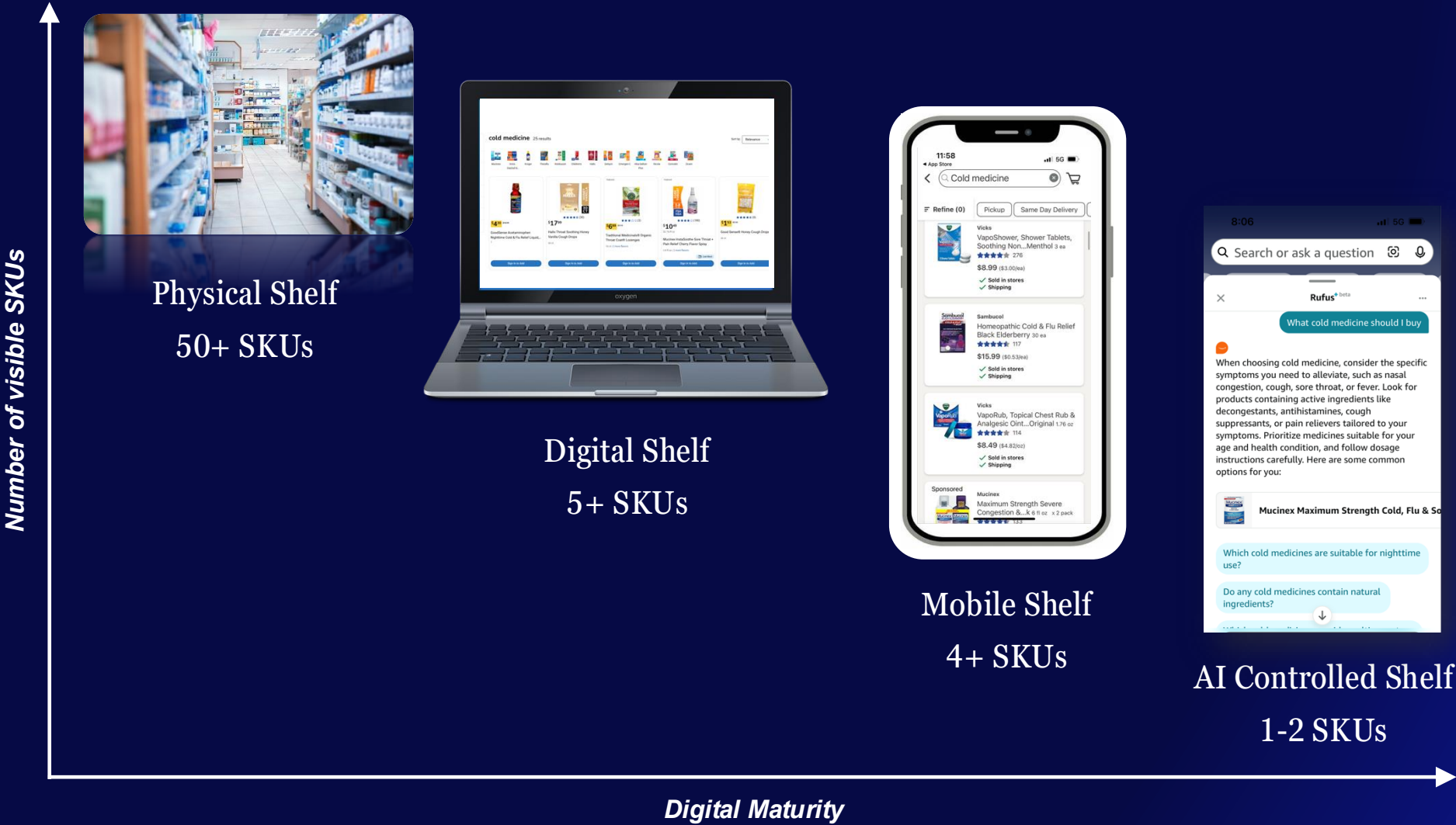
Protection & Exclusivity



- 1. Branded keywords exclusivity
- 2. Limit competitiveness of campaigns

AI has the potential to transform shelf strategy

A new, even more challenging competitive environment



Source: NIQ Digital Shelf

Today, shoppers show a great appetite for AI-driven personalized solutions globally

Global | % Of respondents

84%

Would be likely to purchase a product if the retailer **made it easy on their website or app to compare key product attributes**

65%

Find it helpful when a retailer **suggests products based on their previous purchases or preferences**

58%

Are comfortable with a digital shopping platform making product suggestions

51%

Would be interested in using tools powered by Artificial Intelligence (AI) to **help manage their household shopping in the future**

40%

Are comfortable with a digital shopping platform **making purchase decisions for them**

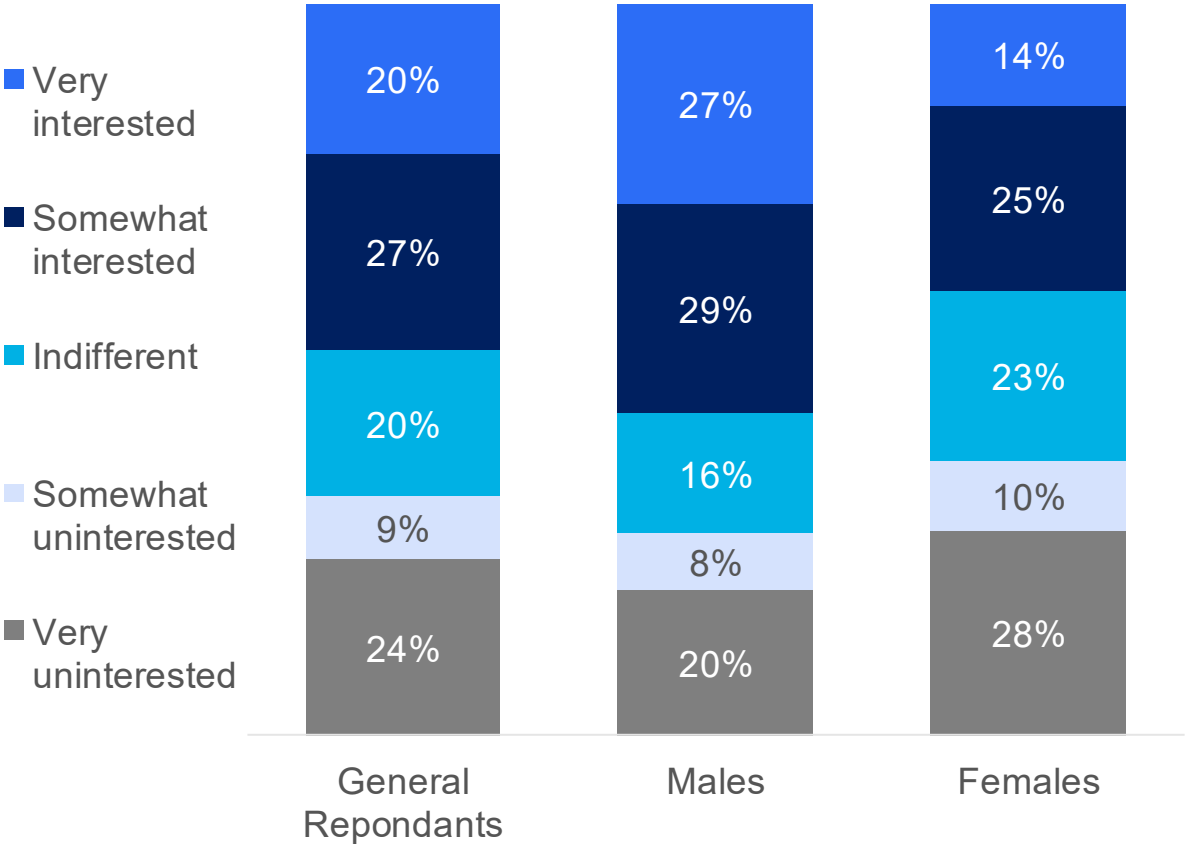
Source: NIQ Global Consumer Outlook Jul-25

In the US, a near majority of shoppers interested in having GenAI assistance while shopping

Men over-index here by a substantial margin

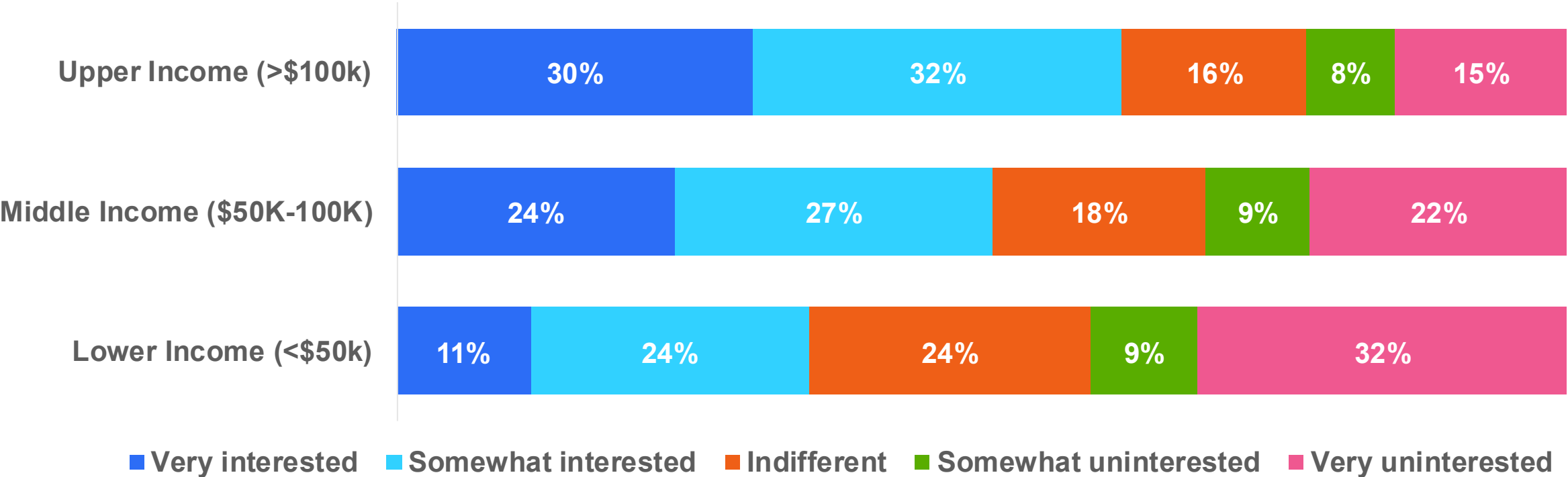
Interest in having a GenAI agent help you research and purchase a product?

47%
showed
interested in
GenAI while
shopping



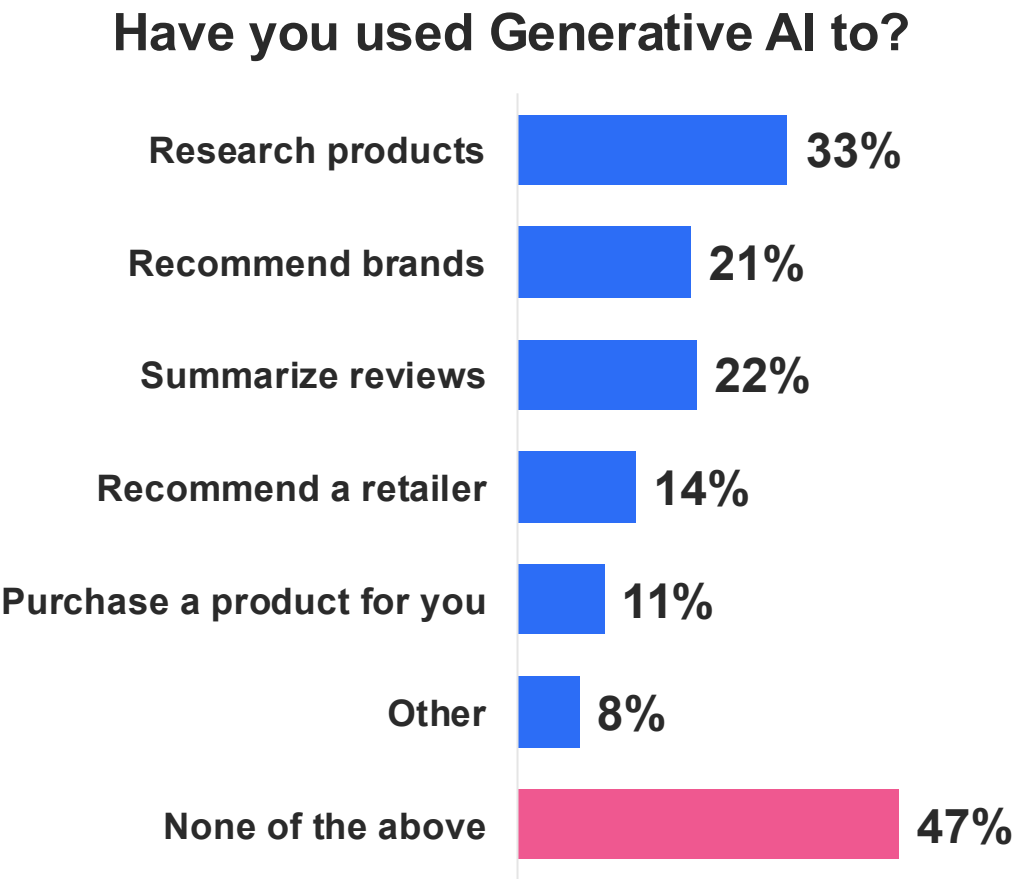
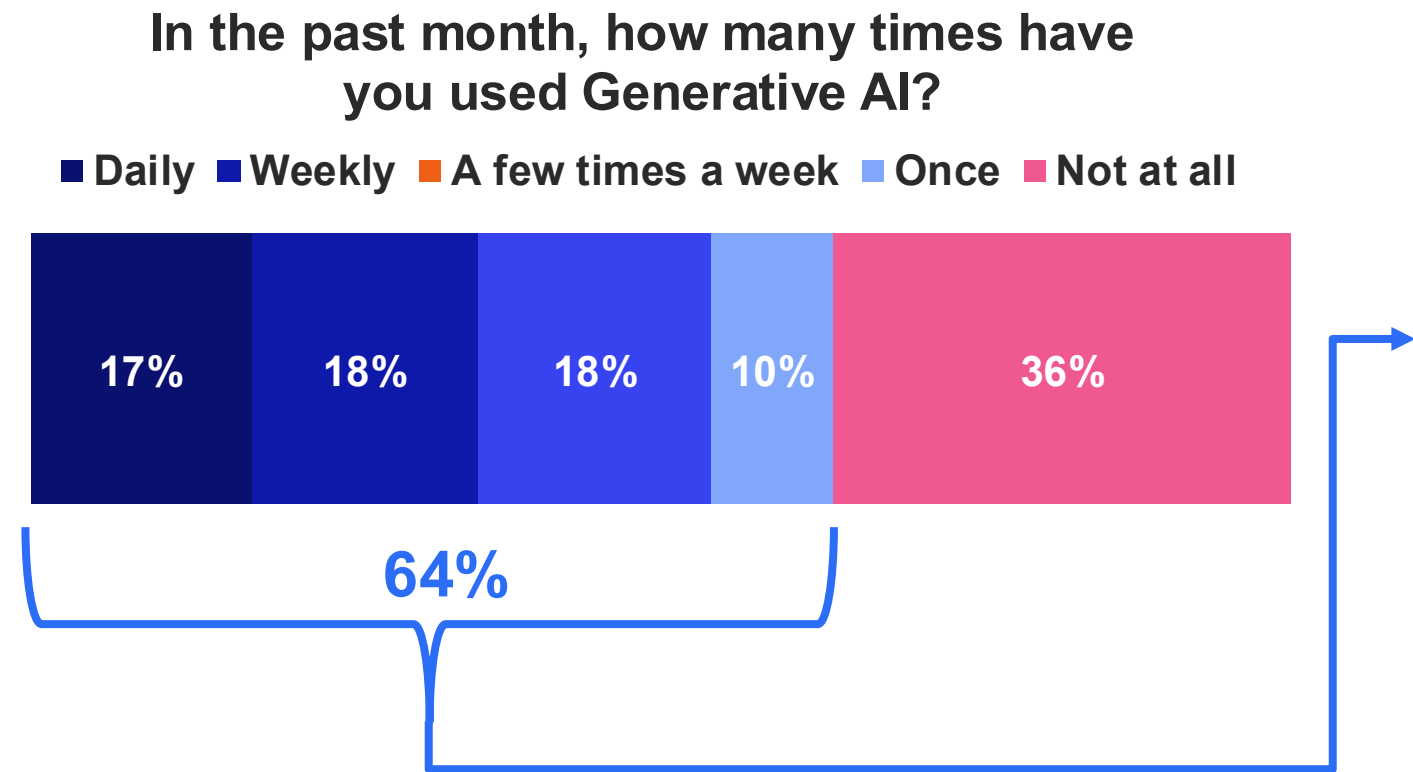
Higher income households more open to utilizing AI tools for shopping

Rate your interest in having a Generative AI agent help you research and purchase a product?

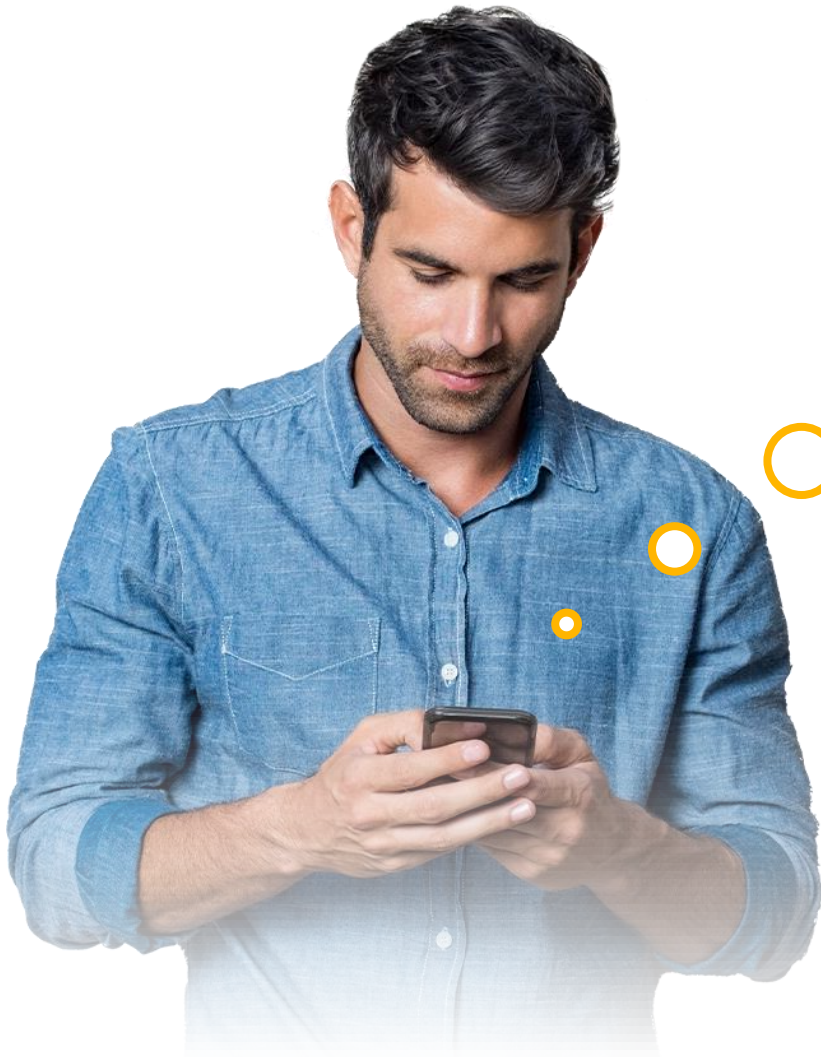


Source: NIQ BASES, AI survey Questions November 2025

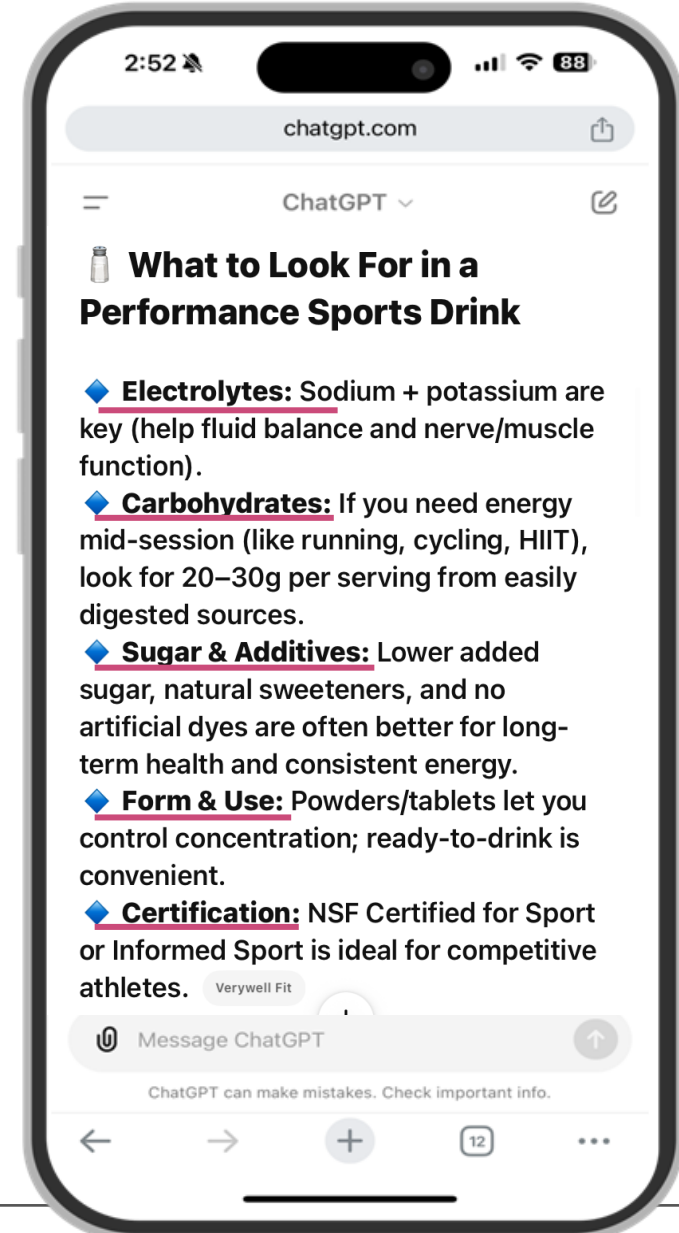
Generative AI for shopping is in early days of adoption and primarily oriented around research versus full agentic processes



AI is fundamentally changing the path to purchase

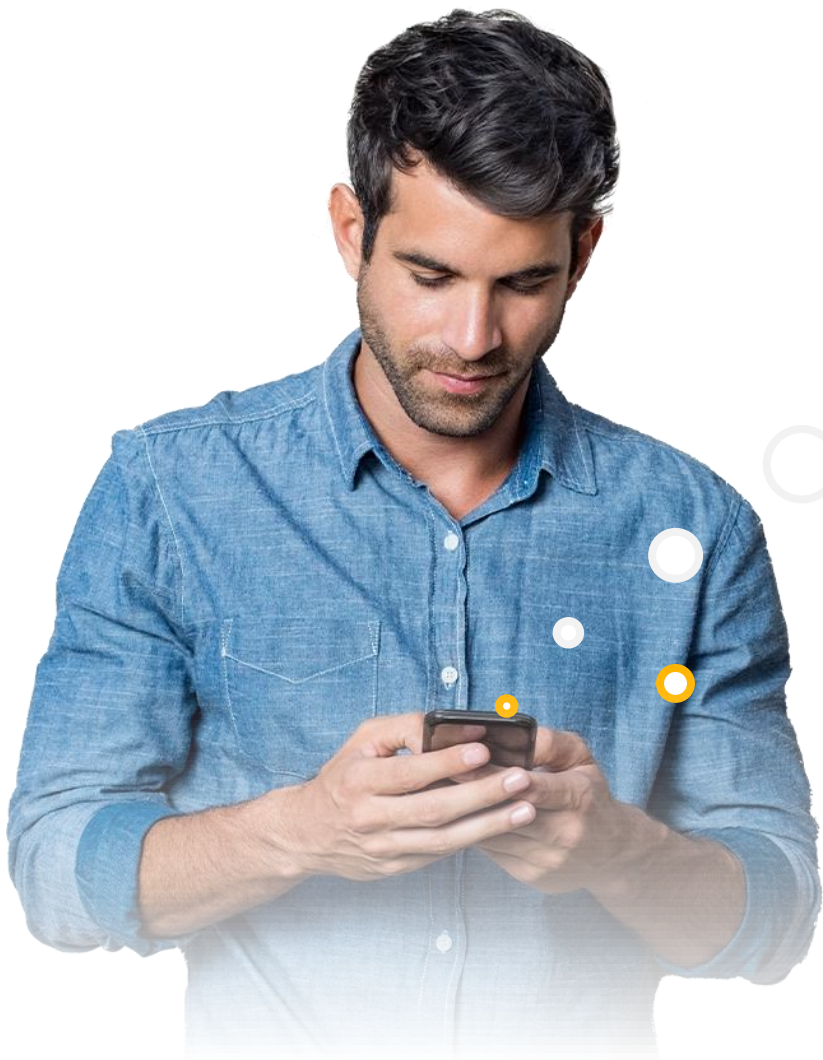


Help me with the right sports drinks to help improve my performance



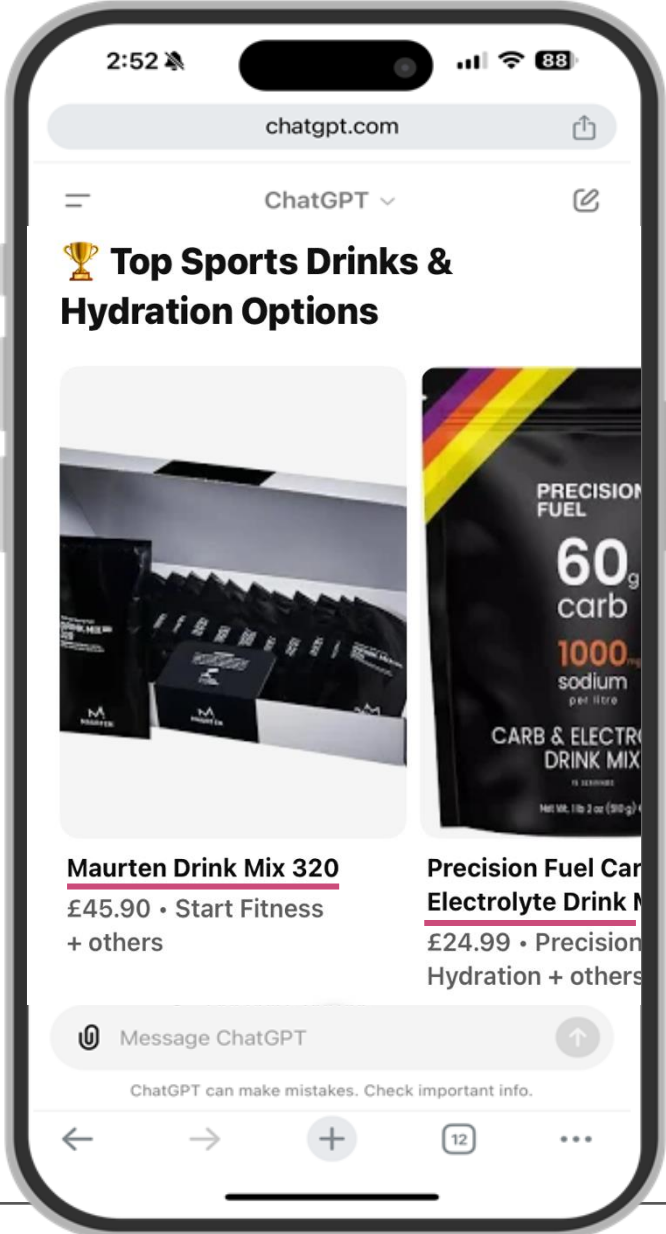
Source: ChatGPT

AI can influence what products are selected



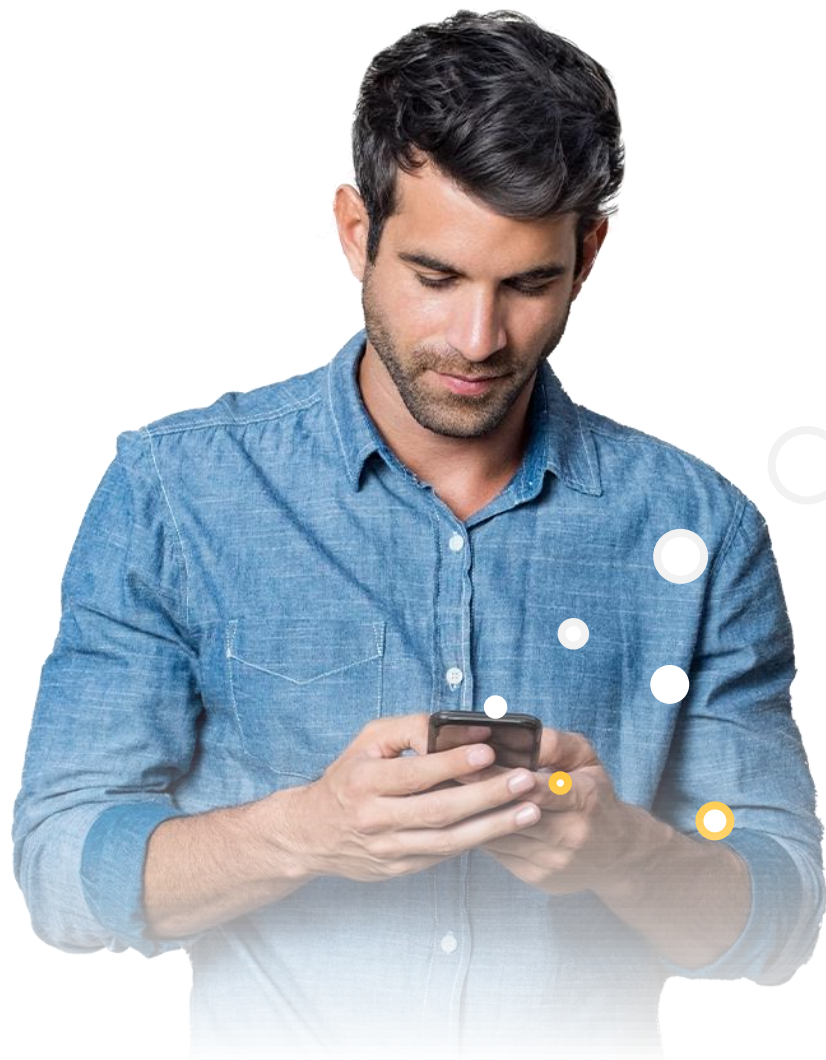
Help me with the right sports drinks to help improve my performance

Include brand recommendations on highly-rated ingredients.



Source: ChatGPT

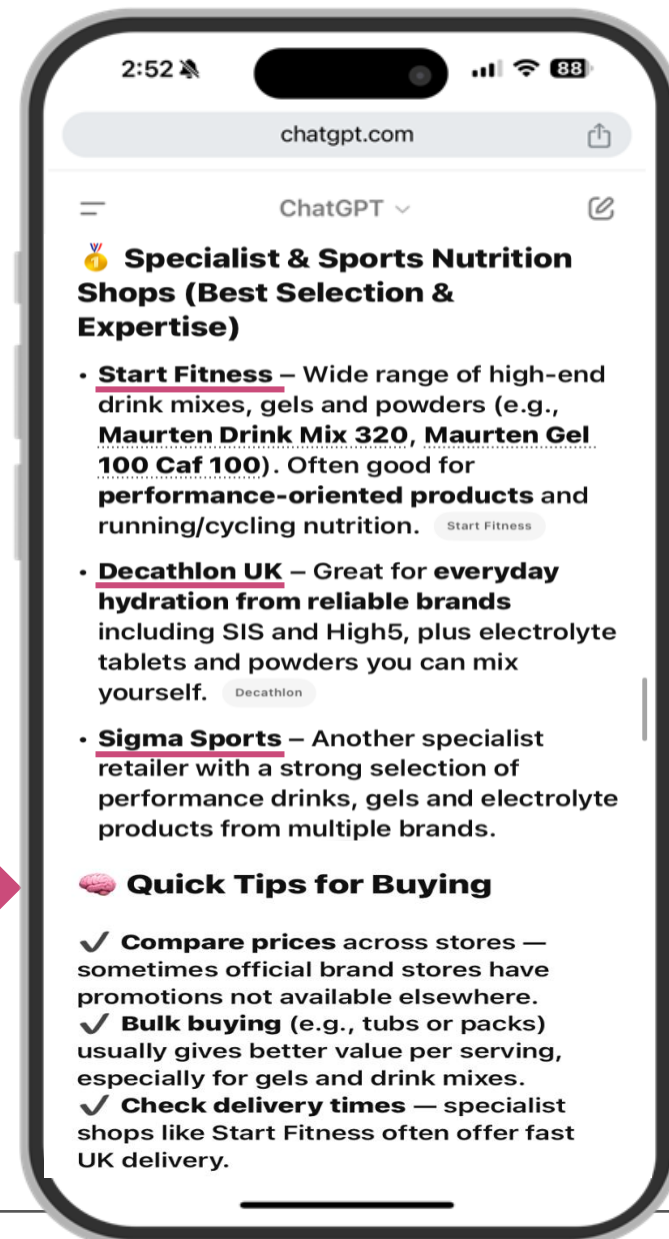
AI can influence where the trip is made



Help me with the right sports drinks to help improve my performance

Include brand recommendations on highly-rated ingredients.

Where is the best place to buy all these products?



🏆 Specialist & Sports Nutrition Shops (Best Selection & Expertise)

- **Start Fitness** – Wide range of high-end drink mixes, gels and powders (e.g., **Maurten Drink Mix 320, Maurten Gel 100 Caf 100**). Often good for **performance-oriented products** and running/cycling nutrition. Start Fitness
- **Decathlon UK** – Great for **everyday hydration from reliable brands** including SIS and High5, plus electrolyte tablets and powders you can mix yourself. Decathlon
- **Sigma Sports** – Another specialist retailer with a strong selection of performance drinks, gels and electrolyte products from multiple brands.

🧠 Quick Tips for Buying

- ✓ **Compare prices** across stores — sometimes official brand stores have promotions not available elsewhere.
- ✓ **Bulk buying** (e.g., tubs or packs) usually gives better value per serving, especially for gels and drink mixes.
- ✓ **Check delivery times** — specialist shops like Start Fitness often offer fast UK delivery.

Source: ChatGPT

ChatGPT use as a search engine varies fundamentally across Generations

Boomers+



Baby Boomers usually ask ChatGPT straightforward questions and use it much like they would Google

Millennials



Millennials, on the other hand, tend to use ChatGPT more personally, treating it more like a digital guide by asking for advice on daily problems or bigger life choices

Gen Z



Younger cohorts, especially college students use ChatGPT as an all-in-one assistant. They connect it to documents, prepare complex prompts, and use it regularly for schoolwork, creative ideas, or even decisions about their personal lives

Brands face a new frontier of optimization for discoverability

	AI Agent Optimization	Traditional Digital Shelf SEO
Discovery Trigger	Natural language prompts (e.g., “Find me a gift for a 10-year-old who loves science”)	Keyword-based search (e.g., “STEM toys for kids”)
Ranking Logic	Relevance to user context (intent, preferences, availability, price, quality)	Keyword match, reviews, sales velocity, sponsored placement
Data Source	Structured product feeds + real-time APIs + user context (calendar, email, chat history)	Product listings, metadata, reviews, and ad spend
Experience Flow	End-to-end in-chat journey: discovery → purchase → fulfillment	Multi-step: search → click → site/app → checkout
Brand Visibility	Organic placement based on agent’s interpretation of relevance (limited ads—so far)	Pay-to-play visibility via retail media and SEO
Optimization Focus	Feed quality, schema markup, fulfillment speed, agent-readable attributes	Keywords, content, ratings, pricing, and ad bidding
Customer Data Access	Limited — agent mediates the relationship and may restrict data sharing	Broader access via site analytics, CRM, and pixels
Trust & Privacy	High sensitivity — agents require opt-in for personal data use	Lower sensitivity — data collected via cookies and tracking
Emerging Risk	Brands become interchangeable unless they’re agent-preferred or exclusive	Brands can still differentiate via storytelling and UX

Source: NielsenIQ

AI in ecommerce: new data expectations

The rapidly changing world of AI means there are new product data expectations that fuel these experiences

Structured Attributes:

Standardized data that enables AI to compare, filter, and recommend products effectively. .

Machine-Readable Content:

Product information formatted for algorithms — not just humans— to interpret and act on.

Real-Time Personalization:

Content that adapts to shopper behaviour, context, and preferences instantly.

AI-Driven Recommendations:

Enriched metadata and shopper signals that power predictive product suggestions.

Voice & Visual Search

Compatibility: Content optimized for emerging search methods, from smart speakers to camera-based queries.

This shift means product content must be **smarter, faster, and more connected** than ever before.

AI will affect more than just the shopper experience in retail today



Source: NIQ Digital Shelf

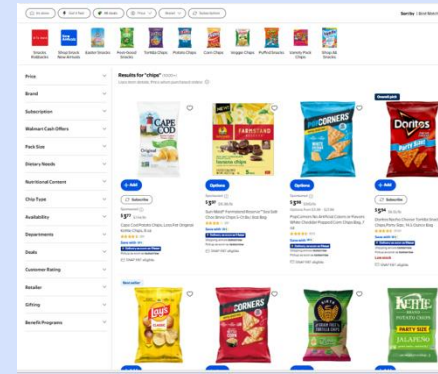
The online battleground is different than what drove brand's historical success

When a shopper walks into the aisle...



- ✓ Defined share of shelf
- ✓ Static assortment
- ✓ Beneficial brand equity
- ✓ Limited activation tactics

When a shopper searches online...



- Online search investment wins search
- Past success is a rapidly diminishing asset
- Competitive set is always changing
- Dynamic content, price, and research

Go beyond the eCommerce team and utilize digital shelf analytics for use cases that aid the total organization

Digital Shelf Analysis Use Cases	Ecommerce	Category Management	Sales	Sales Field Force	Analytics/ Data Science	Revenue Management	Digital Media	Supply Chain	R&D/ Innovation	Shopper/ Consumer Insights
Decrease Out of Stock	✓	✓	✓	✓				✓		
Optimize Distribution	✓	✓	✓	✓						
Align Offline and Online Distribution	✓	✓	✓	✓						
Track Innovation		✓	✓							✓
Retailer negotiation/JBP's	✓	✓								
Price Monitoring	✓	✓	✓	✓		✓				
Optimize Online Promotions	✓	✓	✓			✓	✓			
Optimize Search Results	✓		✓						✓	
Sentiment Analysis (R&R)	✓								✓	
Optimize Media Spend	✓		✓			✓	✓		✓	
Modeling/Data Lake	✓				✓	✓	✓			

Source: NIQ Digital Shelf

Excellence in Digital Shelf Management evolves to driver total brand success, online and offline

			
Stage	Fundamental	Mastery	Leadership
Activities	Ensure availability, visibility, content, price, and promotion are compliant with brand and retailer standards	Monitor competition, lead category in content innovation, win search, and test-and-learn novel tactics	Help retailers shape the digital shelf experience for the category and drive unique insights into the broader brand organization
Outcomes	Achieve the brand's "fair share" of sales online	Lead the category, take share from competition, and over-index online versus in-store	Become the online category captain and transform the overall business though insights - ultimately driving total brand sales growth
			Digital Shelf Management = Total Brand Management

Source: NIQ Digital Shelf

Digital Shelf leadership drives excellence for the entire brand organization

Digital Shelf Management

- ❑ Monitors ratings and reviews to ensure products are at adequate levels to convert
- ❑ Benchmarks titles, descriptions, and image content against competition to meet category standards
- ❑ Optimizes for key search terms
- ❑ Tracks OOS rates
- ❑ Invests in retail media
- ❑ Observes price and promotional activity

Passive, Corrective, and Risk Averse

Digital Shelf Leadership

- ❖ Quickly integrates UGC from reviews into product development decisions
- ❖ Trials new content with online platforms first
- ❖ Tracks what shoppers are searching for and what upstart brands are putting into product descriptions to uncover category innovation trends early on
- ❖ Understands demand trends and shopper behavior down to the region and store level
- ❖ Uses data to adjust media, pricing strategy, and promotions in coordination to drive total sales

Proactive, Innovative, and Visionary

Thank you



NielsenIQ