



From Market-Level Strategy to Store-Level Precision



Built for the Future

Presenters

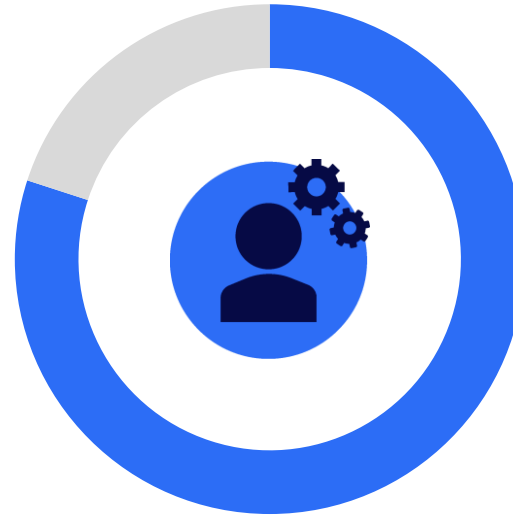


**Bianca
Piluso**
VP, Analytics
NIQ



**Jim
Presley**
GM
NIQ

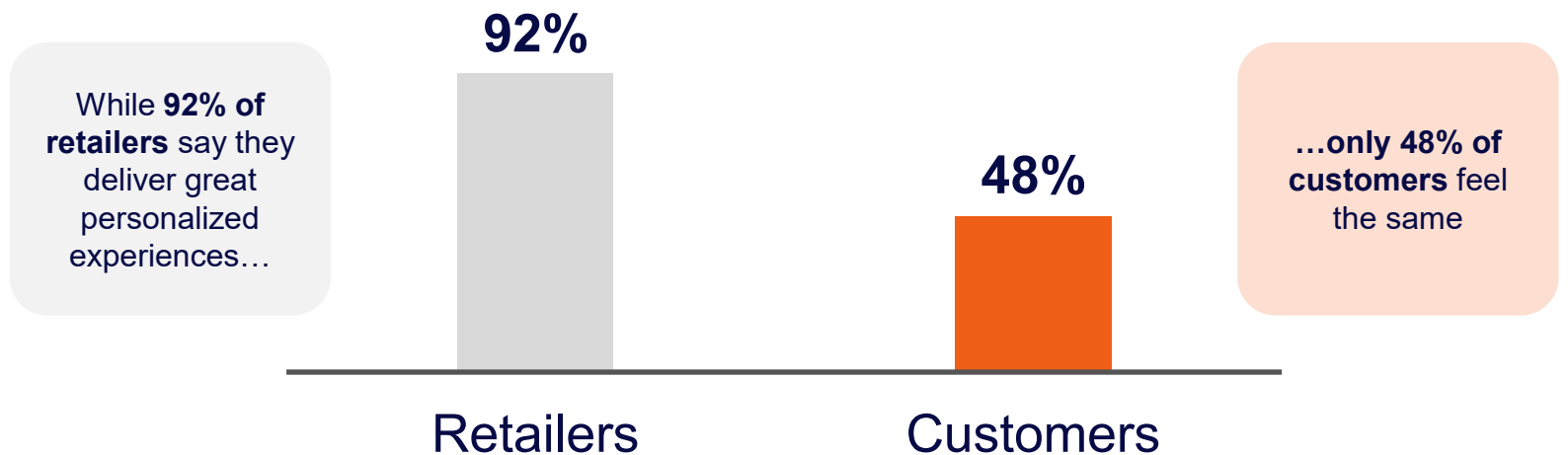
Localization
isn't new,
it is just
more
important



80%

*of consumers prefer
personalized experiences*

*There's a large disconnect between delivery and
perception of a great personalized experience*



Source: Deloitte US

... and the rate of change continues to increase

Two generations with two very different needs

Younger generations are more diverse, digitally native, and shop in fundamentally different ways.

65+

Adults now outnumber the under 18

Cultural diversity is redefining who shops and how

The racial makeup of major markets is shifting rapidly, changing who shops, how they shop, and where growth comes from.

4 in 10

Gen Z consumers identify as multicultural

A growing percentage of store footprints are changing YoY

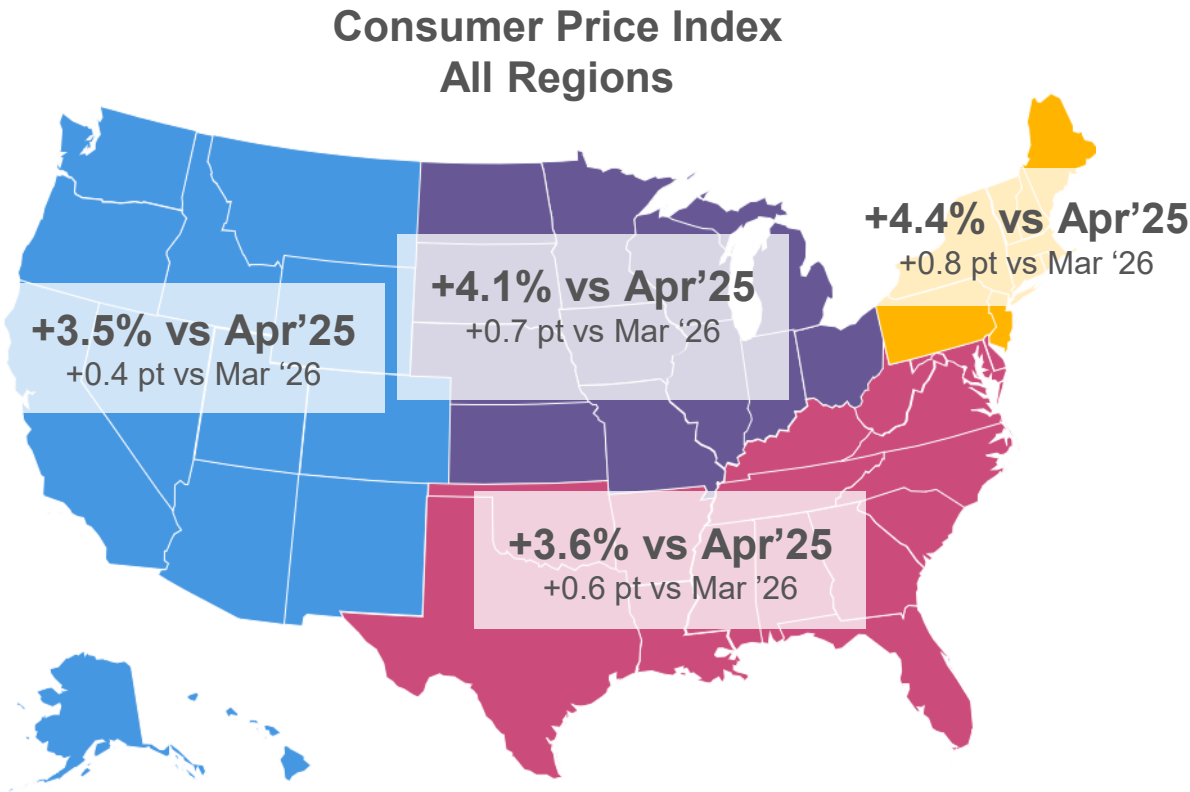
Re-format, closure, ownership change, re-model, etc

16%

Consumer companies built in a time of *mass* production, *mass* distribution, and *mass* marketing must recognize a *shift from mass to micro*

A challenging economy creates cost savings pressure for MFGs and Retailers

Annualized % Chg vs April 2025



Energy
+17.9%
+5.4pt vs Mar '26

Food
+3.2%
+0.5 pt vs Mar '26

**Revolving
Outstanding Credit
Card Debt**
\$1.3 Trillion
+3.3 vs YA
+0.7% vs Prior Month

**Delinquency Rate
(Q4,'25)**
2.9%
-0.05 pts vs YA
-0.1 vs Prior Quarter

Sources: [U.S. Bureau of Labor Statistics - Consumer Price Index](#) | vs. LY | Slide updated in in May 2026 (data updated monthly, through April 2026)

Localization isn't cliché,
it *delivers*

3:1

*Companies save 3x of every
dollar invested in **localization***

Source: McKinsey Consulting

55% higher
purchase / **conversion
rate** if the brand
communicates relevant
/ personalized value

Reduce **re-work costs**
from **30-40%**

+4.9% Projected
CPG growth through 2029
is driven by regionalized
consumer centric
strategies

Improve conversion by
**1.5% for every
1% gain**
in localization accuracy

What's at stake?

Failing to meet shopper expectations

When local shoppers encounter assortments that don't reflect their needs, missions, or routines you see a reduction in relevance, satisfaction, and conversion.

*Irrelevant assortments =
Missed demand & lost trips*

Losing out to the competition

If competitors localize faster, they will win shelf space, loyalty, and incremental demand.

*Faster, more localized players
win the shelf*

Falling behind in the market

Organizations that rely on averages move slower, spread resources too thin, and struggle to scale what works—while others operationalize precision.

*Averages slow decisions while
precision scales growth*

Let's see *localization* in
action

Meet Fabian!





What else does Fabian buy when he buys "HAPPY"?

Bottled Water

324 index

1.5M common trips



Potato Chips

234 index

556k common trips



Home Chef

168 index

300k common trips



Ground beef

127 index

277k common trips

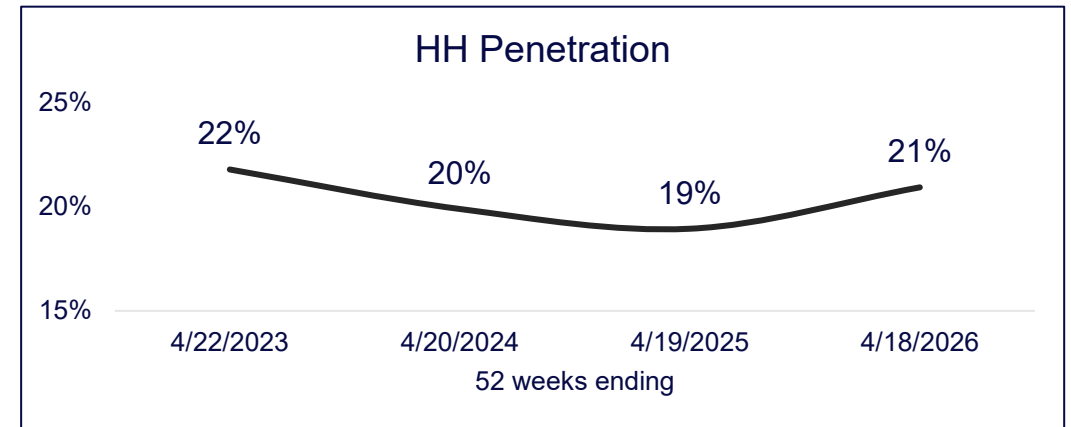


Source: NIQ Omnishopper



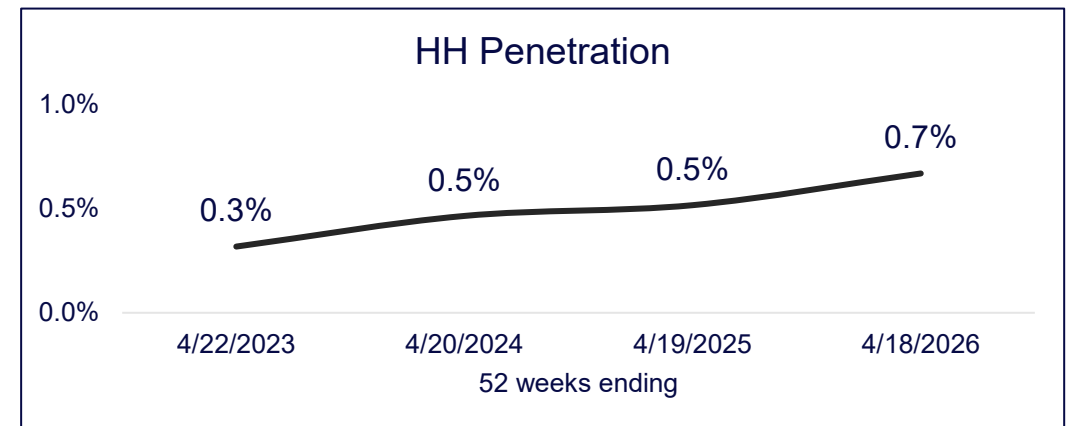
Full sugar offering

(1%)
penetration



ZERO sugar offering

+2x
penetration



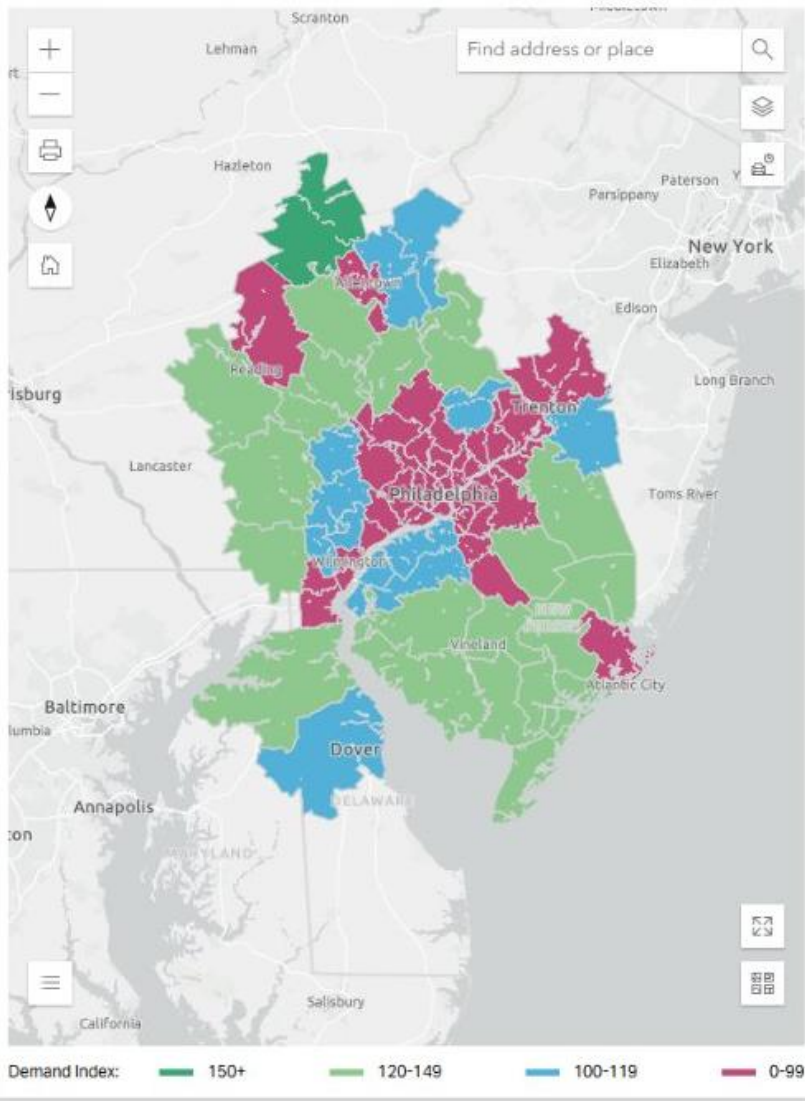
What localized markets over index with Fabian?

Top 8 Markets

- Salt Lake City, UT
- Fort Defiance, AZ
- Red Rock, NM
- Alvarado, TX
- Elk River, MN
- Goshen, IN
- Carrollton, KY
- Canton, OH



Localize our efforts to maximize **HAPPY! Zero Sugar** in a market...



Total Volume per 100 HHs

21.02

Total \$ per 100 HHs

\$13.04

% Pen

0.6%

Buy Rate

35.01

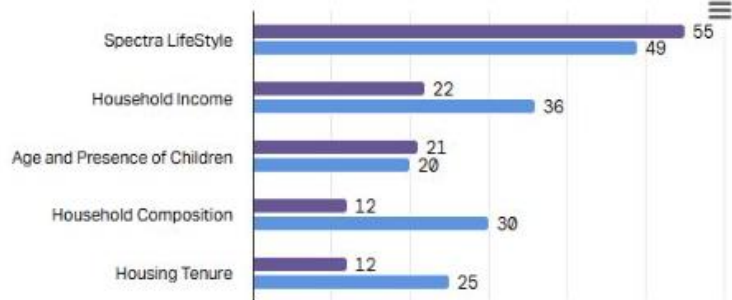
Total \$ per 100 Buyers

2171.82

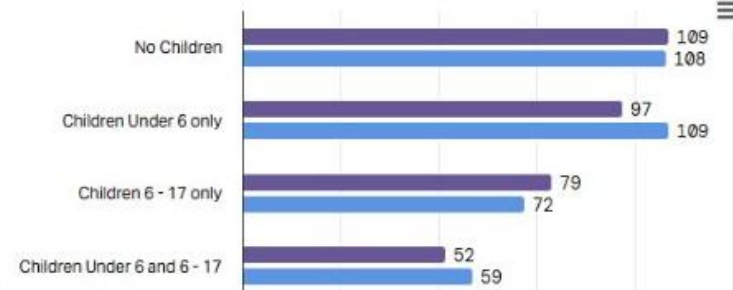
Price per Unit

0.62

Attributes Driving Consumption



Age and Presence of Children

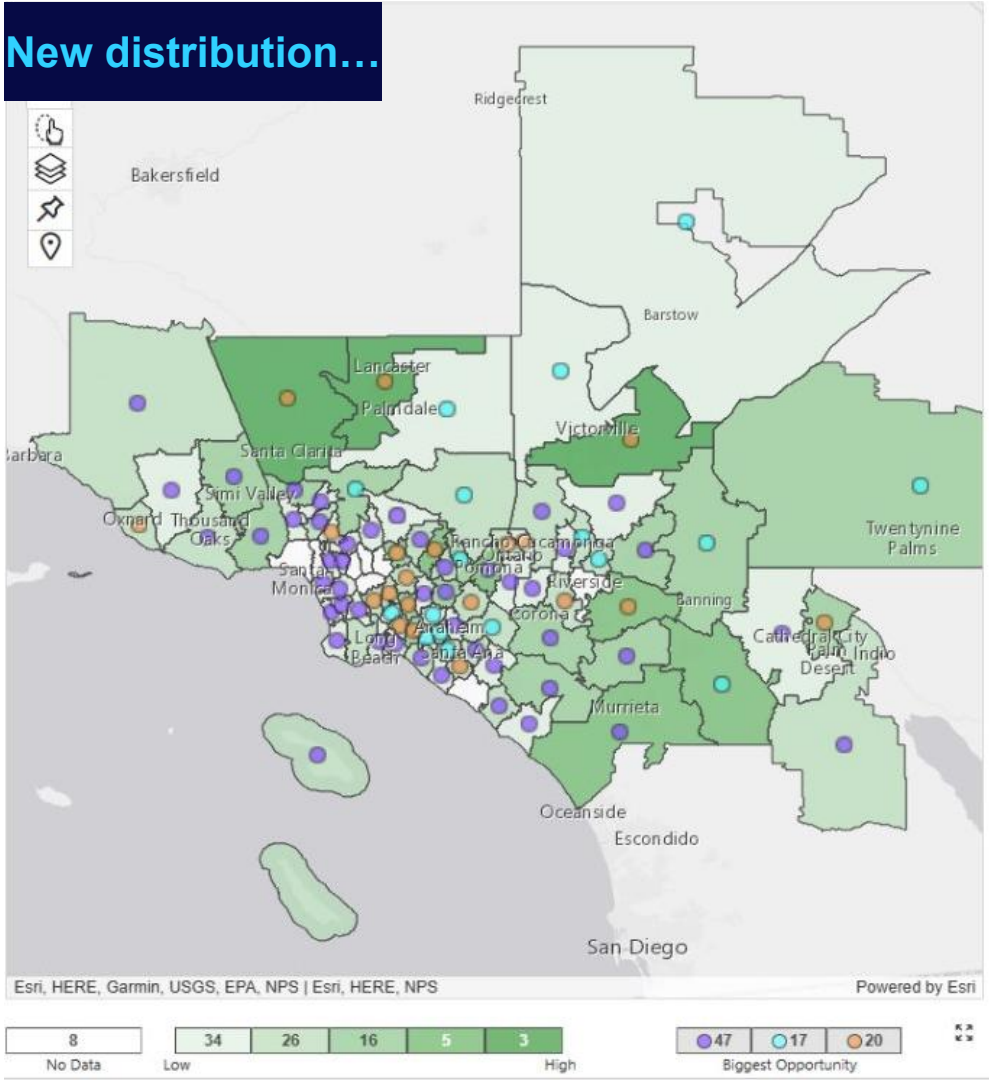


BehaviorScape

BehaviorScape Plus 15 Segments

Row Dimension	Affluent Living	Striving City & Surrou...	Mid Downscale Rural ...	Total
Younger Families	76	107	67	80
Older Families	92	66	62	79
Evolving Adults	95	93	86	93
Mature Singles	106	89	169	126
Mature Couples	99	97	123	107

Localize to store level for...



Source: NIQ Precision Solutions

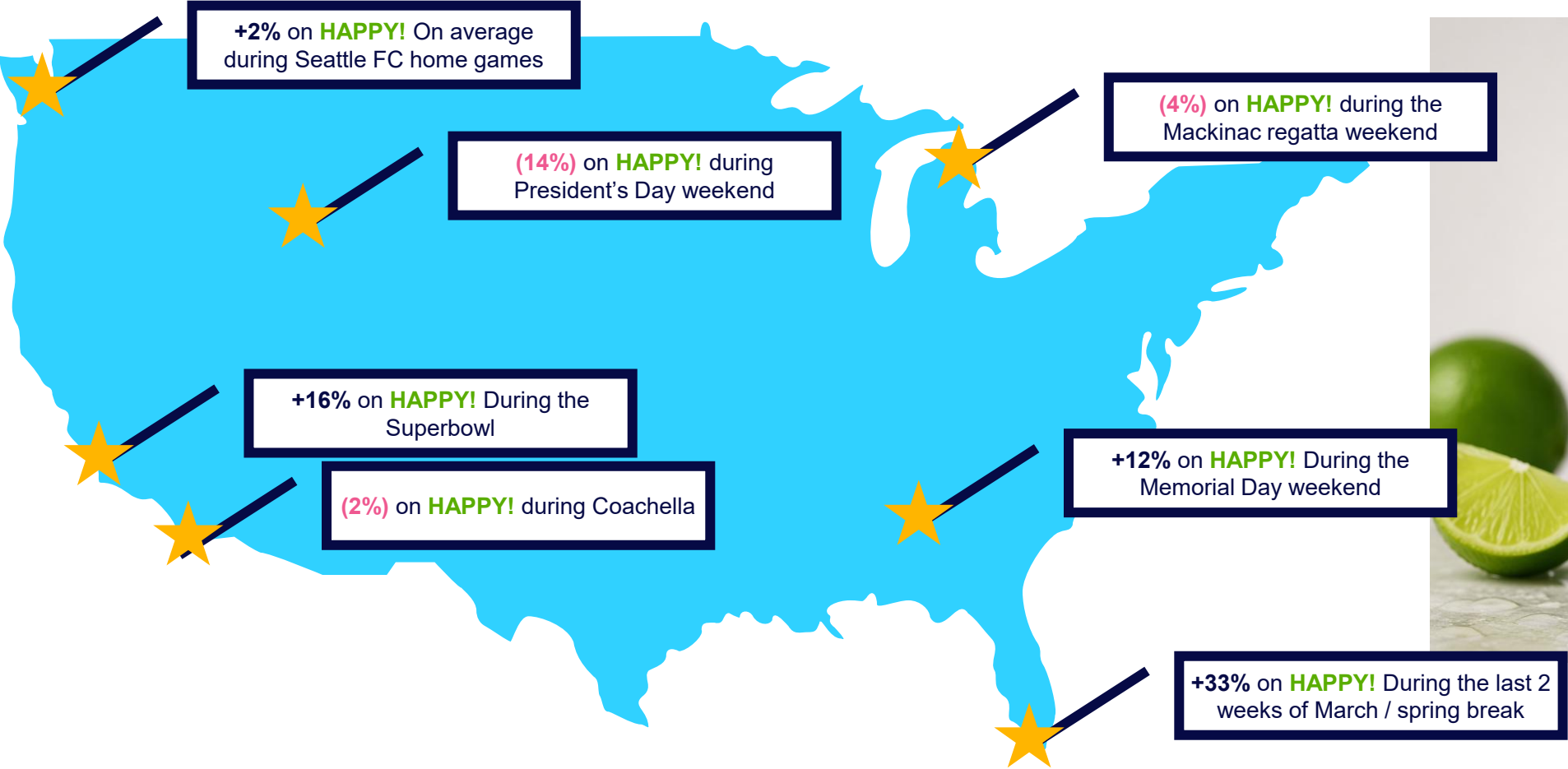




Precision Solutions

Industry first solution combining RMS and consumer sourced data to localize precise areas with consumer metrics

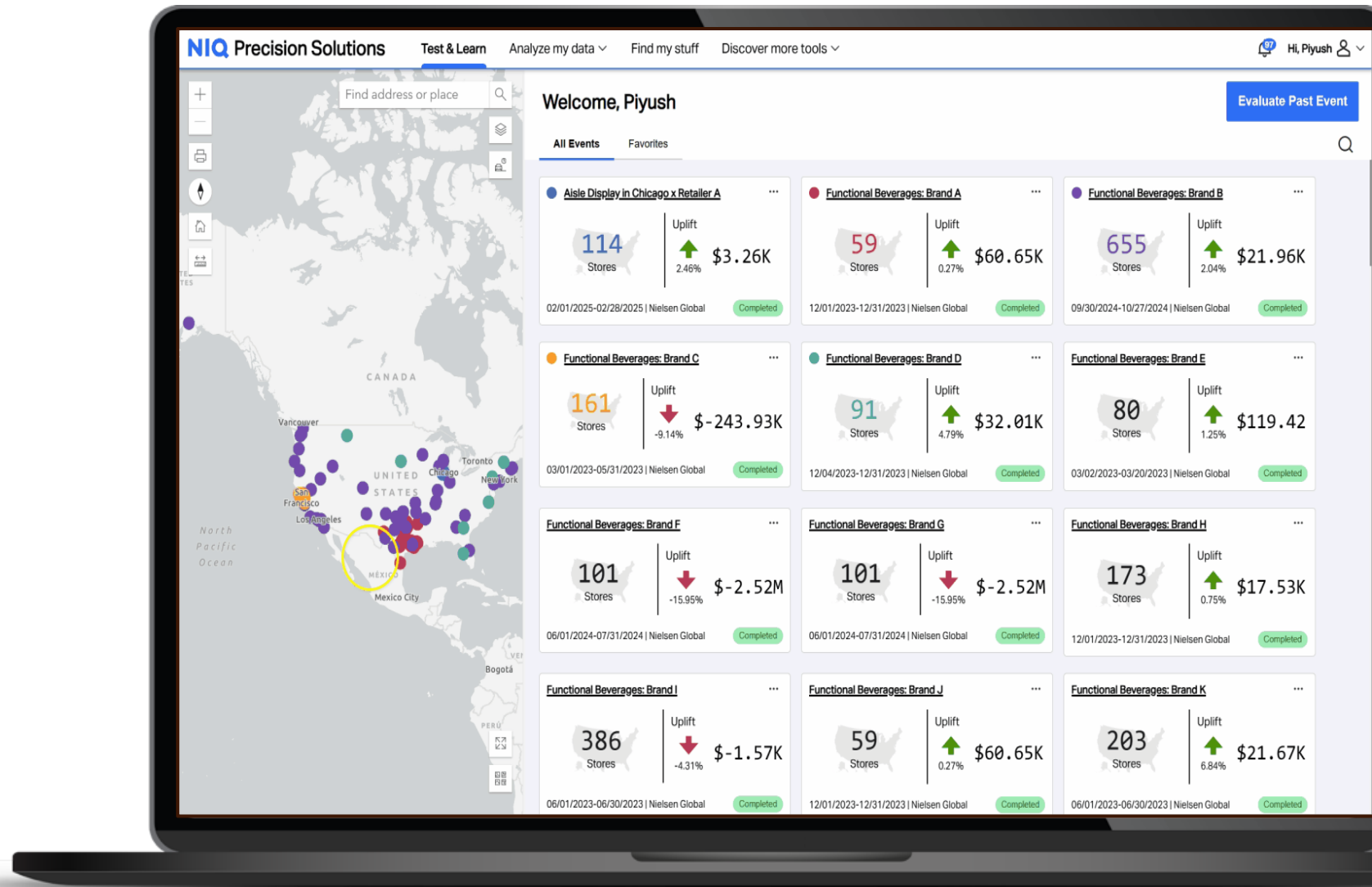
Know what Fabian best responds to before you execute...



Streamline the experimentation process

Any localized promotions or targeted campaigns can be tested to:

- Understand the effectiveness of your strategy
- Gain cost efficiencies and streamline testing time
- Access results within hours



Key benefits

Maximize your growth through localized executions, consumer targeting and predictive modeling.

- **Identify** growth pockets and pinpoint buyer segments
- **Target** high-value local opportunities
- **Test** initiatives in-market with real-world data
- **Predict** outcomes leveraging AI-enabled models
- **Optimize** assortment, pricing, and activation strategies before scaling

How it works

Activate demand locally, prove lift, and scale with confidence

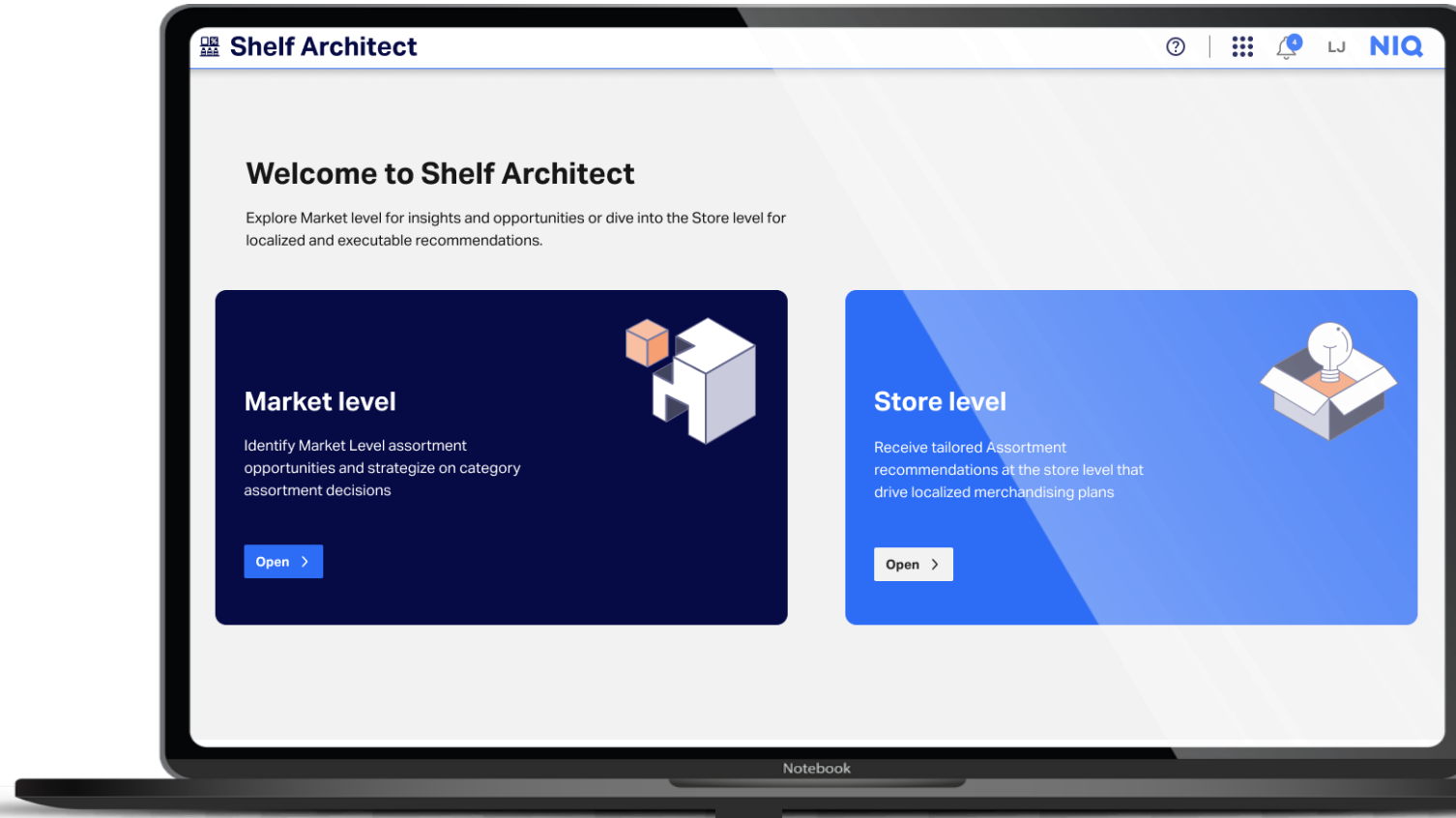
- **Combines granular trade areas, advanced profiling, and AI-enabled models into a comprehensive tool, offering:**
 - Consumer buyer targeting and localized retail sales for targeted actions
 - Integrated testing capabilities and predictive modeling for confident decision making
 - A modern, interactive, and intuitive interface for faster adoption and visual storytelling

Shift from selling recommendations to shaping category decisions unique to each store

Insights and recommendations that reflect how each store truly operates, not market averages

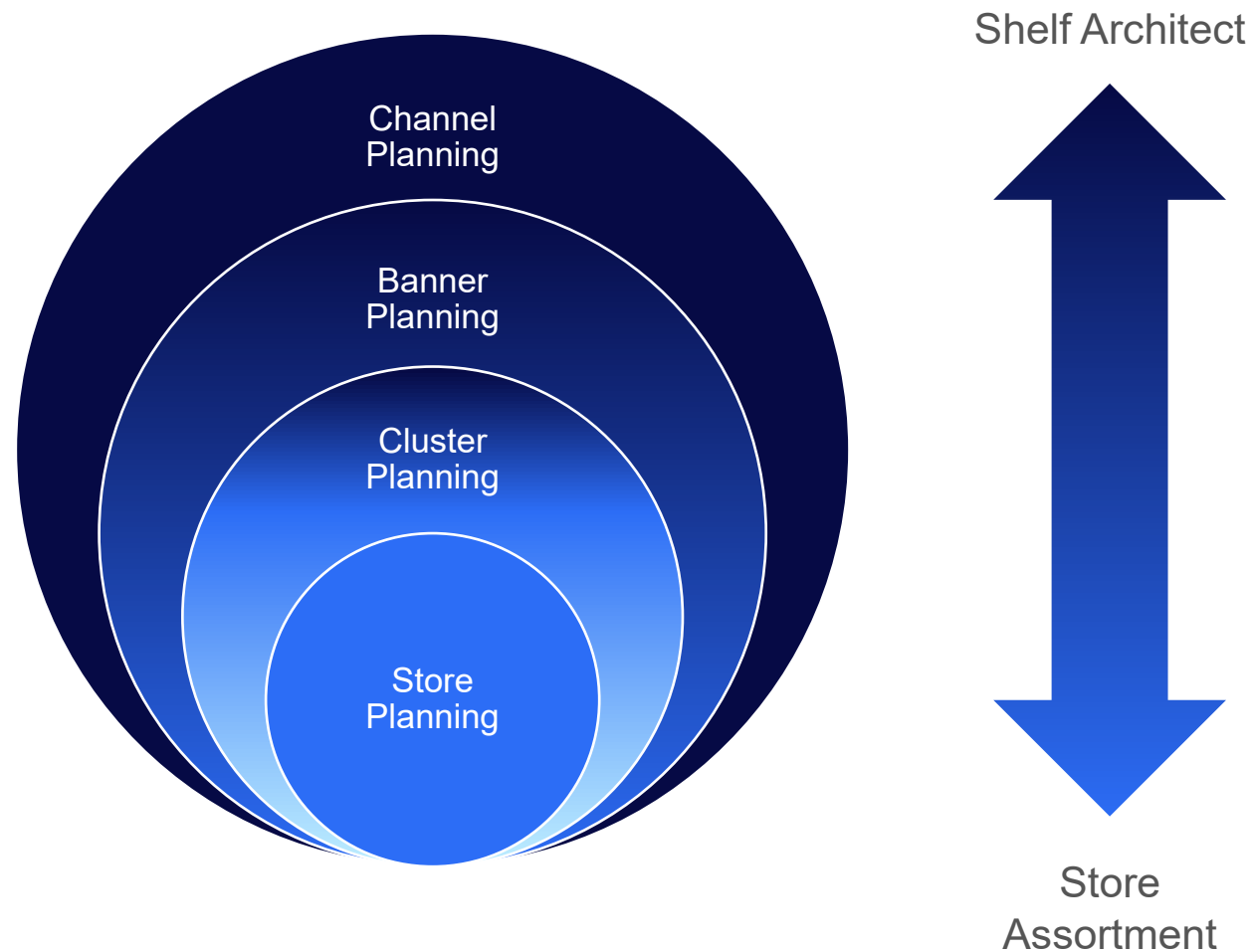
NIQ's Approach to Store Level Provides:

- **Localized Recommendations** for ALL Stores
- **Executability** driven by...
 - Clustered Competitive Sets
 - Account-Specific Category Definitions
 - Configurable Recommendation Weights
 - Dynamic Rule & Guardrail Creation
 - Comprehensive Exception Reporting
- Store-Specific **Forecasting**
- POG **Automation Compatibility**
- **Trusted models** underlying Recommendation
- **Streamlined Set-up** Process



Shelf Architect is a lead-in to Store Assortment

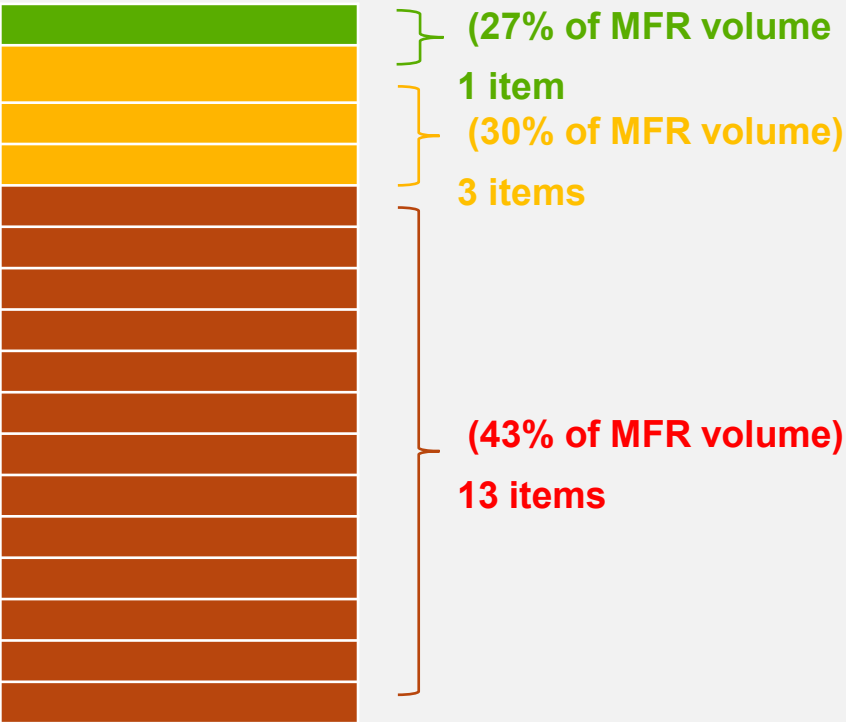
Channel and Banner Strategy
should inform the way
Manufacturers Plan for
Clusters and Stores



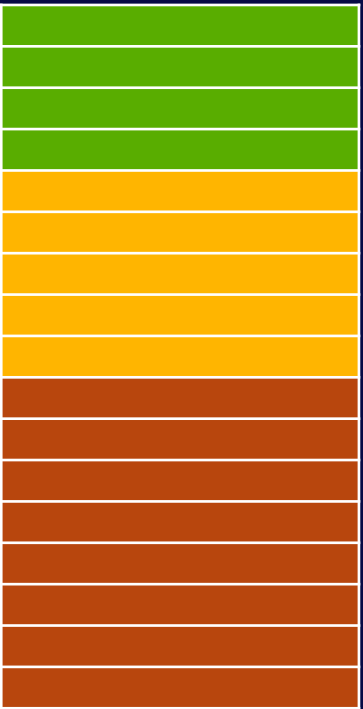
Relying On Velocity Rankings Could Put Your Portfolio At Risk

Incrementality helps uncover opportunities to protect and expand distribution

Ranking Metric: Velocity Ranking (\$ / MMM ACV)
Manufacturer: Emerging Brand in Candy Category
Retailer: Target



Ranking Metric: NIQ Assortment Incrementality
Manufacturer: Emerging Brand in Candy Category
Retailer: Target



By incorporating incrementality you can:

- Prove the incremental value that your products contribute to the category
- Protect slower turning niche products by proving their incrementality contribution
- Uncover opportunities to target competitive fast turning products that are cannibalistic to the set

Store Level Assortment helps to identify local needs that could be overlooked at Retailer Level

Meijer Optimization Comparison – Market Level vs Store Level

Store	 Market Level Recommendation	 Store Level Recommendation
Meijer Store: 184715746 Royal Oak, MI	● Expand Brand 1 ● Decrease Brand 2	● Expand Brand 2 ● Decrease Brand 1
Meijer Store: 804800841 Cleveland, OH	● Decrease Brand 3 ● Decrease Brand 2	● Expand Brand 2 ● Decrease Brand 3
Meijer Store: 1152392083 Clarkston, MI	● Expand Brand 4 ● Decrease Brand 5	● Maintain Brand 5 ● Decrease Brand 4

*By using Store Level Optimizations these 3 stores improve MFR X sales by **19% on average per store***

Where does market-level decision making break down?



Stores that “look similar” serve **very different shoppers**



Teams **lack a clear way to prioritize** which stores matter most



Assortments worked *in theory* but **underperformed locally**

Ultimately, market-level decisions mask store-level opportunity

Key benefits

Your assortment blueprint

- **Store-level precision** powered by proven product-incrementality models.
- **Clear, defensible decisions** anchored in long-term performance.
- **Full control** through customizable rules, guardrails, recommendation levers and competitive definitions.
- **Balanced value** that supports both retailer priorities and manufacturer growth.
- **Planogram-compatible outputs** built for fast execution in tools like NIQ Spaceman.

How it works

Build the right mix in every store

- Choose your retail account and executable clusters
 - Key retailers/Category Captains
 - Retailers with store level data who can execute
- Choose your category and the competitive product set (i.e. Discover)
- Build your “Blueprint”
 - Specify rules/guidelines
 - Recommendation parameters
 - Retailer-driven constraints
- NIQ runs Models and delivers results
- View and adjust your recommendation to create outputs that are planogram-compatible

How can *localization* fuel your next phase of growth?



Precision Solutions



Store Level Assortment

Let us help you operationalize Localization

From opportunity identification to shelf execution

Precision Solutions

- Identify high-value store clusters based on demand, shoppers, and performance
- Rank stores by true growth potential, not just size or sales
- Create a shared view of priority locations across insights, sales, and category teams

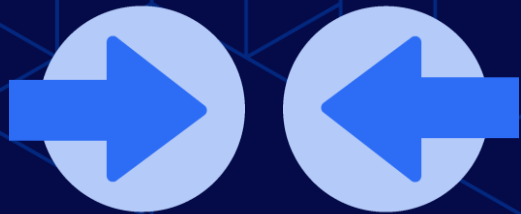
Shelf Architect

- Translate insights into store-specific assortments
- Balance retailer constraints with manufacturer growth goals
- Deliver shelf-ready, planogram-compatible outputs

Go from insights silos to connected execution



Companies that shift to localized execution can expect 3:1 improvement from:



**Marketing
efficiency**



**Trade-spend
effectiveness**



**Speed to
activation**

*As consumer behavior diversifies,
the first company to hyper
localize will win — improving
efficiency, not increasing
complexity.*

*“The first one to hyper localize
wins”*

Localization: CALL TO ACTION

WHO

Leverage the most accurate, representative, and scaled **consumer data** to **identify** your target consumer and understand their behavior at the most granular level



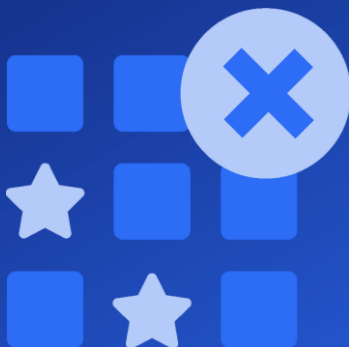
WHERE

Leverage harmonious **retail measurement and consumer data** to understand **where your target consumer** shops and which markets, areas, and stores have the most significant opportunities



WHICH

Leverage store specific **activation strategies** and methodologies to optimize the assortment, pricing, secondary placement, and distribution in those locations with significant opportunities.



Thank You

Questions about localization?

Contact us!



Bianca Piluso

VP, Analytics, NIQ
Bianca.Piluso@nielseniq.com



Jim Presley

GM, NIQ
Jim.Presley@nielseniq.com



Built for the Future

Localization can help find efficiency in times of economic challenges

Fragmented consumer preferences make national messaging less effective

Changing values, attitudes, lifestyles, priorities, and ways of shopping

2.5X

Increase in consumer touch points over last 5 years; small CPGs accelerating growth

Localized strategies improve ROI

Marketing effectiveness increases when optimized geographically and aligned to local demand drivers

5X

Granular local analytics drive 5X ROI improvement and sales & penetration increases

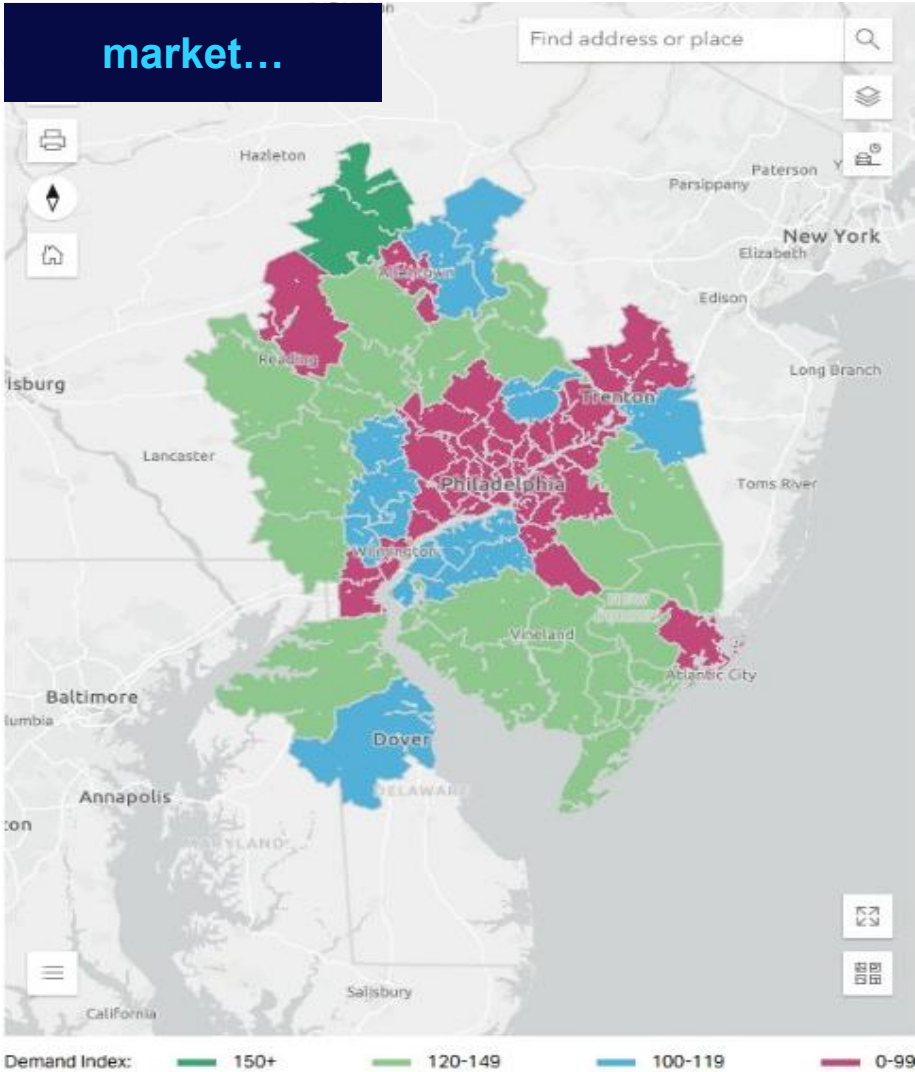
Regional value, wellness and economic differences require tailored strategies

Price sensitivity, wellness expectations and preferences vary by region

4.9%

Projected CPG growth through 2029 is driven by regionalized consumer centric strategies

Localize our efforts to maximize **HAPPY! Zero Sugar** in a...



Source: NIQ Precision Solutions

