



NIQ



An NIQ
Company

NextGen Tech

How can the latest innovations
revolutionize your channel
business?

Tatjana Wismeth

Head of Distribution & Supply Chain Intelligence

Channel Summit Monaco | May 2024

GfK & NIQ

Together we raise the bar



The combination of GfK & NIQ, is creating the **world's largest market and consumer intelligence provider.**

With unparalleled global reach, measurement capabilities, and innovative technology, Nielsen IQ and GfK together offer the **most complete and clear view of consumer buying behavior and tech & durables market tracking.**

Our combination is an exciting step for the future of our industry, but we are even more excited about the value it will bring to our brand, retail and distribution partners.

Over 100 years of supporting the industry with leading market measurements

Over 35,000 expert employees, all focused on their commitment to helping clients achieve success

We provide unrivaled Global coverage, present in >100 Countries, representing 95% of the World's GDP

Supporting over 30,000+ clients across FMCG, Tech & Durables Industries

Brand and marketing performance

Target your most valuable segments to improve brand strength, optimize your marketing, and drive ROI.

Consumer and shopper intelligence

Discover your target customers to understand how they think, act and buy.

Distribution & Point-of-Sale Intelligence

Know what is selling, where, when, and at what price, based on robust point of sale data.

Sales Effectiveness

Boost your sales efficiency and secure your business success with actionable insights.

gfknewron

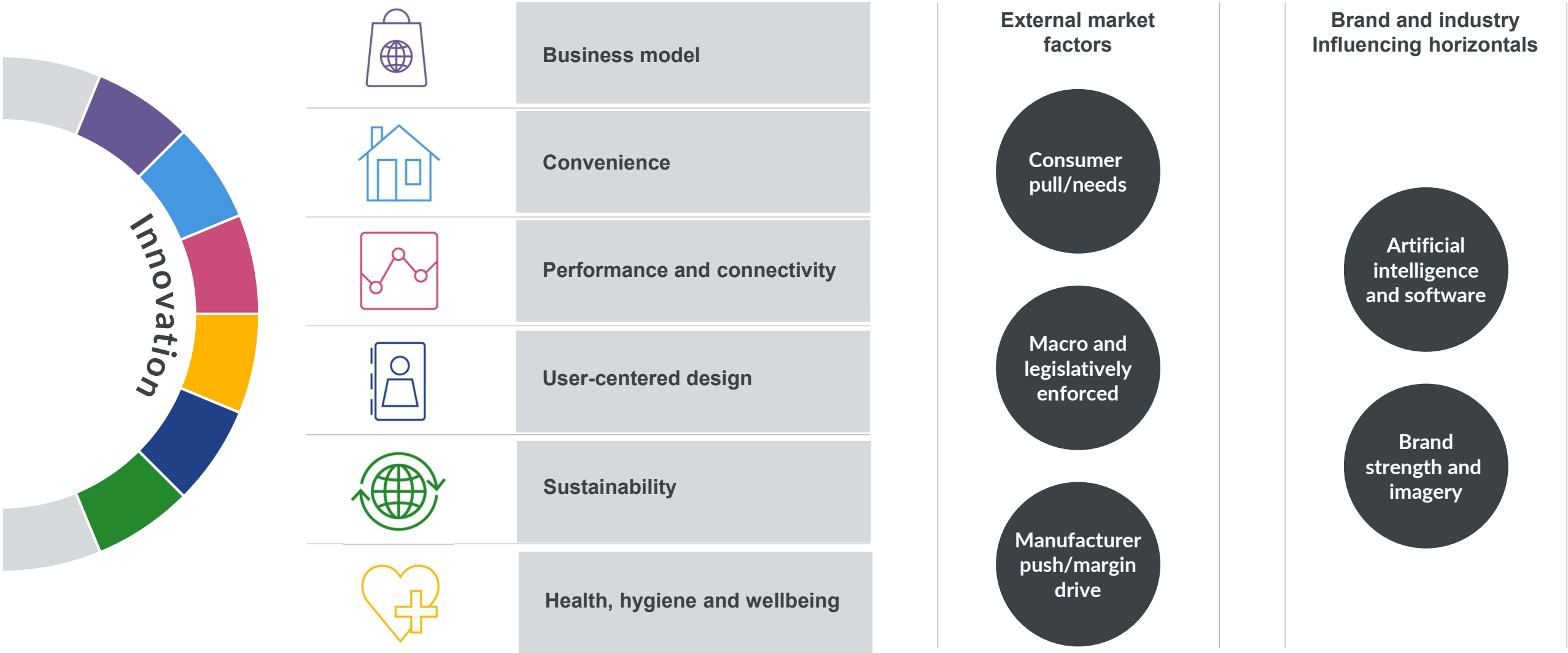


Platform extracting signal from the noise augmented by GfK Customer Success team.

gfkconsult

Envision.
Strategize.
Build.

What does innovation look like in T&D industry?



Source: Conceptualized by market experts of Global Strategic Insights Team @GfK. This is conceptualized by looking at some of the key categories across all key TCG and H&L sectors. How is it different from trends and themes: There will certainly be some level of overlap as some trend manifest as drivers innovation. But innovation is at a more basic level at an execution or implementation level versus a trend which is more broad

Business Model Innovation

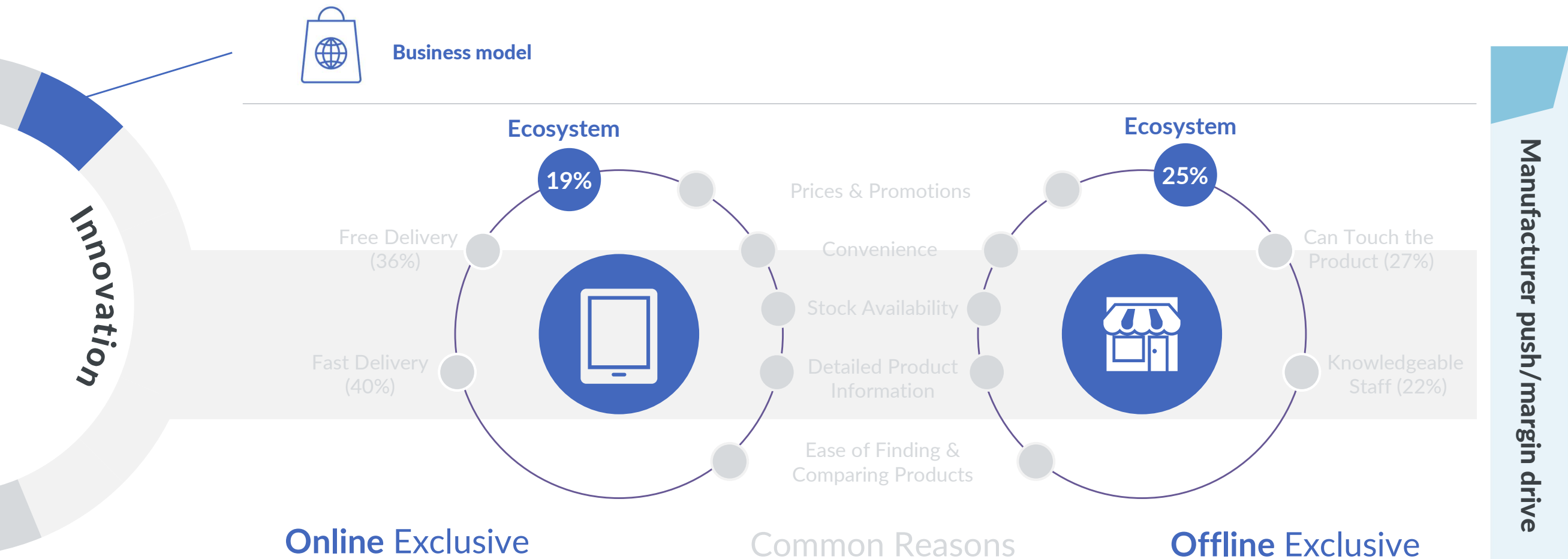


Consumers demand a seamless shopping experience



Rise of new expectations

Services that go beyond traditional retail



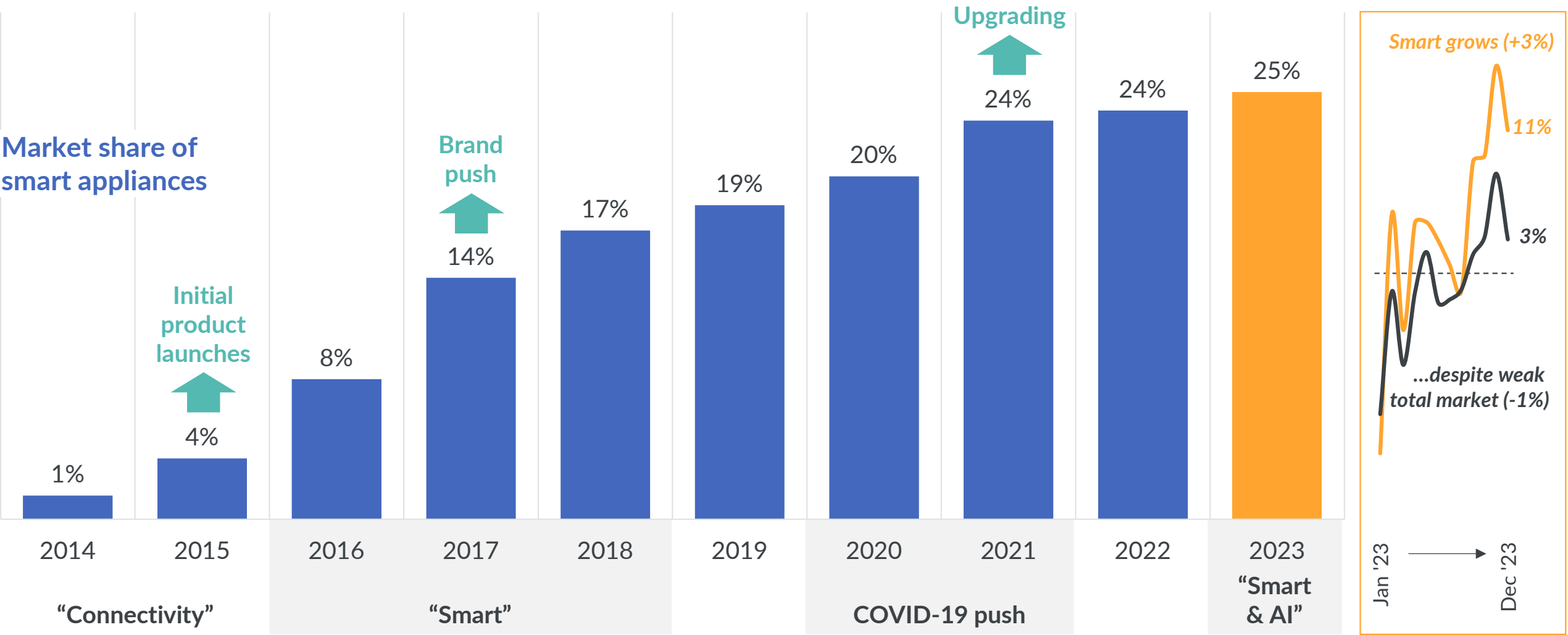
Convenience

Home Appliances market has seen multiple major pushes of smart appliances



Resulting in every fourth dollar spent on connected appliances

Global (ex. North America) | Home Appliances (MDA/SDA) | Share % and growth rate +/- % of smart appliances



Performance & Connectivity

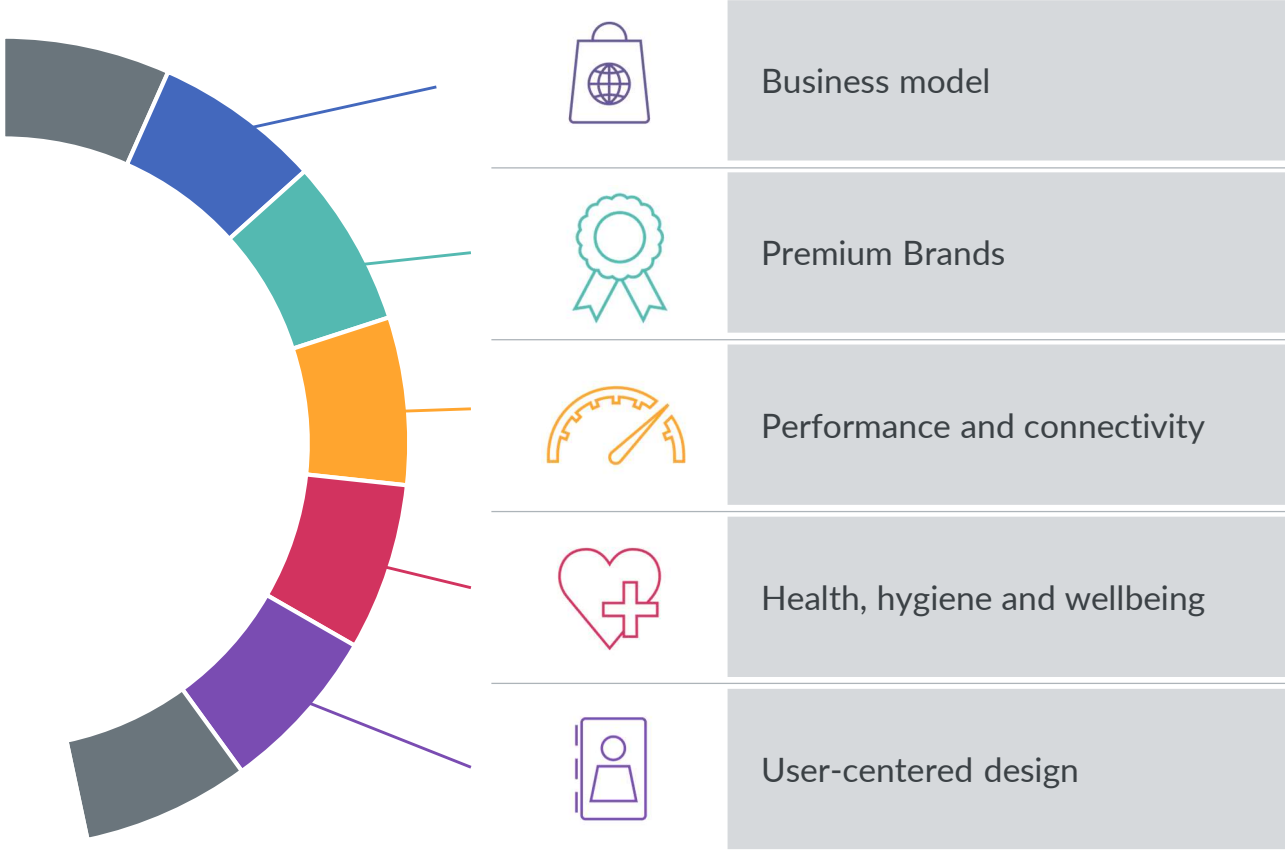
The focus on quality emerges in growth pockets



47% agree

“I prefer to own fewer but higher quality items
#9 life attitude, ↑2 ranks from 2021, ↑4 from 2019

#5 in China, ↑1 rank

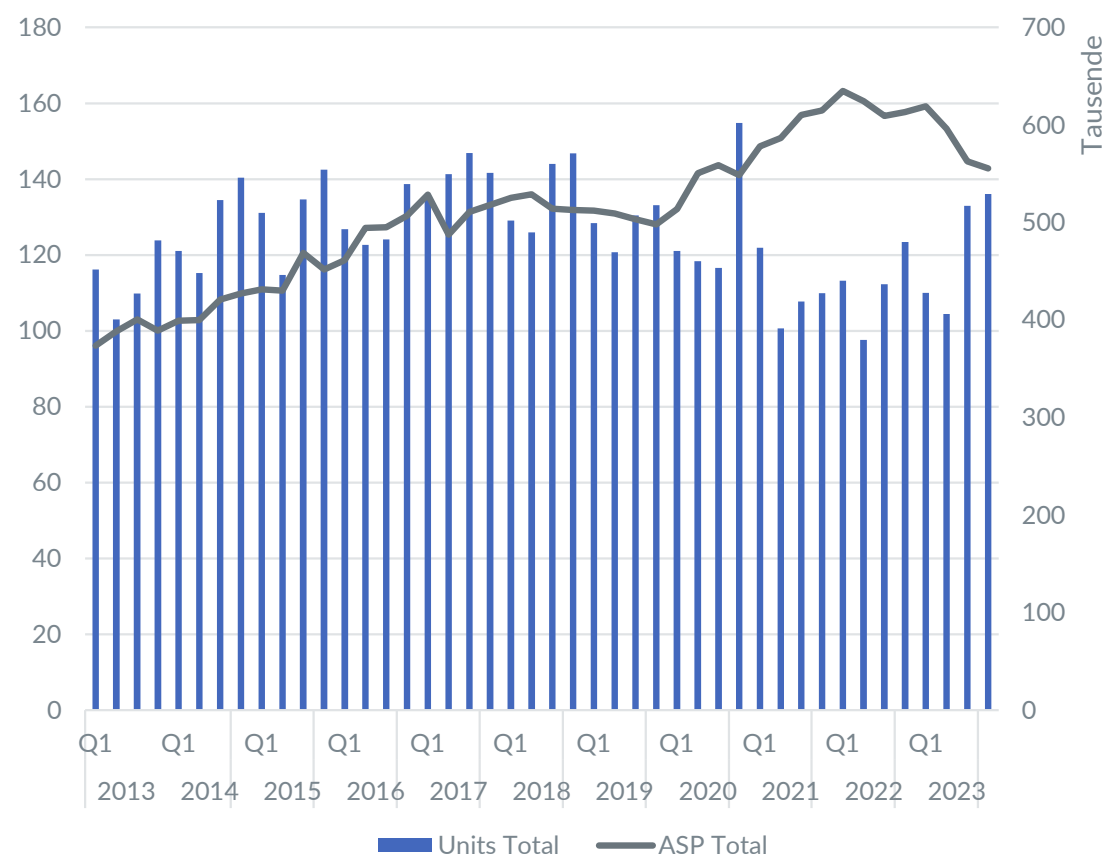
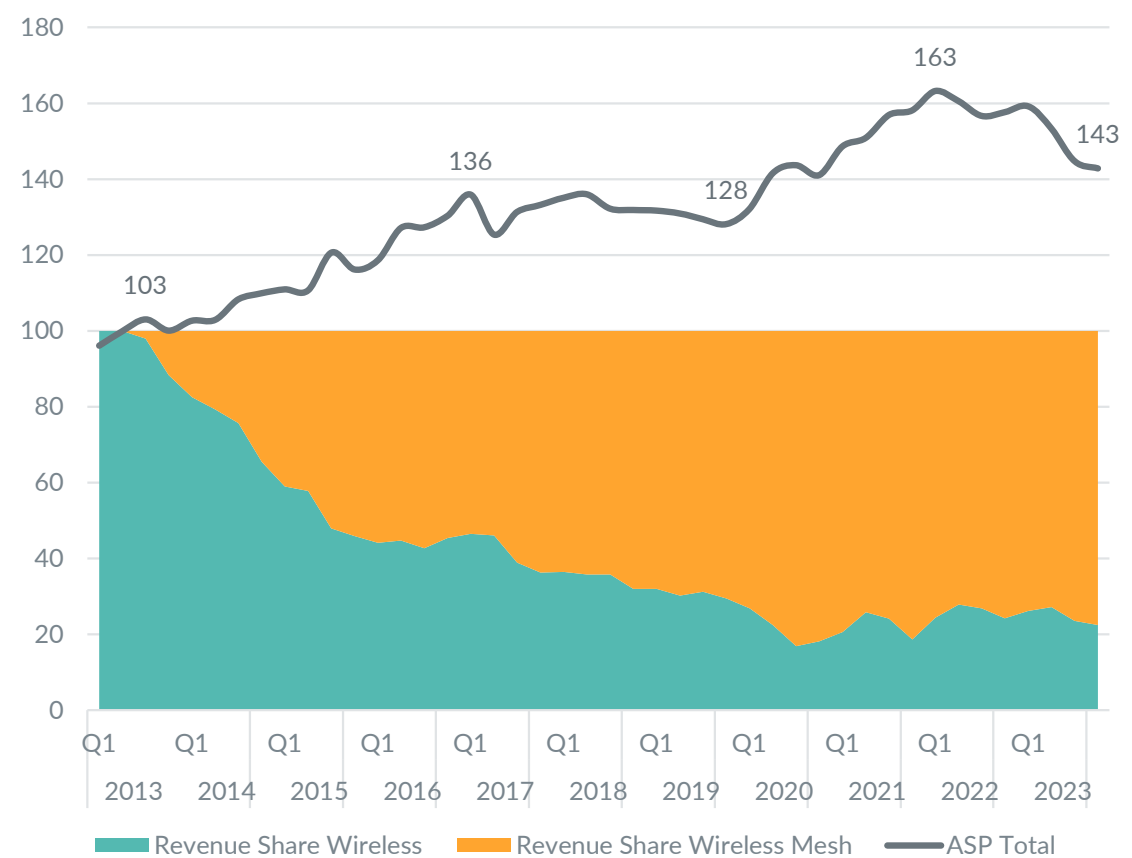


Consumer pull/needs

How innovations drive ASPs: Routers and Wireless Mesh in Germany



With the introduction of (PBX) routers supporting Mesh, ASPs started to increase steadily. But not only revenue and ASPs, also units demand was driven by new Mesh technology.



User Centric Design

Design is important for a significant amount of consumers!



40%

Of smartphone consumers have decided for their final product because of the appearance in 2023.

Rank #3

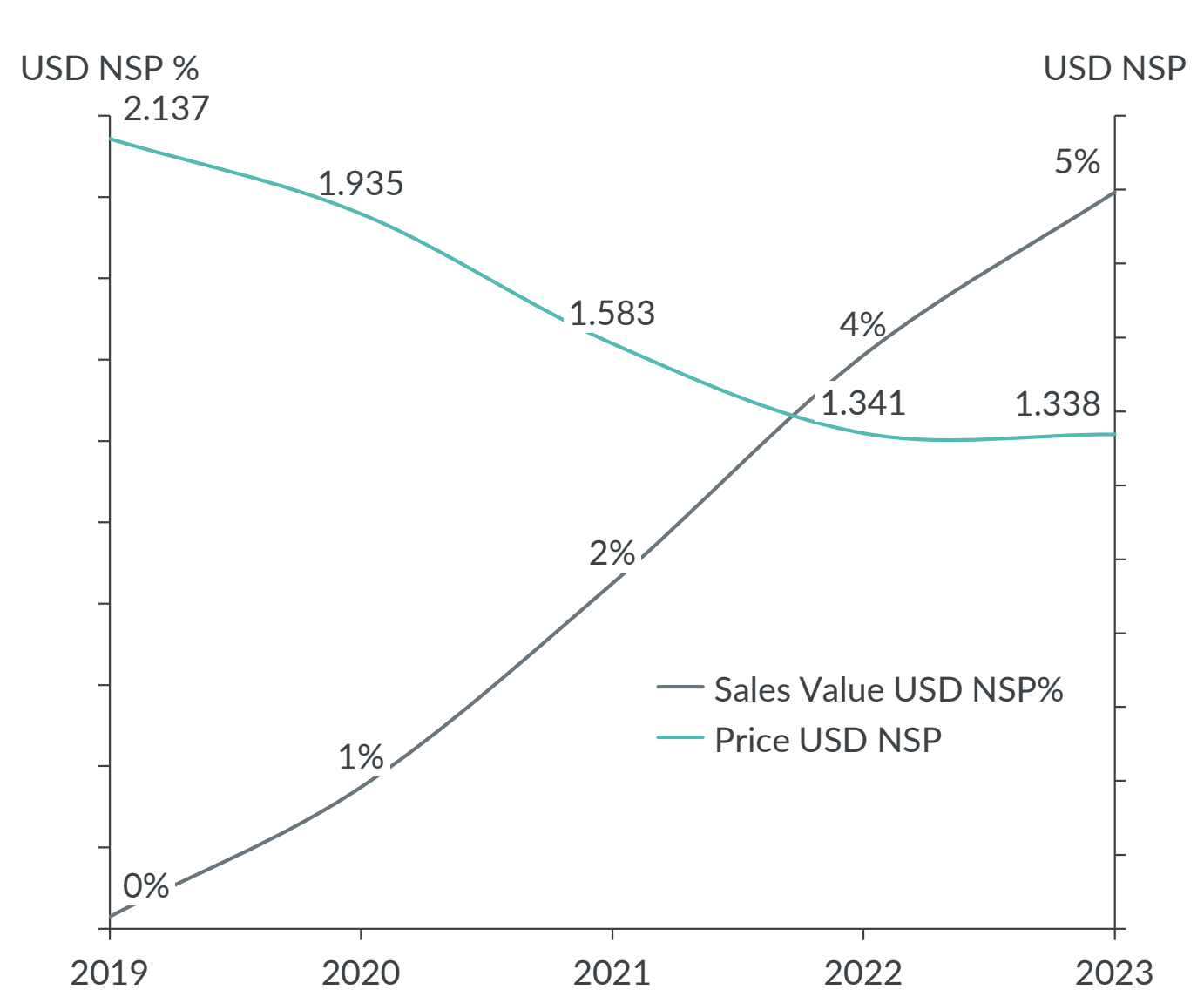
Survey Question:

Which of these product design aspects were most important to your final choice?

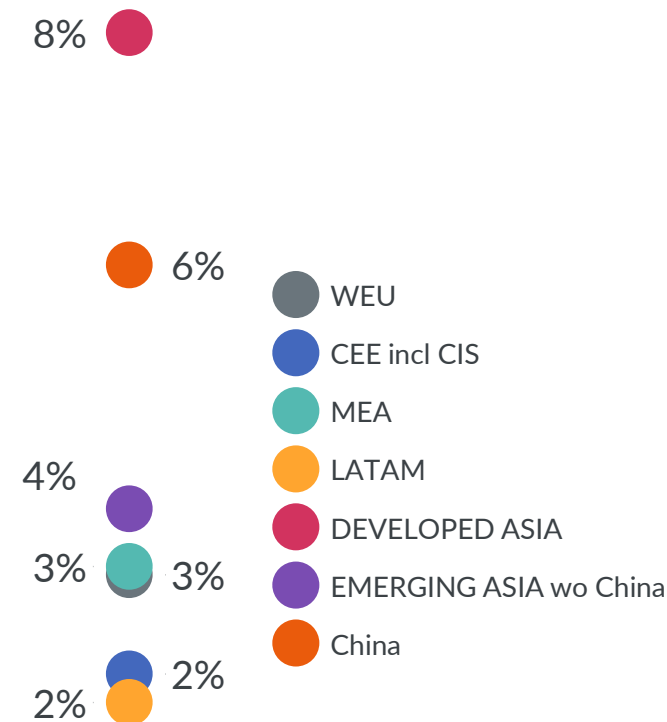


Foldables are gaining importance, driven by Asia

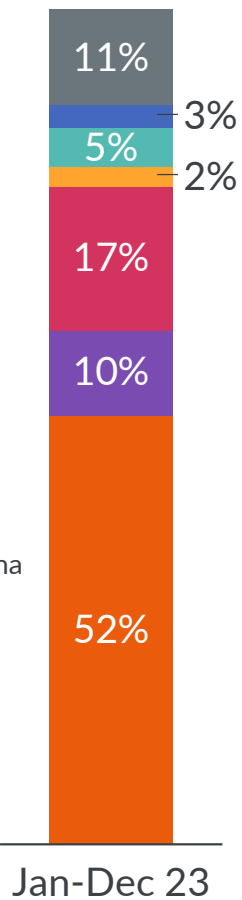
Estimation is that this will further evolve also in other regions.



Share of foldables in Region in USD NSP%



Share of Regions in foldable in USD NSP%

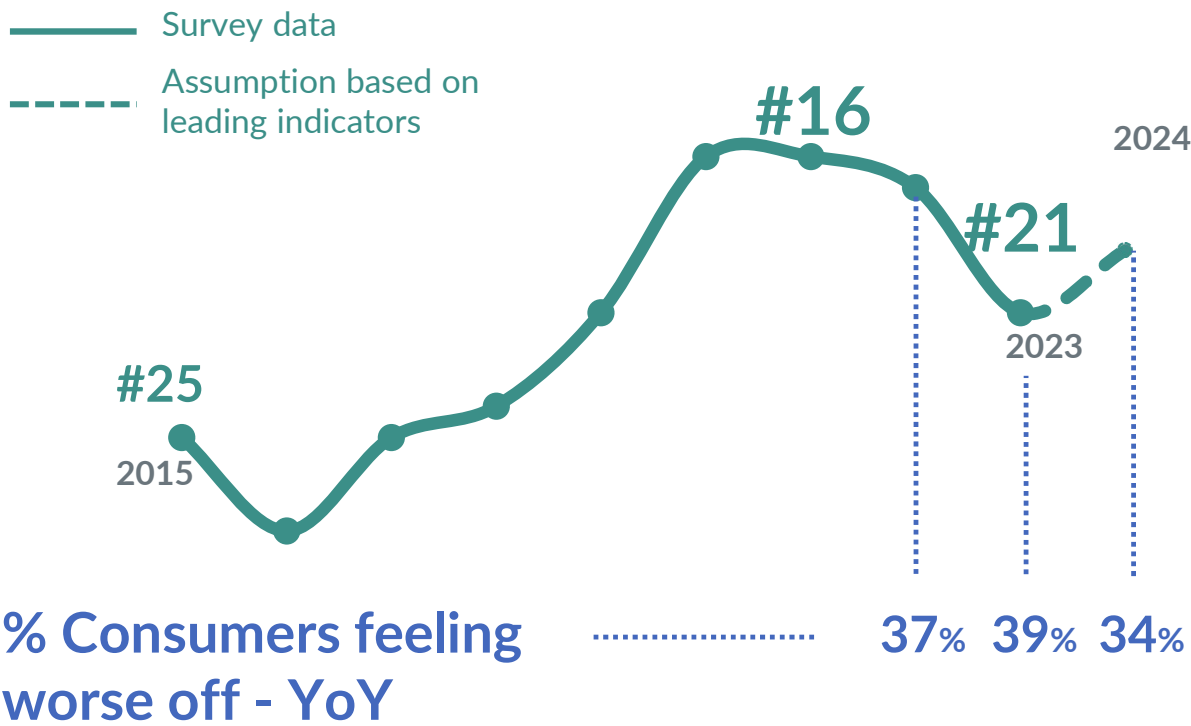


Sustainability

For 2024, sustainability is expected to grow in relevance, as economic security rises.

Protecting the environment as a personal value

It is a **growing** personal value since 2015, but “economic security first” has been a priority in 2023



Source: GfK Consumer Life Global 2023 and previous years, C1 (global = 18 countries), ranks out of 57 personal values
NIQ Consumer Outlook 2024, Global
Q: Compared to a year ago, is your household better off or worse off financially
Global Strategic Insights – Innovation in Consumer Tech & Durables

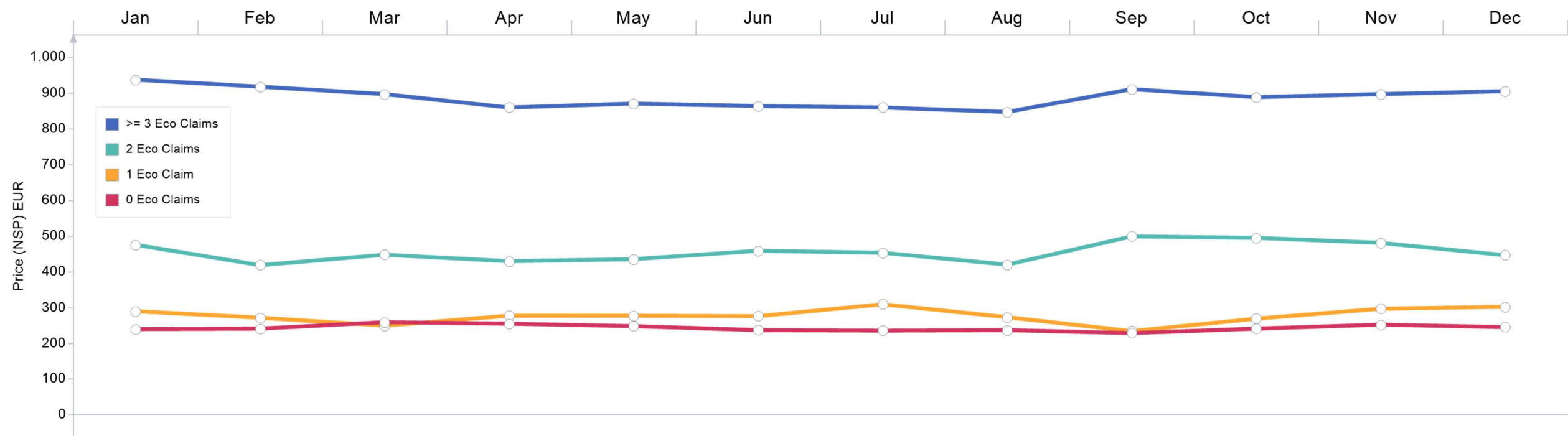


Products with multiple eco-claims achieve higher price points

Eco-claims support premium price ranges



Price development | Eco-claim features | Distributors | EU4 | 2023

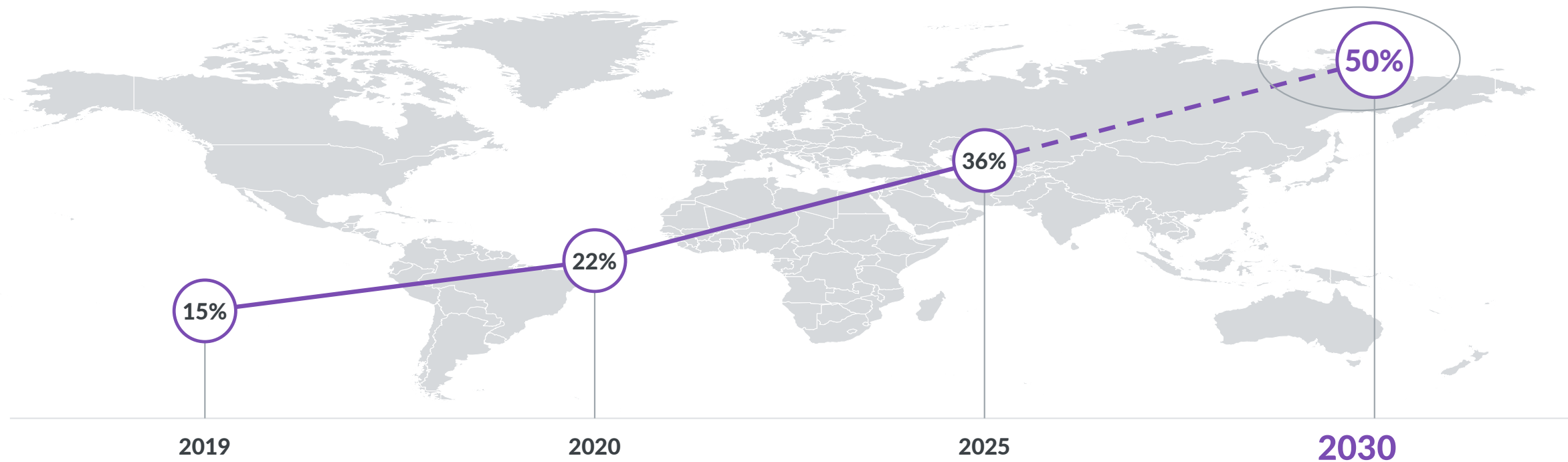


Sustainability has reached maturity

It is no longer a question of IF or WHEN but only a question on HOW



By 2030, 50% of global population will be eco-active!



Source: WCWD 2020 EU-10 ; GfK Market Intelligence:Sales tracking (GfK estimation)

A scenic landscape featuring a winding asphalt road on a hillside. Several large white wind turbines are visible in the background against a blue sky with scattered clouds. In the foreground, a white sports car is driving on the road. The overall scene suggests a focus on sustainable energy and transportation.

\$700 bil.
Business potential

Example France: Refurbished market outpacing the new handset market!



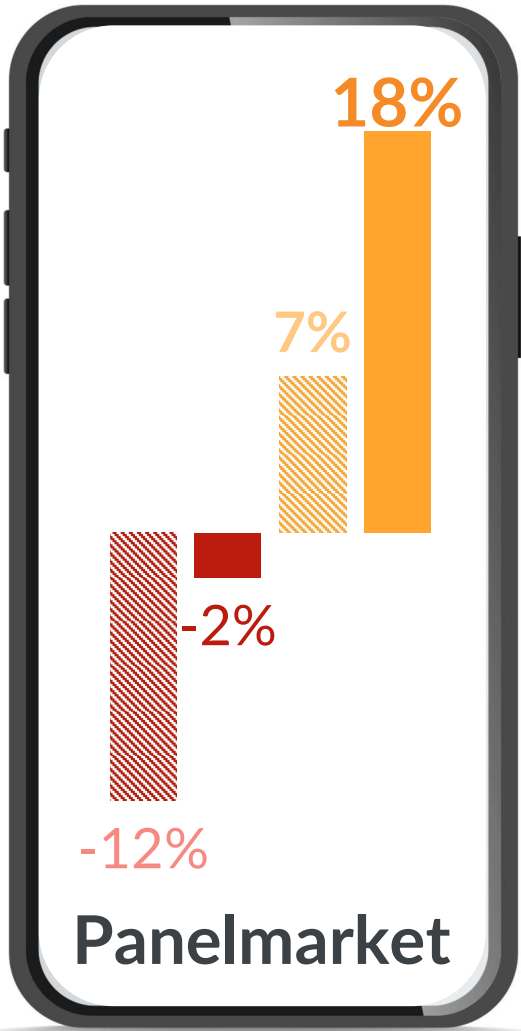
New
Refurb



Units



Turnover in EUR NSP

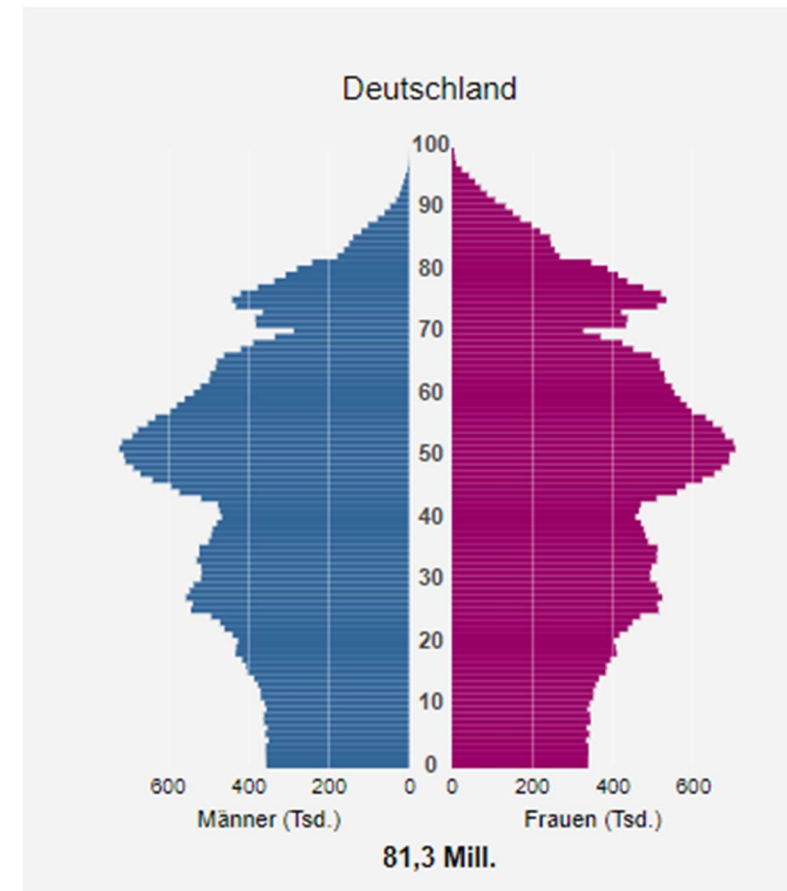
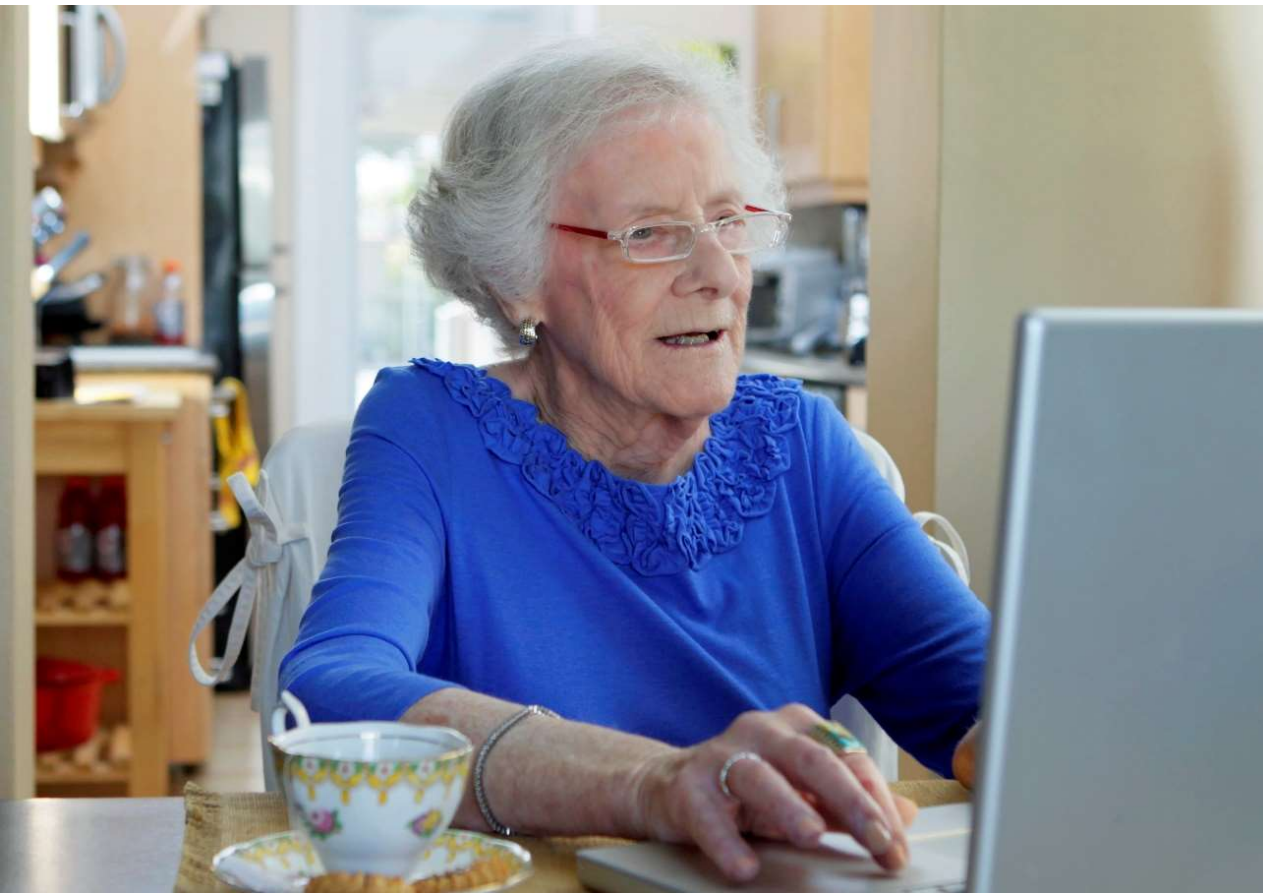


Health, Hygiene & Well-being



Leading EU economies will face an elderly society more intensively

It's offering opportunities in both B2C & B2B for technology

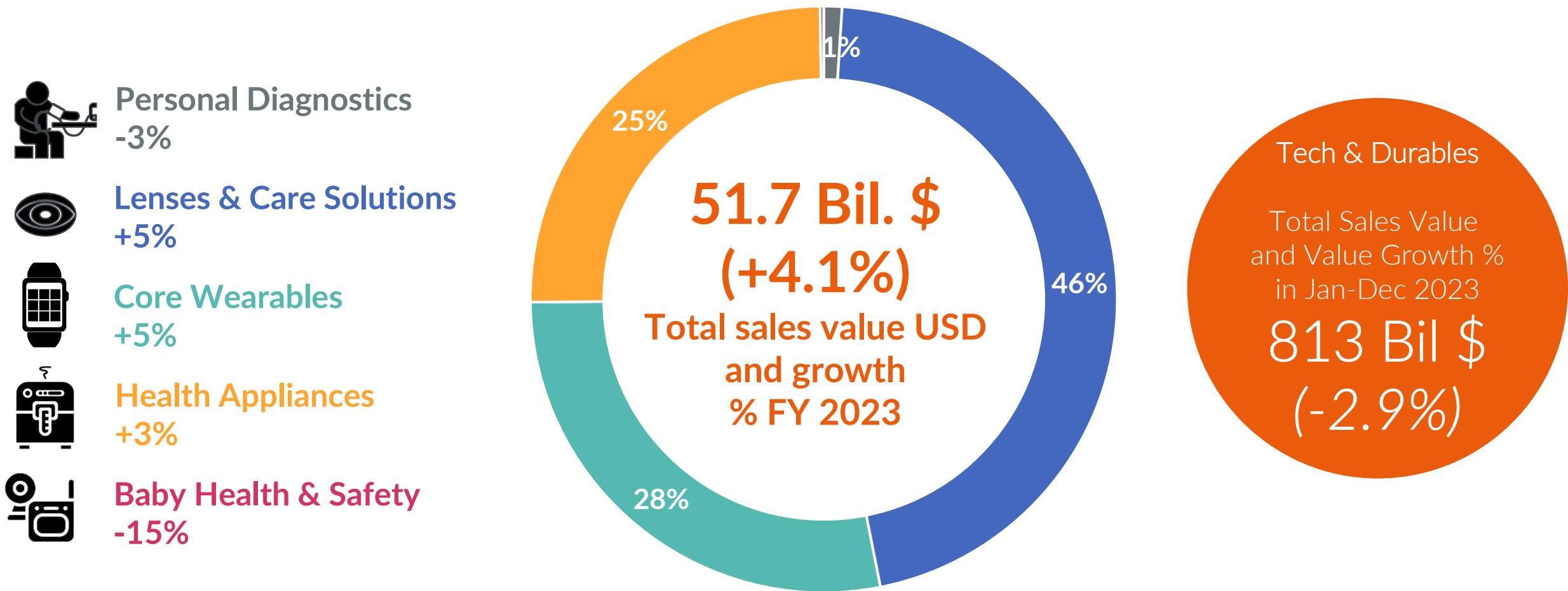


Categories offering health benefits performed better than total TCG market



Health had a spotlight during COVID followed by market saturation and is slowly back to growth

Health Categories in TCG, Optics, Babycare



Source: Market Intelligence Sales Tracking Period: 2022-2023 Personal Diagnostics: Blood Pressure Monitor, Digital Thermometers, Personal Scales, Nebulizers Lenses & Care solutions: Contact Lenses, Spectacle Lenses, Eyedrop Care Drops Core Wearables: Smartwatches, Wrist Sport Computer, Health & Fitness Tracker Health Appliances: Light Therapy, Food Preparation: Liquidisers, Juicers/Pressors, Hypoglycemic Rice Cooker, Hot Air Fryers, Water Filters, Air Treatment Baby Health & Safety: Baby Monitors
Global Strategic Insights – Innovation in Consumer Tech & Durables

Eye-opening statistics reveal the hidden truth

The older you get, the more likely you are to have a disability




87 million

Europeans have some form of disability

=

1 in 4 European adults

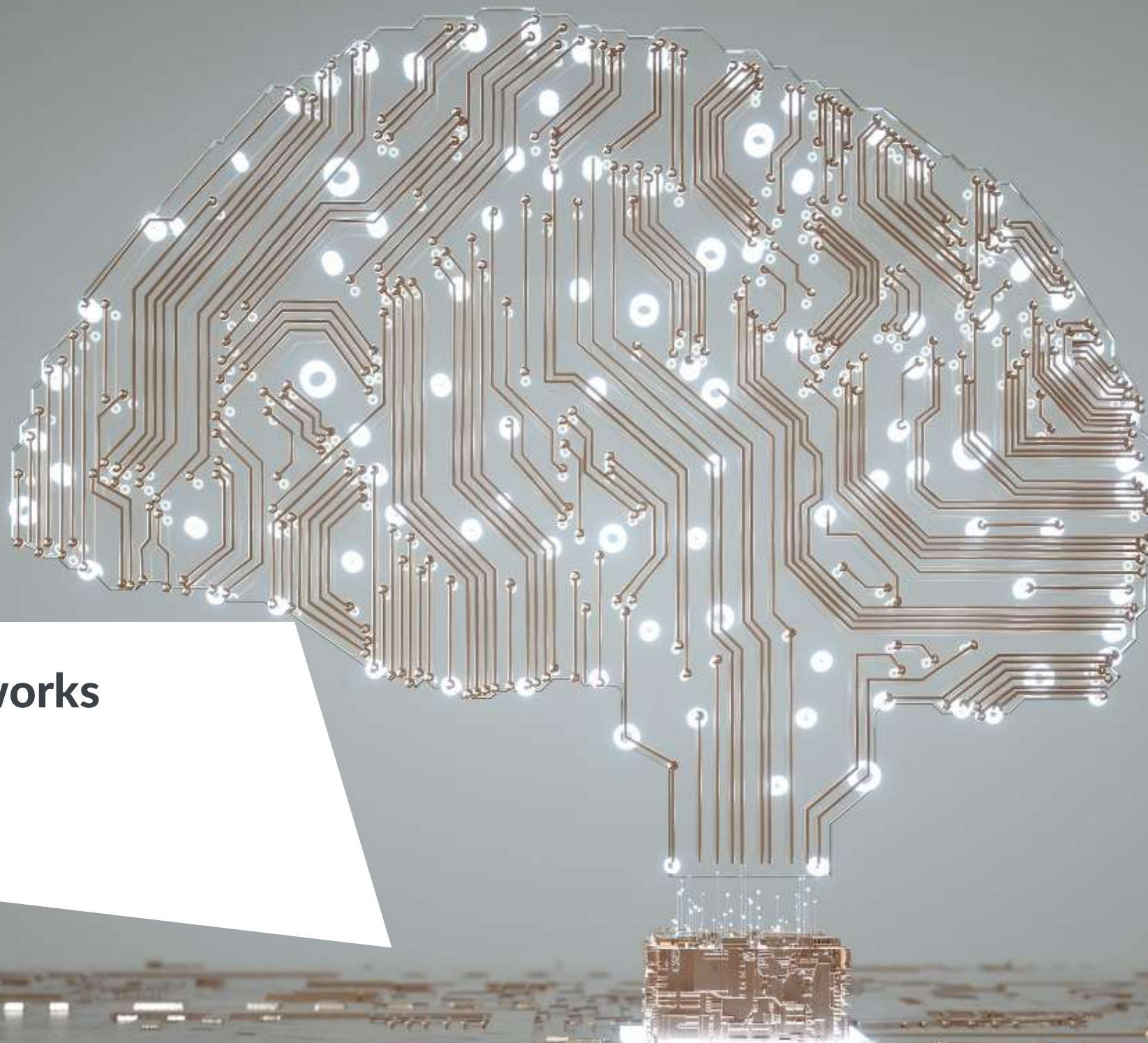


A prosthetic arm with a transparent, mechanical hand is shown reaching out towards a human hand. The prosthetic arm is made of clear plastic and metal, with visible internal mechanisms and wires. The human hand is positioned on the right side of the frame, with the index finger pointing towards the prosthetic hand. The background is black.

Technology is needed to overcome the biggest challenges our society is facing.

Artificial Intelligence

Neural networks



Will automation make our jobs obsolete?

How AI can Revolutionize Business Operations and Drive Transformation



Human vs AI: Can ChatGPT outsmart a CMO?

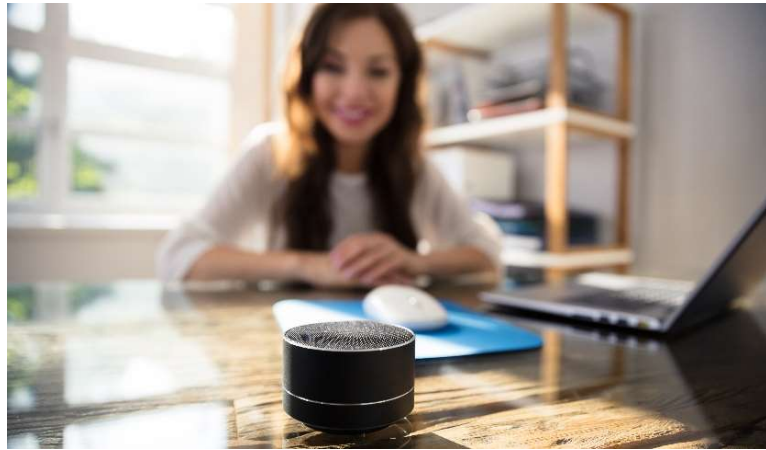
GfK's CMO, Gonzalo Garcia Villanueva, goes head-to-head against the latest craze in AI, ChatGPT, to debate the latest trends and how marketing leaders should pivot based on them. Can robots really take over our jobs?

Watch video →



Limitations

AI offers great potential in various ways, but there are still boundaries



Specialization



Creativity



Impulses



Legislation &
Data security

BIG DATA

AI and Machine Learning: Why are these technologies so important within the retail landscape?



“Generative AI is here, and executives expect it to have an enormous impact on business, but most say they are unprepared for immediate adoption.”

How big is the market for

AI in retail?

> \$ 31bn in 2028

Potential benefits of AI

- Increase of profits and **optimization of processes**, for example by providing support for smart staffing, management of inventory and optimization of product offerings.
- AI enables **further success for sustainability** initiatives. Being used for forecasting, AI can improve inventory planning and thus **reduce waste**.
- **Enriched customer experiences** with improved personalization or recommendations and better loyalty programs.
- Support to create **actionable insights**. This might be done by creating demand forecasts, optimizing pricing strategies or tackling supply chain issues by integrating AI.

Unlocking the future: How Data-Centricity is driving innovation and progress



Know:

+30%

▶ data-driven businesses are growing at an average of more than 30% annually
~ Forrester

React:

47%

▶ outperformers reprioritize 47% more frequently
~ McKinsey

Predict:

20x

▶ more likely to acquire new customers if you're a data driven business
~ McKinsey

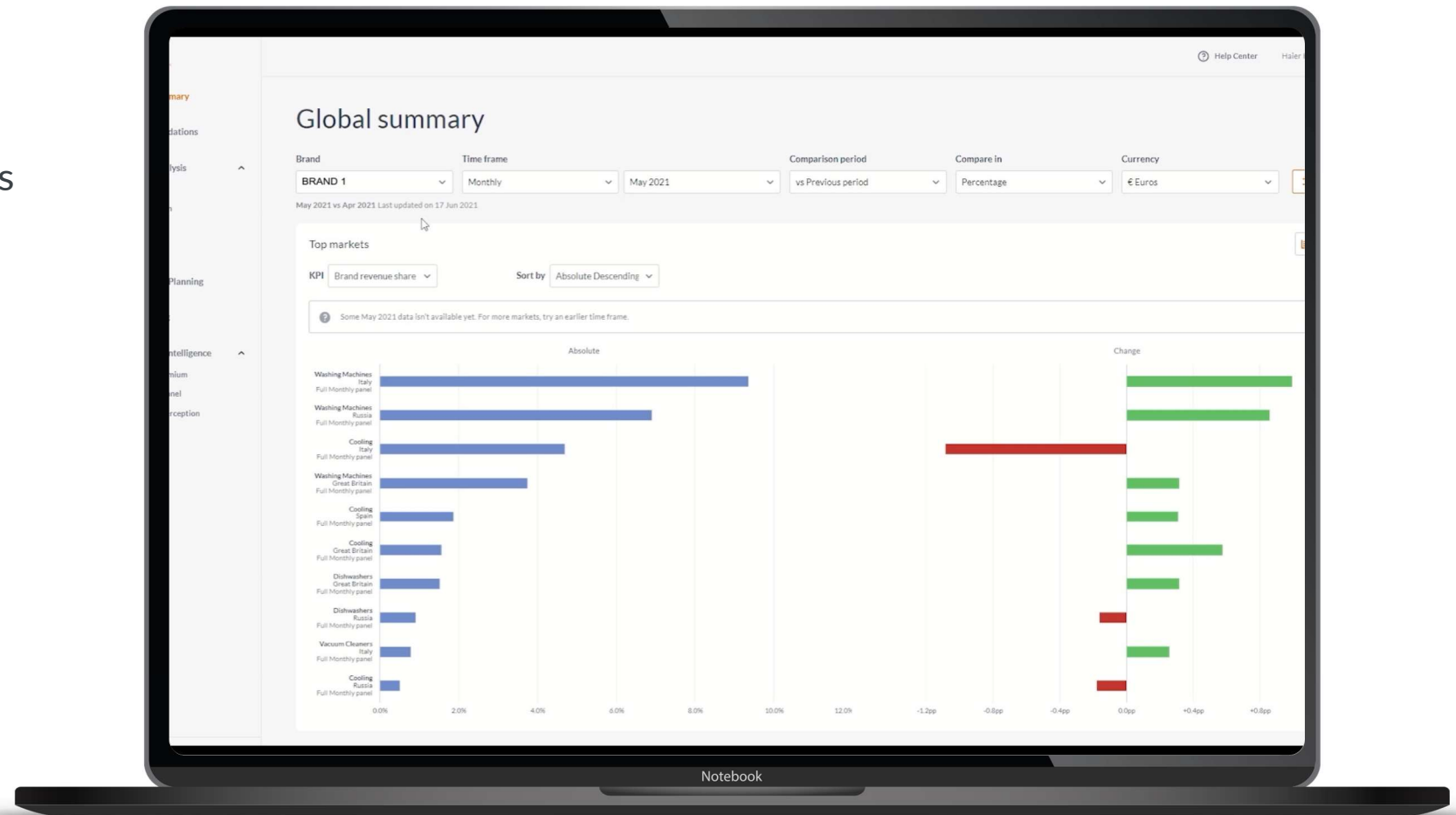
Revolutionizing Market Insights: How GfK is using AI to reach new heights

How **gfknewron** provides market insights & recommendations for your business in one go



- Online, always-on platform
- Providing insights on your finger tips
- Extracting signals from noise
- Giving recommendations
- Allowing simulations

Request your live demo now!



GfK provides insights on your fingertips

gfknewron – AI-enabled online tool for extract the signals from the noise



..... **Coming soon
for
sell-through!**



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Thank you very
much!

In case of any questions or
comments, please contact me:

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