

From Data to Consumer Foresight

National consumer intelligence is shifting CPG and retail from backward-looking market reporting to real-time, AI-powered decisions about what consumers want, why behavior changes, and what will happen next

by Consumer Magazine

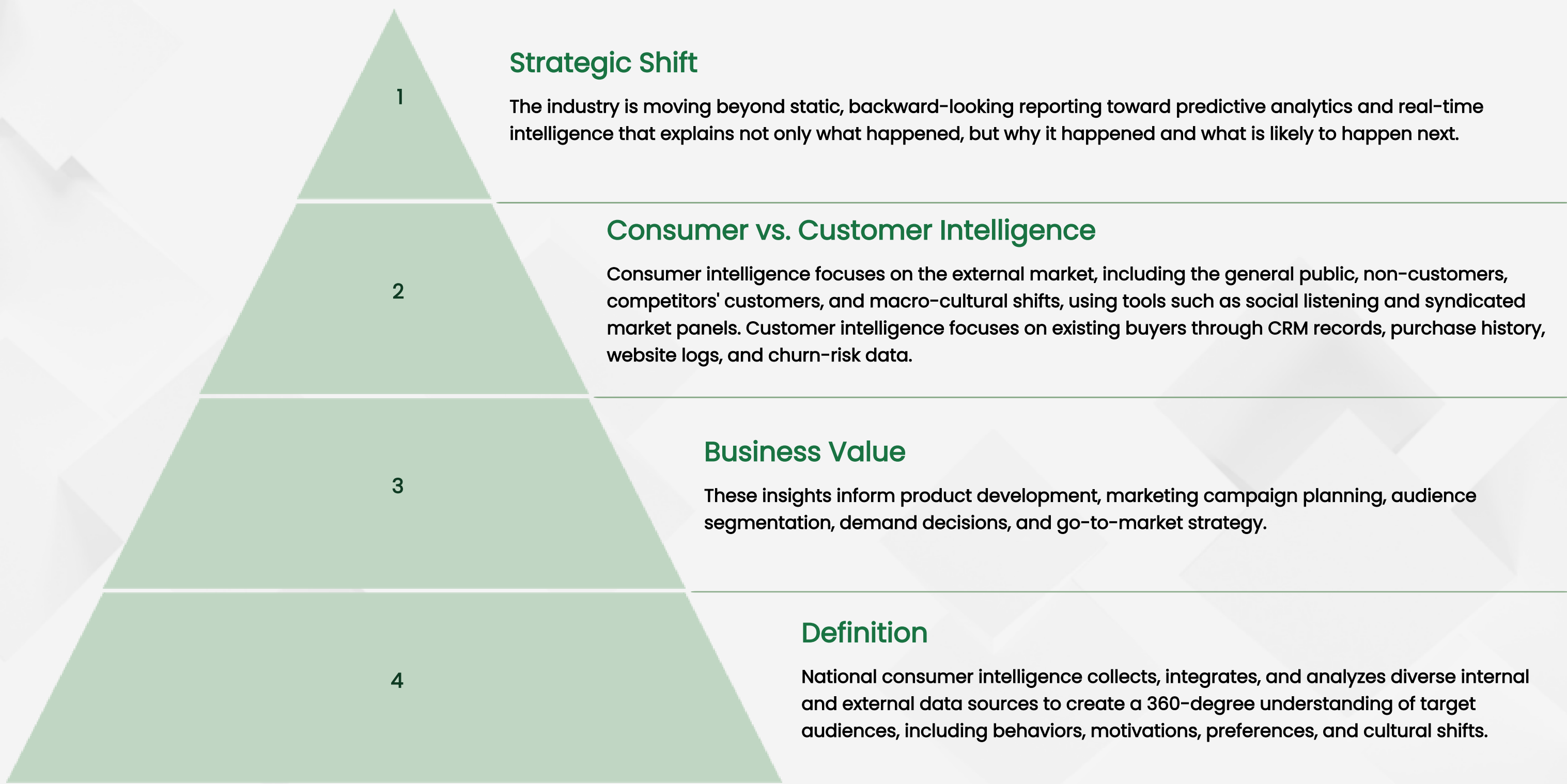
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Consumer Intelligence Connects the Market, the Shopper, and the Next Decision



The Intelligence Stack Is Expanding from POS Transactions to Continuous Consumer Signals

Transactional & Syndicated Data

Aggregated retail sales collected from thousands of retailers through POS scanner records provide unit sales, pricing, and velocity, while newer systems add e-commerce and omnichannel metrics.

Unstructured & Behavioral Sources

Social listening captures sentiment, cultural shifts, and unmet needs; geolocation and mobile panels reveal physical foot traffic and customer journeys; credit and debit card panels track share of wallet and spending across broader categories.

Unified Insight

Consumer Panels

Legacy panels such as the National Consumer Panel, a NielsenIQ–Circana joint venture, relied on manual barcode scanning and self-reporting, whereas new-age panels from Numerator and Fetch Rewards use OCR on digital and physical receipts to capture store location, item details, and loyalty-card usage in real time.

Retailer Portals

Walmart Retail Link, Kroger Stratum, and Target POL provide granular, immediate first-party data but are limited to one retailer.

Integration requirement: Modern platforms centralize these heterogeneous inputs so executives can connect market performance with shopper behavior and context.

The Vendor Market Splits between Scaled Measurement, Specialized Panels, and Strategic Intelligence

Vendor	Role & Distinctive Value
NielsenIQ and Circana	The bedrock of CPG syndicated data, providing xAOC and MULO market measurement; after IRI and The NPD Group merged in 2022 and rebranded as Circana, major manufacturers often subscribe to both providers to mitigate coverage gaps.
SPINS	A specialized health and wellness provider with exclusive relationships across natural, specialty, and gourmet retailers, often partnering with Circana for conventional-market context.
Numerator	A new-age panel leader built through the acquisition of InfoScout, combining receipt-based data and digital tracking for an omnichannel view of the consumer journey.
Kantar	A global panel provider whose UK grocery panel increased 83% to 55,000 households, improving precision in hard-to-reach channels.
Euromonitor International	Global market intelligence and forecasting across 210 countries and jurisdictions.
Dynata and Ipsos	Large-scale survey, polling, sentiment, and attitudinal research providers that complement transactional data.
Executive Implication	Vendor selection should match the decision required, not simply the largest available dataset.

AI Investment Is Expanding the Intelligence Market across Three Distinct Layers

USD 92.24B

Consumer AI market

Approx. USD 92.24 billion in 2024, projected to reach USD 674.49 billion by 2030 at a 28.3% CAGR — forming the technology base for consumer-facing personalization and automation.

USD 5,000B+

General AI market

Expected to grow from USD 248.93 billion in 2025 to more than USD 5,000 billion by 2034, with a 40.5% CAGR during 2026–2034, accelerating the underlying capabilities used by intelligence platforms.

USD 75.0B

Consumer insights & market intelligence services

Projected to expand from USD 47.14 billion in 2025 to USD 75.0 billion by 2035, reflecting sustained demand for structured research, measurement, and forecasting.

USD 4.21B

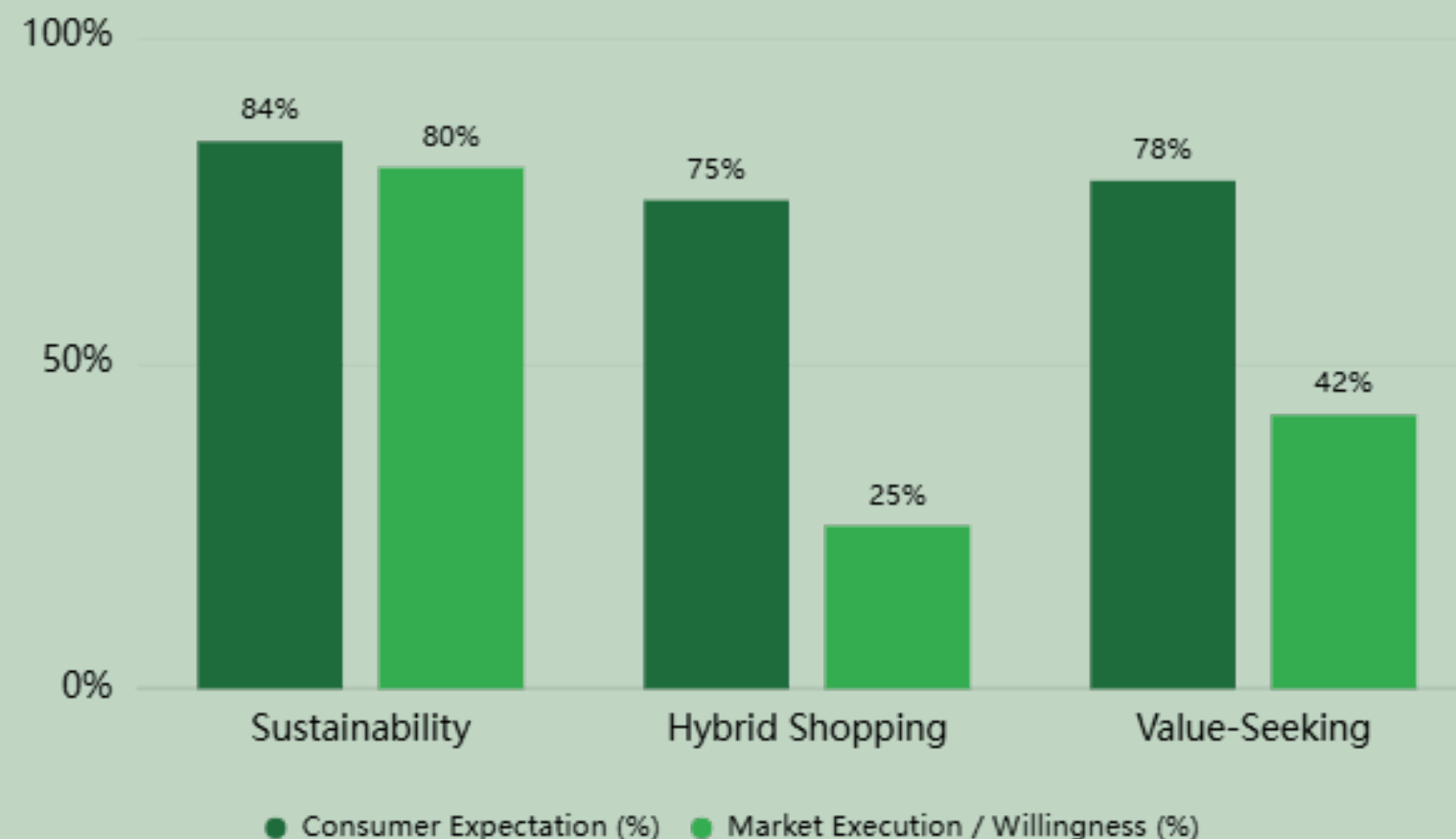
Customer Intelligence Platform market

Valued at USD 4.21 billion in 2025 and expected to grow steadily as businesses invest in personalization and relationship management.

Strategic interpretation: These are related but distinct markets, so their values should not be added together. Together they show that intelligence is becoming a scaled technology and services ecosystem rather than a periodic research function.

Three Consumer Forces Are Rewriting the 2024–2026 CPG and Retail Growth Agenda

Consumer Expectations vs. Market Execution

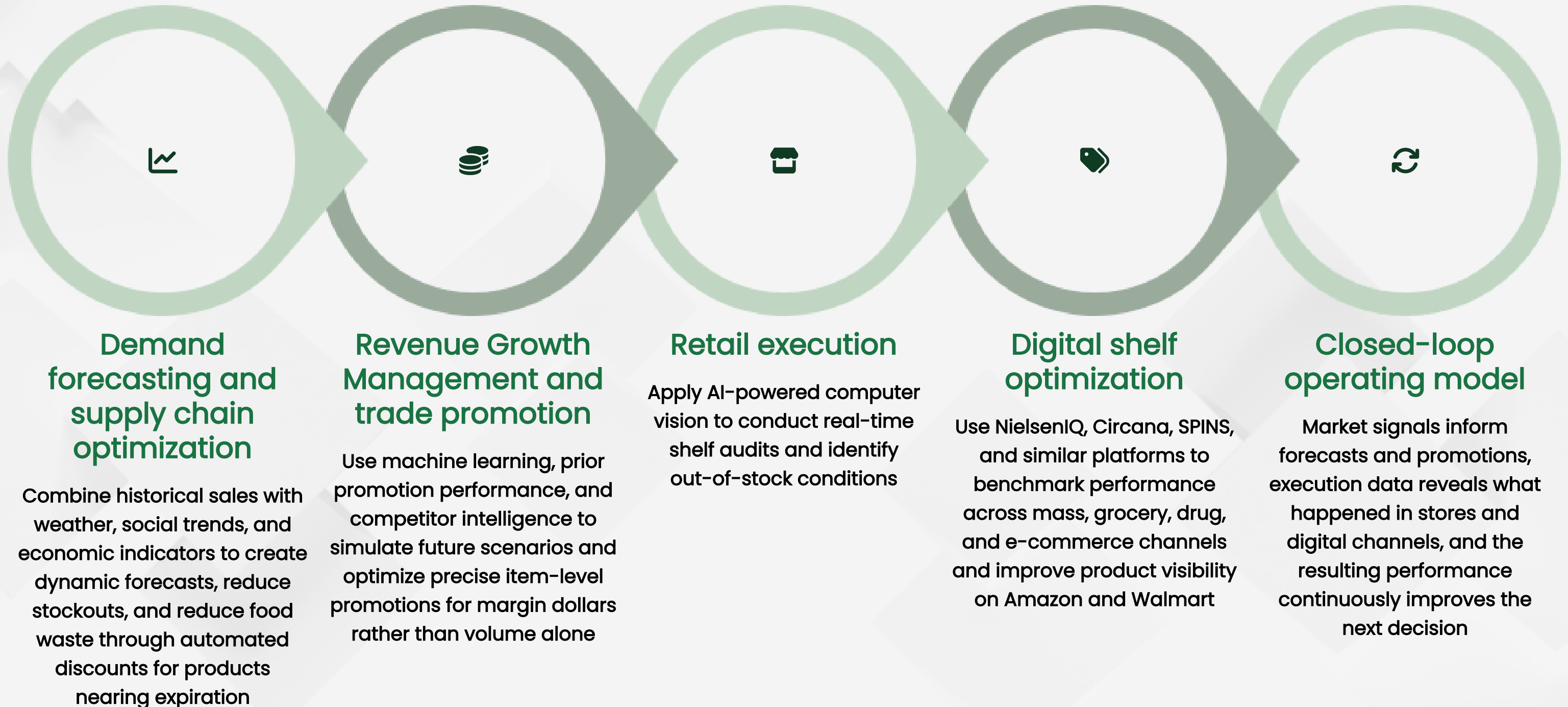


Three Forces & Intelligence Implications

- Sustainability & ethical consumption: ~84% call sustainability very important; 83% expect brands to shape ESG; up to 80% will pay a premium — brands must validate green supply chains and communicate measurable impact.
- Hybrid shopping: 75% demand an optimized physical-and-virtual experience while only 25% are satisfied with current execution — accelerating digital channels, live commerce, and DTC models.
- Value-seeking: Inflation lifts price sensitivity and private-label demand, increasing appetite for AI-driven promotions that deliver personalized value.

Executive takeaway: consumer intelligence must join sustainability attitudes, channel behavior, and price sensitivity in one decision system — not as separate trend reports.

The Highest-Value Use Cases Turn Intelligence into Closed-Loop Commercial Decisions



Basket Logic, Share of Wallet, and Predictive AI Convert Data into Actionable Growth Levers

Basket analysis

- Affinity analysis identifies products frequently purchased together using three core metrics
- Support: the frequency with which an item appears in a transaction
- Confidence: the conditional probability of buying a second item given purchase of the first
- Lift ratio: accuracy of the relationship compared with random transactions; above 1 indicates a strong actionable affinity

Commercial application

- A co-purchase index reveals cross-sell opportunities such as peanut butter and jam
- Helps increase the value of each trip by surfacing complementary product pairings
- Translates basket patterns into merchandising and promotion decisions

Share of wallet

- SOW measures the percentage of a consumer's total category spending allocated to one brand
- Unlike market share, it compares performance against the consumer's wallet, not the total market
- Low-SOW consumers are targets for retention and expansion
- High-SOW brands focus on strategic alignment and defense

Predictive and generative AI

- Machine-learning models learn continuously from live data to anticipate customer needs
- Generative AI simulates product outcomes and produces thousands of localized marketing assets
- Enables hyper-personalization at scale across channels and regions





Digital Trust Is the License to Scale Granular Consumer Intelligence

Regulatory baseline

The European Union's GDPR protects data subjects in the EU, while the California Consumer Privacy Act grants California consumers rights including deletion of personal information and opting out of its sale.

Transparency evidence

74% of retail businesses inform customers about their AI usage, positioning transparency as a practical way to narrow the confidence gap.

Business tension

More granular data enables better personalization, forecasting, and targeting, but increases the obligation to explain collection, analysis, AI usage, and consumer choices.

Executive control model

Pair data minimization and regulatory compliance with explicit consent, accessible preference controls, explainable AI practices, and governance over vendor data flows.

Trust mandate

Privacy has become a competitive differentiator rather than only a legal hurdle, requiring clear communication channels about how data and AI are used.

Strategic conclusion

The organizations most able to scale intelligence will be those that make responsible data use visible enough for consumers to understand and trust.

Winning Organizations Will Build an Intelligence Operating System, Not Another Dashboard

Define the Decision Backbone

Start with high-value executive questions such as demand, promotion margin, shelf availability, share of wallet, sustainability claims, and channel experience rather than collecting data without a decision owner.

Build the Integrated Signal Layer

Connect syndicated and transactional data, retailer portals, new-age panels, social listening, mobile and geolocation signals, credit and debit card panels, CRM, and digital behavior while preserving the distinction between consumer and customer intelligence.

Operationalize AI Use Cases

Prioritize forecasting, trade-promotion optimization, shelf execution, digital-shelf benchmarking, basket-based cross-sell, predictive modeling, and generative localization where measurable business outcomes can be tracked.

Establish Trust by Design

Govern GDPR and CCPA obligations, explain AI usage, provide deletion and opt-out pathways where required, and make transparency part of the consumer experience.

Create a learning loop: feed execution results back into models and planning so the organization moves from periodic reporting to continuously improving decisions.

Final implication: in 2026, competitive advantage comes from linking data breadth, analytical speed, commercial action, and digital trust into one operating system.

