A universal tool for effective cross-network evaluation
What’s more, the transactionally driven early days of retail media negotiations have been replaced by a greater spirit of collaboration that is helping to improve platform capabilities as well as program efficiency and effectiveness.

With eMarketer expecting retail media ad spending to reach $61 billion by 2024, networks and brand advertisers have embraced the need to establish mutually beneficial partnerships that address the business needs of both parties. The list of potential partners continues to grow, giving brands an array of choices about where and how to spend their money; the leading retail media networks are responding by working more closely with brands to earn those dollars.

Brand organizations are now tasked with developing a strategic understanding of how retail media can best be leveraged to drive incremental growth, which retailers will provide the greatest opportunities for success, and what specific media investments will be most effective at achieving the desired impact.

They also must learn how to align their retail media activity with the rest of their commerce marketing plan, which can improve success not only through more seamless shopper engagement but also by fostering greater internal efficiency across functions.

This level of organizational understanding is critical to future success. Despite the skyrocketing spending forecasts, brand organizations are still working with finite marketing budgets—especially during a period of economic uncertainty. Brands risk wasting some of their limited dollars by investing in retail media platforms or programs that can’t meet their specific objectives or don’t measure up to industry standards.

How to Pick Partners

There are two important ways to evaluate the best retail media platforms for investment. The first is to assess each network individually, the role it plays within—and the impact it has on—you brand retailer relationship, and the opportunities it provides for achieving your brand goals. Retail media has become a critical aspect of the broader supplier-retailer relationship and, in many cases, an important factor in joint business planning. This broader context must always be considered when making investment decisions.

The second, more objective way to evaluate the best places to invest is by comparing the various networks to determine their relative strengths and weaknesses against a uniform set of key performance criteria. In fact, as the marketplace has evolved, many criteria that initially served as network differentiators have now become “Table Stakes,” that a network must offer to adequately address the needs of their brand partners and keep pace with their competitors.

To help our clients efficiently evaluate spending opportunities across networks, The Mars Agency created a Retail Media Health Scorecard to track the capabilities of leading networks across the key criteria that advertisers need to optimally plan, execute and measure retail media activation.

This general framework for network scorecarding is customized for each of our clients to reflect their unique business objectives, budgets, performance expectations, and retail partnership priorities. Internally, we continuously update the information to stay ahead of the rapidly evolving capabilities of existing networks and the ongoing launch of new platforms across the retail landscape.

To help the industry at large gain a better understanding of the opportunities available, and to encourage the development of evaluation standards that might ultimately improve both the collaborative process and overall network effectiveness, The Mars Agency is sharing this Retail Media Report Card publicly on a quarterly basis.

Evolving with the Industry

Each report is updated to reflect the ongoing enhancements made by these platforms, to evaluate additional platforms, and to modify our analysis as needed to continue reflecting best practices across the industry. In this edition, we begin coverage of the networks operated by Ahold Delhaize and Sam’s Club, complete with one-page Platform Profiles at the end of this report. We’ve also added three offline placement options to the Media Opportunities evaluation—including email, YouTube and circular placement—to reflect the ongoing expansion beyond on-platform advertising toward omnichannel ecosystems.

We also have strengthened the evaluation process by adding two new elements:

Table Stakes: As the marketplace has matured and advertisers have refined their expectations, some criteria that may have been optional capabilities initially should now be considered standard requirements for any competitive retail media network. The Mars Agency has identified 44 of the 65 evaluation criteria used in this report as “Table Stakes,” and is now considering each network’s ability to deliver them as a key component of our evaluation process. This new assessment factor has even led some networks to receive lower ratings in some areas than they have in previous editions of this report. Table Stakes criteria are identified in the first column of each Performance Area scorecard (pages 10–14).

RMN Marketplace Leader: To recognize best-in-class practices across the network landscape, we have decided to literally crown (although with emojis only) a Marketplace Leader that we believe possesses the greatest number of industry-leading capabilities brands need to build effective retail media campaigns. In this report, that designation goes to Amazon. We explain why in their Platform Profile on page 17.

We hope you enjoy the third edition of The Mars Agency’s Retail Media Report Card, which covers activity in 1Q 2023.
The Mars Agency has established 65 criteria for evaluation that can be grouped into 5 key performance areas.

The specific criteria for each Performance Area reflect tangible capabilities, services and offerings, such as the network’s ability to customize the audience, provide access to sales data or advertise through social media channels. In the Top-Line Assessment on page 8, our retail media specialists evaluated and compared the networks based on the number of criteria they meet (especially the Table Stakes) and how well those criteria are delivered to determine “best in class” partners in each Performance Area who are exceeding industry standards. Each of the criteria is explained in greater detail in the Glossary at the end of this report.
5 key performance areas

1_TARGETING
How robust is the network's overall audience? How sophisticated is its ability to engage with specific shopper segments? Can it target beyond its own site? We evaluate each network's Targeting capabilities based on 14 criteria ranging from audience scale to conquering opportunities.

2_MEASUREMENT & REPORTING
What is the level of data transparency and reporting sophistication for the network's results? Does it provide access to customer and sales data? Can it distinguish between online and offline sales? We evaluate each network's Measurement & Reporting capabilities based on 11 criteria ranging from programmatic sales measurement to custom analysis opportunities.

3_MEDIA OPPORTUNITIES
How well does the network connect with shoppers along the entire path to purchase, both on-site and across the digital landscape? Is it offering in-store opportunities along with digital media? We evaluate each network's Media Opportunities across 21 potential touch points ranging from on-site search to in-store radio.

4_INNOVATION
Does the network consistently develop next-level media opportunities incorporating new tools and technologies? Is it keeping pace with evolving shopper demands? We evaluate each network's Innovation strengths based on 10 criteria ranging from testing opportunities to AR/VR implementation.

5_PARTNERSHIP
Does investment unlock other opportunities with the retailer? Does the investment satisfy broader vendor commitments? Does the network provide creative flexibility? We evaluate each network's Partnership strengths based on 9 criteria ranging from training programs to JBP opportunities.
In the Top-Line Assessment chart on page 8, each retailer is assigned a simple green, yellow or red color based how well they meet the criteria for that performance area.

**Green** signifies that the retailer is exceeding expectations compared with the state of connected commerce overall and within the competitive set.

**Yellow** means the retailer is maintaining its position within the overall competitive set.

**Red** indicates that it is lagging on the development curve.

**CHART KEY**

- **Best-in-Class Market Leader**
- **First-time this retail media network is covered**
- **Upgrade in assessment level from last Report Card**
- **“Table Stakes” criteria that all networks should offer**
For the public version of the Retail Media Report Card, we’ve chosen to only identify the “Green” retailers that are exceeding expectations. The goal of this public report is to offer brand advertisers a best-in-class method of cross-network evaluation, not to overtly criticize the networks — although we are happy to give the identified leaders some well-deserved credit.

Naturally, we present a complete assessment in our work with clients and often in direct discussions with the retail media networks themselves — who, in many cases, appreciate the competitive comparison and the potential guidelines for improved collaboration with brand partners that this evaluation provides. In fact, nearly all the networks are helping The Mars Agency compile this report.

The scorecard presents a clear view into the relative strength and sophistication of each retailer. In this way, brands can easily identify the industry leaders, versus the developing platforms, versus the networks that are trailing the marketplace in key performance areas.

These designations are meant to be used as a method of evaluating the relative investments that should be considered across the landscape of networks, as well as a tool for bringing practical, more mutually beneficial plans to the negotiating table. They are not, however, intended to be used for making any straightforward “yes or no” determinations on investments because there are many other factors that should impact those decisions, as noted earlier.

That, in fact, is the next exercise we take with our clients: creating a framework for investment that sets parameters on how much to spend at each retailer, as well as which internal function should provide the funding — a decision that, at some level, we believe should be determined by the capabilities and sophistication of the retail media partner. (For more of our perspective on investment best practices, read “Making Sense of Retail Media.”)

This framework also provides guidance on tactic selection, which again should be based on each retailer’s capabilities and sophistication level. It is here, at the tactic level, where brands can — and should — more comfortably make “yes or no” funding decisions based on the scorecard. (As always, though, the brand’s specific goals and KPIs should be considered, too.)

While this specific process isn’t necessarily the “be all, end all” solution, we have found it extremely effective at helping The Mars Agency’s clients evaluate retail media network capabilities to guide their investment decisions.

It has also helped our clients conduct more open, informed investment discussions with their retail media network partners by clearly identifying where they fall within the competitive landscape in terms of meeting the commerce marketing needs of brand partners.

Notes

To determine the “Best in Class” networks in the five Performance Areas, The Mars Agency’s retail media specialists first evaluated each network based on the number of criteria they meet; a particular emphasis was placed on the number of Table Stakes they satisfy, which was weighed against how many unique or next-gen criteria they provide. The team then carefully considered how well each of those criteria are meeting the needs and expectations of advertising partners relative to current industry standards. Please refer to the Glossary at the end of this report for definitions of the criteria.

Media Opportunities Networks receive a circle if the media opportunity can be purchased directly through the network as part of a campaign. Opportunities that can only be secured separately through a retailer’s merchant or marketing team do not qualify.

The information in this report has been collected from various industry sources by The Mars Agency and, in most cases, verified by the retail media networks themselves. Factual information represents the best available data at the time of publication. The Mars Agency has made every effort to be as accurate and up to date as possible with this information. In certain cases, platform assessments reflect objective evaluations determined by considering industry best practices and The Mars Agency’s own experience and expertise. For questions, contact Peter Breen at breenp@themarsagency.com.
Targeting
How they engage with their shoppers

Measurement & Reporting
Transparency and sophistication of results

Media Opportunities
Ability to connect with the shopper along the entire path to purchase

Innovation
Driving next-level media opportunities

Partnership
Ability to build best-in-class joint business collaboration
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<td>Behavioral Targeting (e.g. Browsing behavior)</td>
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</tr>
<tr>
<td>Dedicated Data Analytics / Other Resources</td>
<td>●</td>
<td>●</td>
<td>●</td>
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<td>●</td>
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</tr>
<tr>
<td>Creative Flexibility (incl. Self-serve certification)</td>
<td>●</td>
<td>●</td>
<td>●</td>
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<tr>
<td>First-to-Market Test &amp; Learns</td>
<td>●</td>
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<td>●</td>
</tr>
</tbody>
</table>
KEY PARTNERS
Citrus Ad Powered by Epsilon, Catalina, Neptune, Volta, LiveRamp, Quotient

RECENT DEVELOPMENTS
AD Retail Media Network launched in January and is being added to the Retail Media Report Card for the first time this quarter. May enhancements include the rollout of new onsite placements.

ANALYSIS
AD Retail Media launched several offerings during the first quarter, including real-time reporting for onsite search. The network is eager to continue expanding across the remainder of the year with the following opportunities: competitive benchmarks, premium placements and other improvements onsite, and efficiencies such as streamlined approaches to the planning process and communication between AD Retail Media and the Corporate Scale team.

ON THE HORIZON
Self-serve onsite display, social media opportunities, short-form video, unified measurement, post-checkout advertising, connected stores, and the Food Lion chain’s migration to the company-wide PRISM ecommerce platform.
KEY PARTNERS
CitrusAd, Merkle, Neptune Retail Solutions, Google Ad Manager, The Trade Desk

RECENT DEVELOPMENTS
Albertsons Media Collective (The Collective) has enhanced their capabilities around dynamic creative optimization. They have added behavioral targeting in their onsite tools as well as new onsite placements and a CTV offering. In addition, they’ve launched measurement tools inclusive of holistic buyer data, such as new, loyal and lapsed buyers.

ANALYSIS
The Collective has made huge strides during the start of their second year, paving the way toward some industry-leading measurement practices with several additions in that area. Current and future offerings are increasingly providing an array of ways to engage shoppers from the targeting and engagement perspectives.

ON THE HORIZON
Opportunities in online video, YouTube, and in-store TV/video.

RETAILER / RETAIL MEDIA NETWORK
Albertsons / Albertsons Media Collective

YEAR LAUNCHED
2022

AUDIENCE SIZE
100 million
KEY PARTNERS
All services/capabilities are Amazon-owned.

RECENT DEVELOPMENTS
Sizmek Ad Suite has relaunched as Amazon Ad Server, giving advertisers a direct connection to Amazon’s range of audiences and ad tech solutions.

Amazon Ad Server helps power dynamic creative optimization using Amazon Audiences, which also informs campaign performance and ad delivery insights through Amazon Marketing Cloud (AMC). By bringing Amazon Ad Server’s breadth of cross-media analytics into AMC, users can gain advanced insights about audiences and sales to optimize their Amazon DSP campaign strategy.

ANALYSIS
Amazon is aggressively moving into the broader digital and OTT space to compete against the likes of Google and Facebook. They’re leveraging their DSP to attract advertisers in verticals such as automotive and insurance — categories that were previously foreign to Amazon Ads. Amazon also gets bonus points for their technology solutions, which are helping brands solve marketing challenges across their entire digital media footprint.

ON THE HORIZON
Branded experiences with Alexa is an existing Amazon Ads offering now available in open beta. These immersive, unique experiences help ad-supported audiences discover brands through voice, screen-tap or remote in a deeper, more tailored way, helping them learn more, interact with exclusive content, and even shop for products.

BEST IN CLASS ASSESSMENT
In full disclosure, Amazon ranks poorly in our evaluation of Media Opportunities. However, its capabilities in the four other Performance Areas is so strong that The Mars Agency still considers Amazon to be the best-in-class network operator. Here are just some of the reasons Amazon earned our first crown:

Targeting: Amazon’s closed loop measurement lets advertisers prospect and re-target shoppers across their connected media ecosystem. From Amazon Search, to DSP, to streaming TV and audio ads, their 1P data enables advertisers to reach shoppers at all stages of the funnel.

Measurement & Reporting: Omnichannel metrics, which originally launched for CPGs in the U.S. to measure in-store impact, will expand later this year to additional categories and internationally.

Innovation: Their latest advertising innovation, the recently announced Amazon Marketing Cloud Audiences, lets advertisers use a variety of data signals to create custom audiences for use in DSP campaigns.

And, to be clear, much of Amazon’s subpar performance in offering many of the offsite media opportunities that brand advertisers are seeking is by design: for the moment, at least, the company is choosing not to work across any social media platforms outside of its own proprietary ecosystem.

RETAILER / RETAIL MEDIA NETWORK
Amazon / Amazon Advertising

YEAR LAUNCHED
2012

AUDIENCE SIZE
150 million +

TOP-LINE ASSESSMENT
TARGETING
How they engage with their shoppers

MEASUREMENT & REPORTING
Transparency and sophistication of results

MEDIA OPPORTUNITIES
Ability to connect with shoppers along the entire path to purchase

INNOVATION
Driving next-level capabilities & media opportunities

PARTNERSHIP
Ability to build best-in-class joint business collaboration
**Best Buy. Ads**

**KEY PARTNERS**
Criteo, Google

**RECENT DEVELOPMENTS**
Best Buy Ads has quickly ramped up the channels their advertisers can leverage to reach shoppers along the path to purchase. They have added dynamic creative optimization through retargeting and product feeds, along with shoppable content, to better drive conversion.

**ANALYSIS**
Coming up on their first anniversary, Best Buy Ads have been pushing themselves to gain parity with more established networks. Their focus on channel expansion and partnerships is helping to drive engagement and conversion in-store and online for brands.

**ON THE HORIZON**
Self-serve reporting is coming quickly, and clean room functionality is in development, which will give advertisers much greater control of their investments and optimizations.

<table>
<thead>
<tr>
<th>RETAILER / RETAIL MEDIA NETWORK</th>
<th>Best Buy / Best Buy.Ads</th>
</tr>
</thead>
<tbody>
<tr>
<td>YEAR LAUNCHED</td>
<td>2022</td>
</tr>
<tr>
<td>AUDIENCE SIZE</td>
<td>180 million</td>
</tr>
</tbody>
</table>

**TOP-LINE ASSESSMENT**

**TARGETING**
How they engage with their shoppers

**MEASUREMENT & REPORTING**
Transparency and sophistication of results

**MEDIA OPPORTUNITIES**
Ability to connect with shoppers along the entire path to purchase

**INNOVATION**
Driving next-level capabilities & media opportunities

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**ON THE HORIZON**
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KEY PARTNERS
Google’s DV360, Criteo, The Trade Desk, Google Ad Manager, LiveRamp, Google Ads, Meta, Pinterest, YouTube

RECENT DEVELOPMENTS
Under Parbinder Dharwal’s new leadership, the CMX organization is expanding rapidly by rolling out strategic teams across Product, Business Operations, Business Insights, Partnerships, Marketing, and Sales. More details to come in the second half of 2023.

ANALYSIS
The potential for customer targeting across 78 million CVS ExtraCare loyalty program members gives brands an extensive opportunity to effectively reach specific shoppers. Brands receive wrap-up reports that include segment-level breakdowns on how campaigns perform against each target audience.

ON THE HORIZON
CMX is in the midst of adding more onsite and offsite product offerings, expanding audience targeting and measurement capabilities, and enhancing their vendor reporting dashboard to provide additional metrics.

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CMX is in the midst of adding more onsite and offsite product offerings, expanding audience targeting and measurement capabilities, and enhancing their vendor reporting dashboard to provide additional metrics.
KEY PARTNERS
Goodway Group, The Trade Desk, Bohan, LiveRamp, Google Ad Manager, Snowflake

RECENT DEVELOPMENTS
DGMN recently completed testing of a new partnership with Meta. They’re the first retailer to offer closed-loop measurement with in-store and online sales, which lets advertisers quantify performance across the Meta ecosystem.

With 19,000 physical store locations, Dollar General has the largest retailer footprint in the U.S. and has plans to continue expanding. With that extensive footprint, 75% of U.S. residents live within five miles of a store.

ANALYSIS
DGMN has established a new retail media insights team to support brands and agencies in fulfilling their reporting and measurement needs, understanding media performance, and improving ROI (ROAS and iROAS). The network offers unduplicated reach of the hard-to-find and hard-to-measure rural customer, with 80% of Dollar General stores serving markets of 20,000 or fewer residents.

ON THE HORIZON
DGMN plans to deliver a new video advertising solution and more closed-loop reporting.
KEY PARTNERS
Pacvue, Flywheel

RECENT DEVELOPMENTS
The network recently launched item-level promotion opportunities for CPGs.

ANALYSIS
DoorDash has expanded their media offerings across search and display over the last year, including the launch of branded collections and self-serve search capabilities. This has given brands new opportunities to win on the platform. The ability to target at either the retailer-specific or national/retailer-agnostic level gives DoorDash a strong point of differentiation from traditional retailers.

ON THE HORIZON
For CPG, DoorDash is adding new-to-brand and product-level reporting for sponsored products, and in the third quarter will roll out keyword targeting and reporting. Also in Q3, the DoubleDash multiple-store delivery service will become a biddable surface.

For enterprise restaurants and franchises, Q3 will include access to self-service sponsored listings.

RETAILER / RETAIL MEDIA NETWORK
DoorDash / DoorDash Advertising

YEAR LAUNCHED
2021

AUDIENCE SIZE
25 million+ monthly active shoppers
10 million+ DashPass members
KEY PARTNERS
CitrusAd, Epsilon, The Trade Desk

RECENT DEVELOPMENTS
Gopuff Ads has enhanced its sampling capabilities with a Surprise & Delight program for in-bag inserts of product and marketing materials. Brands can also set up samples as items that can be added to carts for free.

ANALYSIS
Gopuff is an extremely versatile platform that partners closely with agencies and brands to redefine the online shopper experience. They stand out among on-demand services platforms through their ability to personalize the shopper experience, leverage cutting-edge innovation and experiential marketing, and offer sampling and social commerce opportunities.

ON THE HORIZON
N/A
KEY PARTNERS
PromoteIQ, The Trade Desk, Neptune Retail Solutions

RECENT DEVELOPMENTS
The 2023 Path to Purchase Institute Annual Trends Report ranked Kroger #1 for Data Actionability; Kroger has also ranked #1 on Targeting Effectiveness and Measurement Capabilities for the last two years.

ANALYSIS
KPM invested early in offering a breadth of media opportunities, and their ability to apply handcrafted audiences to unique media plans helps them deliver effectively against advertiser needs. As the marketplace has matured, they’ve leaned into developing deeper strategies for cohesively leveraging placements to provide a seamless shopper experience both online and in-store. Kroger’s focus on expansion into new geographic regions via remote fulfillment hubs (with partner Ocado) leaves KPM uniquely positioned to enjoy strong growth in the coming year.

ON THE HORIZON
Disney Advertising and KPM are powering the next generation of streaming TV advertising fueled by retail media insights. This collaboration will drive value for brands by combining the purchase-based insights of KPM with the premium CTV content of Disney. Beta campaigns will include customized audiences, managed service, and measurable sales reporting.

TOP-LINE ASSESSMENT
RETAILER / RETAIL MEDIA NETWORK
Kroger / Kroger Precision Marketing (KPM)
YEAR LAUNCHED
2017
AUDIENCE SIZE
60 million households

TARGETING
How they engage with their shoppers

MEASUREMENT & REPORTING
Transparency and sophistication of results

MEDIA OPPORTUNITIES
Ability to connect with shoppers along the entire path to purchase

INNOVATION
Driving next-level capabilities & media opportunities

PARTNERSHIP
Ability to build best-in-class joint business collaboration
KEY PARTNERS
Criteo, CitrusAd, The Trade Desk, Google Ad Manager, LTK

RECENT DEVELOPMENTS
Roundel launched a YouTube product, as well as new display inventory on the Target App’s search listing pages.

ANALYSIS
The shift in vendor income credit for programmatic buys is the next step in Roundel’s efforts both to let brands directly control their media buys and to shift the activation and reporting workload on the KIOSK analytics platform to brands and their agency partners.

ON THE HORIZON
Coming soon are several enhancements to measurement (more granular lift metrics) and KIOSK (benchmarks, inclusion of Programmatic by Roundel), increased owned & operated inventory for Target Product Ads and display, and expanded inventory via PbR.
KEY PARTNERS
The Trade Desk, Circana, LiveRamp, Pacvue, CommerceIQ, Skai, Flywheel, Stackline, Pinterest

RECENT DEVELOPMENTS
Among recent developments are display retargeting and In-club attribution for search campaigns. The network is among the first to connect search and sponsored product ads to offline sales, giving advertisers greater visibility into results. Additionally, in partnership with The Trade Desk, LiveRamp and IRI (now Circana), they’re helping advertisers reach shoppers through real-time, intelligently retargeted display ads.

ANALYSIS
Sam’s Club MAP has made huge strides during their first year, paving the way toward potentially industry-leading measurement practices by offering transparency and real-time data access. Their current offerings provide a multitude of ways to engage shoppers based on KPIs. MAP still has opportunities to expand their offerings into more channels like Meta and influencers.

ON THE HORIZON
Moving forward, the MAP team will continue evolving their data monetization and ad tech partnership strategy while remaining focused on the Sam’s Club member. They’re also concentrating on testing, building and partnering to deliver an additive ad experience for members; working to evolve search, display and omnichannel offerings; and seeking to improve the customer experience through connected analytics.

RETAILER / RETAIL MEDIA NETWORK
Sam’s Club / Sam’s Club Member Access (MAP)

YEAR LAUNCHED
2022

AUDIENCE SIZE
Not Disclosed

TOP-LINE ASSESSMENT

TARGETING
How they engage with their shoppers

MEASUREMENT & REPORTING
Transparency and sophistication of results

MEDIA OPPORTUNITIES
Ability to connect with shoppers along the entire path to purchase

INNOVATION
Driving next-level capabilities & media opportunities

PARTNERSHIP
Ability to build best-in-class joint business collaboration
Shipt

KEY PARTNERS
Criteo, CitrusAd, Pacvue

RECENT DEVELOPMENTS
Shipt recently added high-impact, shoppable display units.

ANALYSIS
Shipt can target at the retailer-specific or national/retailer-agnostic level. The platform supports deliver-to-home offerings for a broad range of retailers in addition to parent Target. Revamped upper-funnel onsite display and offsite social media capabilities are helping brands win across the path to purchase.

ON THE HORIZON
Shipt plans to increase utilization of first-party data for targeting across various engagement channels.
KEY PARTNERS
Circana, Criteo, The Trade Desk, Quotient, Neptune Retail Solutions, Epsilon

RECENT DEVELOPMENTS
WAG recently introduced custom audience targeting for self-serve programmatic. They also began accepting segments from the Crossix data platform for both managed and self-service.

ANALYSIS
WAG is a modern personalization engine that can leverage insights from 105 million+ myWalgreens loyalty program members and one billion daily digital customer touchpoints to give brands more meaningful ways to connect with shoppers. Real-time SKU-level optimization based on daily transactions is available via WAG’s programmatic DSP and clean room.

ON THE HORIZON
In the works are partnerships with Snap, TikTok, and Nextdoor (WAG is looking for brand partners for testing). WAG’s partnership with IRI (now Circana) is expanding to include Facebook and Pinterest, which will facilitate incremental conversion measurement.

TOP-LINE ASSESSMENT
RETAILER / RETAIL MEDIA NETWORK
Walgreens / Walgreens Advertising Group (WAG)
YEAR LAUNCHED
2020
AUDIENCE SIZE
109 million

TARGETING
How they engage with their shoppers

MEASUREMENT & REPORTING
Transparency and sophistication of results

MEDIA OPPORTUNITIES
Ability to connect with shoppers along the entire path to purchase

INNOVATION
Driving next-level capabilities & media opportunities

PARTNERSHIP
Ability to build best-in-class joint business collaboration
KEY PARTNERS
The Trade Desk, Pacvue, Flywheel

RECENT DEVELOPMENTS
Walmart Connect recently announced the launch of display auctions for onsite display through their display self-serve platform, along with variant bidding for search campaigns. Also, advertisers are now able to toggle between featured, halo and total item set views in the advertising dashboard to determine results against each.

ANALYSIS
Walmart is focused on investing in their media offerings to become a top 10 ad business overall (not just the leader among RMNs). The additions and enhancements made to their media products over the last year have resulted in more strategic, KPI-driven campaigns and improved performance for advertisers. However, there is still room for improvement with both media opportunities and measurement.

ON THE HORIZON
Walmart Connect continues to focus on making improvements to both their ad products and tools. They also continue to test sponsored video search placement onsite in addition to other placements on Roku, Snapchat and TikTok.

RETAILER / RETAIL MEDIA NETWORK
Walmart / Walmart Connect

YEAR LAUNCHED
2017

AUDIENCE SIZE
100 million+
GLOSSARY

Details and definitions for the evaluation criteria across four key Performance Areas.
<table>
<thead>
<tr>
<th>Glossary Targeting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience Scale</td>
<td>The retail media network has an audience of at least 50 million shoppers.</td>
</tr>
<tr>
<td>Audience Growth</td>
<td>The retail media network’s audience has grown by at least 10% year over year.</td>
</tr>
<tr>
<td>Purchase-Based Targeting</td>
<td>The availability of a proprietary first-party database of shopper sales data.</td>
</tr>
<tr>
<td>Keyword Targeting</td>
<td>The ability to buy top-of-page placement in the search results of keywords or target ads based on keyword searches.</td>
</tr>
<tr>
<td>Geo-Targeting</td>
<td>The ability to target campaigns to specific locations such as ZIP codes or store footprints.</td>
</tr>
<tr>
<td>Behavioral Targeting</td>
<td>The ability to target campaigns based on specific shopping activity on the retailer’s website such as browsing or search.</td>
</tr>
<tr>
<td>Contextual Targeting</td>
<td>The ability to place ads in specific locations on the retailer's website or within relevant content off-platform.</td>
</tr>
<tr>
<td>Demographic Targeting</td>
<td>The ability to target campaigns to specific personal characteristics.</td>
</tr>
<tr>
<td>Competitive Conquering</td>
<td>The ability to target campaigns to your competitors’ shoppers.</td>
</tr>
<tr>
<td>Templated Audience Segments</td>
<td>The ability to leverage pre-built audience segments (such as holiday entertaining or Millennial shoppers) that are available to all advertisers.</td>
</tr>
<tr>
<td><strong>Custom 1P Audiences</strong></td>
<td>The ability for the advertiser to create unique “from scratch” audience segments from the retailer’s 1st party data that are not available to other advertisers.</td>
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<tr>
<td>------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Clean Room / Brand Audience Ingestion</strong></td>
<td>The ability to share anonymized brand data for targeting and measurement.</td>
</tr>
<tr>
<td><strong>Retargeting / Site Pixeling</strong></td>
<td>The ability to leverage tracked behavior on the retailer’s platform to conduct retargeting campaigns.</td>
</tr>
<tr>
<td><strong>Retailer Targeting</strong></td>
<td>On cross-retailer platforms (like DoorDash), the ability to target campaigns at the retailer level. On retailer platforms, the ability to target campaigns at the banner level (e.g., Ralphs vs. King Soopers at Kroger).</td>
</tr>
</tbody>
</table>
### Glossary: Measurement & Reporting

<table>
<thead>
<tr>
<th>Standard Media Metrics</th>
<th>Commonly accepted methods of digital media measurement such as impressions, click-through rate and cost per click.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closed-Loop Attributed Sales &amp; ROAS</td>
<td>The use of the retail media network’s own 1P data to measure sales and resulting ROAS (return on ad spend).</td>
</tr>
<tr>
<td>100% Deterministic Sales Data</td>
<td>The retail media network exclusively leverages 1P data for reporting rather than modeled or extrapolated data.</td>
</tr>
<tr>
<td>Total Omni Sales Data</td>
<td>The retail media network reports both online and brick &amp; mortar sales impact.</td>
</tr>
<tr>
<td>% New Buyers</td>
<td>The retail media network reports the number or percentage of buyers who are new to your brand.</td>
</tr>
<tr>
<td>Sales Lift &amp; iROAS (True Incrementality)</td>
<td>The ability to measure a campaign’s true incremental sales impact by analyzing granular data points among actual buyers such as new-to-brand, purchase frequency or basket ring.</td>
</tr>
<tr>
<td>Viewability, Fraud Transparency</td>
<td>The retail media network provides access to, or the ability to utilize, outside ad quality measurement tools (like MOAT, DoubleVerify or IAS).</td>
</tr>
<tr>
<td>Self-Serve/Real-Time Reporting</td>
<td>The ability for advertisers to access reports directly, in as close to real time as possible.</td>
</tr>
<tr>
<td>Media Mix Modeling</td>
<td>The ability to gauge the unique impact of each specific tactic within a campaign through multi-touch attribution, mixed modeling or predictive analysis, either in-flight or post-event.</td>
</tr>
<tr>
<td>Custom/Ad Hoc Analysis</td>
<td>The ability for advertisers to create or request their own custom analysis/reports.</td>
</tr>
<tr>
<td><strong>Self-Serve Onsite Search</strong></td>
<td>Does the retail media network allow advertisers to launch, measure and optimize search activations via self-serve ad platforms, either through the retailer’s own platform or 3P services such as Criteo, CitrusAd and Pacvue?</td>
</tr>
<tr>
<td><strong>Self-Serve Programmatic</strong></td>
<td>Does the retail media network have a demand side platform (DSP) or private marketplace (PMP) that lets advertisers directly manage off-site programmatic campaigns?</td>
</tr>
<tr>
<td><strong>Self-Serve Onsite Display</strong></td>
<td>Does the retail media network have a platform allowing advertisers to directly manage on-site display campaigns?</td>
</tr>
<tr>
<td><strong>Shoppable Content</strong></td>
<td>Does the retail media network offer opportunities for advertisers to create shoppable content (such as recipe pages or click-through videos)?</td>
</tr>
<tr>
<td><strong>AR/VR</strong></td>
<td>Is the retail media network creating shopper engagement opportunities around the emerging technologies of augmented and virtual reality?</td>
</tr>
<tr>
<td><strong>Livestream Shopping</strong></td>
<td>Is the retail media network hosting live sponsored shopping events on digital platforms or do they have partnerships available to stage them?</td>
</tr>
<tr>
<td><strong>1P Data Sharing</strong></td>
<td>Does the platform let advertisers use its 1P data for campaigns handled by 3P service providers/publishers outside of its own partner network?</td>
</tr>
<tr>
<td><strong>Dynamic Creative Optimization (DCO)</strong></td>
<td>Can advertisers use 3P creative tools (such as AdForm or Flashtalking) to mass-personalize ad experiences to drive shopper engagement?</td>
</tr>
<tr>
<td><strong>Loyalty Program Alignment</strong></td>
<td>Does the retailer have a loyalty program that can be leveraged for retail media network activity?</td>
</tr>
<tr>
<td>JBP Process for Retail Media</td>
<td>Does the retail media network offer joint business planning and/or preferred partnerships for brands and agencies?</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Retailer-Level JBP Integration</td>
<td>To what extent is retail media network activity integrated into the broader JBP process between the retailer and advertiser?</td>
</tr>
<tr>
<td>Annual Planning/Top-to-Tops</td>
<td>Does the relationship include standard business opportunities such as annual planning and top-to-top meetings?</td>
</tr>
<tr>
<td>In-Store Opportunity Leverage</td>
<td>Can the retail media investment earn value-added activation in stores (like increased distribution or incremental display)?</td>
</tr>
<tr>
<td>Partner Training Programs/Certifications</td>
<td>Is the retail media network creating shopper engagement opportunities around the emerging technologies of augmented and virtual reality?</td>
</tr>
<tr>
<td>Dedicated Account Reps</td>
<td>Does the retail media network provide advertisers with a direct point of contact?</td>
</tr>
</tbody>
</table>

| Dedicated Data Analytics/Other Resources | Does the retail media network have dedicated internal resources for data analytics and other key business needs? |
| Creative Flexibility (Self-Serve Certification) | How much control does the advertiser have over campaign creative/messages? Can advertisers earn creative certification to develop ad units directly within the platform? |
| First-to-Market Test & Learns | Does the retail media network offer opportunities to conduct first-to-market test & learns on new offerings before activating them at scale? |
OUR TEAM

Eric Pankratz
Commerce Media Director, Target

Jennifer Olsen
Commerce Media Director, Small Format

Katy Jordan
Commerce Media Director, Walmart

Courtney Crossley
VP Commerce Media

Kristin Wall
Sr. Ecommerce Director

Andy Howard
Commerce Media Director, Regional Grocery

Ethan Goodman
VP Commerce Media

Erin Taylor
Commerce Media Director, Kroger
The Mars Agency is an award-winning, independently owned, global commerce marketing practice. With talent around the world, we connect people, technology, and intelligence to make our clients’ business better today than it was yesterday. Mars’ industry-leading MarTech platform, Marilyn®, helps marketers understand the total business impact of their commerce marketing, enabling them to make better decisions, create connected experiences and drive stronger results. Learn more at themarsagency.com and meetmarilyn.ai.