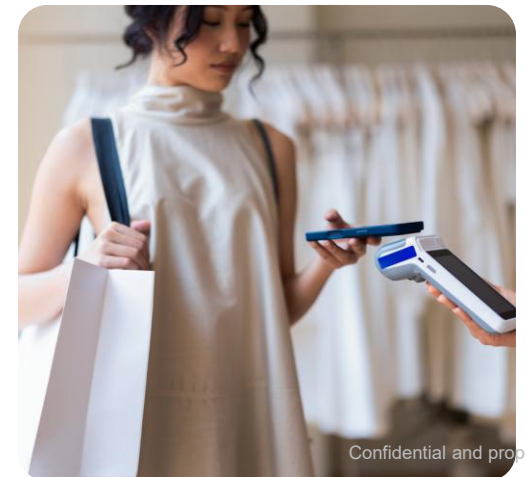


From Information to Influence: The Strategic Power of Retail Data

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From Information to Influence

The Strategic Power of Retail Insights



Source: NielsenIQ RMS | 52 w/e 09/19/26
Source: NielsenIQ Panel On Demand Omnishopper | 52 w/e 07/11/26



Consumer spending consolidates around large players as growth becomes more fragmented elsewhere- is it because they are big?



Large Players



Mid-sized Players



Smaller Players

\$

4.7% ↑

0.8% ↑

0.5% ↓

Units

2.2% ↑

1.4% ↓

2.4% ↓

Source: NielsenIQ Retail Measurement - FMCG | US NIQ Total Store Inc Fresh - 444 - Weekly (Synd) | 52 w/e 09/19/26, Large = sample of retailers> \$15B, >1k stores, 15+ states, Mid = sample of retailers, \$3-14.9B, 100-999 stores, 4-14 states, Small= sample of all other retailers. Sample groups range from 6-13+ retailers

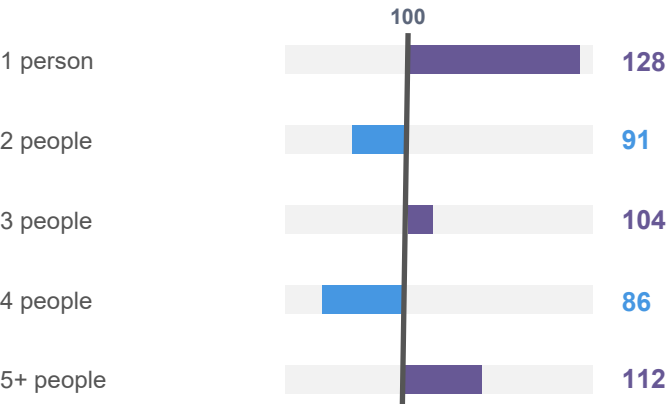
More data does not equal more insight

One product. Many signals. No Obvious Decision.

Illustrative sales index | Category average = 100

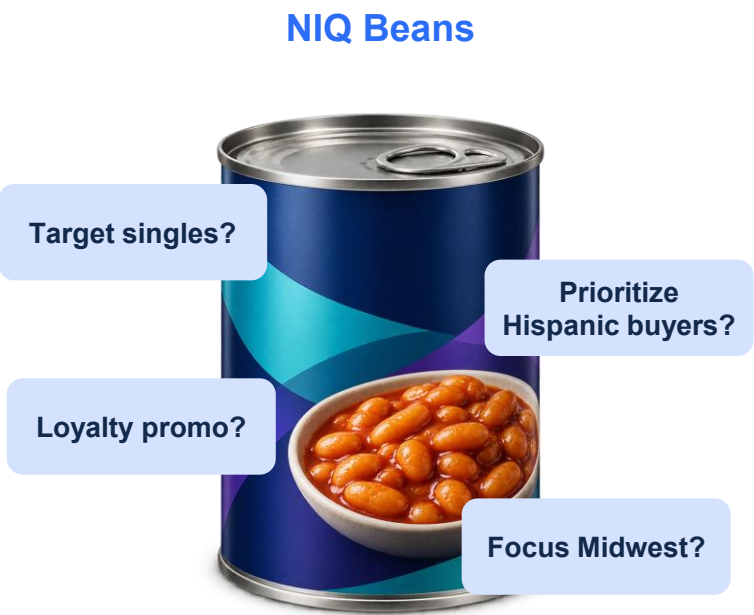
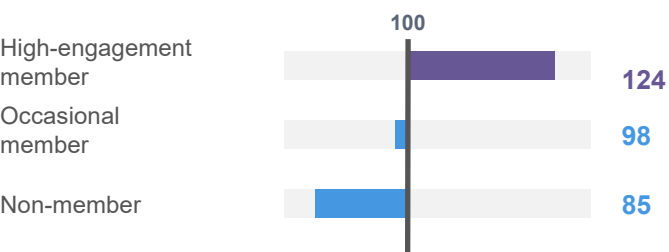
Household size

Who appears to buy more?



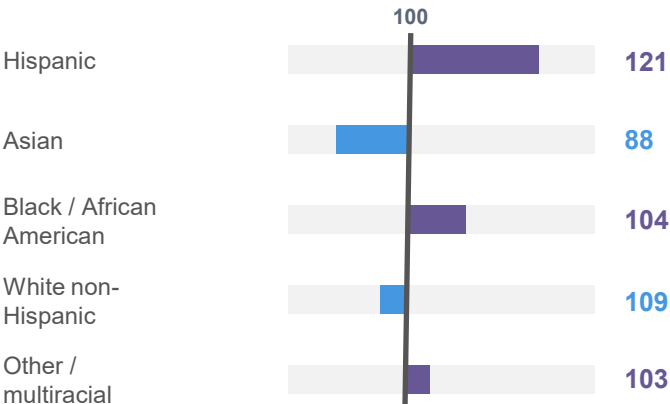
Loyalty status

Does loyalty change the story?



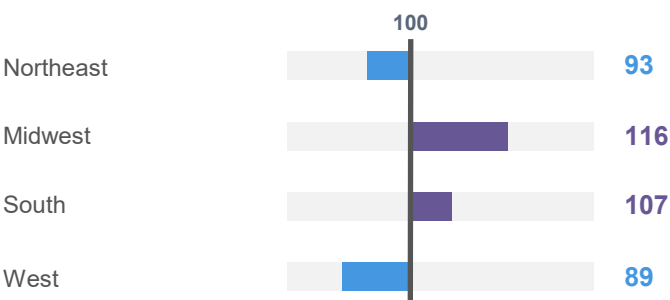
Ethnic / Cultural group

Which audience matters most?



Region

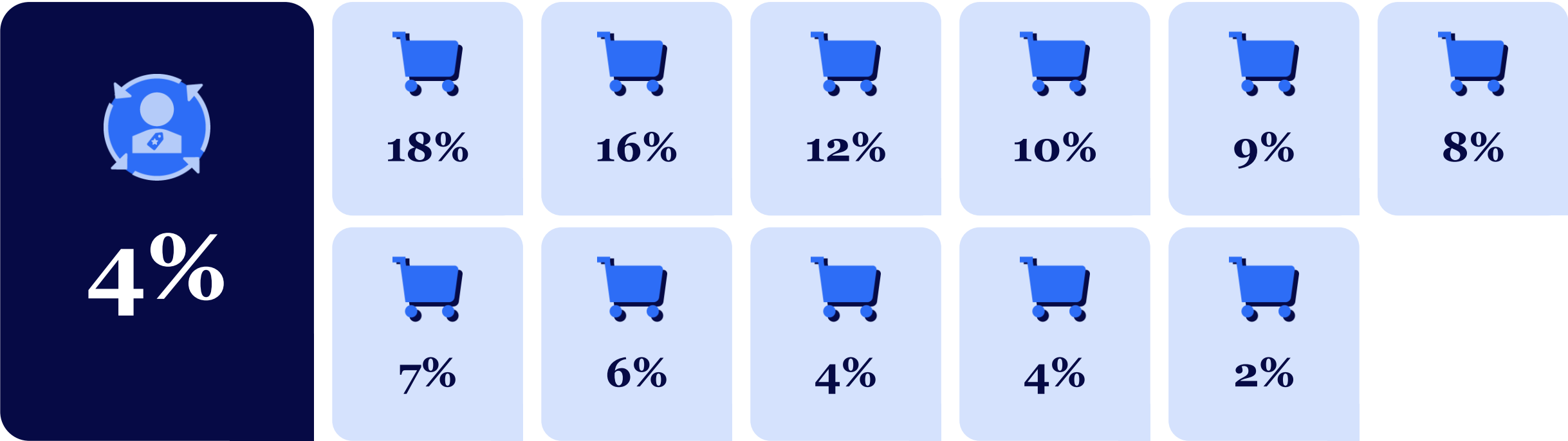
Where should we invest?



Every cut is valid. The decision depends on which question matters.
More data creates more stories. Clear recommendations connect the signals.

Data ≠ Decision

It's not just your internal lens... it's understanding your shoppers' complete wallet...



Source: NielsenIQ Panel On Demand Omnishopper, Illustrative view of a typical mid-small player view | 52 w/e 09/5/26

Organizations that consistently act on signals appear to outperform



Embedded Insights Culture



Developing Insights Culture



Traditional Decision Model

\$	2.3% ↑	0.8% ↓	1.5% ↓
Units	1.0% ↑	3.8% ↓	2.4% ↓

Source: NielsenIQ Retail Measurement - FMCG | US NIQ Total Store Inc Fresh - 444 - Weekly (Synd) | 52 w/e 09/26/26, Subjective classification as High, Medium, or Low Data Usage based on how frequently data is reviewed and integrated into business decision-making, each group has >15 varying sized retailers present

Shopper relevance is the industry's most important growth asset



Embedded Insights Culture



Developing Insights Culture



Traditional Decision Model

Buyers

0.9% ↑

0.4% ↓

0.3% ↑

Trip Frequency

1.6% ↑

5.0% ↓

1.0% ↓

Basket Size

0.8% ↑

0.8% ↑

1.5% ↑

Source: NielsenIQ Panel On Demand Omnishopper | US Exp Osh - NDH Synd Full View - 444 5 yr | 52 w/e 09/5/26, Players were classified as High, Medium, or Low Data Usage based on how frequently data is reviewed and integrated into business decision-making.

Data becomes strategic when it changes a decision

Illustrative output based on the prior sales-index signals

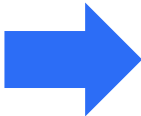
Signals	Index Range
Household size	86–128
Ethnic / cultural group	88–121
Region	89–116
Loyalty penetration	85–124
Product market performance	110–124



Optimization tool

Assortment + Space

Balances demand signals with store constraints, shelf capacity and planogram rules



15 Planograms

One recommendation set

4 increase 4 decrease
4 add 3 drop

Recommended action by planogram

■ Increase ■ Decrease ■ Add ■ Drop

P01 Increase +2 facings	P02 Drop Remove from set	P03 Add 2 facings	P04 Decrease -1 facing	P05 Increase +2 facings
P06 Decrease -1 facing	P07 Add 1 facing	P08 Decrease -1 facing	P09 Drop Remove from set	P10 Increase +2 facings
P11 Add 2 facings	P12 Decrease -2 facings	P13 Increase +2 facings	P14 Add 1 facing	P15 Drop Remove from set

One data story cannot fit every shelf. Optimization makes the tradeoffs actionable.

Illustrative

Better supplier conversations begin with a shared version of the truth...

Promo \$ | Total store



5.2%

Vs. Year Ago

Promo efficiency | Total store



-0.2%

Vs. Year Ago

The Old Model

- Annual JBPs built on historical scans
- Each party brings their own data- debates ensue
- Promo planning based on vendor allowances, not ROI
- No shared view of shopper cross-channel behavior

The New Model

- Continuous insight cycles powered by real-time data
- Shared neutral data platform- one source of truth
- AI-Optimized promotions targeting true incrementality
- Full omnichannel shopper visibility for all parties

We are promoting more, but driving less efficiency

Source: NielsenIQ Retail Measurement - FMCG | US NIQ Total Store Inc Fresh - 444 - Weekly (Synd) | Total US xAOC Latest 52 Weeks 9/19/26

The challenge isn't access to more information.

It's turning information into better decisions

Three questions everyone in this room should be asking themselves:

01

How much organizational friction exists because different teams operate from different facts?

02

How quickly can we distinguish a meaningful signal from market noise?

03

Can we consistently turn insights into action across the organization?

Call to action

As we review today's consumer and retail shifts, consider which signals deserve action, which are simply noise, and how quickly your organization can tell the difference.

Today's panel...



Nicole Collida Davis

Managing Director and SVP,
Retail Insights, North America



Vince Gambino

Chief Merchandising Officer



Sarah May

Director of Retail Solutions



Thank you for joining us!

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