

NIQ

How AI Agents, Trusted Data, and the Digital Shelf Are *Rewriting the Path to Purchase*



NACDS TSE
TOTAL STORE EXPO

Presenters

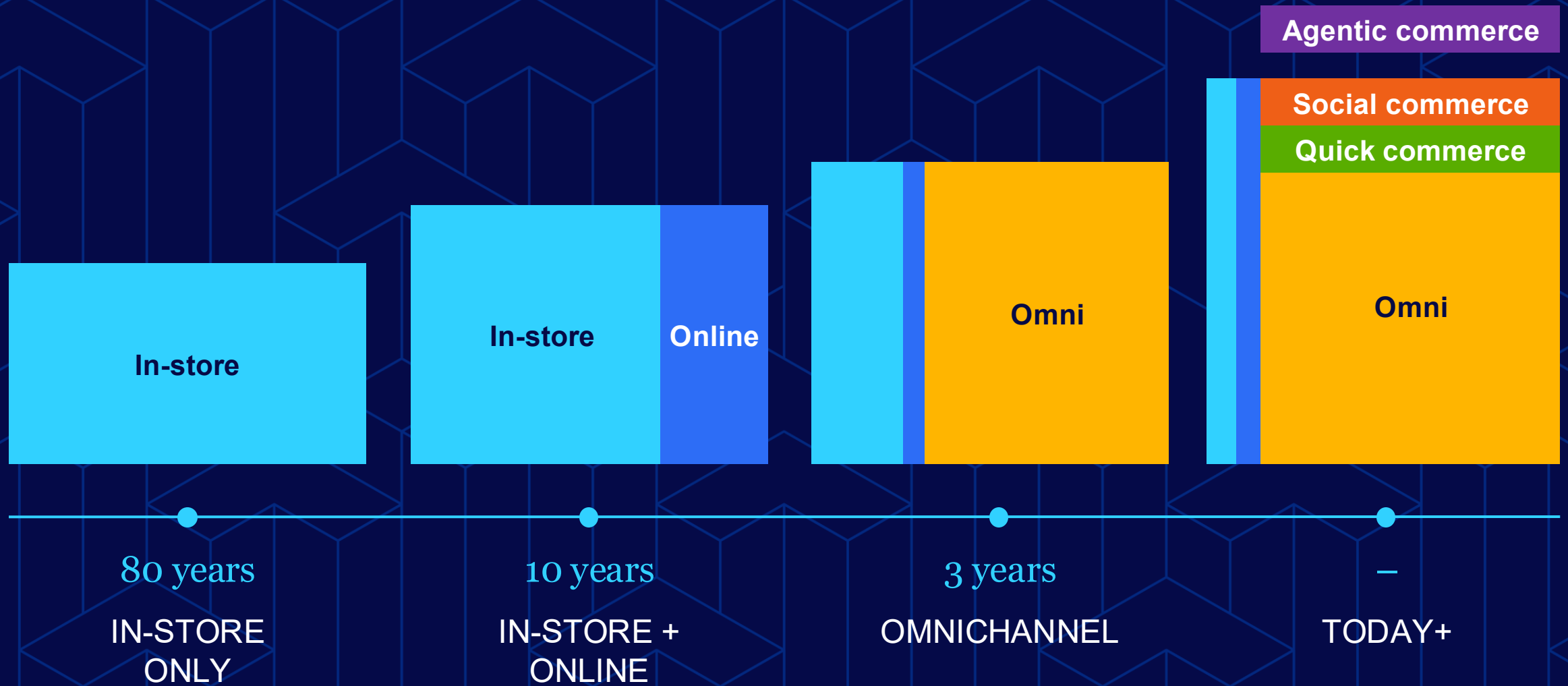


Allison Paul
SA&I NA Head of
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VP, US Retail –
Digital Shelf Content

The pace of change *is accelerating rapidly*



Almost half of Americans have recently used AI to shop; two-thirds are considering usage

42% have used at least one AI tool to shop within the past month



19% used **subscribe or auto-replenish** features



17% used AI-powered **product recommendations**



12% used a **chatbot that guided** them through a purchase

68% have considered using at least one AI tool to shop



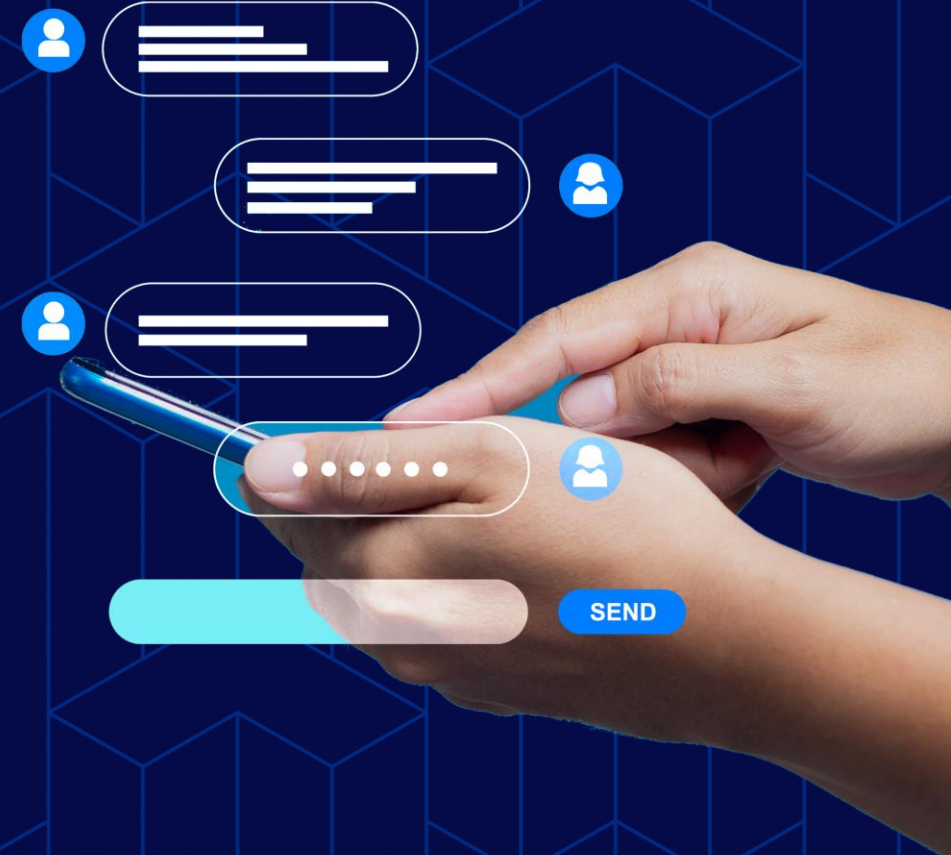
27% considered AI-powered **product recommendations**



26% considered AI-powered **shopping list**



22% considered AI-powered **personal shopping assistant**



Americans are beginning to demonstrate openness to AI's benefits for shopping

Younger generations are more open

"Artificial intelligence will make **online shopping more personalized**"

Use AI to "**Get recommendations on what to purchase**"

"**Having less choice** makes it easier for me to make a purchase decision"

"**AI generated summaries or recommendations** would make me **try a new product**"

Total **69%**

Millennials **81%**

Total **30%**

Millennials **41%**

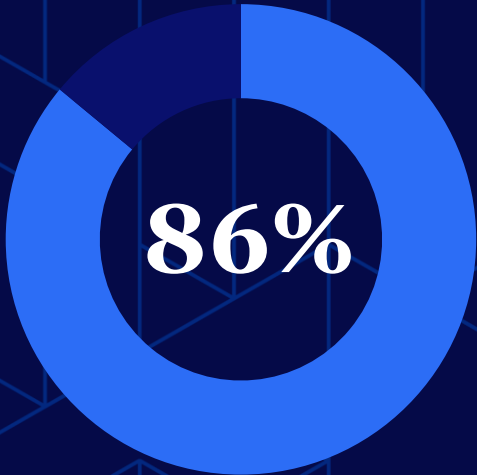
Total **30%**

Gen Z **39%**

Total **11%**

Gen Z & Mill **16%**

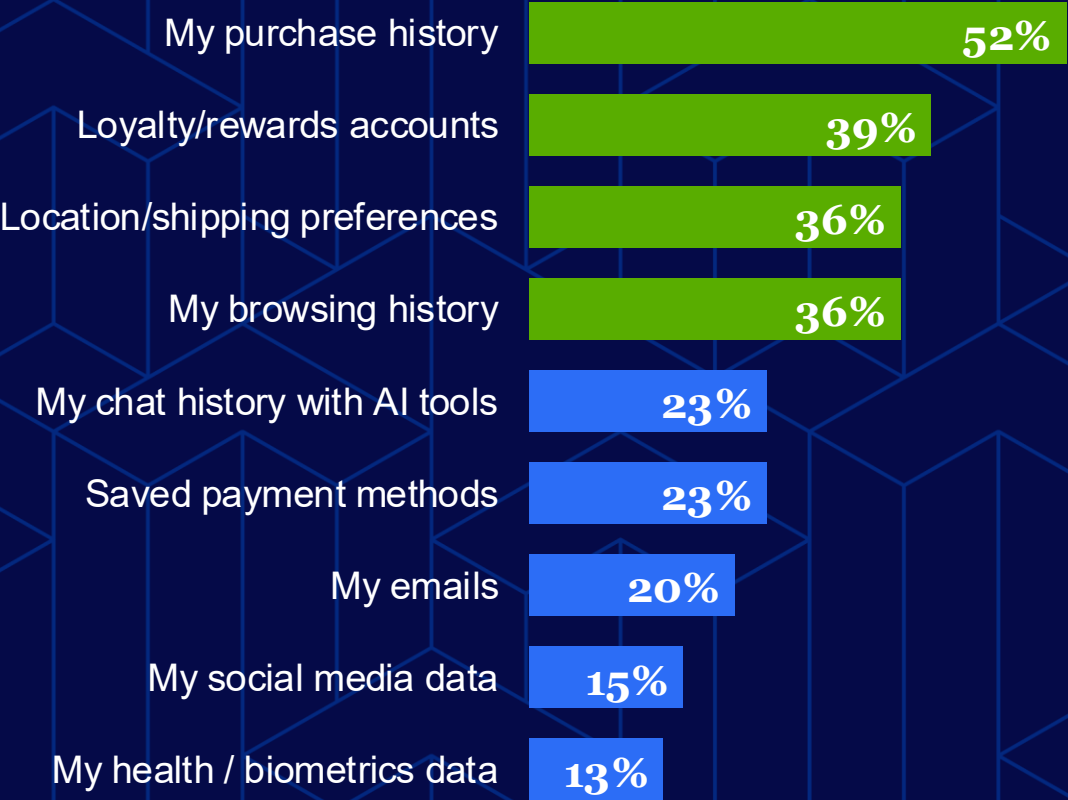
Most consumers are comfortable sharing at least some data with AI tools & agents
prioritizing shopping-relevant data such as purchase & browsing history, loyalty account, and shipping preferences



are **comfortable** sharing
some personal data with
AI tools / agents

*among those who have used or
considered using AI for shopping in P30D*

Level of Comfort with Data Sharing

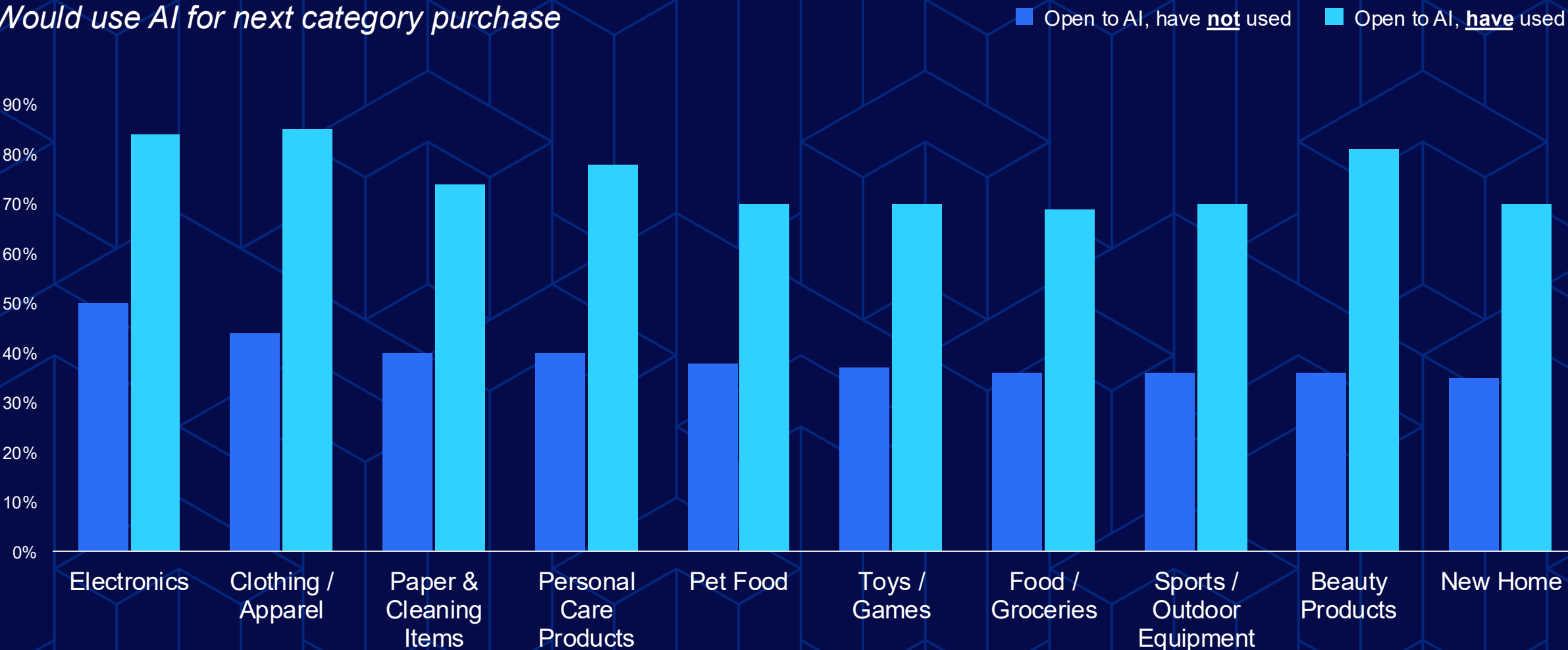


Adoption Breeds Expansion

Those who have used AI to shop likely to use for multiple categories

Tech and durables are more likely to be shopped using AI

Would use AI for next category purchase

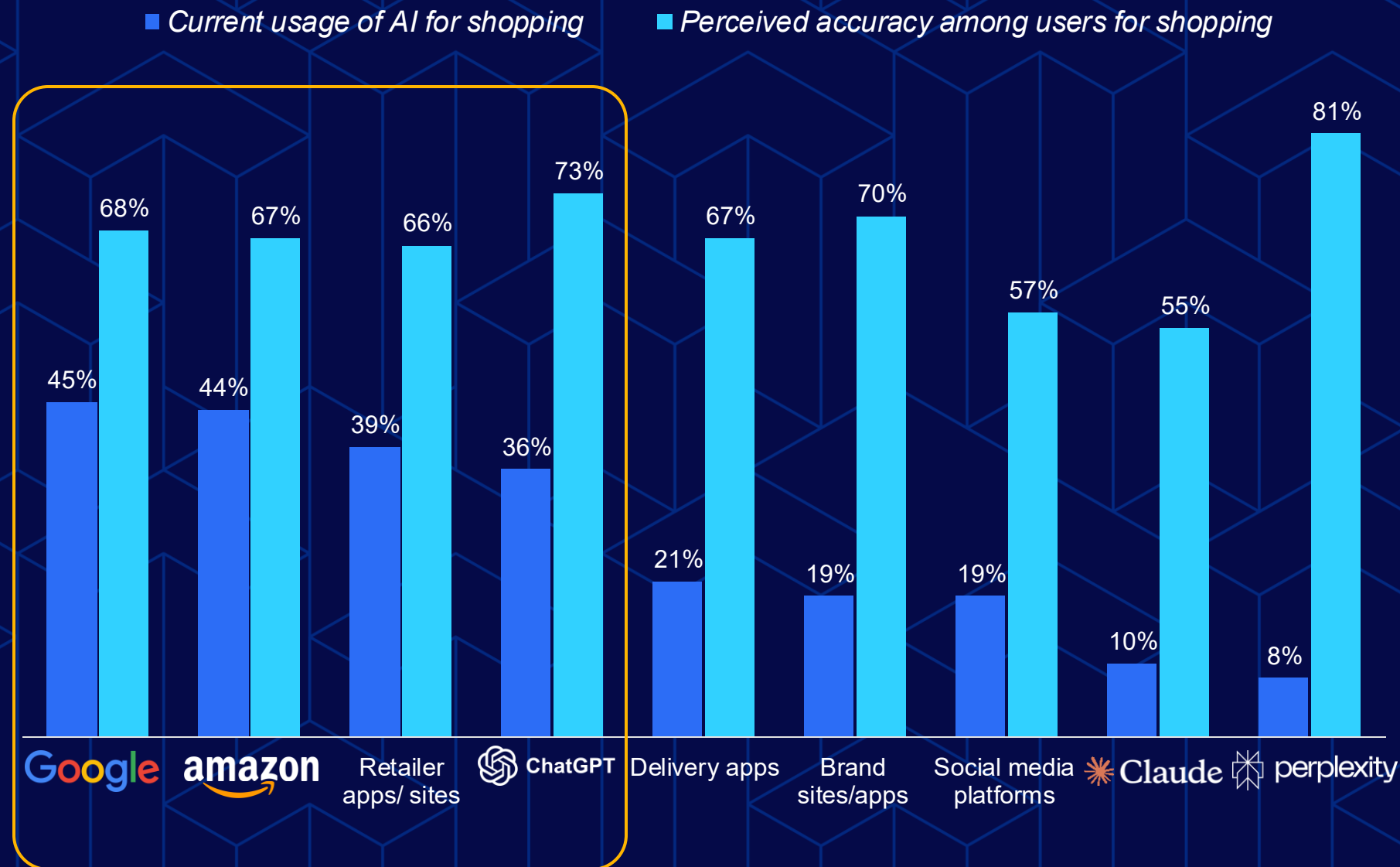


By far, the top motivation for using AI in shopping is to save money



Current AI usage concentrates among Google, Amazon, ChatGPT, and native platforms on retailer sites/apps

Amazon leads in satisfaction



From shelf to chat: AI is the new aisle

Agentic commerce, LLM advertising, and democratized AI tools are tilting the playing field toward challengers — and rewriting how shoppers discover, evaluate, and buy

What LLMs reward now



Structured product data

Clean attributes, ingredients, claims — machine-readable, not just brand-poetic.



Authentic explanatory reviews

Reddit, Substack, creator comments — "why" beats star ratings.



Need-state language

"Best X for Y," "alternative to Z" — content that answers the agent's question.



Cultural & social signal

TikTok and YouTube traction now feeds nearly half of agentic results.

\$25B

LLM advertising opportunity — a layer where contextual relevance, not budget, decides placement (for now).

10–20%

of US e-commerce spend may flow through agentic shoppers by 2030 — recasting RMN traffic and conversion economics.

The Big Shift - Search Has Changed

From

To

Ranking pages



**Being
recommended by AI**

Keywords



Structured data

Websites



**Full ecosystem
presence**



How AI Chooses Products



Retailers (Amazon, Walmart, Kroger)



Reviews & ratings



Community signals



Comparison content



Consensus across sources

The New Winning Formula

NIQ Brandbank

The proven formula for winning in digital commerce



Structured product data

+



High review volume

+



Consistent metadata

+



Strong distribution

+



Clear category ownership

Structured Data Wins

Vague claims lose

(e.g. 'healthy snack')

Specific attributes win

(e.g. 'protein', 'carbs', dietary claims)

**AI favors
*machine-readable data***



Retail is the Digital Shelf



AI prioritizes retailer
PDPs over brand sites

Incomplete data lowers
AI confidence

Amazon, Walmart, Target,
Kroger are **critical**

What Brands *Must* Do



Fix product data everywhere



Ensure complete, consistent data across all channels.



Optimize retailer PDPs



Turn PDPs into high-performing conversion drivers.



Guide better reviews



Drive quality reviews and improve continuously.



Publish comparison-ready content



Standardize data for easy comparison.



Act like data companies, not marketers



Use data to optimize, not guess.

The Differentiator – Most Platforms Manage Content. *We Power AI Visibility*

AEO/GEO Requires

- Clean, structured product data
- Consistent taxonomy across retailers
- High-quality, standardized attributes
- Scalable distribution across the ecosystem

*This is what
AI systems actually
read, trust, and use*

AI doesn't care about
your workflow.

It cares about your
data consistency

Typical solutions:

- Focus on workflow + PIM
- Fragmented or inconsistent data models
- Limited standardization at scale
- Built for publishing — not AI consumption

*Optimized for
managing content,
NOT fueling AI*

Win in Market with Brandbank and Digital Shelf Best Practices

NIQ Brandbank

Power the **foundation layer** AI depends on to recommend products

Structured, standardized product data at **global scale**

Data **trusted by retailers** — and therefore by AI

Deep **retailer integration** (true digital shelf presence)

Consistent taxonomy + attributes across environments

NIQ Digital Shelf

Improve your brand's **visibility on retailer search engines & LLMs**

Find out top **keywords** for each product

Understand how to **be in top positions**

Prioritize actions to maximize the impact

Get suggestions of **optimized content**

Monitor how changes affected the position

Gain visibility on products suggested, in what order, which were purchased, and where