

SEPT 2026

MARS UNITED
COMMERCE

SPECIAL _____ REPORT

RETAIL MEDIA REPORT CARD

A universal tool for effective cross-network evaluation

INTRODUCTION

What a difference a quarter makes. As we published the last edition of our Retail Media Report Card back in June, some industry pundits were speculating that the rise of agentic search would have a negative impact on the future relevance of retail media networks.

Fast-forward a few months, and networks not only are forging partnerships with leading third-party answer engine operators, they're also introducing agentic search platforms of their own — complete with incremental ad inventory for brand partners (see page 9 for a few examples).

Networks also continue to diversify their media inventory well beyond the onsite ad opportunities that currently still account for 77% of U.S. outlays, per EMARKETER.

They're building in-store media platforms to reach the millions of shoppers who still make most CPG purchases. And they're spreading out across all avenues of offsite digital media to reach existing and new shoppers anywhere they consume media. Heck, they're even starting to create the content that's being consumed (see page 24).

Collectively, these measures counteract the potential impact of agentic search, which theoretically reduces traffic to retailer websites by helping shoppers make decisions beforehand. Initial crisis averted.

Retail media therefore heads into the back half of 2026 with wind in its sails and momentum in its sales: EMARKETER projects U.S. ad spending to grow another 20% (or so) to reach nearly \$73.0 billion this year and hit \$118 billion by 2030. And while most of that will still go to onsite activation, offsite media allocations (including in-store) are growing twice as fast. That bullishness has some retailers openly discussing their retail media revenue as part of earnings calls as a vital source of overall growth.

The amplified marketplace competition brought by agentic search, meanwhile, is helping drive ingenuity and innovation, as networks strive to build unique platforms and processes that make it easier for brand partners to achieve their specific business goals by providing access to identified audiences across the entire path to purchase.

Intensifying competition is also making it even more critical for brand advertisers to scrutinize their retail media options carefully. Brands are tasked with developing a strategic understanding of how best to leverage retail media to drive incremental growth, deciding which retailers provide the greatest opportunities for success, and determining what specific media tactics are most effective at achieving the desired impact.

They also must align their retail media activity with the rest of the commerce marketing plan, which can improve success not only through more seamless shopper engagement but by fostering greater internal efficiency across functions. This step is critical to future growth for brands and the retail media networks themselves.

On the other side of the table, retail media networks similarly understand that future sales growth will require a greater emphasis on enterprise-wide commerce partnerships rather than a myopic focus on media transactions. Integration has become a cornerstone for success.

How to Pick Partners

There are two very 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 — your broader retailer relationship, and the opportunities it provides for achieving your specific brand objectives. Retail media has become a critical aspect of the broader supplier-retailer partnership and, in an increasing number of 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. As the marketplace has evolved, in fact, a growing number of criteria that initially served as network differentiators are now “Table Stakes” that any network must offer to address the needs of brand partners and keep pace with competitors.

To help our clients efficiently evaluate spending opportunities, Mars United created a retail media health scorecard to track the capabilities of leading networks across the key criteria advertisers need to optimally plan, execute, and measure their activity. This general framework for network scorecarding is customized for each client to reflect its unique business objectives, budget, 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.

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, Mars United has publicly shared this Retail Media Report Card on a quarterly basis since fall 2022. This public report presents the foundational scorecarding elements of our evaluation process for clients.

INTRODUCTION

Quarterly Overview

We update each quarterly Report Card 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 in the industry.

For that reason, we updated our Platform Profiles last quarter to more clearly and explicitly present each network's key capabilities and ways of working. See page 27 for a rundown of all the new elements.

In terms of capability updates, 16 of the 27 retail media networks covered in this Report Card added a collective 47 tools and opportunities to their existing capabilities, working either to keep pace or gain an advantage (as the case may be) in this highly competitive marketplace.

Lowe's Media Network outpaced the field with eight updates across four Key Performance Areas, followed by **Uber Advertising** with six. **Ace Hardware's RedVest Media** and **Shipt Media** had five updates apiece.

The totals represent more updates among fewer networks than in the second-quarter Report Card, a possible sign that some of the more established networks are reaching maturity in terms of their basic capabilities and are now doubling back to develop more sophisticated tools.

Updates for Targeting and Measurement & Reporting Capabilities were the most common this quarter, a trend even more evident in the drill-downs for those two Key Performance Areas now presented in the Platform Profiles.

It's also worth noting that 41% (19) of the updates came from on-demand delivery providers Uber, Shipt, DoorDash, Instacart, and Gopuff. The channel has become an important part of retail media strategy for brands looking to reach shoppers in retailer-neutral environments.

We hope you enjoy the 15th edition of Mars United's Retail Media Report Card.

The goal of this public Retail Media Report Card is to offer brand advertisers a simple, “step one” method of cross-network evaluation. For clients, we prepare a more extensive assessment that reviews and compares each network’s strengths and weaknesses in the context of their unique business needs and relationships.

We often also share this deeper level of analysis 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 our evaluation provides. In fact, all the networks covered in this report assist with its preparation.

The scorecard presents a clear view into the relative strength and sophistication of each retail media network. In this way, brands can easily identify the industry leaders, versus the developing platforms, versus the networks trailing the marketplace in our five Key Performance Areas.

As the marketplace has matured and advertisers have refined their expectations, some criteria that initially may have been optional capabilities should now be considered standard requirements for any competitive retail media network.

Mars United has identified 48 of the 89 assessment criteria evaluated in this report as “Table Stakes,” and considers each network’s ability to deliver them as a key component of our evaluation. Table Stakes criteria are identified in the first column of each Performance Area scorecard (pages 10-23).

These assessments are meant to be used as one 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 straightforward “yes or no” determinations on network 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, the brand’s specific goals and KPIs need to be considered.)

While this specific process isn’t necessarily the “be all, end all” solution, we have found it extremely effective at helping Mars United’s clients evaluate the broader landscape of 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.

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Notes:

The information in this report has been collected from various industry sources by Mars United Commerce and, in most cases, verified by the retail media networks themselves. Factual information represents the best available data at the time of publication. Mars United Commerce 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 Mars United Commerce’s own experience and expertise.



USING THE SCORECARD

Mars United Commerce has established 89 evaluation criteria that can be grouped into five 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 and other metrics, or advertise through social media channels and in physical stores. Each of the criteria is explained in greater detail in the Glossary at the end of this report. Additional information about each network’s capabilities can be found in the Platform Profiles starting on page 27.

CHART KEY



First time this retail media network is covered



“Table Stakes” criteria that all networks should offer



Upgrade in assessment level from last Report Card



New criteria added to the evaluation this quarter

USING THE
SCORECARD

5 KEY PERFORMANCE AREAS

01_TARGETING

How robust is the network's overall audience? How sophisticated is its ability to engage with specific shopper segments? Does it have clean room data sharing capabilities? We evaluate each network's Targeting capabilities based on 15 criteria, ranging from audience scale to data clean room opportunities.

02_MEASUREMENT & REPORTING

What is the level of data transparency and reporting granularity for the network's results? Does it provide access to customer and sales data? Does it offer media mix modeling? We evaluate each network's Measurement & Reporting capabilities based on 17 criteria, ranging from programmatic sales measurement to custom analysis options.

03_MEDIA OPPORTUNITIES

How well does the network connect with shoppers along the entire path to purchase, both onsite and across the digital landscape? Is it offering in-store opportunities along with digital media? We evaluate each network's Media Opportunities across 36 potential touchpoints, ranging from onsite search to in-store radio.

04_INNOVATION

Does the network consistently develop next-level media opportunities incorporating new tools and technologies? Is it keeping pace with the evolving demands of both advertisers and shoppers? We evaluate each network's Innovation strengths based on 7 criteria, ranging from external first-party data sharing to generative AI search tools.

05_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 14 criteria, ranging from training programs to JBP opportunities.

EVALUATED RETAIL MEDIA NETWORKS

The icons below are used to identify the networks in the Key Performance Area charts on pages 10 to 23.



Walmart



Sam's Club



Retail Media

Costco



Target



Amazon



Kroger



Albertsons



Ahold Delhaize USA



Hy-Vee



Winn-Dixie



Wakefern Media Exchange



Walgreens



CVS Pharmacy



Best Buy



Dollar General



Family Dollar



Instacart



Uber



DoorDash



Gopuff



Shipt



The Home Depot



Lowe's Home Improvement



Ace Hardware



7-Eleven



Wawa



Petco



Table Stakes

Capability Updates

A roundup of the capabilities networks have added since our last Retail Media Report Card (designated with green circles in the Key Performance Area charts):

Amazon Ads: Self-Service Sales Data; YouTube; AI Content Generation, Generative AI Search

Costco Retail Media: YouTube

CVS Media Exchange (CMX): Dynamic Creative Optimization/Personalization

DoorDash Ads: Rest of Market Analysis; Streaming Audio, Digital Out of Home

Goose Media Network: JBP Process for Retail Media

Gopuff Ads: Experiential/Out-of-Store Sampling; AI Content Generation, Generative AI Search

Gulp Media Network: Baseline Sales Measured by Deterministic Data

Hy-Vee RedMedia: Streaming Audio; Generative AI Search

Instacart Ads: Geo-Targeting; Rest of Market Analysis

Lowe's Media Network: Competitive Conquesting, Retargeting/Site Pixeling; Sales Lift & iROAS (via A-B/exposed vs. unexposed testing), Sales Lift & iROAS (True incrementality), Media Mix Modeling, Basket Analysis; Circular; Connected TV; In-Store Signage

Petco Spot Media: Dynamic Creative Optimization/Personalization

RedVest Media: Templated Audience Segments; Self-Service Onsite Search (In-grid), Self-Service Onsite Search (Banners), Social Influencers

Roundel: Sales Lift & iROAS (via A-B/exposed vs. unexposed test); YouTube

Shipt Media: Demographic Targeting, Clean Room/Brand Audience Ingestion; Custom/Ad Hoc Analysis; Digital Sampling; Social Influencers

Uber Advertising: Demographic Targeting; Self-Service/Real-Time Reporting, Media Mix Modeling; Offsite Search; Experiential/Out-of-Store Sampling, Push Notifications

Walgreens Advertising Group (WAG): In-Store Video/TV; In-Store Opportunity Leverage

Key Performance Upgrades

Highlights from the many enhancements networks have made to their offerings since the last Report Card (see Platform Profiles for more).

Ahold Delhaize Retail Media: Digital screens in new strategic locations (vestibule, front-aisle, and pharmacy) should reach 1,000+ stores by year end.

Albertsons Media Collective: A new measurement framework projects lifetime customer value over 52 weeks, providing a more complete picture of campaign impact.

Amazon Ads: Sponsored search campaigns can be one-clicked into relevant “Alexa for Shopping” agentic search prompts without the need for any additional creative, setup, or spend.

CVS Media Exchange: Checkout ads are in open beta across 6,900 stores.

Dollar General Media Network: New “SMART” campaigns let advertisers activate across the search environments of Dollar General and on-demand delivery partner DoorDash in a single campaign.

Gopuff Ads: “Go” is a multi-modal, AI-enabled shopping assistant that makes product recommendations based on location, time, and purchase history whenever users open the Gopuff app.

Instacart Ads: An integration with Google Search lets consumers using AI Mode browse recommendations and add products to a cart without leaving the conversation.

Kroger Precision Marketing: The AI-enabled “Shopping Assistant” helps shoppers discover relevant products, build baskets, and receive personalized recommendations. Product listing ads can be served up at relevant moments.

Sam’s Club Connect: The in-club demo cart experience now features tablets that let members easily rate the sampled products. Ratings are automatically added to the right product detail page on SamsClub.com.

Shipt Media: “Shipt Kits” are curated product bundles that customers can one-click into their baskets. Brand opportunities span inclusion in seasonal kits or exclusive, fully branded kits.

Walmart Connect: The network has moved to a unified, deduplicated attribution methodology across sponsored search, onsite display, and Walmart DSP, providing a standardized cross-channel view of performance.

																
Targetable Audience Scale (50 million+ shoppers)		ND	ND													
Purchase-Based Targeting (First-party data)																
Keyword Targeting (Search)																
Geo-Targeting (ZIP code or store-level)																
Behavioral Targeting (e.g., Browsing behavior)																
Contextual Targeting (e.g., Site placement/location)																
Demographic Targeting																
Competitive Conquesting																
Templated Audience Segments (e.g., Millennial Moms)																
Custom 1P Audiences (Unique "from scratch" segmentation)																
Clean Room/Brand Audience Ingestion																
Retargeting/ Site Pixeling																
Retailer- or Banner-Specific Targeting		NA	NA	NA	NA	NA				NA			NA	NA	NA	NA
Predictive/ Look-Alike Audiences																
Audience Expansion via 3P Data																

													
Targetable Audience Scale (50 million+ shoppers)		ND	ND	ND	ND	ND	ND				ND	ND	
Purchase-Based Targeting (First-party data)													
Keyword Targeting (Search)													
Geo-Targeting (ZIP code or store-level)													
Behavioral Targeting (e.g., Browsing behavior)													
Contextual Targeting (e.g., Site placement/location)													
Demographic Targeting													
Competitive Conquesting													
Templated Audience Segments (e.g., Millennial Moms)													
Custom 1P Audiences (Unique “from scratch” segmentation)													
Clean Room/Brand Audience Ingestion													
Retargeting/ Site Pixeling													
Retailer- or Banner-Specific Targeting							NA	NA			NA	NA	NA
Predictive/ Look-Alike Audiences													
Audience Expansion via 3P Data													

ND = Not disclosed; NA = Not applicable

																
Standard Media Metrics (e.g., Impressions, CTR, CPC)	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Closed-Loop Attributed Sales & ROAS (First-party data)	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Baseline Sales Measured by Deterministic Data	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
IAB Measurement Compliance		●	●		●	●	●	●	●	●	●	●	●	●	●	●
Ad-Attributed Total Omni Sales Data	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
% New Buyers	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Sales Lift & iROAS (via A-B/exposed vs. unexposed test)	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Sales Lift & iROAS (True incrementality)			●	●	●	●	●	●	●	●	●	●	●	●		
Viewability/ Fraud Transparency (Direct or via 3P tags)	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●
Self-Service/ Real-Time Reporting	●	●	●		●	●	●	●	●	●		●	●	●	●	●
Media Mix Modeling		●	●		●	●	●	●		●	●		●	●	●	
Custom/ Ad Hoc Analysis	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Targeted Audience- Level Reporting	●	●	●	●	●	●	●	●		●	●	●	●	●	●	●
Creative Versioning- Level Reporting		●	●	●	●	●	●	●		●	●	●	●	●	●	●
Basket Analysis		●	●			●	●	●	●	●	●	●	●	●	●	
Rest of Market Analysis		●	●		●	●	●						●			
Self-Service Sales Data		●	●		●	●	●	●	●	●		●	●	●	●	●

												
Standard Media Metrics (e.g., Impressions, CTR, CPC)												
Closed-Loop Attributed Sales & ROAS (First-party data)												
Baseline Sales Measured by Deterministic Data												
IAB Measurement Compliance												
Ad-Attributed Total Omni Sales Data		NA	NA	NA	NA	NA						
% New Buyers												
Sales Lift & iROAS (via A-B/exposed vs. unexposed test)												
Sales Lift & iROAS (True incrementality)												
Viewability/ Fraud Transparency (Direct or via 3P tags)												
Self-Service/ Real-Time Reporting												
Media Mix Modeling												
Custom/ Ad Hoc Analysis												
Targeted Audience-Level Reporting												
Creative Versioning-Level Reporting												
Basket Analysis												
Rest of Market Analysis												
Self-Service Sales Data												

NA = Not applicable

																
Managed Service Onsite Search (In-grid)	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●
Managed Service Onsite Display	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Managed Service Onsite Search (Banners)	●	●	●	●	●	●	●	●	●	●		●	●	●	●	●
Self-Service Onsite Search (In-grid)	●	●	●	●	●	●	●	●	●	●		●	●	●	●	
Self-Service Onsite Display	●	●				●	●	●		●		●			●	
Self-Service Onsite Search (Banners)	●	●	●			●	●	●	●	●		●	●	●	●	
Email (Brand-sponsored spot or stand-alone)	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Mobile App Integration	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Circular (Print or digital)	●		●	●		●			●	●	●	●	●	●		●
Digital Sampling	●					●	●			●		●				
Managed Service Brand Store		●	●	●	●	●	●	●	●	●		●	●	●	●	●
Self-Service Brand Store		●				●	●					●				

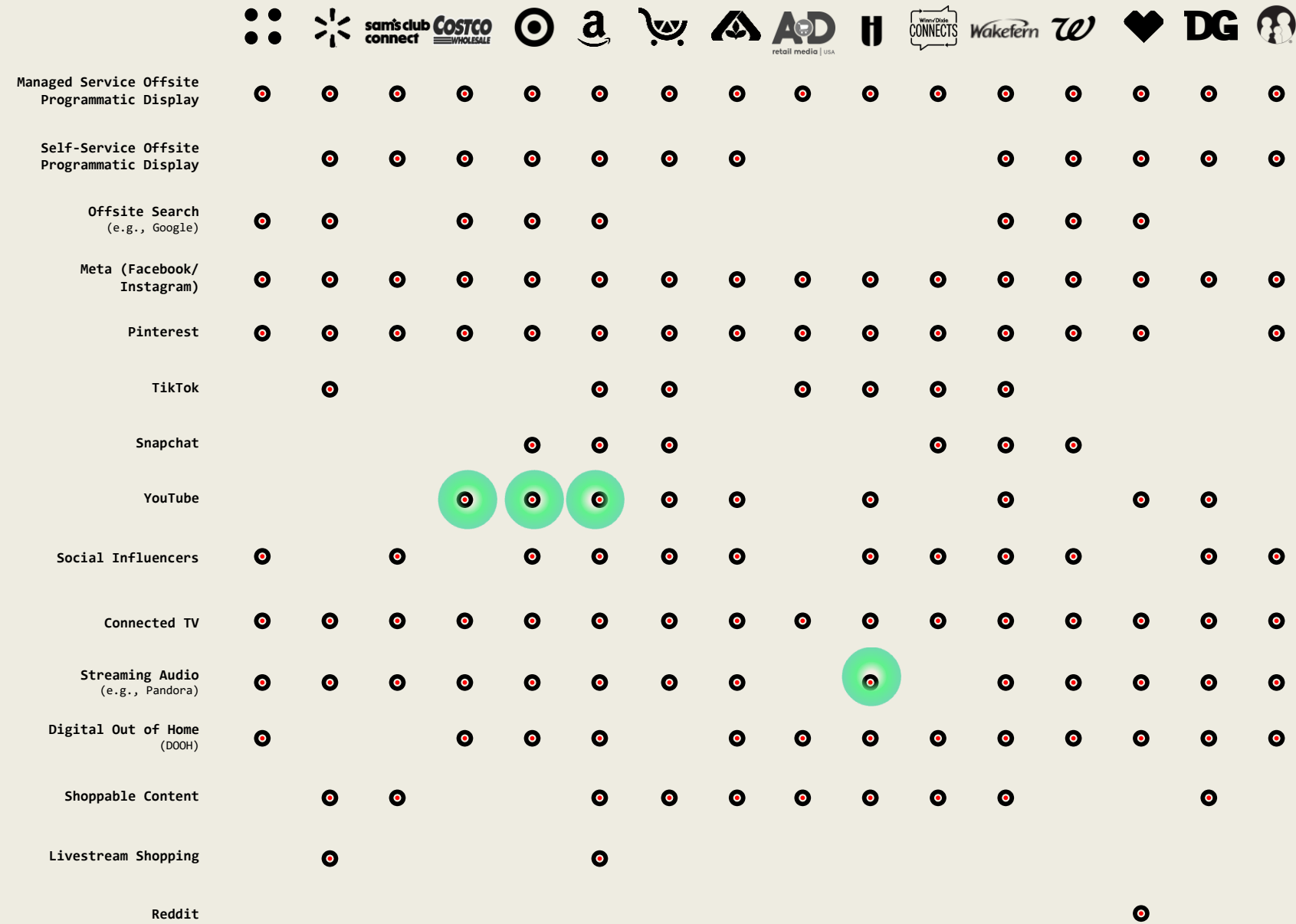
Note: Networks earn a circle if the opportunity can be purchased directly through the network as part of a campaign. Opportunities that can only be secured separately through a retailer's merchant or marketing team do not qualify.

NA = Not applicable

											
Managed Service Onsite Search (In-grid)	●	●	●	●	●	●	●	●	●	●	●
Managed Service Onsite Display	●	●	●	●	●	●	●	●	●	●	●
Managed Service Onsite Search (Banners)	●			●	●	●	●	●	●	●	●
Self-Service Onsite Search (In-grid)	●	●	●	●	●	●	●	●		●	●
Self-Service Onsite Display	●	●	●	●	●	●					●
Self-Service Onsite Search (Banners)	●	●		●	●	●		●			●
Email (Brand-sponsored spot or stand-alone)	●	●	●	●	●	●	●	●	●	●	●
Mobile App Integration	●	●	●	●	●	●	●	●	●	●	●
Circular (Print or digital)	●	●	NA	NA	NA	●	●	NA			●
Digital Sampling	●		●	●	●						NA
Managed Service Brand Store		●	●	●	●	●	●			●	●
Self-Service Brand Store											

Note: Networks earn a circle if the 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.

NA = Not applicable



Note: Networks earn a circle if the 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.

													
Managed Service Offsite Programmatic Display													
Self-Service Offsite Programmatic Display													
Offsite Search (e.g., Google)													
Meta (Facebook/ Instagram)													
Pinterest													
TikTok													
Snapchat													
YouTube													
Social Influencers													
Connected TV													
Streaming Audio (e.g., Pandora)													
Digital Out of Home (DOOH)													
Shoppable Content													
Livestream Shopping													
Reddit													

Note: Networks earn a circle if the 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.

															
In-Store Sampling	●	●	●	●	●				●	●	●			●	●
In-Store Radio	●	●	●		●		●	●	●	●	●	●	●	●	
In-Store Video/TV	●	●	●	●	●	●	●	●	●	●	●	●	●		
Gas Pump TV		●	●	●	NA	NA		●	●			NA	NA	NA	NA
Associate Engagement					●				●		●	●			●
Shelf Tags					●		●		●	●	●	●	●	●	●
In-Store Signage (e.g., aisle blades, floor graphics)			●		●		●	●	●	●	●	●	●	●	●
Experiential/ Out-of-Store Sampling		●	●		●						●		●	●	
Push Notifications			●	●		●		●	●			●		●	●

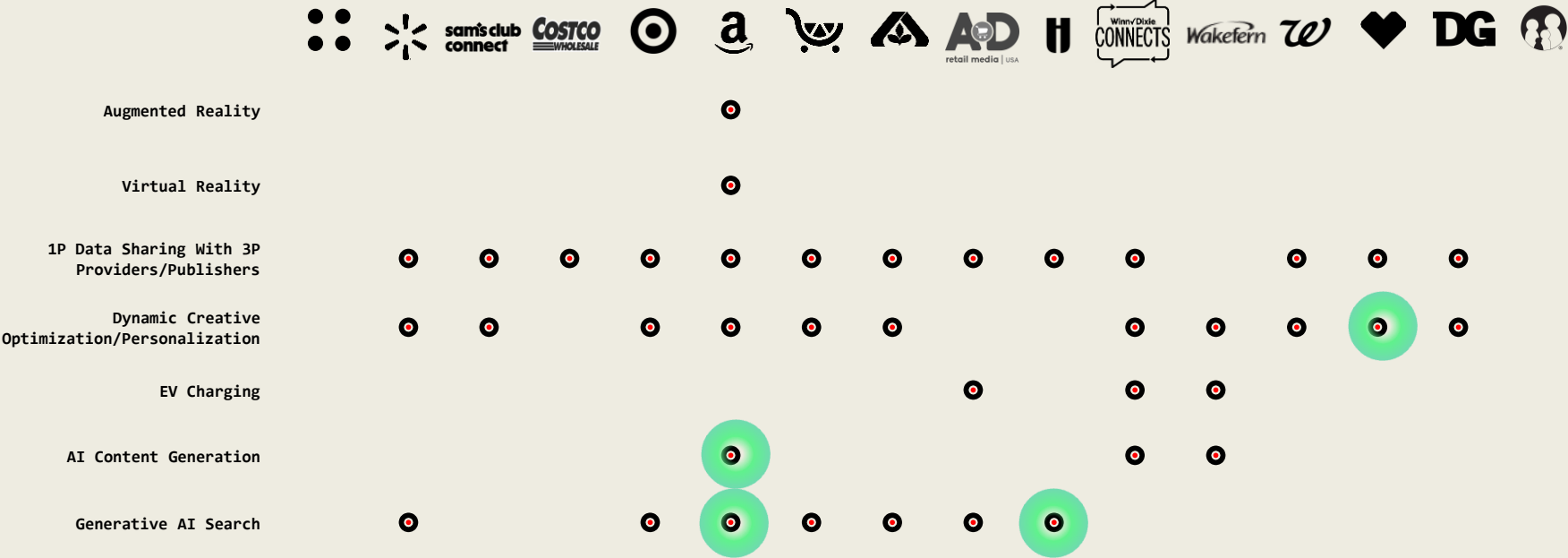
Note: Networks earn a circle if the opportunity can be purchased directly through the network as part of a campaign. Opportunities that can only be secured separately through a retailer’s merchant or marketing team do not qualify.

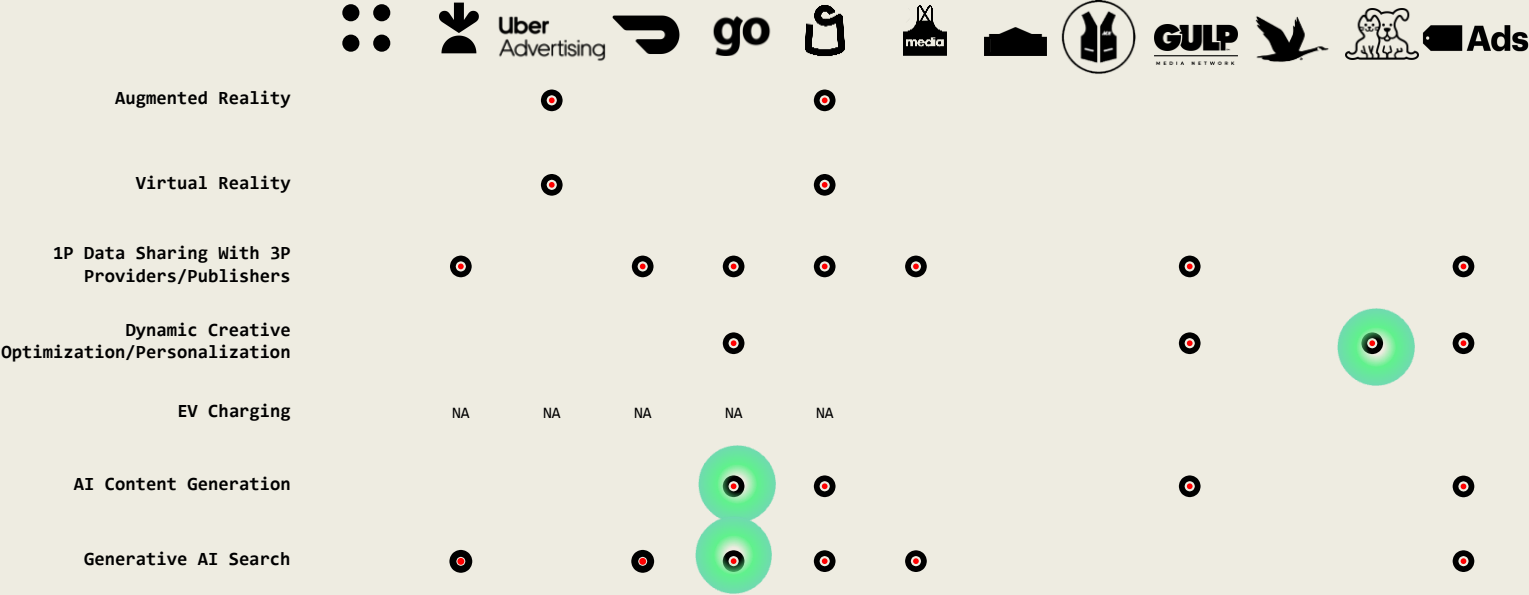
NA = Not applicable

		 Uber Advertising		go		 media						 Ads	
In-Store Sampling		NA	NA	NA		NA							
In-Store Radio		NA	NA	NA		NA							
In-Store Video/TV			NA	NA		NA							
Gas Pump TV		NA	NA	NA	NA	NA	NA	NA				NA	NA
Associate Engagement		NA	NA	NA		NA							
Shelf Tags		NA	NA	NA		NA							
In-Store Signage (e.g., aisle blades, floor graphics)		NA	NA	NA		NA							
Experiential/ Out-of-Store Sampling													
Push Notifications				NA									

Note: Networks earn a circle if the 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.

NA = Not applicable





NA = Not applicable

																
JBP Process for Retail Media																
Retailer-Level JBP Integration																
Annual Planning/Top-to-Tops																
In-Store Opportunity Leverage (e.g., Distribution/incremental display)																
Partner Training Programs/ Certifications																
Dedicated Account Reps																
Dedicated Data Analytics/ Other Resources																
Creative Flexibility (Incl. self-service certification)																
First-to-Market Test & Learns																
Agency Partnerships																
Roadmap Visibility/ Collaboration																
Transparency Into Media Rates																
Loyalty Program Alignment																
Off-Platform Strategic Vendor Partnerships																



												
JBP Process for Retail Media												
Retailer-Level JBP Integration		NA	NA	NA		NA						
Annual Planning/Top-to-Tops												
In-Store Opportunity Leverage (e.g., Distribution/incremental display)		NA	NA	NA		NA						
Partner Training Programs/ Certifications												
Dedicated Account Reps												
Dedicated Data Analytics/ Other Resources												
Creative Flexibility (Incl. self-service certification)												
First-to-Market Test & Learns												
Agency Partnerships												
Roadmap Visibility/ Collaboration												
Transparency Into Media Rates												
Loyalty Program Alignment												
Off-Platform Strategic Vendor Partnerships												

CAPABILITY SPOTLIGHT

Exclusive Branded Entertainment

Remember when simply making content shoppable was a big deal? Retail media networks are now taking that concept a whole lot farther by first developing their own content.

The idea that retail media has turned retailers into publishers has become even more literal recently as Walmart, Albertsons, and Target began developing exclusive entertainment content as part of their retail media go-to-market strategies.

The launch of in-house creative studios that help brand partners develop their advertising assets has been a steadily growing trend across networks in recent years.

The most noteworthy recent example might be the June launch of **Instacart Ads Studio**, a full-service creative marketing operation that the on-demand delivery leader is positioning as a place “where brand stories meet shopping baskets.” Spawned from Local Produce, Instacart’s existing internal agency, the offering worked with 200 brands on 420-plus campaigns during a two-year development stage.

If they haven’t rolled out full-blown creative services, advances in AI are helping networks offer some level of assistance: Nine of the 27 networks covered in this Report Card at least offer automated content generation tools if not more sophisticated content development services.

Main Street Meets Hollywood Boulevard

Those aforementioned retailers, however, have entered a whole new arena by working with publishing partners and even brand partners to produce original content — as in streaming entertainment — specifically for retail media environments:

Albertsons Media Collective teamed with Procter & Gamble this summer to unveil a new model for branded entertainment that taps into the broader “micro-drama” trend but is informed by the shopper insights behind all retail media advertising.

Rico’s Tacos, the first scripted short-form video series from the partners, integrated Bounty, Head & Shoulders, Vicks, and other P&G brands into the story of a family-operated business told over the course of 20 one- to two-minute episodes. The series was distributed across Albertsons-owned YouTube, social media, and — most uniquely — in-store digital platforms.

Walmart is leveraging its own VIZIO streaming TV platform to produce and distribute branded content specials that organically weave multiple products into a storyline and send viewers to Walmart.com for purchase. The first iteration, a summer-themed “Backyard Escapes” program in June, was followed by a back-to-college-focused “Join the Club” special in August.

“For too long, the advertising industry has treated storytelling and commerce as separate disciplines,” VIZIO GM Courtney Naudo said in a release about the initiative. “Walmart is creating a new model where content, media, and commerce work together as one connected experience.”

Target, meanwhile, has taken the partnership route, working with NBCUniversal on an exclusive, shoppable digital series overtly titled “Shop What Happens” that lets viewers buy featured products in real time. Streaming platforms include NBCU’s Peacock, TikTok, Instagram, and YouTube. Formatted for mobile viewing, the series features stars from the NBCU-owned Bravo channel in talk-show style segments about summer trends, fashion, and beauty. Depending on the platform, viewers scan QR codes or click direct links to purchase products showcased in the segments.

CAPABILITY SPOTLIGHT

Exclusive Branded Entertainment

Coming Soon to a Media Network Near You?

The idea of retailers and especially brands trying their hand at creating original, ad-friendly entertainment content isn't anything new. In fact, Walmart and P&G joined forces back in 2010-2011 to produce a "Family Movie Night" series of made-for-TV programming. And historically speaking, P&G is the company that put the soap in "soap opera" by helping launch that genre for radio and television in the 1940s.

What's new about these latest endeavors is the use of first-party shopper data not only to build an ideal audience but to develop ad hoc content for those audiences. It's the convergence of entertainment content and commerce, which lets retailers and brands shorten the path from inspiration to purchase through engaging content and technology.

For networks, exclusive content also provides a literally ownable media opportunity to offer brands — at a time when retail media relationships are moving farther away from stand-alone ad buys toward deeper, integrated partnerships.

These efforts also represent yet another way the rest of the retail media marketplace is following the lead of Amazon, whose Prime streaming service has numerous product placement and shoppable ad offerings that turn thousands of original programs into media plays.

Amazon, in fact, just enhanced its existing "Shop the Show" functionality with a "Shop the Scene" feature that leverages Amazon Lens technology to let viewers tap into the Amazon Shopping app and find items they see within content. And its Brand Innovation Lab already works with advertisers on long-form video programming.

Whatever the motivation, original content can benefit brand partners, who can contribute to (or at least support) entertainment that can drive product discovery farther up the purchase funnel while also providing a direct mechanism for immediate purchase. And by integrating naturally into programming rather than advertising around it, brands connect with audiences in less-disruptive ways that can strengthen engagement and foster trust.

"Traditional branded entertainment usually ran in one direction. A brand made or sponsored content, bought distribution and hoped the right people watched. Measurement came later," wrote Maureen Kerr, in a recent article for *Forbes*. "The retailer brings something a studio does not have: a live relationship with the shopper near the moment of purchase and a record of what that shopper actually buys."

"Retail media is evolving beyond placements toward work that drives brand love, commerce, and measurement," said Brian Monahan, SVP-Media for Albertsons Media Collective. "With aggregated shopper insights that shape the creative and evaluate performance, brands have a clearer view of what is resonating with their customers and what is driving results."

Of course, not every retailer has the resources required to create its own entertainment programming. But exclusive arrangements like Target's deal with NBCUniversal may offer a more feasible blueprint for other networks as retail media success continues moving toward stronger partnerships with brands.

PLATFORM PROFILES

Retail Media
Network Logo

RETAILER HIGHLIGHTS

Key facts and figures about the retail media network and the retailer organization that it serves.

JBP-APPROVED MEDIA PARTNERS

A list of external platforms through which a brand's campaign activation will count toward its JBP investment commitment.

PLATFORM PARTNERS

Third-party demand side platforms through which brands can build and manage ad campaigns.

KEY CAPABILITIES

An at-a-glance snapshot of key capabilities, services, and business practices made available to brand partners by the retail media network:

- Agency Partnerships
- First-Party Data Sharing
- IAB Compliance
- In-Store Opportunity Leverage
- Off-Platform Strategic Vendor Partnerships
- Partner Training
- Retailer-Level JBP Integration
- Retail Media JBP

Understanding the Platform Profiles

A guide to the new information provided on each retail media network

TARGETING & MEASUREMENT OPPORTUNITIES (chart at right)

A deeper dive into some of the key targeting and measurement opportunities from the Key Performance Areas where it's important for brands to understand which specific media types are covered.

OVERVIEW

A quick description of the retailer's position within the retail landscape, go-to-market strategy, and customer profile, along with additional facts and information.

A brief overview of the retail media network, its go-to-market strategy, marketplace positioning, key strengths, and primary objectives.

JOINT BUSINESS PLANNING

Outlines the available JBP options for retail media investments: jointly negotiated as part of the enterprise JBP; standalone with the retail media network; or both options available to the brand.

RECENT DEVELOPMENTS

A brief overview of recent additions and enhancements to the network's business operations, capabilities, or partner services.

SELF-SERVICE OPTIONS

A rundown of the onsite and offsite self-service campaign management opportunities available and the platforms offering them.

REPORTING OPTIONS

A short list of key campaign reporting opportunities available, with third-party partners noted where applicable.

AI CAPABILITIES

A short list of key AI capabilities offered by the network. (Visit the Glossary at the end of the report for definitions.)

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
TARGETING	Capability Available			
	Managed Service			
	Self-Service			
	Purchase-Based			
	Keyword			
	Behavioral			
	Contextual			
	Geo-Targeting			
	Demographic			
	Competitive Conquesting			
MEASUREMENT/REPORTING	Clean Room Audiences			
	Predictive/Look-Alike			
	Retargeting/Pixeling			
	Custom Analysis			
	Closed-Loop Attributed Sales/ROAS			
	% New Buyers			
	Incrementality (Test vs. Control)			
	Incrementality (True Incrementality)			
	Viewability/Fraud			
	Audience-Level Reporting			
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: Largest East Coast grocer

Store Count: 2,000

Footprint: 19 states in the Eastern and Southeastern U.S.

Banners: Food Lion, Stop & Shop, Hannaford, Giant Food, Martin’s, Giant

Loyalty Programs: GO Rewards (Stop & Shop); Giant Flexible Rewards (Giant Food); Giant Choice Rewards (Giant); MVP (Food Lion); My Hannaford Rewards

Addressable U.S. Audience: 27 million

JBP-APPROVED MEDIA PARTNERS

Catalina Savory
Chicory Vibenomics
Inmar Media

PLATFORM PARTNERS

Edge (in-house platform)

KEY CAPABILITIES

- Agency Partnerships
- First-Party Data Sharing
- IAB Compliance
- In-Store Opportunity Leverage
- Partner Training
- Retailer-Level JBP

OVERVIEW

A division of global food retailer Ahold Delhaize, Ahold Delhaize USA encompasses five leading omnichannel grocery brands: Food Lion, Giant Food, The GIANT Company, Hannaford, and Stop & Shop. Combined, these companies comprise the largest grocery retail group on the East Coast and the fourth largest in the nation, serving millions of omnichannel customers each week.

AD Retail Media, ADUSA’s in-house retail media network, empowers brand partners to connect with shoppers through data-driven, measurable solutions both online and in-store. By championing reimagined customer engagement, AD Retail Media creates exceptional omnichannel experiences for shoppers while driving growth and loyalty for brands.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP

SELF-SERVICE OPTIONS

Onsite Search: Edge (internal platform)

REPORTING OPTIONS

- Self-service, near-real-time dashboard for onsite search, offsite display
- API for onsite search and onsite display
- End of Campaign reporting for all other tactics

AI CAPABILITIES

- Audience Building
- Creative Development
- Insights Reports
- Media Optimization
- Workflow Automation/Optimization

RECENT DEVELOPMENTS

Onsite, a shoppable homepage hero banner lets shoppers add products directly to their carts.

Offsite improvements include refined category audiences for targeting, closed-loop ROAS reporting on Pinterest, and iROAS reporting for contextual media via partner Chicory.

In store, AD USA has undertaken a full-scale deployment of digital screens at new strategic locations — vestibule, front-aisle, and pharmacy — across all five retail brands. The rollout has reached 370+ stores to date and is expected to cover 800+ more by the end of 2026.

Updates to the proprietary Edge ad platform launched in January include a metric glossary for significant terminology and calculations, along with automatic wallet actualization for sponsored products at the end of campaign flights, with unused funds released back for rollover use.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x		
TARGETING	Purchase-Based			x
	Keyword	x	x	x
	Behavioral			
	Contextual		x	x
	Geo-Targeting	x	x	x
	Demographic			
	Competitive Conquesting	x	x	x
	Clean Room Audiences			x
	Predictive/Look-Alike			x
MEASUREMENT/REPORTING	Retargeting/Pixelling	NA		
	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)			
	Incrementality (True Incrementality)	x		x
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA		
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: Largest grocer in Western U.S.

Store Count: 2,220+

Footprint: National

Banners: Albertsons, Safeway, Vons, Acme, Jewel-Osco, Shaw's, Randalls, Tom Thumb, 10 others

Loyalty Program: for U

Addressable U.S. Audience: 100 million

JBP-APPROVED MEDIA PARTNERS

AdAdapted

Fetch Rewards

Neptune Retail Solutions

Stingray Advertising

PLATFORM PARTNERS

Criteo

Google DV360

The Trade Desk

KEY CAPABILITIES

Agency Partnerships

First-Party Data Sharing

IAB Compliance

In-Store Opportunity Leverage

Partner Training

Retailer-Level JBP Integration

Retail Media JBP

OVERVIEW

Albertsons Companies is one of the largest food and drug retailers in the U.S. and the only grocer with a coast-to-coast footprint (not forgetting Alaska and Hawaii). With deep roots in local communities across more than 2,200 stores in 35 states, Albertsons blends national scale with strong regional relevance, tailoring assortments, promotions, and experiences to reflect local tastes and needs. Guided by a purpose of bringing people together around the joys of food, Albertsons focuses on fresh, high-quality products, omnichannel convenience, and meaningful value delivered through initiatives like the “for U” loyalty rewards program.

Albertsons Media Collective is a next-generation network built on connections, technology, and innovation. The network allows brand partners to reach shoppers across in-store, digital, and offsite channels using sophisticated first-party data and closed-loop measurement. Leveraging the companywide focus on innovation and a wealth of regional shopper insights, The Collective helps brands engage consumers when and where it matters most, offering targeted marketing solutions and scalable programs designed to drive sales, strengthen loyalty, and maximize brand impact.

JOINT BUSINESS PLANNING

Conducted individually for all retailer services, with separate JBP for retail media

SELF-SERVICE OPTIONS

Offsite: Google DV360, The Trade Desk

Onsite Search: Criteo

REPORTING OPTIONS

- Self-service, near-real-time reporting dashboard for search
- Dashboard for all managed service tactics
- End of Campaign reporting

AI CAPABILITIES

- Performance Reports
- Shopping Assistant Search Inventory

RECENT DEVELOPMENTS

The Collective this summer debuted a first-of-its-kind branded entertainment model co-created with P&G and powered by shopper insights. A scripted short-form video series, *Rico's Tacos*, was distributed across YouTube, social media, and in-store platforms, marking a new concept for retail media: original, insights-driven content that moves shoppers from inspiration to purchase.

A new integration with Criteo brings sponsored product discovery into Albertsons' AI-powered conversational search engine. Brand ads now appear at the moment shoppers are planning meals and building baskets: over 85% of AI search sessions start with open-ended intent.

In measurement, a new framework projects lifetime customer value (LTV) over 52 weeks. Paired with ROAS, LTV gives brands a fuller picture of campaign impact, including new-to-brand acquisition and long-term repeat behavior, moving beyond single-purchase metrics.

Expanded closed loop measurement capabilities now include verified purchases across produce, meat, seafood, bakery, deli, and floral, including weighed items that historically have been difficult to measure. The capability gives fresh advertisers clearer proof of sales impact and return on ad spend.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based			x
	Keyword	x	x	
	Behavioral			x
	Contextual	x	x	
	Geo-Targeting	x	x	x
	Demographic			x
	Competitive Conquesting	x	x	
	Clean Room Audiences			x
	Predictive/Look-Alike			x
MEASUREMENT/REPORTING	Retargeting/Pixelling	NA		
	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)		x	x
	Incrementality (True Incrementality)		x	x
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA		x
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: Largest U.S. ecommerce retailer

Store Count: 530

Footprint: 45 states nationally

Banners: Whole Foods Market

Loyalty Program: Amazon Prime

Addressable U.S. Audience: 167 million (Amazon Prime members)

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

Amazon DSP (internal platform)

KEY CAPABILITIES

- Agency Partnerships
- Clean Room
- First-Party Data Sharing
- IAB Compliance
- Off-Platform Strategic Vendor Partnerships
- Partner Training
- Retailer-Level JBP Integration
- Retail Media JBP

OVERVIEW

Amazon reaches hundreds of millions of shoppers across its vast consumer-facing ecosystem. The ecommerce giant serves a broad, diverse customer base that values convenience, speed, competitive pricing, and expansive selection and exhibits high purchase frequency across everyday essentials, CPG products, and nearly all other product categories. With deep integration across shopping, content streaming, smart home, and fulfillment services, Amazon plays a central role in both the daily lives and purchase decision-making of consumers.

Amazon Ads continues to push the boundaries of retail media by enhancing both the Amazon DSP and Amazon Marketing Cloud platforms with smarter tools, expanded inventory, and deeper audience insights. Through premium partnerships, advanced bidding controls, and enriched first-party datasets, it is evolving into a more signal-rich, performance-driven ecosystem. Ongoing innovation streamlines campaign execution and empowers more personalized (for shoppers) and measurable (for brands) ad experiences across content, commerce, and devices.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP

SELF-SERVICE OPTIONS

Onsite Search & Display, Offsite: Internal Amazon platforms

REPORTING OPTIONS

Self-service, near-real-time reporting dashboard for search and DSP

AI CAPABILITIES

- Audience Building
- Content Generation
- Creative Development
- Insights Reports
- Media Optimization
- Performance Reports
- Shopping Assistant Search Inventory (Alexa for Shopping)
- Workflow Automation/Optimization

RECENT DEVELOPMENTS

Amazon introduced “Alexa for Shopping” prompts within Amazon’s Responsive Ecommerce Creative. The offering lets shoppers engage with brands immediately to learn more during the conversational search process, helping refine areas of interest that will immediately point to answers without having to visit PDPs for additional content. The feature is automatically enabled for advertisers through an “Enhance creative with AI” checkbox without the need for additional creative, setup, or budgeting.

Amazon DSP has unlocked omnichannel metrics at a retailer-specific attribution level. Campaigns can now measure how Amazon ad spend drives offsite sales at Walmart, Target, and other retailers.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based		x	x
	Keyword	x	x	x
	Behavioral	x	x	x
	Contextual	x	x	x
	Geo-Targeting	x	x	x
	Demographic	x	x	x
	Competitive Conquesting	x	x	x
	Clean Room Audiences	x	x	x
	Predictive/Look-Alike	x	x	x
	Retargeting/Pixelling	NA	x	x
MEASUREMENT/REPORTING	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)		x	x
	Incrementality (True Incrementality)			
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			x

Best Buy Ads

RETAILER HIGHLIGHTS

Key Fact: Largest consumer electronics retailer in the U.S.

Store Count: 1,056

Footprint: National

Banners: Best Buy

Loyalty Program: My Best Buy

Addressable U.S. Audience: 200 million

JBP-APPROVED MEDIA PARTNERS

Roku

PLATFORM PARTNERS

Criteo

Google DV3860

Magnite

The Trade Desk

Yahoo DSP

KEY CAPABILITIES

Clean Room

IAB Compliance

In-Store Opportunity Leverage

Off-Platform Strategic Vendor Partnerships

Retail Media JBP

Retailer-Level JBP Integration

OVERVIEW

The leading consumer tech specialty retailer in the U.S., Best Buy reaches more than 200 million customers across its stores, digital properties, app, and in-home experiences. These customers over-index in a broad mix of categories that include travel, sports, and cars. With its strong emphasis on in-store experiences, in-house Geek Squad tech services, and omnichannel convenience (online ordering, in-store pickup, and same-day delivery), Best Buy attracts both value-driven and tech-savvy consumers who are highly engaged throughout their purchase journeys.

With more than 93% of transactional revenue tied to a customer ID, Best Buy Ads helps brands connect with high-intent shoppers through a powerful first-party data foundation and closed-loop measurement. The network brings together commerce, content, and culture to help brands engage customers across the full path to purchase. With more than two billion annual customer interactions and expanding opportunities across in-store media, AI-powered discovery, and omnichannel activation, the network creates meaningful connections in moments when technology decisions are being made.

Through premium media placements, strategic partnerships, and privacy-safe audience solutions, Best Buy Ads enables brands to reach relevant audiences and drive measurable business outcomes. Recent investments in audience, measurement, and in-store capabilities continue to expand the way brands can connect with Best Buy customers.

JOINT BUSINESS PLANNING

Conducted within the Best Buy JBP

SELF-SERVICE OPTIONS

Offsite: The Trade Desk, Google DV360, Magnite, Yahoo DSP

Onsite Search and Display: Criteo, Google Ad Manager, Magnite

REPORTING OPTIONS

- Self-service, near-real-time reporting dashboard
- End of Campaign reporting

AI CAPABILITIES

Content Generation

RECENT DEVELOPMENTS

Best Buy Ads continues to expand its in-store media portfolio while advancing new measurement and activation capabilities.

The network has introduced new ways for brands to engage shoppers in-store, with the opportunities including Best Buy Radio, mobile switch boards, the Geek Squad queue, and expanded front-of-store options.

In measurement, it is developing new reporting capabilities for in-store screens to provide greater campaign visibility.

The network also continues to scale accessibility for audience and measurement tools, such as predictive audiences, data clean rooms, and enhanced reporting in the My Ads campaign management platform. And it is adding more premium, high-impact placements across the website and app, including home page and video opportunities.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based			x
	Keyword	x		
	Behavioral			x
	Contextual	x	x	
	Geo-Targeting			x
	Demographic		x	x
	Competitive Conquesting	x		
	Clean Room Audiences			x
	Predictive/Look-Alike		x	x
	Retargeting/Pixelling	NA	x	x
MEASUREMENT/REPORTING	Custom Analysis		x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers			
	Incrementality (Test vs. Control)		x	x
	Incrementality (True Incrementality)		x	x
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA	x	
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: Third-largest dollar store chain in the U.S.

Store Count: 7,338

Footprint: National

Banners: Family Dollar

Loyalty Program: Dollar Perks

Addressable U.S. Audience: 80 million

JBP-APPROVED MEDIA PARTNERS

Inmar Media

Neptune Media Solutions

PLATFORM PARTNERS

The Trade Desk

Epsilon Retail Media*

KEY CAPABILITIES

IAB Compliance

Off-Platform Strategic Vendor Partnerships

Partner Training

Retailer-Level JBP Integration

Retail Media JBP

OVERVIEW

Family Dollar is a value-focused retailer operating over 8,000 stores across the U.S., predominantly serving everyday essentials at affordable prices to low- and middle-income communities. The retailer’s strategy emphasizes convenience, deep discounting, and compact stores that make it easy for shoppers to find household goods, groceries, health & beauty items, and seasonal products close to home.

As Family Dollar’s retail media network, Chesapeake Media Group (CMG) is uniquely positioned to engage some of the hardest-to-reach value-conscious shoppers in the U.S. Family Dollar serves one of the most diverse shopper bases in all of retail, giving advertisers access to high-frequency, underserved audiences that are often difficult to reach through traditional media channels.

JOINT BUSINESS PLANNING

Conducted within the Family Dollar JBP

SELF-SERVICE OPTIONS

Offsite: The Trade Desk

REPORTING OPTIONS

- Reporting dashboard featuring standard metrics
- End of Campaign reporting

AI CAPABILITIES

Audience Building

RECENT DEVELOPMENTS

Brand campaigns at Family Dollar have launched with a retail media overlay.

Expanded measurement capabilities will soon include long-term purchase analysis, beginning with offsite vehicles.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service			x
TARGETING	Purchase-Based			x
	Keyword	x		
	Behavioral			
	Contextual	x	x	
	Geo-Targeting			x
	Demographic			x
	Competitive Conquesting			
	Clean Room Audiences			
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA		
MEASUREMENT/REPORTING	Custom Analysis			x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers			x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)			
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA		x
	Rest of Market Analysis			

*Epsilon Retail Media is part of Publicis Groupe, parent company of Mars United Commerce.



RETAILER HIGHLIGHTS

Key Fact: The largest warehouse club retailer in the U.S.
Store Count: 643
Footprint: National
Banners: Costco Wholesale
Loyalty Program: Membership model
Addressable U.S. Audience: 54.5 million

JBP-APPROVED MEDIA PARTNERS

Criteo
In-warehouse TV network
Symbiosys

PLATFORM PARTNERS

Criteo	The Trade Desk
Epsilon Retail Media*	Yahoo DSP
Google DV360	DSP-agnostic for offsite
StackAdapt	display

KEY CAPABILITIES

Agency Partnerships

First-Party Data Sharing

Off-Platform Strategic Vendor Partnerships

Partner Training

Retail Media JBP

OVERVIEW

Costco Wholesale operates approximately 643 warehouse locations in the U.S., offering members a wide selection of bulk groceries, electronics, household goods, and exclusive brand offerings at value-oriented prices. Costco’s membership model — featuring Gold Star, Business, and Executive levels — drives strong customer loyalty. Shoppers visit clubs frequently for both planned purchases and everyday essentials, making Costco a dominant player in warehouse club retailing with a deeply engaged, value-seeking customer base.

Costco Retail Media leverages the retailer’s first-party data and high-engagement member base. Brands can tap into Costco’s customer reach through targeted digital media, in-warehouse sampling and displays, sponsorships, co-op marketing programs, and digital ad integrations tied to member behavior and promotional calendars. These tools help advertisers connect with highly loyal members at key purchase moments within the warehouse club environment. A new campaign management platform named Costco Velocity and powered by tech partner Moloco positions the network as a transparent, closed-loop, sales-driven ecosystem that replaces black-box ad tech with an open, member-first architecture. The goal is to drive measurable incrementality by accelerating product discovery and conversion across onsite, offsite, and in-club experiences.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP as “Annual Media Plans”

SELF-SERVICE OPTIONS

Onsite Search, Display: Criteo
Offsite: DSP-agnostic, including Google DV360, Epsilon Retail Media*, The Trade Desk, Yahoo DSP, YouTube

REPORTING OPTIONS

- Near-real-time reporting dashboard
- End of Campaign reporting

AI CAPABILITIES

None currently available

RECENT DEVELOPMENTS

In Costco’s second-quarter earnings call, CFO Gary Millerchip reemphasized the retailer’s commitment to maintaining a “member-first” mindset by introducing retail media opportunities with personalization capabilities that will deliver more relevant messaging. That focus ultimately should also deliver a better return on advertiser investments, he said.

As it continues modernizing and strengthening owned and operated opportunities, Costco Retail Media is also working to establish additional offsite partnerships like the one struck with Google DV360 and YouTube this spring.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x		x
TARGETING	Purchase-Based			x
	Keyword	x		
	Behavioral			x
	Contextual	x	x	
	Geo-Targeting			x
	Demographic			x
	Competitive Conquesting		x	
	Clean Room Audiences			x
	Predictive/Look-Alike			x
MEASUREMENT/REPORTING	Retargeting/Pixelling	NA	x	x
	Custom Analysis			x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers			x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)			
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA		x
	Rest of Market Analysis			

*Epsilon Retail Media is part of Publicis Groupe, parent company of Mars United Commerce.



RETAILER HIGHLIGHTS

Key Fact: 85% of U.S. residents live near a CVS store

Store Count: 9,000

Footprint: National

Banners: CVS

Loyalty Program: ExtraCare

Addressable U.S. Audience: 90 million

JBP-APPROVED MEDIA PARTNERS

Neptune Retail Solutions

Vibenomics

PLATFORM PARTNERS

Criteo

The Trade Desk

Yahoo DSP

KEY CAPABILITIES

Clean Room

First-Party Data Sharing

IAB Compliance

Off-Platform Strategic Vendor Partnerships

OVERVIEW

CVS Pharmacy operates approximately 9,000 retail pharmacy locations across the U.S., serving millions of customers with pharmacy services, health & wellness products, and everyday essentials. CVS shoppers are health-focused, convenience-driven consumers who value trusted health care and personalized solutions alongside everyday purchases. The retailer’s ExtraCare loyalty program captures deep first-party behavioral data that reflects real purchase activity across both in-store and digital channels, making CVS a powerful touchpoint for brands in health, beauty, and other CPG categories.

CVS Media Exchange (CMX) is a leading retail media network creating meaningful connections between brands and customers at CVS. Founded in 2020, CMX is helping brands engage consumers through first-party, front-of-store data from over 90 million addressable ExtraCare members. Offering managed and self-service campaign solutions, CMX bridges digital and in-store activation with closed-loop reporting and measurement. Leading brands partner with CMX to drive impact and advance brand health — all while supporting CVS customers on their health & wellness journeys.

JOINT BUSINESS PLANNING

No retail media JBP at this time

SELF-SERVICE OPTIONS

Offsite: The Trade Desk

Onsite Search and Display: Criteo

Syndicated and pre-defined audiences

REPORTING OPTIONS

- Self-service, near-real-time dashboard
- End of Campaign reporting

AI CAPABILITIES

- Audience Building
- Insights Reports
- Media Optimization
- Performance Reports

RECENT DEVELOPMENTS

Competitive conquesting is now a targeting capability for all sponsored products and sponsored brand campaigns, enabling brands to shift consideration and capture share.

Front entrance screens launched in August to deliver bold, brand-forward messaging that drives discovery and accelerates trial.

Sales attribution for Meta campaigns is now available, providing closed-loop sales measurement and greater visibility into campaign performance on both Facebook and Instagram.

CMX Checkout Ads are in open beta and available in 6,900 stores nationwide. This solution helps brands stay top of mind at the final stage of the shopping journey, turning the final touchpoint into lasting awareness that can drive future visits and incremental purchases.

Rest of market measurement is currently in open beta and targeted for general availability in 2027.

A new partnership with Polaris DSP lets advertisers activate first-party CMX audiences across DOOH placements to extend the reach of their campaigns.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x		x
TARGETING	Purchase-Based			x
	Keyword	x		
	Behavioral			x
	Contextual	x	x	
	Geo-Targeting			x
	Demographic			x
	Competitive Conquesting	x	x	
	Clean Room Audiences			x
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA		
MEASUREMENT/REPORTING	Custom Analysis			x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers		x	x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)			x
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: Largest value chain in the U.S.
Store Count: 21,000
Footprint: National
Banners: Dollar General, DG Market, DGX, pOpshelf
Loyalty Program: myDG
Addressable U.S. Audience: 100 million

JBP-APPROVED MEDIA PARTNERS

DoorDash
Fetch Rewards
Recess

PLATFORM PARTNERS

StackAdapt
The Trade Desk
Yahoo DSP

KEY CAPABILITIES

Agency Partnerships
Clean Room
First-Party Data Sharing
IAB Compliance
Off-Platform Strategic Vendor Partnerships
Partner Training
Retailer-Level JBP Integration
Retail Media JBP

OVERVIEW

Dollar General positions itself as America’s neighborhood general store, delivering everyday low prices on items including food, snacks, health & beauty aids, cleaning supplies, basic apparel, housewares, paper products, and seasonal needs. The assortment includes products from trusted national brands and high-quality private brands. The in-store experience is designed to make shopping hassle-free and affordable. Dollar General operates more than 20,000 stores in 48 states and will open an additional 450 locations in 2026.

Dollar General Media Network (DGMN) harnesses the power of this expansive and unduplicated retail footprint to deliver targeted, high-impact advertising solutions. Bolstered by rapidly growing onsite ecommerce and delivery businesses, DGMN helps brands connect with rural, suburban, and urban communities throughout the U.S. that are often outside the reach of traditional media and retail channels.

JOINT BUSINESS PLANNING

Conducted separately for Dollar General and DGMN

SELF-SERVICE OPTIONS

Onsite Search and Display: Criteo
Offsite Display: The Trade Desk, Yahoo DSP, PubMatic, StackAdapt
Syndicated and custom audiences: LiveRamp

REPORTING OPTIONS

- Near-real-time reporting dashboard
- End of Campaign reporting

AI CAPABILITIES

- Audience Building
- Insights Reports
- Media Optimization
- Performance Reports

RECENT DEVELOPMENTS

Nationwide rollout of the AI-enabled DG In-Store Radio Network has reached 12,000 stores in partnership with QSIC. The network turns in-store audio into a measurable media channel, delivering localized shopper engagement and new activation opportunities for advertisers at the point of purchase.

DGMN is expanding its ad portfolio with shoppable ads on Meta platforms, along with video placements and other enhanced onsite experiences, to drive stronger engagement across the full funnel.

New integrations with Kevel, The Trade Desk, and Google Commerce Media Suite allow brands to extend Dollar General’s first-party audiences across onsite and offsite media. These capabilities provide full-funnel measurement, SKU-level attribution, and direct visibility into sales outcomes.

Additionally, DGMN’s new SMART campaigns enable advertisers to activate across both DG and DoorDash search environments through a single campaign, delivering incremental reach, real-time optimization, and closed-loop measurement.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based			x
	Keyword	x		
	Behavioral	x	x	
	Contextual	x	x	
	Geo-Targeting	x	x	x
	Demographic			x
	Competitive Conquesting	x	x	
	Clean Room Audiences			x
	Predictive/Look-Alike			x
MEASUREMENT/REPORTING	Retargeting/Pixelling	NA		
	Custom Analysis	x		x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)		x	x
	Incrementality (True Incrementality)			
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA		x
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: No. 1 U.S. third-party marketplace for grocery and retail based on 2025 order volume

Store Count: Not applicable

Footprint: National

On-Demand Delivery Brand: DoorDash

Loyalty Program: DashPass

Addressable U.S. Audience: Not disclosed

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

DoorDash Ads Manager (internal platform)

StackAdapt

Symbiosys

The Trade Desk

Yahoo DSP

KEY CAPABILITIES

Agency Partnerships

First-Party Data Sharing

Off-Platform Strategic Vendor Partnerships

Retail Media JBP

OVERVIEW

DoorDash is the leading third-party marketplace in the U.S. based on grocery and retail order volume, with over 56 million monthly active users globally through the DoorDash, Wolt, and Deliveroo on-demand delivery apps. The company serves a digitally native, convenience-driven consumer who values speed, choice, and on-demand access to food and other everyday essentials; over 30% of monthly active customers in the U.S. engage in grocery and other retail categories. Users are highly engaged on mobile, with frequent repeat usage driven by meal occasions, last-minute needs, and impulse purchases, making DoorDash a key player in the local on-demand commerce landscape.

DoorDash Ads helps advertisers connect to consumers throughout the path to purchase across both onsite and offsite solutions. The company continues to grow within new verticals beyond its core restaurant delivery service while parallel-pathing an expansion of marketing solutions to help brand partners accelerate growth.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP

SELF-SERVICE OPTIONS

Onsite Search & Display: DoorDash Ads Manager, Pacvue, Skai, CommercetIQ

Offsite: Symbiosys

Social/Google: Symbiosys

REPORTING OPTIONS

Self-service, near-real-time reporting dashboard and API

AI CAPABILITIES

None currently available

RECENT DEVELOPMENTS

New “Spotlight” display and video ad formats, including an auto-scroll carousel, allow for greater brand storytelling and creative control on DoorDash's homepage.

Expanded catalog management capabilities make it easier for brands to understand and manage digital shelf presence.

Several new iterations within sponsored products improve campaign management efficiency and maximize control over configurations. With improved targeting stacking, brands can combine targeting capabilities for more precise reach. A new campaign dashboard features customizable data visualization, making it easy to track performance trends.

A new Help Center gives brands a centralized, searchable set of how-to, FAQ, and troubleshooting articles to maximize success across activations.

DoorDash Ads has expanded third-party measurement validation studies to include off-platform shopper impact through a partnership with Circana. Designed to help marketers measure the overall incrementality of their DoorDash ad spend, the studies will become available to select partners in second-half 2026.

At DoorDash, a first-of-its-kind direct integration with Shopify allows local retailers to offer on-demand delivery.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based	x	x	x
	Keyword	x	x	
	Behavioral	x	x	x
	Contextual	x	x	x
	Geo-Targeting	x	x	x
	Demographic	x	x	x
	Competitive Conquesting	x		
	Clean Room Audiences			
	Predictive/Look-Alike			x
MEASUREMENT/REPORTING	Retargeting/Pixelling	NA		
	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)	x	x	
	Incrementality (True Incrementality)	x		
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis	x	x	



RETAILER HIGHLIGHTS

Key Fact: Tenth-largest convenience store retailer in the U.S.

Store Count: 1,200+

Footprint: 13 states in the Mid-Atlantic, Midwest, and Southeastern U.S.

Banners: Wawa

Loyalty Program: Wawa Rewards

Addressable U.S. Audience: 5 million

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

Epsilon Retail Media*

KEY CAPABILITIES

- IAB Compliance
- In-Store Opportunity Leverage
- Partner Training
- Retail Media JBP
- Retailer-Level JBP Integration

OVERVIEW

Wawa is a regional convenience-store retailer with over 1,200 stores across the Mid-Atlantic, Midwest, and Southeastern U.S. With fresh, quality food as its “differentiator” in the convenience channel and a reputation for coffee, fuel, and everyday essentials as well, Wawa serves a highly loyal and frequent-shopper audience that values quality, speed, and convenience. The customer base spans commuters, on-the-go families, and loyal local shoppers who visit stores multiple times per week, giving Wawa one of the most engaged retail audiences in its markets.

Goose Media Network leverages the vast scope of Wawa’s 684 million+ annual visitors, 5 million+ loyalty-program members, and 4.4 million+ quarterly app users to help advertisers reach shoppers across the purchase journey. The network’s tailored approach to targeting leverages loyalty, app engagement, and transaction behavior data to help brands connect with shoppers at key moments across digital and in-store channels. Due to the high visit frequency and strong brand affinity among the customer base, Wawa’s retail media solutions enable advertisers to drive awareness, trial, and conversion in the convenience category – increasingly supported by data and measurement tools that tie exposure to real shopper behavior.

JOINT BUSINESS PLANNING

Conducted separately with Wawa and Goose Media

SELF-SERVICE OPTIONS

None currently available

REPORTING OPTIONS

- Real-time reporting dashboard
- End of Campaign reporting

AI CAPABILITIES

None currently available

RECENT DEVELOPMENTS

Goose Media Network has released a self-service reporting dashboard for all advertisers that includes key performance metrics with breakouts by company, brand, campaign and product.

The network is speaking to multi-touch attribution providers with the intention of providing a richer view of performance that will capture the full customer journey. Expanded targeting options for social campaigns on Meta properties will include awareness and traffic (vs. awareness alone).

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service			
TARGETING	Purchase-Based			x
	Keyword			
	Behavioral			
	Contextual	x	x	
	Geo-Targeting	x	x	x
	Demographic			x
	Competitive Conquesting			
	Clean Room Audiences			
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA		
MEASUREMENT/REPORTING	Custom Analysis		x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers		x	x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)			
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA		x
	Rest of Market Analysis			

*Epsilon Retail Media is part of Publicis Groupe, parent company of Mars United Commerce.



RETAILER HIGHLIGHTS

Key Fact: Only on-demand delivery service that maintains its own inventory

Store Count: NA

Footprint: 39 states nationally

On-Demand Delivery Brand: Gopuff

Loyalty Program: Fam

Addressable U.S. Audience: Not disclosed

JBP-APPROVED MEDIA PARTNERS

Koddi

PLATFORM PARTNERS

Epsilon Retail Media*

The Trade Desk

KEY CAPABILITIES

Clean Room

First-Party Data Sharing

IAB Compliance

Off-Platform Strategic Vendor Partnerships

Retailer-Level JBP Integration

Retail Media JBP

OVERVIEW

Gopuff is an on-demand delivery service that brings convenience items such as snacks, drinks, household goods, alcohol, cleaning supplies, and OTC medication to consumers in as little as 15 minutes. The company is unique in the marketplace because it maintains its own network of micro-fulfillment centers rather than sourcing products from local retailers. Gopuff continues to expand a footprint that currently operates in hundreds of cities across 18 states.

Gopuff Ads is an innovative platform that’s eager to develop new capabilities and build exciting partnerships between brands and media. The company has worked with media companies, TV shows, and retailers in unique ways to generate buzz and build the customer base. Since launching in 2024, the network has continued to build the in-house platform, rolling out new partnerships that strengthen its analytics acumen and capabilities to help brands reach shoppers in unique ways. Gopuff Ads will be taking additional steps throughout 2026 to improve the platform and its media offerings.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP

SELF-SERVICE OPTIONS

Onsite Search and Display: Epsilon Retail Media*
Sponsored Products, Offsite Display, Sampling: Internal platform

REPORTING OPTIONS

- Dashboard
- Custom surveys and insights studies
- End of Campaign reporting

AI CAPABILITIES

- Audience Building
- Content Generation
- Insights Reports
- Performance Reports

RECENT DEVELOPMENTS

Gopuff in June launched “Go,” a multi-modal, AI-enabled shopping assistant with advanced functionality that:

- automatically makes product recommendations based on location, time, and purchase history the moment a user opens the Gopuff app.
- allows users to interact by talking or typing in conversational language to ask for meal ideas or make specific requests.
- blends content and commerce in a scrollable, contextual product discovery interface.

A new integration with agentic AI-powered marketing solutions company GrowthLoop will let brands move beyond broad category targeting to segment shoppers based on geography, purchase history, and order frequency, then activate targeted campaigns via sell side or demand side platforms. The offering is also available to ad partners for BevMo!, the California-based retailer owned by Gopuff.

Later in 2026, brands will be able to target audiences for sponsored products ads in the Gopuff app.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based		x	x
	Keyword	x	x	
	Behavioral	x	x	x
	Contextual		x	x
	Geo-Targeting	x	x	x
	Demographic	x	x	x
	Competitive Conquesting	x	x	x
	Clean Room Audiences			
	Predictive/Look-Alike	x	x	x
MEASUREMENT/REPORTING	Retargeting/Pixelling	NA	x	x
	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)	x	x	x
	Incrementality (True Incrementality)	x	x	x
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			

*Epsilon Retail Media is part of Publicis Groupe, parent company of Mars United Commerce.



RETAILER HIGHLIGHTS

Key Fact: Largest convenience store chain in the U.S.
Store Count: 12,385
Footprint: National
Banners: 7-Eleven, Speedway
Loyalty Programs: 7Rewards; Speedy Rewards
Addressable U.S. Audience: 100 million

JBP-APPROVED MEDIA PARTNERS

GSTV

PLATFORM PARTNERS

The Trade Desk

KEY CAPABILITIES

- Clean Room
- First-Party Data Sharing
- IAB Compliance
- In-Store Opportunity Leverage
- Off-Platform Strategic Vendor Partnerships
- Retailer-Level JBP Integration
- Retail Media JBP

OVERVIEW

7-Eleven is the leading convenience retailer in North America, operating more than 13,000 stores across the U.S. and Canada under the 7-Eleven, Speedway, and Stripes banners. The retailer serves a highly varied, on-the-go customer looking for convenience, quick-serve food and beverages, fuel, and everyday essentials. With broad geographic penetration — about half of U.S. households live within two miles of a store — and a large loyalty audience through the 7Rewards and Speedy Rewards programs, 7-Eleven attracts millions of daily visitors ready to make immediate-consumption and impulse purchases.

Gulp Media Network’s strength lies in 7-Eleven’s 12 million daily shoppers and high-frequency, convenience-driven retail environment. The retailer’s immediate-consumption format resonates strongly with Gen Z and younger Millennial consumers, giving Gulp Media a differentiated audience within the retail media landscape. With over 500,000 in-store transactions per hour, Gulp Media leverages rich first-party data from 7Rewards and SpeedyRewards, the retailer’s Brainfreeze Collective shopper panel (200,000+ participants), and in-store behavior to help brands drive trial, test new products, and engage shoppers at the right moment in the path to purchase.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP

SELF-SERVICE OPTIONS

Offsite: The Trade Desk (Non-endemic advertisers only)

REPORTING OPTIONS

End of Campaign reporting

AI CAPABILITIES

- Content Generation
- Media Optimization

RECENT DEVELOPMENTS

Gulp Media Network introduced “5-minute iROAS” measurement methodology for Gulp Radio ad campaigns. The metric is designed to quantify the immediate sales impact of in-store audio advertising by pinpointing sales that occur within the first five minutes after an ad plays, then determining incremental lift by comparing those results to data from the same store and daypart when the ad didn’t run.

This store-level, time-based control also allows campaigns to run throughout the full 7-Eleven and Speedway footprint by eliminating the need to suppress media in traditional test/control stores.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available			x
	Managed Service			x
	Self-Service			
TARGETING	Purchase-Based			x
	Keyword			
	Behavioral			x
	Contextual			
	Geo-Targeting			x
	Demographic			x
	Competitive Conquesting			x
	Clean Room Audiences			x
	Predictive/Look-Alike			x
	Retargeting/Pixeling	NA		x
MEASUREMENT/REPORTING	Custom Analysis			x
	Closed-Loop Attributed Sales/ROAS			x
	% New Buyers			x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)			x
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA		x
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: One of the leading independent grocers in the U.S.

Store Count: 560

Footprint: 9 states in the Midwest

Banners: Hy-Vee, Hy-Vee Fast & Fresh, Dollar Fresh Market, Strack & Van Til

Loyalty Program: PERKS

Addressable U.S. Audience: 10.5 million

JBP-APPROVED MEDIA PARTNERS

Grocery TV
Neptune Retail Solutions
Vibonomics

PLATFORM PARTNERS

Instacart Carrot Ads
The Trade Desk

KEY CAPABILITIES

Agency Partnerships

First-Party Data Sharing

IAB Compliance

In-Store Opportunity Leverage

Retailer-Level JBP Integration

Retail Media JBP

OVERVIEW

Hy-Vee, Inc. is an employee-owned corporation operating more than 560 supermarkets (299), pharmacies, and convenience stores across nine Midwestern states. The flagship supermarket brand has become synonymous with quality, variety, convenience, healthy lifestyles, culinary expertise, and superior customer service, and was recently named among the top grocery stores in the U.S. by USA TODAY. Hy-Vee’s 70,000+ employees provide “A Helpful Smile in Every Aisle” to customers every day.

The RedMedia retail media network views itself as the gateway to the Midwest, connecting brands with highly loyal Hy-Vee shoppers through high-impact omnichannel solutions. The network delivers differentiated in-store capabilities that let brands influence shoppers at the point of purchase, where brand consideration and sales outcomes are decided. RedMedia is also helping set industry standards for performance assessment with multi-touch closed-loop attribution, incrementality measurement, new-to-brand reporting, and matched-market testing options, which provide brands with clear, defensible proof of impact. Through deep integration into overall brand business planning, RedMedia goes beyond media execution to identify national and regional growth challenges, then acts as a strategic lever to solve them.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP

SELF-SERVICE OPTIONS

Onsite Search and Display: Instacart Carrot Ads

REPORTING OPTIONS

- Real-time reporting dashboard for onsite via Instacart Carrot Ads
- Mid-Campaign and End of Campaign reporting for all other tactics

AI CAPABILITIES

- Insights Reports
- Performance Reports
- Workflow Automation/Optimization

RECENT DEVELOPMENTS

RedMedia recently rolled out offsite streaming audio opportunities through The Trade Desk, which pairs authenticated RedMedia audiences with foot traffic data from Adsquare.

The network also rolled out back-office generative AI capabilities to greatly enhance the way brands plan, activate, and optimize campaigns through greater speed to activation, stronger audience relevance, and improved performance.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	
TARGETING	Purchase-Based		x	x
	Keyword	x	x	
	Behavioral	x	x	x
	Contextual	x	x	x
	Geo-Targeting	x	x	x
	Demographic	x	x	x
	Competitive Conquesting			
	Clean Room Audiences			x
	Predictive/Look-Alike	x	x	x
	Retargeting/Pixelling	NA		x
MEASUREMENT/REPORTING	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)	x	x	x
	Incrementality (True Incrementality)	x	x	x
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: Largest grocery ads ecosystem In North America

Store Count: NA

Footprint: 2,200 retail banner partners; 310+ partner sites powered by Instacart advertising technology

On-Demand Delivery Brand: Instacart

Loyalty Program: Instacart+; Cart Star

Addressable U.S. Audience: Not disclosed

JBP-APPROVED MEDIA PARTNERS

Google/YouTube	Roku
Meta	TikTok
NBCUniversal	The Trade Desk
Pinterest	

PLATFORM PARTNERS

Instacart Ads Manager (internal platform)

The Trade Desk

KEY CAPABILITIES

Agency Partnerships

First-Party Data Sharing

IAB Compliance

Off-Platform Strategic Vendor Partnerships

Partner Training

Retail Media JBP

OVERVIEW

Instacart is a leading grocery technology and delivery platform that connects consumers with 2,200+ retail banners across grocery, mass, club, and specialty stores in the U.S. and Canada. The platform serves 59+ million consumers across the Instacart Ads ecosystem, digitally engaged shoppers who use Instacart for both planned stock-up trips and immediate grocery needs. With high household penetration and frequent repeat usage, Instacart plays a central role in how consumers discover, shop for, and replenish grocery and everyday essentials online.

Instacart increasingly positions itself as a full-funnel retail media ecosystem rather than just a grocery delivery marketplace. Its core value is built on consumer intent and first-party commerce signals that help brands reach consumers at moments that matter and connect media to real purchase behavior. As the retail media marketplace matures, Instacart Ads’ goal is to expand its footprint across more shopping touchpoints while maintaining a performance-first mindset, strengthening its role as a scaled partner for CPG advertisers looking for measurable outcomes across the path to purchase. Instacart is also an accredited MRC partner.

Instacart Ads now supports 9,000+ active brand advertisers and continues expanding its retailer ecosystem, which currently boasts 310+ partners leveraging Carrot Ads, in-store innovation, and new data tools.

JOINT BUSINESS PLANNING

Instacart Ads and data programs can be aligned with broader JBPs

SELF-SERVICE OPTIONS

Onsite Search and Display: Instacart Ads Manager

REPORTING OPTIONS

- Self-service, near-real-time reporting dashboard
- End of Campaign reporting

AI CAPABILITIES

- Media Optimization
- Workflow Automation/Optimization

RECENT DEVELOPMENTS

Instacart’s first-party audiences, shoppable pins, and closed-loop measurement in Pinterest Ads Manager are now available to all U.S. advertisers. Integrated contracting and billing lets advertisers manage directly via self-service.

Self-service onboarding for the Instacart Ads platform is available for emerging brands looking to get started on the platform with lower minimums.

Instacart announced plans to test ads on its pioneering AI-powered shopping assistant, which is powered by more than a decade of grocery-specific machine learning.

An immersive, shoppable vertical video feed for advertisers gives customers a more engaging way to discover and shop for meals and recipes.

The new Instacart Ads Studio is a full-service, in-house creative offering for CPG brands of all sizes.

An integration with Google Search lets consumers using AI Mode browse recommendations and add products to a cart without leaving the conversation. The capability expands Instacart’s existing integration with Google’s separate Gemini agentic search platform.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
TARGETING	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	
	Purchase-Based		x	x
	Keyword	x	x	
	Behavioral	x	x	
	Contextual		x	
	Geo-Targeting	x	x	x
	Demographic			
	Competitive Conquesting	x	x	
	Clean Room Audiences			x
	Predictive/Look-Alike			
MEASUREMENT/REPORTING	Retargeting/Pixelling	NA		
	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)	x	x	
	Incrementality (True Incrementality)	x	x	
	Viewability/Fraud	x	x	x
	Audience-Level Reporting	x	x	x
	Rest of Market Analysis		x	



RETAILER HIGHLIGHTS

Key Fact: The largest pure-play U.S. grocer

Store Count: 2,694

Footprint: 35 states nationally

Banners: Kroger, Food4Less, Fred Meyer, Fry's, Harris Teeter, King Soopers, Ralphs, Smith's, 13 others

Loyalty Program: Kroger Plus

Addressable U.S. Audience: 62 million households

JBP-APPROVED MEDIA PARTNERS

Disney YouTube

Roku

PLATFORM PARTNERS

Google DV360

Kroger Ad Platform (internal platform)

Meta

Prism (internal platform)

The Trade Desk

Yahoo DSP

KEY CAPABILITIES

Agency Partnerships

IAB Compliance

First-Party Data Sharing

Off-Platform Strategic Vendor Partnerships

Partner Training

Retailer-Level JBP Integration

Retail Media JBP

OVERVIEW

Kroger is the largest U.S grocer and fourth largest retailer. The company combines extensive household reach with more than 20 years of first-party loyalty data that captures 95% of sales to create more personalized, positive shopping experiences in-store and online. Guided by its “Fresh for Everyone” commitment, Kroger leverages shopper insights to ensure every customer enjoys better access to fresh, affordable food while brand partners benefit from deeper connections with real shoppers.

As a pioneer in retail media, Kroger Precision Marketing powered by 84.51° now operates as a fully unified organization spanning insights, media, loyalty marketing, and incentives. With 20-plus years of Kroger loyalty card data at its disposal, KPM boasts some of the richest insights and targeting capabilities available. Parent Kroger is fully behind KPM’s efforts as a key piece of the company’s overall plans to increase digital penetration. KPM is helping brands build strong connections with consumers to drive growth through science-driven “Insights to Activation.”

JOINT BUSINESS PLANNING

Conducted within the retailer JBP or separately with Kroger and KPM

SELF-SERVICE OPTIONS

Offsite: The Trade Desk, Yahoo DSP, Meta, Google DV360

Onsite Search and Display: Kroger Ad Platform (internal)

REPORTING OPTIONS

- Self-service, near-real-time reporting for onsite campaigns via Kroger Ad Platform dashboard and API
- Self-service, near real-time reporting for Direct Connect campaigns via Kroger Ad Platform dashboard
- End of Campaign reporting for all other tactics

AI CAPABILITIES

- Insights Reports
- Media Optimization
- Shopping Assistant Search Inventory

RECENT DEVELOPMENTS

Kroger continues to expand its in-store digital media footprint in partnership with Barrows, giving brands additional opportunities to engage shoppers through a growing network of digital screens and high-impact placements.

The new agentic AI-enabled Shopping Assistant experience leverages Kroger’s first-party data to help shoppers discover relevant products, build baskets more efficiently, and unlock personalized recommendations. Product Listing Ads are now eligible to be served within Shopping Assistant, letting brands extend visibility and conversion into these AI-driven journeys while connecting shoppers to relevant products at the point of consideration.

New interactive cross-shop and basket dashboards are now live in the 84.51° Stratum self-service insights platform, providing deeper visibility into shopping behavior, brand switching, basket composition, and category relationships to help advertisers uncover growth opportunities and inform strategic planning.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based		x	x
	Keyword	x		
	Behavioral	x	x	x
	Contextual		x	x
	Geo-Targeting	x	x	x
	Demographic		x	x
	Competitive Conquesting	x	x	x
	Clean Room Audiences			
	Predictive/Look-Alike	x	x	x
	Retargeting/Pixelling	NA	x	x
MEASUREMENT/REPORTING	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)	x	x	x
	Incrementality (True Incrementality)	x	x	x
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			x



RETAILER HIGHLIGHTS

Key Fact: Has 30 million+ rewards members across distinct programs for consumers and Pros

Store Count: 1,750

Footprint: National

Banners: Lowe's Home Improvement

Loyalty Program: MyLowe's Rewards

Addressable U.S. Audience: 120 million

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

Criteo

Epsilon Retail Media*

KEY CAPABILITIES

Agency Partnerships

IAB Compliance

Off-Platform Strategic Vendor Partnerships

Retailer-Level JBP Integration

Retail Media JBP

OVERVIEW

Lowe's Companies is a FORTUNE 50 home improvement retailer that handles approximately 16 million weekly customer transactions and serves 120 million unique shoppers. The company employs approximately 300,000 associates and operates more than 1,700 stores, 530 branches, and 130 distribution centers. The customer base comprises DIYers, "Do-It-For-Me" homeowners, and Pros (professionals), and boasts a stronger segment of female shoppers than is typical in the channel. Lowe's also is increasingly targeting small- to mid-sized businesses. Since launching in 2024, the MyLowe's Rewards loyalty program has gained more than 40 million members.

Lowe's Media Network (LMN) continues to evolve as a core growth driver within the broader Lowe's retail and loyalty ecosystem, supporting brand partners across the full home improvement path to purchase. Purpose-built to connect brands with both DIY and Pro customers, LMN leverages Lowe's' first-party shopper data and owned-and-operated platforms, including digital properties and in-store touchpoints, to deliver measurable business results for brand partners. As the retail media landscape matures, LMN is balancing innovation with accountability, pairing expanded reach and new formats with improved measurement, transparency, and service. This approach reflects Lowe's commitment to long-term partnership and LMN's role within brand partner planning.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP

SELF-SERVICE OPTIONS

Onsite Search: Criteo

REPORTING OPTIONS

Self-service, near-real-time reporting dashboard for most tactics: LMN Hub

AI CAPABILITIES

- None currently available

RECENT DEVELOPMENTS

LMN expanded its measurement capabilities for strategic brand partners through the launch of custom incrementality solutions developed with Ipsos. These advanced models provide independently validated measurement of incremental sales and iROAS at both the campaign and brand level, helping advertisers better understand the business impact of their investments.

Overall, the network now offers a comprehensive measurement suite that includes closed-loop attribution, incrementality modeling, and new-to-brand reporting, giving advertisers multiple ways to understand performance and business impact.

The LMN Hub reporting platform has also been enhanced with additional self-service capabilities and advertiser-requested metrics, providing faster access to near-real-time campaign results.

Elsewhere, LMN expanded its omnichannel offerings by introducing in-store signage solutions, enabling brands to create more integrated experiences across digital and physical touchpoints.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x		
TARGETING	Purchase-Based			x
	Keyword	x	x	
	Behavioral	x	x	x
	Contextual	x	x	
	Geo-Targeting		x	x
	Demographic			x
	Competitive Conquesting			x
	Clean Room Audiences			
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA		x
MEASUREMENT/REPORTING	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers		x	
	Incrementality (Test vs. Control)	x	x	x
	Incrementality (True Incrementality)	x	x	x
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			

*Epsilon Retail Media is part of Publicis Groupe, parent company of Mars United Commerce.



RETAILER HIGHLIGHTS

Key Fact: Fifth-largest U.S. retailer and largest home improvement chain

Store Count: 2,000+

Footprint: National

Banners: The Home Depot

Loyalty Program: NA

Addressable U.S. Audience: Not disclosed

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

Orange Access (internal platform)

KEY CAPABILITIES

- Agency Partnerships
- First-Party Data Sharing
- IAB Compliance
- Partner Training
- Retailer-Level JBP Integration
- Retail Media JBP Process

OVERVIEW

The Home Depot is the world’s largest home improvement retailer, operating more than 2,300 stores across the U.S., Canada, and Mexico that are supported by approximately 475,000 associates. The typical store averages 105,000 square feet of indoor retail space, interconnected with an ecommerce business that offers more than one million products for highly engaged DIY and PRO (professional) shoppers. The Home Depot also operates the industry’s largest installation business for the Do-It-For-Me customer.

Orange Apron Media (OAM) connects brands with high-value audiences that are expanding alongside The Home Depot’s footprint, combining the nation’s largest specialty retail ecosystem with expert, dedicated teams and customizable solutions to help advertisers reach their goals. The network engages both high-value PRO shoppers and a rapidly growing DIY audience, allowing partners to connect with unique segments across the entire path to purchase. Through a mix of owned and offsite media, OAM powers full-funnel outcomes, from awareness to conversion, and continues to scale its capabilities to drive brand growth.

JOINT BUSINESS PLANNING

Conducted separately with The Home Depot and Orange Apron Media

SELF-SERVICE OPTIONS

Offsite, Onsite Search and Display: Orange Access

REPORTING OPTIONS

- Self-service dashboard and reports in Orange Access
- Custom reporting and quarterly business reviews via managed service

AI CAPABILITIES

- Audience Building
- Insights Reports

RECENT DEVELOPMENTS

OAM enhanced the self-service platform experience in Orange Access with smarter filtering, data freshness visibility, improved auditing, and proactive in-platform alerts to help advertisers continuously optimize performance and streamline campaign management.

The network also expanded the platform by integrating the Supplier Analytics Program to create a more connected ecosystem of data, tools, and services. The enhanced experience gives brands a seamless way to connect media performance with broader business health, enabling more proactive, data-driven decision-making.

In-store audio has launched nationwide, along with the In-Store Network Kitchen Display, which features 75-inch digital screens in 1,400 stores.

Offsite opportunities continue to expand through enhanced partnerships with platforms such as Pinterest and Reddit, letting brands activate audiences and extend reach across the broader digital ecosystem.

Additionally, OAM harnessed The Home Depot’s World Cup programming to deliver integrated ad opportunities across media, in-store, and experiential touchpoints.

Looking ahead, Orange Apron Media will roll out advanced banner audience targeting and additional self-service capabilities to building and managing brand pages.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based		x	x
	Keyword	x		
	Behavioral	x		x
	Contextual			x
	Geo-Targeting		x	x
	Demographic			x
	Competitive Conquesting			
	Clean Room Audiences			
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA		x
MEASUREMENT/REPORTING	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)	x	x	x
	Incrementality (True Incrementality)			
	Viewability/Fraud	NA		
	Audience-Level Reporting	NA		x
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: Second-largest pet specialty retailer in the U.S.

Store Count: 1,363

Footprint: National

Banners: Petco

Loyalty Program: Vital Care Rewards

Addressable U.S. Audience: 25 million

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

No partners at present

KEY CAPABILITIES

Agency Partnerships

Clean Room

First-Party Data Sharing

IAB Compliance

Partner Training

Retail Media JBP

OVERVIEW

Petco operates nearly 1,400 pet care centers nationwide under a business model that focuses on pet health, wellness, and premium care solutions across food, treats, supplies, services, and veterinary care. The retailer serves highly engaged pet parents who prioritize health and well-being and are brand loyal, digitally active, and willing to invest in quality and specialized products.

Petco Spot Media is a growing retail media ecosystem built on Petco’s first-party shopper and loyalty data, which enables targeted activation and closed-loop measurement. The platform supports a range of self-service and managed media solutions, including sponsored products, onsite display, offsite media, and in-store placement. With access to highly engaged pet parents and continued investment in data, targeting, and measurement capabilities, Petco Spot Media is well suited for brands looking to connect upper-funnel awareness with shopper activation and drive measurable impact across Petco’s digital and physical shopping environments.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP

SELF-SERVICE OPTIONS

Onsite search: Internal platform

REPORTING OPTIONS

- Near-real-time reporting dashboard
- End of Campaign reporting

AI CAPABILITIES

None currently available

RECENT DEVELOPMENTS

Dynamic creative optimization will soon be added to the capabilities toolkit.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x		
TARGETING	Purchase-Based			x
	Keyword	x	x	
	Behavioral			x
	Contextual	x	x	
	Geo-Targeting			x
	Demographic			x
	Competitive Conquesting			
	Clean Room Audiences			x
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA	x	x
MEASUREMENT/REPORTING	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)			
	Incrementality (True Incrementality)			
	Viewability/Fraud	NA		
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: Largest retailer-owned hardware cooperative in the world

Store Count: 5,300

Footprint: National

Banners: Ace Hardware (alongside local franchisee name)

Loyalty Program: Ace Rewards

Addressable U.S. Audience: 70 million

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

Epsilon Retail Media*

Pacvue

KEY CAPABILITIES

Agency Partnerships

IAB Compliance

In-Store Opportunity Leverage

Partner Training

Retailer-Level JBP Integration

Retail Media JBP

OVERVIEW

The Ace Hardware retail cooperative serves millions of customers through a locally owned and operated store model that emphasizes community, service, and convenience. Store owners are empowered to tailor their assortment, services, and approach to the local community's needs, creating an unmatched level of trust and personalization. Approximately 75% of U.S. residents live within a 15-minute drive of an Ace store.

The “Ace Is the Helpful Place” brand promise is reflected in both the customer experience and the consistent industry recognition the company receives. Customer loyalty is central to Ace’s strategy: Ace Rewards members get localized promotions, early access to seasonal products, and increasingly tailored experiences both in-store and through digital channels. The retailer’s website and app bring “helpful” straight to customer doorsteps and, as a result, recent ecommerce sales growth has significantly over-indexed compared with industry averages.

The RedVest Media network is designed to give advertisers what they most need: real-time, measurable results; media plans that connect to the total retail business; and a full-funnel media portfolio. The network leverages Ace’s geographic scale, robust loyalty program, and rapidly expanding digital properties to give advertisers something unique: the ability to tap into the convenience of a scaled store footprint, the precision of hyper-local personalization, and the authenticity that only comes from independent owners who know their communities.

JOINT BUSINESS PLANNING

Conducted as part of the broader merchandising negotiation or through a separate upfront commitment with RedVest.

SELF-SERVICE OPTIONS

Onsite Search: Pacvue

REPORTING OPTIONS

- Self-service, near-real-time reporting dashboard for onsite and offsite campaigns via the Epsilon Retail Media* portal
- End of Campaign reporting for other tactics

AI CAPABILITIES

- Audience Building
- Media Optimization

RECENT DEVELOPMENTS

Weather-triggered programmatic media increases campaign relevance and performance by dynamically activating creative based on local conditions, ensuring that messaging aligns with real-time customer needs.

Social amplification helps brands extend the reach of organic social content by transforming existing posts into programmatic media assets.

Influencer marketing helps brands build awareness and credibility by leveraging trusted creators to develop authentic content to amplify through retail media.

New partner Pacvue lets brands streamline execution by centralizing campaign management, budget pacing, bid optimization, and performance insights.

And a new partnership with DoorDash lets endemic brands advertise on the delivery platform’s Ace Hardware storefront.

*Epsilon Retail Media is part of Publicis Groupe, parent company of Mars United Commerce.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
TARGETING	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x		
	Purchase-Based			x
	Keyword	x	x	
	Behavioral			x
	Contextual		x	x
	Geo-Targeting			x
	Demographic			x
	Competitive Conquesting			x
	Clean Room Audiences			
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA		x
MEASUREMENT/REPORTING	Custom Analysis			x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers			x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)			x
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA		x
Rest of Market Analysis				



RETAILER HIGHLIGHTS

Key Fact: Second-largest mass merchant in the U.S.

Store Count: 1,989

Footprint: National

Banners: Target

Loyalty Program: Target Circle

Addressable U.S. Audience: 140 million

JBP-APPROVED MEDIA PARTNERS

LTK

PLATFORM PARTNERS

DSP-agnostic for self-service offsite display

KEY CAPABILITIES

- Clean Room
- First-Party Data Sharing
- IAB Compliance
- Retail Media JBP

OVERVIEW

Target has built its reputation on providing a unique assortment of fashion, home goods, groceries, and exclusive brand partnerships that appeals to a broad base of value-seeking, yet trend-minded, shoppers who appreciate style, quality, and convenience. These “guests” tend to be digitally savvy, brand-oriented, and receptive to curated product offerings, making Target a highly attractive environment for both national and exclusive brands. The retailer has been placing a strong emphasis on digital engagement through Target.com and the convenience of alternative delivery: same-day at home or at-store pickup/drive-up.

The Roundel retail media network uses first-party data from Target’s loyalty program and digital interactions to help brands reach guests with relevant ads across owned properties and beyond. The platform offers a wide range of solutions including onsite search and display, offsite programmatic, CTV, and custom audience targeting, supported by closed-loop measurement that ties ad exposure to actual purchases. Roundel is a gateway to multi-brand selling events, sampling, and other storefront activations that leverage internal Precision Plus data-sharing capabilities for planning and Kiosk insights dashboard for evaluating results.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP

SELF-SERVICE OPTIONS

Onsite Search: Roundel Media Studio (internal platform)

Offsite: DSP-agnostic, including The Trade Desk, Yahoo DSP (via Programmatic by Roundel Group)

REPORTING OPTIONS

- Self-service real-time reporting dashboard in Roundel Kiosk platform
- End of Campaign reporting

AI CAPABILITIES

- Audience Building
- Creative Development
- Media Optimization

RECENT DEVELOPMENTS

The new Roundel Media Studio Planning tool provides a centralized place to submit campaign briefs, manage activation, access reports (formerly in Kiosk), and find training and support in one platform.

A new conquering opportunity for keyword targeting lets advertisers serve sponsored Target Product Ads on search page results for competitive brand terms.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x		x
TARGETING	Purchase-Based			x
	Keyword	x	x	
	Behavioral			x
	Contextual	x	x	
	Geo-Targeting		x	x
	Demographic			x
	Competitive Conquesting	x		
	Clean Room Audiences			
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA	x	
MEASUREMENT/REPORTING	Custom Analysis		x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)		x	x
	Incrementality (True Incrementality)			x
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			x



RETAILER HIGHLIGHTS

Key Fact: Has more than 40 years of first-party data on member purchases, club visits, and searches

Store Count: 600

Footprint: National

Banners: Sam's Club

Loyalty Program: Membership model

Addressable U.S. Audience: Not disclosed

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

The Trade Desk

KEY CAPABILITIES

Agency Partnerships

Clean Room

First-Party Data Sharing

IAB Compliance

Off-Platform Strategic Vendor Partnerships

Partner Training

Retail Media JBP

OVERVIEW

Sam's Club is a membership-based retailer focused on delivering value, convenience, and a modern omnichannel shopping experience. The company serves millions of members across more than 600 clubs in the U.S. and Puerto Rico. The retailer's member base includes families and small business owners who are value-focused but typically higher income than the average mass merchant shopper. Recent omnichannel activities have increased ecommerce to more than 23% of sales. New partnerships with OpenAI and Google Gemini are moving Sam's Club quickly into agentic commerce.

Sam's Club Connect bills itself as the first "Retail Experience Network." Powered by first-party, deterministic membership data, the network delivers physical and digital ad experiences backed by closed-loop measurement. By connecting brands with members at every stage of the shopping journey through online, offsite, and in-club media, Sam's Club Connect helps drive engagement and measurable growth for advertisers of all sizes.

JOINT BUSINESS PLANNING

Conducted separately for Sam's Club and Sam's Club Connect

SELF-SERVICE OPTIONS

Onsite Search: Internal platform
Offsite: The Trade Desk

REPORTING OPTIONS

- Near-real-time reporting dashboard
- End of Campaign reporting

AI CAPABILITIES

- Audience Building
- Media Optimization

RECENT DEVELOPMENTS

Sam's Club MAP has officially rebranded as Sam's Club Connect, signaling the continued evolution of its commerce media capabilities and a deeper alignment with the broader Sam's Club and Walmart ecosystems. For brand partners, the change represents more than a new name; it reflects an ongoing commitment to helping brands connect with Sam's Club members through increasingly integrated, data-driven, and measurable advertising solutions across the shopper journey.

This new identity reinforces the network's momentum, strengthens its connection to the trusted Sam's Club brand, and underscores its ambition to deliver greater value, innovation, and growth opportunities for partners in the years ahead.

In other recent activity, shopper-facing tablets have been added to the in-club demo cart experience, allowing members to easily rate the products they've sampled. The ratings are automatically added to the appropriate product detail page on SamsClub.com.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x		x
TARGETING	Purchase-Based		x	x
	Keyword	x	x	
	Behavioral		x	x
	Contextual		x	x
	Geo-Targeting		x	x
	Demographic		x	x
	Competitive Conquesting	x		
	Clean Room Audiences			x
	Predictive/Look-Alike		x	x
	Retargeting/Pixelling	NA		x
MEASUREMENT/REPORTING	Custom Analysis			x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)	x	x	x
	Incrementality (True Incrementality)	x	x	x
	Viewability/Fraud	NA		x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis		x	x



RETAILER HIGHLIGHTS

Key Fact: Now available for 80% of U.S. population

Store Count: NA

Footprint: National

On-Demand Delivery Brand: Shipt

Loyalty Program: Shipt Perks

Addressable U.S. Audience: Not disclosed

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

Criteo

Google Commerce Media

The Trade Desk

Symbiosys

Yahoo DSP

KEY CAPABILITIES

IAB Compliance

First-Party Data Sharing

Retail Media JBP

OVERVIEW

Shipt supports same-day delivery for 100-plus retailers such as CVS, Lowe’s, Petco, 7-Eleven, and Walgreens, in addition to parent Target, allowing brands to reach consumers at the retailer-specific or national/retailer-agnostic level. Its services are now available to 80% of the U.S. population. Introduction of the Target Circle 360 program, which includes Shipt Marketplace as a key benefit and unlimited same-day delivery, continues to attract net new customers and grow cross-retailer shopping.

Shipt Media offers advertising and promotional opportunities for brands through enhanced product placement, sponsored offerings, and featured positions both within the Shipt app and the inventories of partner retailers. Leveraging first-party order and browsing data, Shipt is helping brands increase visibility among convenience-oriented shoppers at key moments of purchase intent, driving discovery, conversion, and incremental sales.

JOINT BUSINESS PLANNING

Conducted within the Shipt JBP or separately with Shipt Media

SELF-SERVICE OPTIONS

Onsite Search and Display: Criteo

REPORTING OPTIONS

- Near-real-time reporting dashboard
- End of Campaign reporting

AI CAPABILITIES

- Content Generation
- Insights Reports
- Performance Reports
- Shopping Assistant Search Inventory

RECENT DEVELOPMENTS

Shipt’s new AI Cart Builder tool lets customers leverage generative AI to build baskets based on their needs. It also offers collaborative advertising opportunities for brands.

New “Shipt Kits” are curated product bundles that let customers make seamless, one-click basket additions during the shopping experience. Brand opportunities include guaranteed inclusion in seasonal kits or exclusive, fully branded kits.

Relevance for sponsored products in search has been enhanced through a fully dynamic grid rather than fixed slots, creating greater visibility for brands and a more optimal experience for customers.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based			x
	Keyword	x		
	Behavioral	x		x
	Contextual	x	x	
	Geo-Targeting			x
	Demographic			x
	Competitive Conquesting			
	Clean Room Audiences			x
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA		
MEASUREMENT/REPORTING	Custom Analysis		x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers			x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)			x
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			x

Uber Advertising

RETAILER HIGHLIGHTS

Key Fact: Uniquely positioned with both rideshare and on-demand delivery services

Store Count: NA

Footprint: National

On-Demand Delivery Brands : Uber, Uber Eats, Postmates

Loyalty Program: Uber One

Addressable U.S. Audience: Not disclosed

JBP-APPROVED MEDIA PARTNERS

Google DV360

T-Mobile

PLATFORM PARTNERS

Instacart Carrot Ads

Place Exchange

The Trade Desk

Yahoo DSP

KEY CAPABILITIES

Agency Partnerships

Clean Room

Partner Training

Retail Media JBP

OVERVIEW

Uber is a leading global mobility and delivery platform that connects consumers with both personal transportation and deliveries of food, grocery, alcohol, and convenience items through a single app. The platforms serve a digitally native, convenience-driven audience that values speed, flexibility, and on-demand access for daily life moments. With high usage frequency across the transportation and delivery occasions, Uber sits at the intersection of mobility, local commerce, and immediate consumption, giving it a uniquely broad and behavior-rich consumer footprint.

Having both ride and product delivery services makes Uber a truly unique provider in the on-demand marketplace, and Uber Advertising a unique player in retail media. The platform’s offerings let CPG brands reach consumers in just about any location. Uber also delivers a unique solution for brands looking to bridge the on- and off-premise divide and capture consumer attention across numerous touchpoints.

JOINT BUSINESS PLANNING

Conducted within the Uber JBP

SELF-SERVICE OPTIONS

Onsite Search: Instacart Carrot Ads

Offsite: The Trade Desk, Yahoo DSP

REPORTING OPTIONS

Near-real-time reporting dashboard for search

AI CAPABILITIES

None currently available

RECENT DEVELOPMENTS

Availability for Uber's signature Journey Ads in the Rider app have expanded from private guarantee-only to private marketplace. This update unlocks enhanced programmatic buying options and advanced measurement capabilities for brands.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based		x	x
	Keyword	x	x	x
	Behavioral	x	x	x
	Contextual	x	x	x
	Geo-Targeting	x	x	x
	Demographic	x	x	x
	Competitive Conquesting	x	x	x
	Clean Room Audiences		x	
	Predictive/Look-Alike	x	x	x
	Retargeting/Pixelling	NA	x	x
MEASUREMENT/REPORTING	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)		x	x
	Incrementality (True Incrementality)	x		
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			x



RETAILER HIGHLIGHTS

Key Fact: Largest retailer-owned cooperative in U.S.

Store Count: 380+

Footprint: New Jersey, New York, Connecticut, Pennsylvania, Delaware, Maryland, Massachusetts, New Hampshire, Rhode Island

Banners: ShopRite, Price Rite Marketplace, The Fresh Grocer, Dearborn Market, Gourmet Garage, Fairway Markets, Di Bruno Bros

Loyalty Programs: Price Plus Club

Addressable U.S. Audience: 8 million

JBP-APPROVED MEDIA PARTNERS

Inmar Intelligence

PLATFORM PARTNERS

Inmar Retail Cloud

KEY CAPABILITIES

- Agency Partnerships
- First-Party Data Sharing
- IAB Compliance
- In-Store Opportunity Leverage
- Partner Training

OVERVIEW

Wakefern Food Corp. is the largest retailer-owned cooperative in the U.S. The co-op’s membership consists of about 50 companies operating more than 380 supermarkets in nine Eastern states as ShopRite, Price Rite Marketplace, and five other brands.

The co-op-centric Wakefern Media Exchange (WME) helps brands drive and measure incremental sales across the shopper journey using first-party loyalty data at scale. The network goes to market with an omnichannel, full-funnel strategy spanning onsite, offsite, and in-store media sold directly to brands and aligned on sales goals, promotions, and category priorities.

WME's core partner profile includes endemic national and regional CPG advertisers focused on performance, incrementality, and SKU-level attribution, particularly in high-frequency grocery and household categories. Wakefern's sizable trade region, high loyalty penetration, and closed-loop measurement make WME especially effective at capturing high-intent, omnichannel shoppers at the point of decision and converting them into measurable, attributed buyers.

JOINT BUSINESS PLANNING

Customized by brand partner

RECENT DEVELOPMENTS

There are no new updates this quarter.

SELF-SERVICE OPTIONS

Onsite Search and Display: Inmar Retail Cloud

Offsite Display: The Trade Desk

REPORTING OPTIONS

- Self-service, near-real-time reporting dashboard for most tactics
- End of Campaign reporting

AI CAPABILITIES

- Audience Building
- Content Generation
- Media Optimization

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x	x	x
TARGETING	Purchase-Based			x
	Keyword	x	x	
	Behavioral			x
	Contextual	x	x	
	Geo-Targeting	x		x
	Demographic			x
	Competitive Conquesting			
	Clean Room Audiences			
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA		x
MEASUREMENT/REPORTING	Custom Analysis	x	x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)		x	x
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA		x
	Rest of Market Analysis			



RETAILER HIGHLIGHTS

Key Fact: Largest U.S. drugstore operator
Store Count: 8,050
Footprint: National
Banners: Walgreens
Loyalty Program: myWalgreens
Addressable U.S. Audience: 101 million

JBP-APPROVED MEDIA PARTNERS

Vestcom
Looma

PLATFORM PARTNERS

Criteo
Epsilon Retail Media*
OpenX
The Trade Desk

KEY CAPABILITIES

Agency Partnerships
Clean Room
First-Party Data Sharing
IAB Compliance
Retailer-Level JBP Integration
Retail Media JBP

OVERVIEW

Walgreens operates the largest pharmacy-led retail footprint in the U.S., with over 8,000 stores nationwide serving shoppers who are actively seeking solutions for their health, beauty, personal care, and everyday essentials needs. The vast majority (75%) of the retailer’s high-intent customers live within five miles of a store. Pharmacy traffic amplifies front-of-store performance, with prescription customers twice as likely to shop another category during the trip.

Walgreens Advertising Group (WAG) is built on extensive first-party data that facilitates full-funnel activation and closed-loop accountability. Every media campaign is tied to incremental sales measurement verified by data partner Circana, giving brands proof of performance rather than just impressions. Walgreens’ focus on serving a broad range of health and well-being needs, combined with WAG’s scale and flexibility, delivers a powerful combination for audience targeting.

JOINT BUSINESS PLANNING

Conducted within the retailer JBP

SELF-SERVICE OPTIONS

Onsite Search: Criteo
Offsite: The Trade Desk

REPORTING OPTIONS

- Near-real-time reporting dashboard
- End of Campaign reporting

AI CAPABILITIES

Media Optimization

RECENT DEVELOPMENTS

Walgreens continues to focus on strengthening its retail media ecosystem through greater alignment across merchandising, marketing, and digital, with the goal of driving increased returns and growth for brands.

In the last quarter, WAG announced the upcoming launch of in-store digital screens in partnership with Looma. The rollout will begin this fall and expand to 1,200 stores by early 2027. This new capability extends the omnichannel offering and creates additional opportunities for brands to reach customers at the point of purchase in the retailer’s highest-traffic locations.

WAG is also expanding high-impact media opportunities across Walgreens-owned properties and delivery partner storefronts like DoorDash. These efforts are geared toward increasing available inventory and extending reach to a wider range of shoppers.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service	x	x	x
	Self-Service	x		x
TARGETING	Purchase-Based			x
	Keyword	x		
	Behavioral			x
	Contextual	x	x	
	Geo-Targeting			x
	Demographic			x
	Competitive Conquesting			
	Clean Room Audiences			x
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA		
MEASUREMENT/REPORTING	Custom Analysis		x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers			x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)			x
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA		x
	Rest of Market Analysis			x

*Epsilon Retail Media is part of Publicis Groupe, parent company of Mars United Commerce.



RETAILER HIGHLIGHTS

Key Fact: Largest retailer/CPG retailer in the U.S.

Store Count: 4,600

Footprint: National

Banners: Walmart, Walmart Neighborhood Market

Loyalty Program: Walmart+

Addressable U.S. Audience: Not disclosed

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

The Trade Desk

KEY CAPABILITIES

- Agency Partnerships
- Clean Room
- First-Party Data Sharing
- In-Store Opportunity Leverage
- Off-Platform Strategic Vendor Partnerships
- Partner Training
- Retail Media JBP

OVERVIEW

Walmart operates more than 4,600 stores nationally and serves approximately 150 million customers weekly across its physical store, online, and mobile channels. The shopper base is highly diverse, value-driven, and digitally engaged, making Walmart one of the most representative retail environments in the U.S.

Walmart Connect has evolved into a scaled retail media platform powered by Walmart’s first-party shopper data and closed-loop measurement capabilities. Advertisers can activate campaigns across onsite, offsite, social, and connected TV channels with measurable sales attribution. The platform continues expanding through self-service tools, demand side platform capabilities, and growing CTV opportunities, helping brands connect media performance directly to commerce outcomes.

JOINT BUSINESS PLANNING

Conducted separately with Walmart and Walmart Connect

SELF-SERVICE OPTIONS

Onsite Search, Display and Brand Store: Internal platform

Offsite: The Trade Desk

REPORTING OPTIONS

- Self-service, near-real-time reporting dashboard
- End of Campaign reporting

AI CAPABILITIES

- Creative Development
- Insights Reports
- Performance Reports

RECENT DEVELOPMENTS

Walmart Connect has been updating its identity, targeting, and attribution capabilities to create greater consistency across its advertising ecosystem. The changes leverage Walmart’s first-party shopper data to improve customer identification across online and in-store channels while introducing a more defined approach: household-level targeting for upper-funnel channels such as Walmart DSP, CTV, and social; individual-level targeting for onsite display, which is positioned closer to the point of purchase.

The network has moved to a unified, deduplicated attribution methodology across sponsored search, onsite display, and Walmart DSP, providing a more standardized view of performance across channels. As a result, advertisers should expect improved cross-channel comparability, a clearer understanding of the impact media has on both online and in-store sales, and potential shifts in reported performance metrics as attribution moves to a consistent framework.

Elsewhere, Walmart Connect introduced negative keyword functionality for sponsored products, giving advertisers greater control over where their ads appear in search results. Available for both manual and automatic campaigns using fixed bidding, the update allows advertisers to exclude irrelevant, low-performing, branded or brand-misaligned search terms through exact- and phrase-match negative keywords. The offering is intended to improve campaign efficiency, help focus spend on higher-value traffic, and provide advertisers with greater control over search strategy and performance optimization.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	x	x	x
	Managed Service			x
	Self-Service	x	x	x
TARGETING	Purchase-Based		x	x
	Keyword	x	x	
	Behavioral			x
	Contextual	x	x	
	Geo-Targeting			x
	Demographic			x
	Competitive Conquesting	x		
	Clean Room Audiences			x
	Predictive/Look-Alike			x
MEASUREMENT/REPORTING	Retargeting/Pixelling	NA	x	
	Custom Analysis		x	x
	Closed-Loop Attributed Sales/ROAS	x	x	x
	% New Buyers	x	x	x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)			
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis		x	x



RETAILER HIGHLIGHTS

Key Fact: Has returned to its century-old roots as a Florida-based grocer

Store Count: 235 grocery; 138 liquor

Footprint: Five states in the Southern U.S.

Banners: Winn-Dixie, Harvey's

Loyalty Program: Winn-Dixie Rewards

Addressable U.S. Audience: 5 million

JBP-APPROVED MEDIA PARTNERS

No approved partners at present

PLATFORM PARTNERS

WD Connects (in-house platform)

KEY CAPABILITIES

- Agency Partnerships
- First-Party Data Sharing
- IAB Compliance
- In-Store Opportunity Leverage
- Partner Training

OVERVIEW

The Winn-Dixie Company (known as Southeastern Grocers until January 2026) is a trusted neighborhood grocer with deep roots in Florida and southern Georgia. Building on a legacy more than a century old, the company is working to shape the future of neighborhood grocery through continued store investments, innovative format launches, and a seamless omnichannel shopping experience that delivers exceptional value both in stores and online. Guided by its purpose to feed and enrich the communities it serves, Winn-Dixie is known for exceptional service and locally authentic stores. The grocer is committed to offering fresh, high-quality products and meaningful value through its Winn-Dixie Rewards loyalty program.

The Winn-Dixie Connects retail media network’s solutions are powered by customer science and relevance and designed to reach the right shoppers through the right channels with closed-loop measurement that supports long-term optimization. Working with its brand partners and fueled by data from Winn-Dixie Rewards, the network is committed to helping brands understand, interpret, and predict customer behavior and meet their objectives for driving growth and brand loyalty.

JOINT BUSINESS PLANNING

No retail media JBP at this time

SELF-SERVICE OPTIONS

No options currently available

REPORTING OPTIONS

End of Campaign reporting

AI CAPABILITIES

- Content Generation
- Media Optimizations

RECENT DEVELOPMENTS

Winn-Dixie Connects has broadened its media capabilities to deliver integrated omnichannel solutions that help brands engage shoppers across multiple touchpoints. The portfolio includes in-store media, mass and targeted digital advertising, programmatic activation, and digital out-of-home — creating a comprehensive, scalable retail media offering.

TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
	Capability Available		x	x
	Managed Service		x	x
	Self-Service			
TARGETING	Purchase-Based			x
	Keyword		x	x
	Behavioral			x
	Contextual			x
	Geo-Targeting			x
	Demographic			x
	Competitive Conquesting			x
	Clean Room Audiences			x
	Predictive/Look-Alike			x
	Retargeting/Pixelling	NA		x
MEASUREMENT/REPORTING	Custom Analysis		x	x
	Closed-Loop Attributed Sales/ROAS			x
	% New Buyers			x
	Incrementality (Test vs. Control)			x
	Incrementality (True Incrementality)			x
	Viewability/Fraud	NA	x	x
	Audience-Level Reporting	NA	x	x
	Rest of Market Analysis			x



GLOSSARY

Details and definitions for evaluation
criteria across the Key Performance Areas

GLOSSARY

TARGETING

Audience Scale	The retail media network has a targetable audience in the U.S. of at least 50 million shoppers.	Demographic Targeting	The ability to target campaigns to specific personal characteristics.
Purchase-Based Targeting	The availability of a proprietary first-party database of shopper sales data.	Competitive Conquesting	The ability to target campaigns to your competitors' shoppers.
Keyword Targeting	The ability to buy top-of-page placement in the search results of keywords or target ads based on keyword searches.	Templated Audience Segments	The ability to leverage pre-built audience segments (such as holiday entertaining or Millennial shoppers) that are available to all advertisers.
Geo-Targeting	The ability to target campaigns to specific locations such as ZIP codes or store footprints.	Custom 1P Audiences	The ability for the advertiser to create unique "from scratch" audience segments from the retailer's first-party data that are not available to other advertisers.
Behavioral Targeting	The ability to target campaigns based on specific shopping activity on the retailer's website such as browsing or search.	Clean Room/ Brand Audience Ingestion	The ability to share anonymized brand data for targeting and measurement.
Contextual Targeting	The ability to place ads in specific locations on the retailer's website or within relevant content off-platform.		

GLOSSARY

TARGETING

Retargeting/ Site Pixeling	The ability to leverage tracked behavior on the retailer's platform to conduct retargeting campaigns.
Retailer Targeting	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).
Predictive/Look-Alike Audiences	The ability to build audiences based on their likelihood to take a specific action based on predictive metrics or characteristics shared with the brand's known buyers.
Audience Expansion via 3P Data	The use of third-party data from external sources to reach audiences outside of the retailer's own ecosystem.

GLOSSARY

MEASUREMENT & REPORTING

Standard Media Metrics	Commonly accepted methods of digital media measurement, such as impressions, click-through rate, and cost per click.	Sales Lift & iROAS (True incrementality)	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.
Closed-Loop Attributed Sales & ROAS	The use of the retail media network's own 1P data to measure sales and resulting ROAS (return on ad spend).	Viewability/Fraud Transparency	The retail media network provides access to, or the ability to utilize, outside ad quality measurement tools (like MOAT, DoubleVerify, or IAS).
Baseline Sales Measured by Deterministic Data	The retail media network exclusively leverages first-party data for reporting rather than modeled or extrapolated data.	Self-Service/Real-Time Reporting	The ability for advertisers to access reports directly, in as close to real time as possible.
IAB Measurement Compliance	The network is actively working to adhere to the retail media measurement standards presented by the IAB (Interactive Advertising Bureau).	Media Mix Modeling	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.
Ad-Attributed Total Omni Sales Data	The retail media network reports both online and brick & mortar sales impact.	Custom/Ad Hoc Analysis	The ability for advertisers to create or request their own custom analysis/reports.
% New Buyers	The retail media network reports the number or percentage of buyers who are new to your brand.	Targeted Audience-Level Reporting Basket Analysis	The ability to measure campaign performance at the individual audience level.
Sales Lift & iROAS (via A-B/exposed vs. unexposed test)	The ability to measure a campaign's sales impact by conducting A/B (exposed vs. unexposed) testing on the retail media network's audience.	Creative Versioning-Level Reporting	The ability to measure campaign performance for each creative version of an ad.

GLOSSARY

MEASUREMENT & REPORTING

Basket Analysis	The ability to analyze other products purchased along with the advertised brand.
Rest of Market Analysis	The ability to measure a campaign's impact on incremental sales at other retailers.
Self-Service Sales Data	The ability for advertisers to directly access sales data.

GLOSSARY

MEDIA OPPORTUNITIES

Self-Service Onsite Search	The network allows advertisers to launch, measure, and optimize search activations for in-grid or banner ads via self-service ad platforms, either through the retailer's own platform or 3P services such as Criteo, Epsilon Retail Media, and Pacvue.	Livestream Shopping	The network hosts live sponsored shopping events on digital platforms or has partnerships available to stage them.
Self-Service Onsite Display	The network has a platform allowing advertisers to directly manage onsite display campaigns.	Managed Service Brand Store	Brands can provide a variety of content to populate a landing page dedicated to their product portfolio.
Self-Service Programmatic	The network has a demand side platform (DSP) or private marketplace (PMP) that lets advertisers directly manage offsite programmatic campaigns.	Self-Service Brand Store	Brands are able to directly manage the content that populates their brand store.
Shoppable Content	The network offers opportunities for advertisers to create shoppable content (such as recipe pages or click-through videos).	Associate Engagement	Advertisers can directly target the retailer's employees with advertising campaigns or can leverage them in the store to influence shopper purchases.

GLOSSARY INNOVATION

AR/VR	The retail media network is driving shopper engagement through the use of augmented/virtual reality tools and environments.	EV Charging	The network offers advertising opportunities at the electronic vehicle charging stations in store parking lots.
1P Data Sharing With 3P Partners	The platform lets advertisers use its 1P data for campaigns handled by 3P service providers/publishers outside of its own partner network.	AI Content Generator	The network has artificial intelligence tools that help advertisers create images and other content (like turning plain-background product shots into vibrant lifestyle images) to help improve shopper engagement.
Dynamic Creative Optimization	Advertisers can use 3P creative tools (such as AdForm or Flashtalking) to mass-personalize ad experiences to drive shopper engagement.	Generative AI Search	The network has an advanced AI tool that allows shoppers to conduct product searches by asking questions or using contextual phrases to receive recommendations rather than simple results.

GLOSSARY

PARTNERSHIP

JBP Process for Retail Media	The retail media network offers joint business planning and/or preferred partnerships for brands and agencies.	Creative Flexibility	The advertiser has control over campaign creative/messages and/or can earn creative certification to develop ad units directly within the platform.
Retailer-Level JBP Integration	Retail media network activity is integrated into the broader JBP process between the retailer and advertiser.	First-to-Market Test & Learns	The network offers opportunities to conduct first-to-market test & learns on new offerings before activating them at scale.
Annual Planning/ Top-to-Tops	The relationship includes standard business opportunities, such as annual planning and top-to-top meetings.	Agency Partnerships	The network establishes formal partnerships with marketing agencies that strengthen collaboration and facilitate cross-client benefits.
In-Store Opportunity Leverage	The retail media investment earns value-added activation in stores (such as increased product distribution or incremental display).	Roadmap Visibility/ Collaboration	The network openly shares its future plans with advertisers, actively seeking their input and participation in developing mutually beneficial improvements and innovation.
Partner Training Programs/ Certifications	The network offers formal training and education opportunities to help brands and agencies understand and optimize the platform.	Transparency Into Media Rates	The network openly shares the rates it is charging for media opportunities.
Dedicated Account Reps	The retail media network provides advertisers with a direct point of contact.	Loyalty Program Alignment	The retailer has a loyalty program that can be leveraged for retail media network activity.
Dedicated Data Analytics/Other Resources	The retail media network has dedicated internal resources for data analytics and other key business needs.	Off-Platform Strategic Vendor Partnerships	The retail media network lets advertisers build campaigns directly with third-party vendors with which it shares first-party audience data and measurement capabilities. In addition, these investments are credited toward the advertiser's network investment.

GLOSSARY

ARTIFICIAL INTELLIGENCE

Audience Building	The network leverages AI to automatically create and refine audiences/audience segments based on shopper behavior, purchase patterns, and/or intent signals, enabling smarter targeting and eliminating the need for manual processes.	Media Optimization	The network leverages AI to automatically optimize campaigns in real time by adjusting targeting, bids, budget allocation, and placement rather than relying solely on manual campaign management. The capability spans a majority of onsite and offsite tactics to deliver holistic campaign optimization and is available to advertisers through either managed service or self-service.
Content Generation	The network has artificial intelligence tools that help advertisers create images and other content (for example, turning plain-background product shots into vibrant lifestyle images) to help improve shopper engagement.	Performance Reports	The network uses AI to automatically analyze campaign performance and generate clear reporting summaries, recommendations, and next steps, helping advertisers optimize campaigns faster, without the need for manual report building.
Creative Development	The network uses advanced AI tools to help brands generate, customize, and optimize creative assets (such as images, copy, and ad variations) at scale, enabling more personalized and performance-driven advertising.	Shopping Assistant Search Inventory	The network has extended its ad inventory to include opportunities in generative AI-enabled search agents and/or shopping assistants.
Insights Reports	The network uses AI to identify insights, performance drivers, trends, and optimization opportunities within campaign results, helping advertisers understand what's working and why rather than relying on a manual analysis.	Workflow Automation/Optimization	The network uses AI to automate process flow for pre-campaign activation activities, such as streamlining job tickets, reconciling invoices, building proposals, and identifying audience models and ideal ad inventory.

MEET THE TEAM



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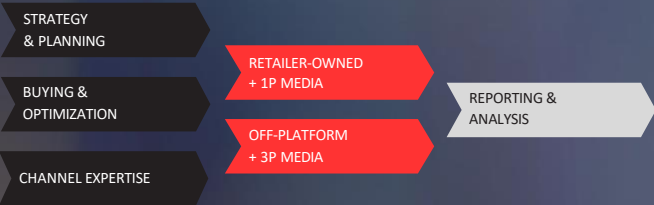
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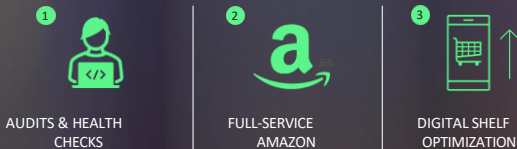
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