

Belgium

A local market perspective on data clean rooms in commerce

What is a data clean room?

A data clean room is a secure, neutral environment in which two or more parties — for example a retailer and a brand, or an advertiser and a media partner — can combine and analyse their first-party data without either side handing over, or seeing, the other's customer-level data. Each party keeps control of its own data; records are matched on pseudonymised identifiers under agreed rules, and only aggregated or explicitly permitted results leave the environment. A clean room does not make collaboration compliant on its own: it provides the controls, while each party remains responsible for its own legal basis and data practices.

For commerce and media, the value proposition rests on four points:

- Privacy by design. Data collaboration that is compatible with GDPR and with the trust customers place in their retailer or bank, because raw customer data is never exchanged.
- More relevant activation. Shared insight makes it possible to build audiences, reach the right shoppers and suppress those who do not need to be reached.
- Proof of impact. Media exposure can be linked to actual sales through closed-loop measurement, rather than read through clicks and impressions alone.
- Control and governance. Each party decides which questions can be asked of its data, which makes partnerships easier to agree and to scale.

The Belgian context

Belgium is a small, densely covered retail market built on strong loyalty programmes. Retailers such as Delhaize, Carrefour, Medi-Market Group, Aveve, Intermarché, bol, Krëfel, Vanden Borre and MediaMarkt each hold loyalty bases ranging from a few hundred thousand to several million members, giving the local market a genuinely rich first-party data foundation to build on. Retail media itself is not new here — Belgium was one of the first territories where Carrefour launched a retail media offer, well before the topic became mainstream. What is new is the shift from selling media space to enabling data collaboration: retailers and brands are increasingly working together not only on campaigns, but on the underlying shopper insights, audiences and measurement behind them.

Market maturity: “in evolution”

Two trends currently define Belgian retail media. First, most collaboration still starts with insight: brands and retailers are focused on better understanding shopper behaviour, for both trade and advertising purposes, before activating anything. Second, budgets are gradually shifting from trade to marketing, as digital media teams begin testing retailer data for more precise targeting and closed-loop measurement.

Retailers themselves sit at different points on the maturity curve. Basic reporting (impressions, reach, click-through rates) remains the norm for several players, while others — including Delhaize and bol — have moved to sales-impact measurement that links exposure to purchase. A smaller group, including Medi-Market Group and Carrefour, is furthest advanced, opening self-service campaigns that let brands activate directly on first-party data through their own channels.

After an early lead, the market has since evolved more slowly than neighbouring countries such as France, the Netherlands and the UK — partly because local media-agency business models do not yet integrate retail media as directly as they do elsewhere. Expectations are that Belgium will close this gap over the coming months as collaboration models mature.

Adoption: a reality check

Exploring	Piloting	Systematic use
Education, vendor conversations, first legal and data-readiness work	One or two contained use cases, often run as a managed service	Repeatable use cases, internal ownership, self-service and a budget line

Interest in data clean rooms is high, but operational use is harder to gauge and probably narrower than the conversation suggests. Most Belgian organisations appear to sit in the first two stages, and the cases below are best read as early markers: Keytrade Bank’s exclusion project was its first clean room use case, while Medi-Market and Pierre Fabre are moving from a managed campaign towards self-service. No public data shows how many Belgian advertisers use clean rooms systematically, and this page does not claim to quantify it.

Points of attention specific to Belgium

- Fragmentation. With several retailers each running their own platform and dataset, brands and agencies face a genuinely fragmented landscape. Multi-retailer or “data alliance” models, already live in other markets, are seen locally as a necessary next step to simplify commercial and operational execution.
- Measurement comparability. Closed-loop measurement is technically achievable in Belgium today, but reporting is not yet built the same way across retailers, making it difficult for advertisers to compare campaign impact from one retailer to another.
- Price and legal complexity. Cost and legal set-up are cited as the two main blockers to broader adoption. The market is starting to respond: some retail media players now offer a single legal framework covering all campaign formats, alongside price parity between first-party and retailer data, to lower the barrier to entry.
- Beyond retail. Data collaboration is expected to extend past classic retail into adjacent sectors — airports, hotels, events and financial services — as “retail media” evolves into a broader “commerce media” logic.

The clean room ecosystem in Belgium

Independent, interoperable platforms	LiveRamp (which absorbed Habu in 2024) and InfoSum (acquired by WPP in April 2025) are the platforms behind the sales house Ads & Data’s “clean room agnostic” approach; other independent providers such as Decentriq or Optable are active in the wider European market. Strengths: a neutral space between partners, cross-cloud connectivity, ready-made workflows for marketers. To check: ownership, neutrality and the partner network reachable from Belgium.
Cloud-native clean rooms	Built into the cloud or data warehouse where data already sits, for example Snowflake, AWS Clean Rooms, Google Cloud or Databricks. Strengths: data stays in place and entry is easy for teams already on that stack. To check: they suit technical teams, and collaboration is simplest when both partners use compatible environments.
Platform (walled garden) clean rooms	Offered by large media platforms to analyse campaign data inside their own environment, such as Google’s Ads Data Hub or Amazon Marketing Cloud. Strengths: direct access to platform-level performance data. To check: the view stops at the platform, so cross-channel comparison needs another layer.
Agency and holding-company solutions	Clean room capabilities are increasingly bundled with media planning and buying, for example InfoSum within WPP’s GroupM and Choreograph; Publicis (Lotame) and Omnicom (Acxiom) have made similar moves. Strengths: integration with the agency’s workflow. To check: transparency and independence of the reporting.

Two developments stand out. The first is interoperability: platforms increasingly connect to each other and to the main cloud warehouses, so partners no longer need to run the same technology to collaborate. The practical question shifts from “which clean room?” to “which partners can we connect to?”. The second is consolidation:

the Habu and InfoSum acquisitions show clean rooms being folded into broader data, identity and media stacks. For Belgian advertisers, ownership, neutrality and portability are becoming part of the selection criteria.

Perspectives from media agencies and publishers

Media agencies	Agencies sit between advertiser and media owner, yet in Belgium they have not so far led the topic; the question was put openly to the market at MM Tech Club in February 2026. Reported barriers: • Time and resources: a clean room project needs data, legal and analytical work that rarely fits campaign timelines or fee models. • Skills: SQL and data-science profiles are scarce in media teams. • Business model: retail media and data collaboration are not yet integrated into how agencies plan, buy and are remunerated. • Fragmentation: each retailer or platform brings its own set-up and reporting format. • Consolidation: platforms owned by agency groups raise neutrality questions for clients.
Publishers and media owners	Publishers bring reach and context, but face a different set of constraints: • Authenticated audiences: matching relies on logged-in or known users, a minority of traffic for many titles. • Technology cost: platform fees, integration and engineering effort. • Legal and contractual complexity: roles, consent and agreements differ by advertiser and platform. • Scale and uncertainty: match rates and actionable audience volumes are hard to predict, and small matched audiences may be too small to activate or measure. • Standardisation: different platforms, identifiers and reporting formats. One response is pooling: Ads & Data links its online publishers' data sets with those of its telecom partners to reach a scale no single title can.

Concrete use cases

Two recent Belgian examples show how data collaboration is being put into practice. The first is retailer-led and built around shopper insight and closed-loop sales measurement; the second comes from financial services and shows a simpler entry point: using a data clean room to keep existing customers out of acquisition campaigns.

Use case 1: Medi-Market × Pierre Fabre (Avène)

At the Gondola Day event, a recent collaboration between Medi-Market Group and Laboratoires Pierre Fabre (Avène), enabled through LiveRamp and supported by Cassius Data Consult, illustrated where the Belgian market stands today. The two organisations built a shared activation routine in four steps — analysis of sell-out performance and shopper behaviour, construction of data-enriched customer segments, activation of those segments both offsite and in-store, and measurement of impact on actual sales through closed-loop reporting.

What it is	Three audiences were built from shopper insight — brand shoppers, lost shoppers and category shoppers — and activated through a managed campaign run by Medi-Market on behalf of Pierre Fabre.
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Why it matters for data collaboration	Pierre Fabre invested in a dedicated data analyst to work with LiveRamp and Medi-Market data — a reminder that the value of these collaborations depends as much on internal capability as on the technology itself. Medi-Market has since opened self-service audience creation to Pierre Fabre directly on its own data, described locally as a first for a Belgian retailer, moving the relationship from a retailer-managed campaign toward the kind of brand-initiated, privacy-enhanced collaboration that data clean rooms are designed to support.
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Results

5.51% Conversion rate	+460 New buyers on the promoted products	+9,000 New buyers on the Avène brand	79% Of stores sold at least one promoted product
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Use case 2: Keytrade Bank × Ads & Data — excluding existing customers

In a campaign for Belgian online bank Keytrade Bank, media partner Ads & Data used LiveRamp’s data clean room technology to remove existing customers from acquisition media — a privacy-safe way to cut waste without exchanging customer files.

What it is	Keytrade Bank wanted its acquisition media to reach prospects, not people who already bank with it. Together with media partner Ads & Data, it matched its customer file against campaign audiences inside a LiveRamp data clean room and used the result to exclude existing customers from acquisition campaigns.
Why it matters for data collaboration	The match ran without any customer data being shared between the parties, keeping the set-up privacy-safe and GDPR-compliant. It was described as a first in the Belgian banking sector and was Keytrade Bank’s first data clean room use case. It also shows that a clean room does not need a complex activation programme to pay off: suppression is a small, contained step that reduces wasted impressions and makes campaigns more relevant.

Outcomes

1st Data clean room use case for Keytrade Bank	0 Customer records shared between the parties	GDPR Privacy-safe, compliant set-up
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Media-efficiency figures were not disclosed in the public case material reviewed.

Recommendations for advertisers and retailers

- Start from the business question and the insight, not from the technology — the same discipline this framework recommends internationally applies directly in the Belgian context.
- Prove value with a small number of high-fit use cases first — audience segmentation and closed-loop measurement are currently the most mature locally — before scaling to a broader activation programme.
- Consider audience exclusion as a low-barrier first step. Keeping existing customers out of acquisition campaigns needs no shared customer files and can be launched quickly, as the Keytrade Bank case shows.
- Push retail media partners for measurement that is comparable across retailers, so results can be benchmarked rather than read in isolation.
- Where a portfolio spans several Belgian retailers, evaluate multi-retailer or data-alliance approaches to reduce fragmentation and duplicated effort.

- Resource the collaboration properly. A dedicated analyst or data lead on the brand side, and clear internal governance on the retailer side (is retail media owned by trade, marketing, or both), materially change outcomes.
- Be explicit about where you stand — exploring, piloting or scaling — and set expectations, budget and success criteria accordingly.
- Select for interoperability and check neutrality: ask who owns the platform, how easily partners on other environments can connect, and how results and data can be moved.
- For agencies and media owners: agencies should build clean room skills and a commercial model for this work; publishers should prioritise authenticated audiences and consider pooling through sales houses or alliances to reach actionable scale.
- Plan ahead for commerce media. The same data collaboration logic is expected to extend beyond retail into travel, events, financial services and other sectors.

Contributed to the international Data Clean Rooms in Commerce white paper by Kevin Kielbaey CEO of Cassius Data Consult & Head Of LiveRamp Benelux market— IAB Belgium Gold Partner.

IAB Belgium / Cassius Data Consult market perspective (Club33 Café, February 2026); LiveRamp & Cassius Data Consult, “Numbers Behind the Scenes: Retail Media in Belgium” (2025); Medi-Market × Pierre Fabre case study, Gondola Day 2026; Ads & Data, “Keytrade Bank verhoogt media-efficiëntie door bestaande klanten uit te sluiten” (adsanddata.be, 2026); WPP, “WPP acquires InfoSum” (3 April 2025); Ads & Data / Mediaspecs, “Let’s Data” (September 2025); MM Tech Club #29, “Data Clean Rooms: Buzzword or Fundamental Shift?” (Kevin Kielbaet February 2026)