

The New Commerce Landscape

From Attention to Incremental Sales: Quantifying TikTok's Offline Impact with NIQ



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FMCG E-Commerce is now a CHF 1.6bn market in Switzerland

Online purchases account for 5.1% of total FMCG value sales

FMCG E-Commerce
Share of Value

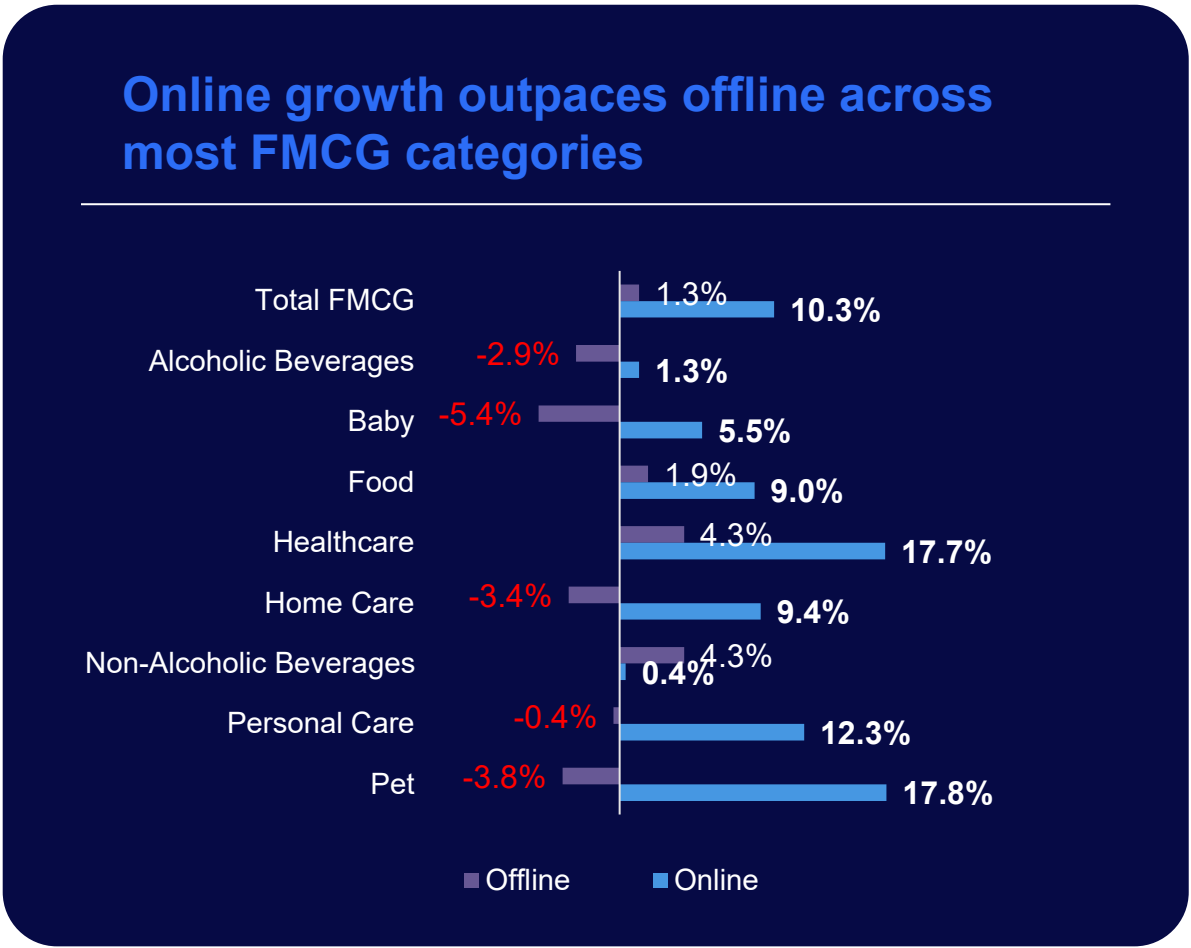
5.1%

Prestige Beauty
E-Commerce
Share of Value

37.6%

Tech & Durables
E-Commerce
Share of Value

57.0%



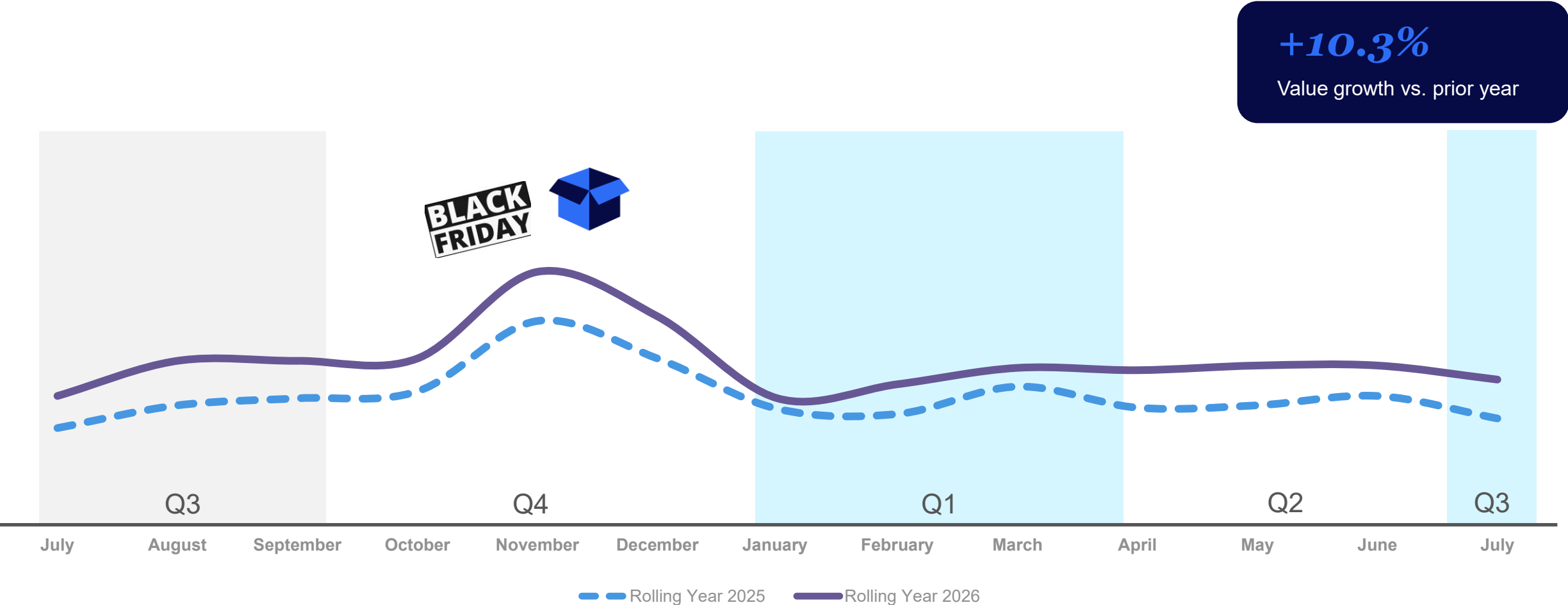
Source: NIQ Omnisaales Switzerland / Total FMCG / L52W ending 9 August 2026

Switzerland`s FMCG E-Commerce grows +10%, with event-led peaks shaping demand



Monthly FMCG E-Commerce value sales

Current rolling year vs prior rolling year | Switzerland | L52W ending 9 August 2026



Source: NIQ Omnisaales Switzerland / Total FMCG / L52W ending 9 August 2026

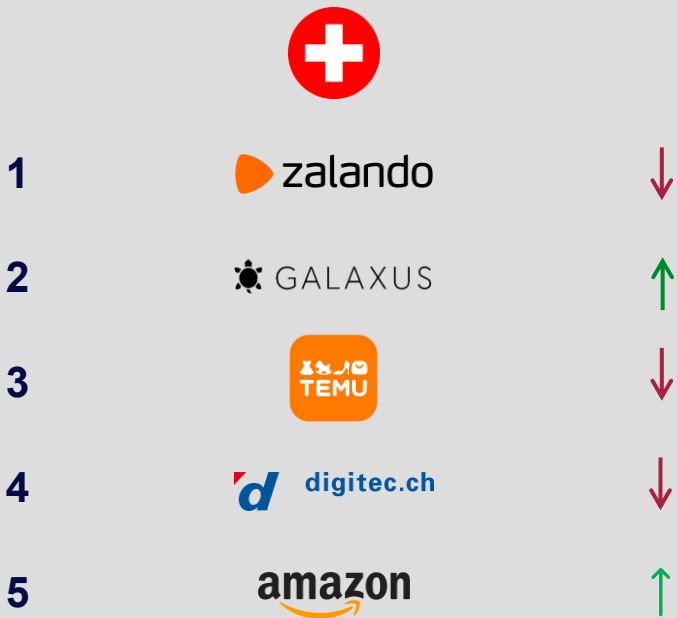


Switzerland's E-Commerce stays retail-led at 73.7% while the category mix broadens

Marketplace share: 26.3% of E-Commerce value up +0.2pp vs. prior year

Top Online Retailers by value sales

Rank movement vs. prior year

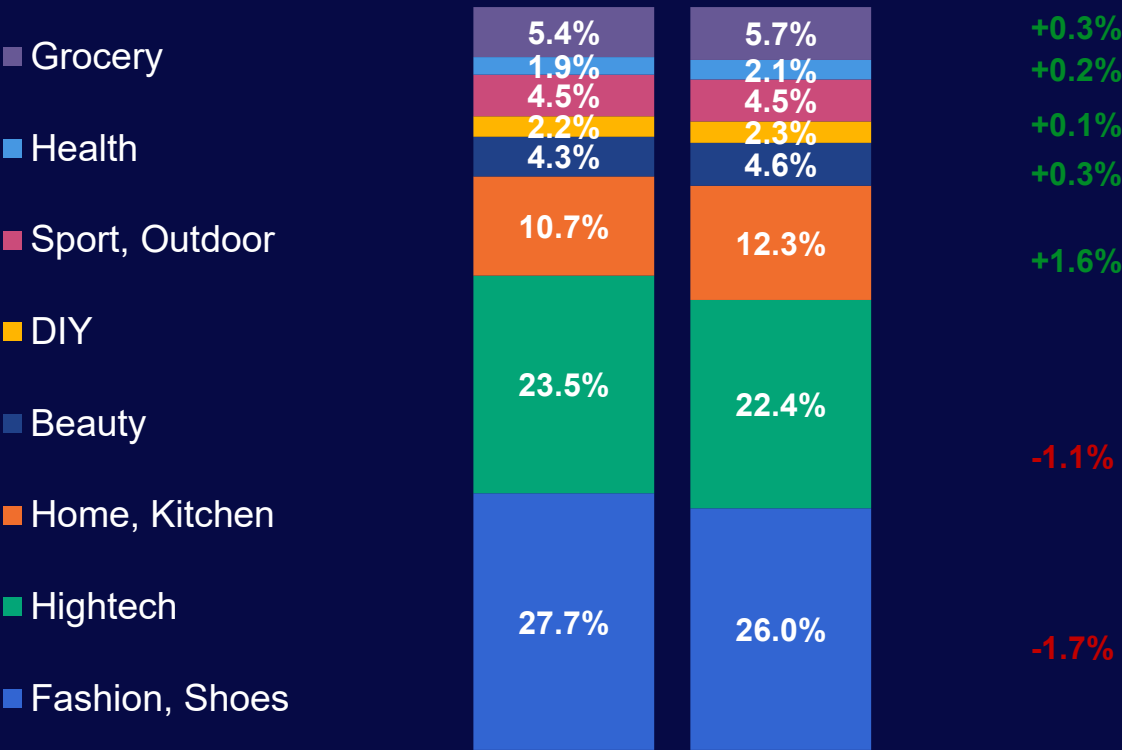


Fastest growing



The category mix is moving beyond High Tech and Fashion

Share of Total E-Commerce value / Current L52W vs prior L52W

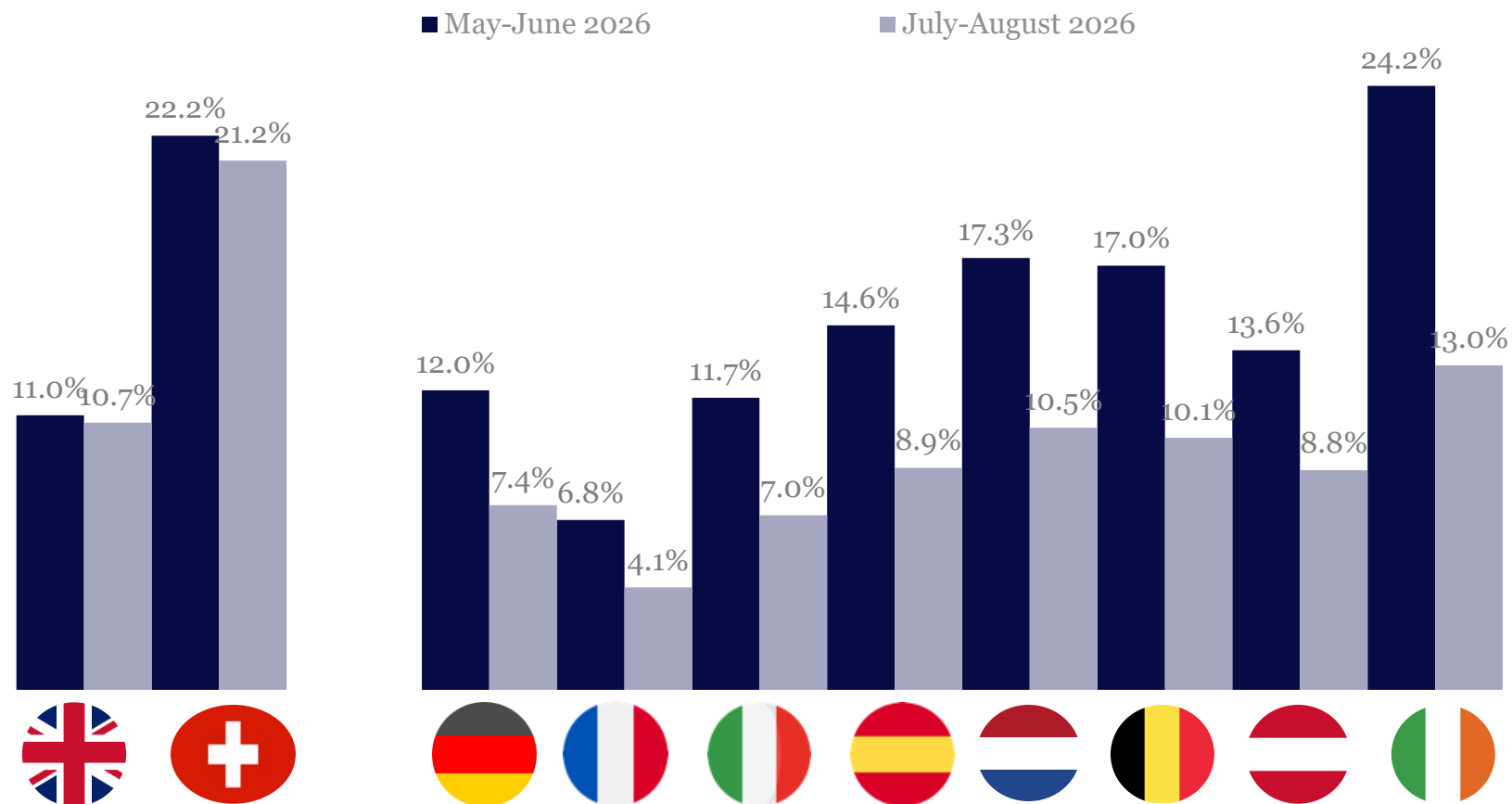


Source: NIQ Digital Purchases / Total E-Commerce Switzerland / L52W until 23 August 2026

The EU Small Parcel Duty cuts Temu's reach across the EU10, Switzerland stays resilient

Temu's penetration rate

EU10 countries - July-August 2026 vs two months before



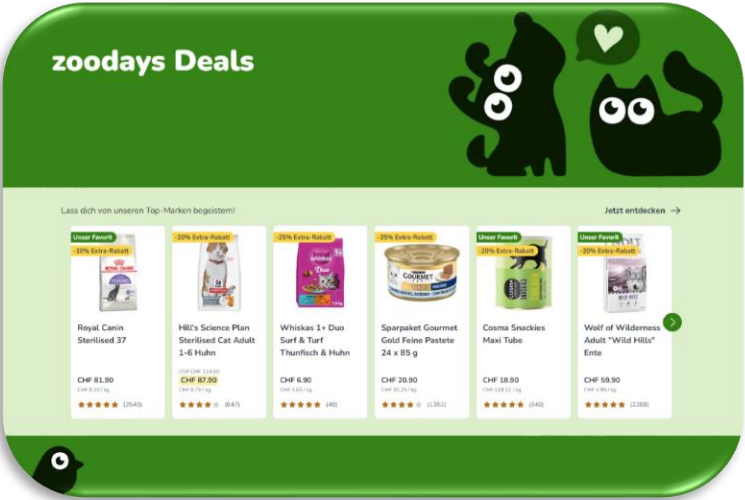
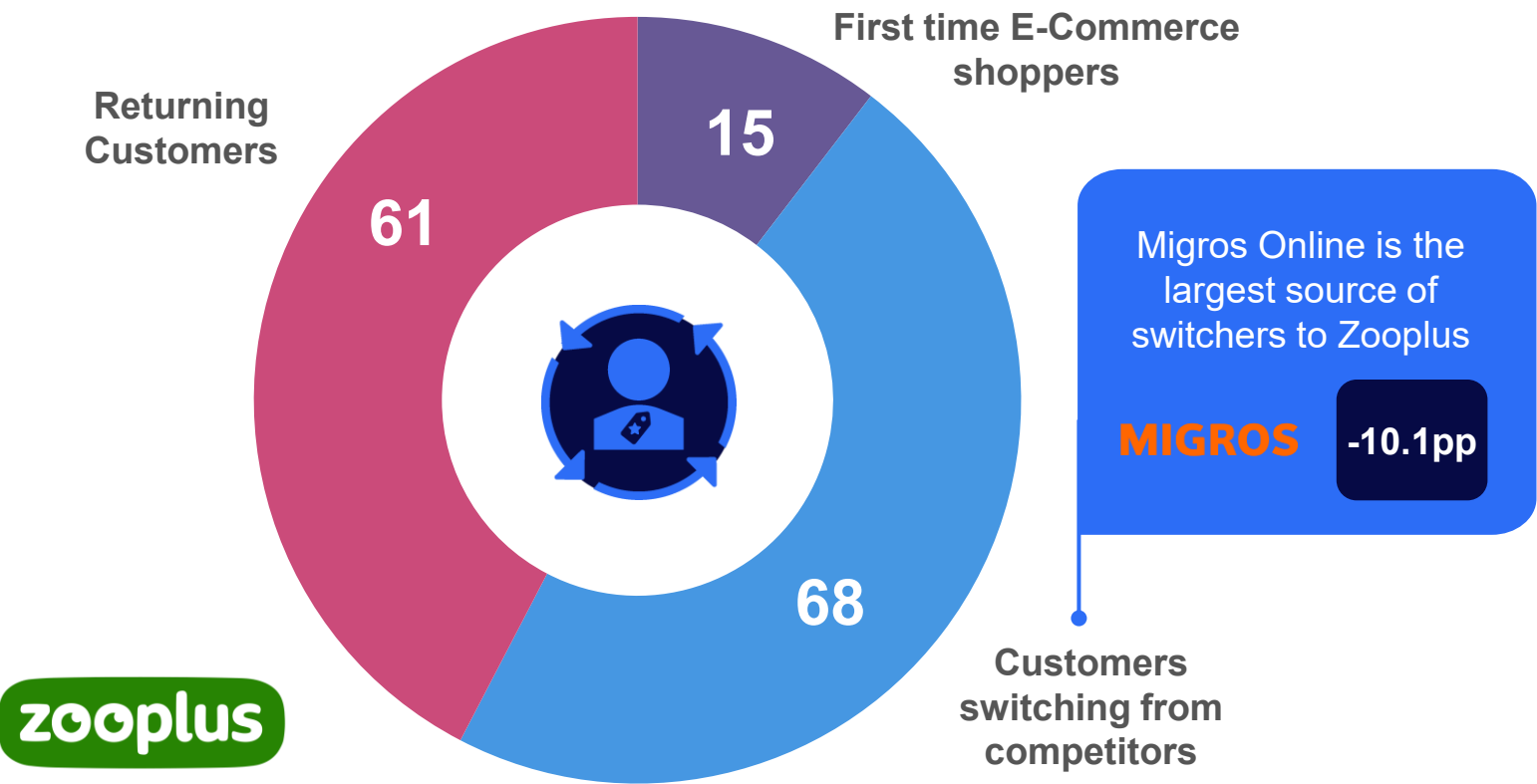
Source: NIQ Digital Purchase eCommerce consumer panel – Total eCommerce of goods (Services excluded) – Data ending on the 30 of August 2026 - DE, UK, FR, IT, ES, BE, NL, IE, AT, CH



Zooplus' growth is driven by customers switching from competitors

Zooplus gained 0.6pp share and became Switzerland's #6 FMCG online retailer

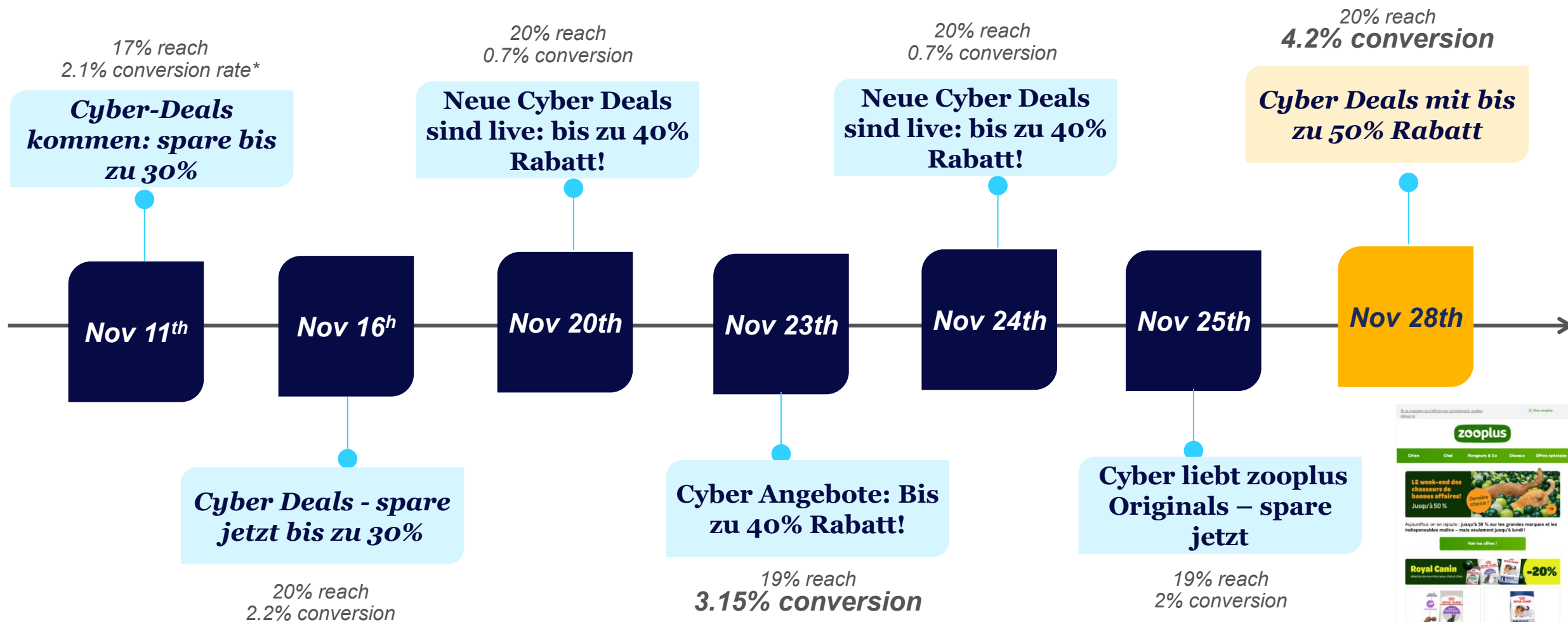
Zooplus' customer base by acquisition source



Source: NIQ Digital Purchases / FMCG E-Commerce Switzerland / 23.08.2024 - 22.08.2025 and 24.08.2025 - 23.08.2026



Zooplus launched its Black Friday campaign relying on intense cadence to building up momentum and conversion



AV nb of email/month = 9



Galaxus performance in Beauty, Switzerland
L52W until 23 August 2026

Nearly 39%
of Galaxus FMCG value sales
came from Beauty

Top Beauty Brands by value sales



Galaxus Beauty shifts away from Gen Z
toward older generations
- Share of Galaxus Beauty value sales

	Previous 52W	Last 52W
Gen Z	33%	31%
Gen Y	36%	37%
Gen X	27%	27%
Gen B	4%	6%

Source: NIQ Digital Purchases / Total FMCG Switzerland / Last 52W until 23 August 2026

Prestige fragrance is being squeezed by three new sources of competition



Arabic Rooted

The dupe phenomenon spans a wide range of brands

Fashion Brands

Dupe Brands

+18%
values sales vs
year ago in CH

#1 Fragrance Brand
on TikTok Shop in Europe

Source: NIQ Omnisaales Prestige / Austria / Last 52 weeks until 16/08/2026

Understanding demand is the first step - measuring impact is the next

- 1** *E-Commerce growth is increasingly event-led*
- 2** *New routes to purchase are redrawing competition*
- 3** *Loyalty must be actively earned in a price-driven market*
- 4** *Beauty reveals the speed of customer change*
- 5** *Growth needs to be measured holistically*



**TikTok is
entertainment that
drives impact that
transcends the
screen**



7 in 10

say TikTok has become their
go to for new brands/ products



Can TikTok drive incremental sales – and justify future investment?

- Media investment is under growing scrutiny
- Advertisers are under pressure to prove outcomes beyond platform metrics





1 THE OBJECTIVE

Determine whether TikTok drove **incremental in-store sales** in Switzerland

2 THE MOMENT

The campaign ran in Q1 2026 when people were more open to **trying new things**

Note: The video is shown for illustrative purposes only and does not represent the actual campaign creative.

The Solution: Proving Incremental Impact with NIQ



1 ACTIVATE

Campaign run on TikTok



2 COMPARE

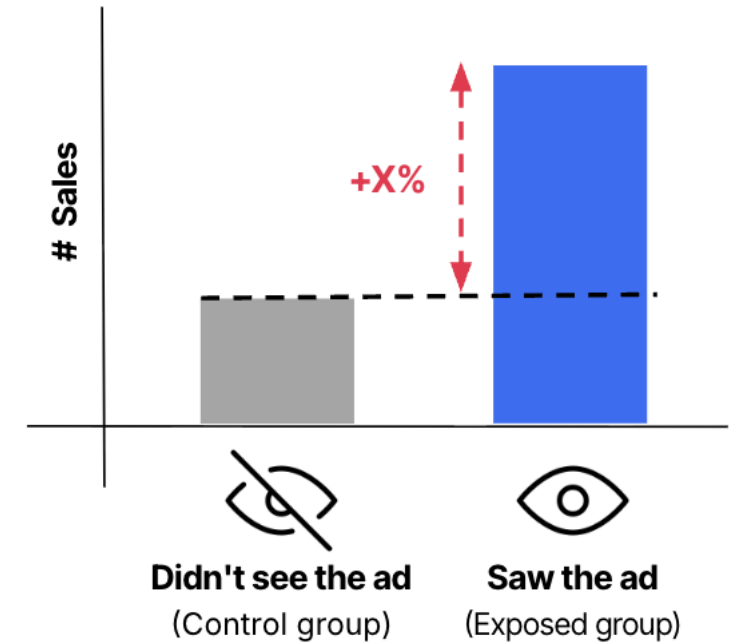
Match test and control regions at store level across Switzerland



3 MEASURE

Isolate TikTok's incremental sales impact

Incrementality



The Result: Validating TikTok as High-Impact Investment



2.1x

Incremental ROI

vs NIQ FMCG Benchmark

This campaign proved TikTok's incremental business impact and **built confidence for future investment.**

The Learnings: From Attention to Incremental Sales



Beyond Awareness

TikTok can drive measurable sales growth, not just brand outcomes



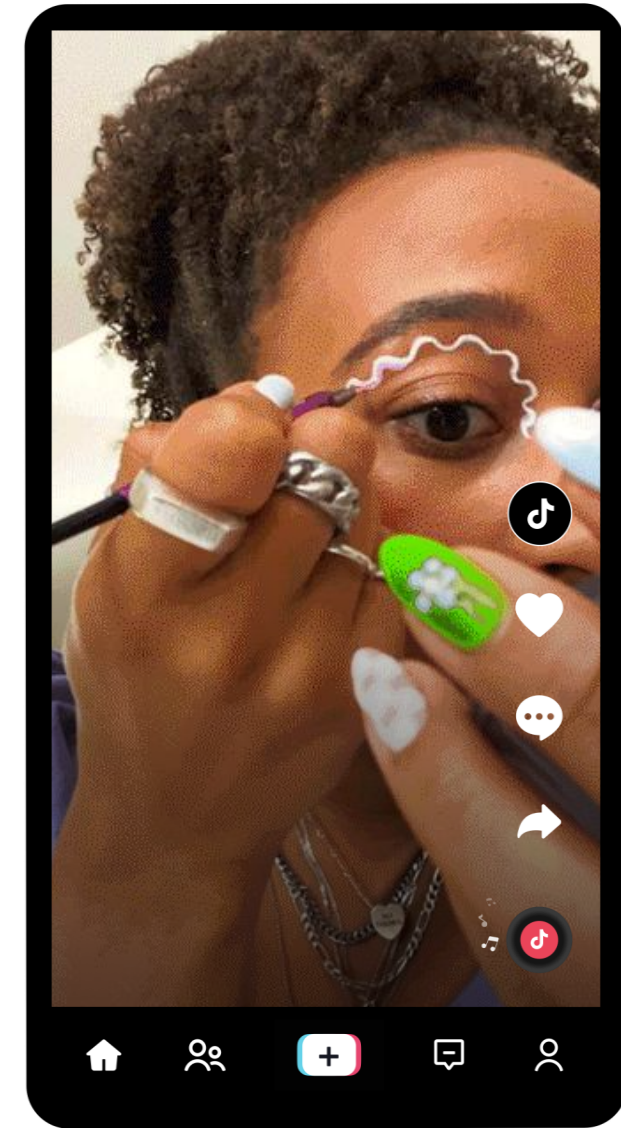
Prove Incrementality

NIQ Marketing Lift helps demonstrate what media truly adds.



Plan to Optimize

Early and consistent measurement planning helps identify growth levers and inform smarter investment decisions.



Insight Summit *Switzerland* 2027

Loft
Zürich

13. April
2027

NIQ

Save the Date

