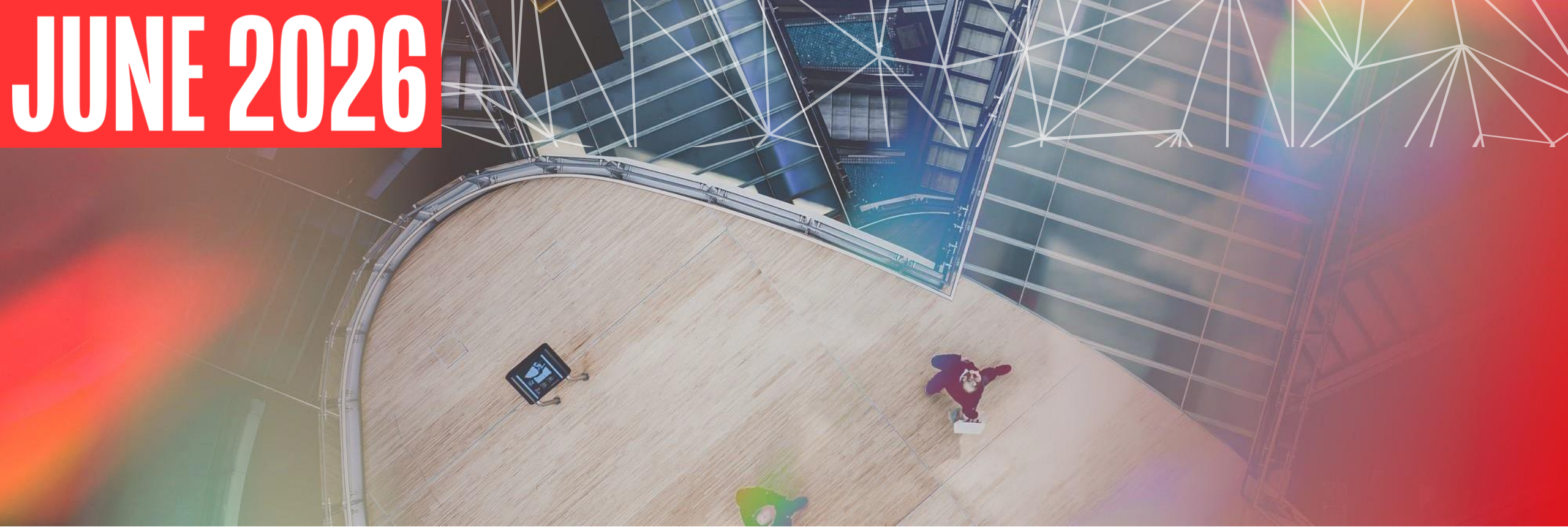


**JUNE 2026**



**MARS UNITED.**  
COMMERCE

  
SPECIAL \_\_\_\_\_ REPORT

# RETAIL MEDIA REPORT CARD

A universal tool for effective cross-network evaluation

# INTRO DUCTION

It's official: Retail media is no longer the shiny new penny in commerce marketing. But its future is still bright: EMARKETER projects U.S. ad spending to grow another 18% and reach nearly \$72.0 billion this year.

While onsite advertising continues to command up to 80% of that total, offsite media allocations are growing twice as fast, as networks seek to expand audiences (and please advertisers) by branching out to other digital platforms as well as the physical store — although that latter channel still accounts for less than 1% of all outlays.

And, apparently, this shift is coming at a fortuitous time.

That shiny new penny is, of course, agentic search, which already is having a measurable impact on product research and discovery through consumer adoption of third-party platforms such as Gemini (Google), ChatGPT (OpenAI), Claude (Anthropic), Microsoft (Copilot) and Perplexity. According to some industry pundits, it ultimately also could substantially reduce traffic to retailer websites and thereby make onsite advertising largely irrelevant.

Retailers have been moving into this arena as well. They're introducing proprietary engines, led by Amazon's newly repositioned Alexa for Shopping (formerly Rufus) and Walmart's Sparky, and also launching apps embedded into these third-party platforms. Experimentation with advertising models that don't contradict an agent's main selling point for consumers — personalized and objective recommendations — has just begun. But agentic ads could become a standard retail media offering before long.

It's not clear if third-party agents will ever significantly bite into retailer traffic: for now, their recommendations are sending users in that direction. But they'll soon represent a fresh contingent of competitors for digital ad dollars in a market already saturated with yet-more retail media networks, as well as "commerce media" players from travel, financial services, hospitality, and other service industries.

The escalating competition, however, is driving ingenuity and innovation, as old-school retail networks strive to build unique platforms and processes that make it easier — as in directly, via self-service tools — for brand partners to achieve their specific business goals by providing access to identified audiences across the entire path to purchase through those aforementioned offsite opportunities.

This ever-intensifying competition makes 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.

## 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.

# INTRO DUCTION

## New Features This Quarter

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 have updated our Platform Profiles 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.

We also welcome **Costco Retail Media** to our coverage for the first time this edition, and welcome back **Wakefern Media Exchange**.

In terms of capability updates, 18 of the 26 retail media networks covered in our previous Report Card added a collective 35 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.

**Gopuff Ads** and **Wakefern** led the pack with four updates each, followed by **Kroger Precision Marketing**, **Petco Spot Media**, **Sam's Club MAP**, and **Shipt Media** with three apiece.

The totals were significantly lower than the ones recorded in our first-quarter Report Card, but somewhat expected given that networks often time their innovation introductions to the start of the calendar year.

Nearly half (17) of the updates were related to new offsite Media Opportunities, either on external digital platforms or in physical stores, as networks seek to provide brand partners with comprehensive audience coverage and full-funnel activation opportunities (as well as give themselves more ad inventory to sell).

Updates to Measurement & Reporting capabilities were also common and were primarily related to the ongoing shift away from managed service toward self-service insights and performance analysis.

**We hope you enjoy the 14th edition of our Retail Media Report Card.**

# 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.

# USING THE SCORECARD

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 91 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.)

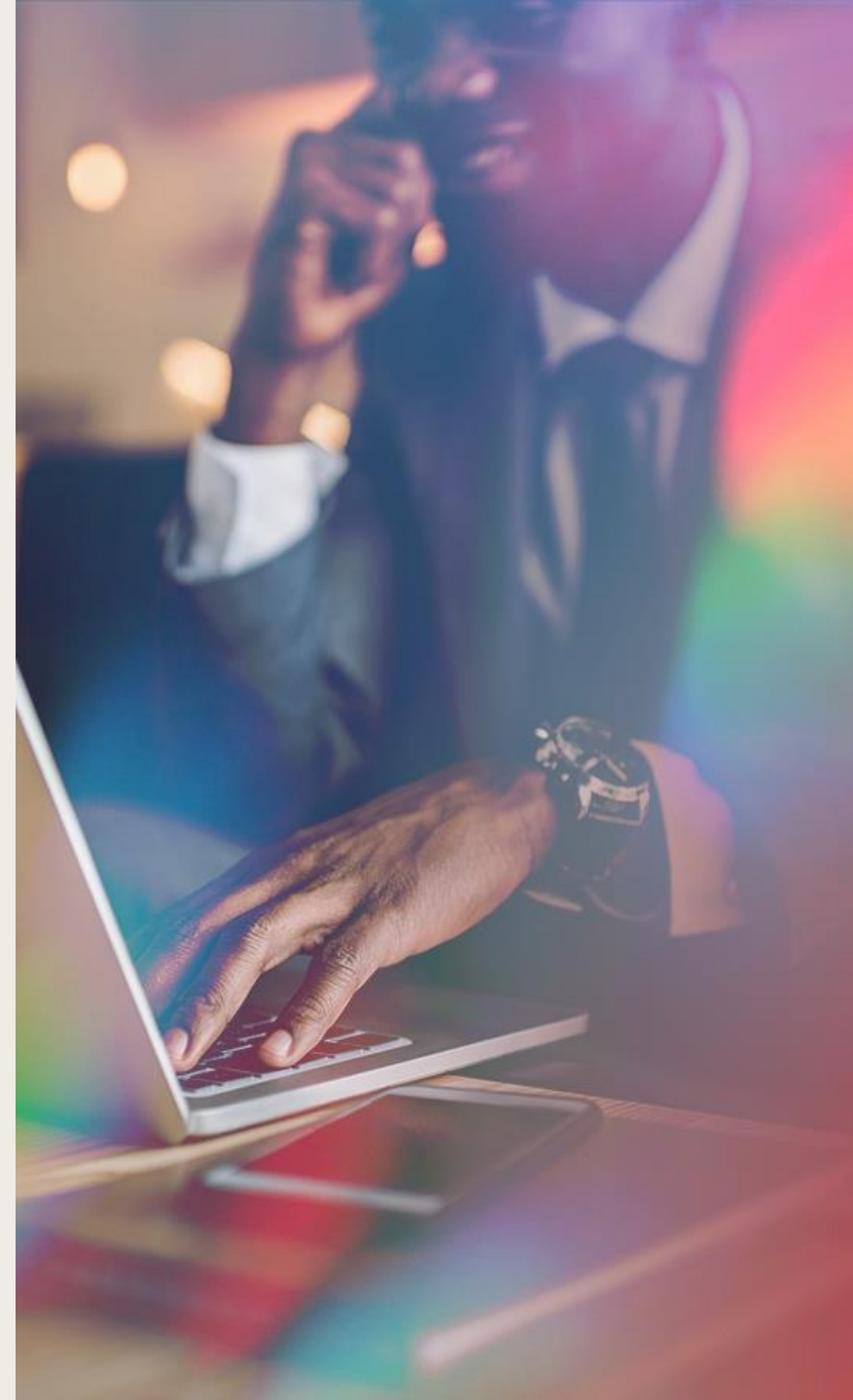
While this specific process isn’t necessarily the “be all, end all” solution, we have found it extremely effective at helping Mars United’s clients evaluate the broader landscape of retail media network capabilities to guide their investment decisions.

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.

...

#### 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.



## Capability Updates

A roundup of the additions networks made to their capabilities since our last Retail Media Report Card (which earn them new “dots” in the assessment charts):

**Ahold Delhaize Retail Media:** Generative AI Search

**Albertsons Media Collective:** Self-Service Sales Data

**Amazon Ads:** Snapchat; Experiential/Out-of-Store Sampling

**Best Buy Ads:** Managed Service Brand Store; Reddit

**CVS Media Exchange:** Experiential/Out-of-Store Sampling

**DoorDash Advertising:** Competitive Conquesting

**Gopuff Ads:** Self-Service/Real-Time Reporting, Basket Analysis, Self-Service Sales Data; Push Notifications

**Hy-Vee RedMedia:** Basket Analysis

**Kroger Precision Marketing:** Self-Service Brand Store; TikTok, YouTube

**Lowe’s Media Network:** Social Influencers

**Orange Apron Media:** In-Store Opportunity Leverage

**Petco Spot Media:** Sales Lift & iROAS (via A-B/exposed vs. unexposed test); Reddit; In-Store Opportunity Leverage

**RedVest Media:** Streaming Audio

**Roundel:** Self-Service/Real-Time Reporting; Dynamic Creative Optimization/Personalization

**Sam’s Club MAP:** Streaming Audio; Gas Pump TV, Push Notifications

**Shipt Media:** Keyword Targeting; AI Content Generation, Generative AI Search

**Uber Advertising:** Meta (Facebook/Instagram)

**Wakefern Media Exchange:** Sales Lift & iROAS (True incrementality), Basket Analysis; Experiential/Out-of-Store Sampling; AI Content Generation

## Key Performance Upgrades

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

**Albertsons Media Collective:** A matched market measurement framework is being used to directly attribute sales, orders, and unit lift to in-store media activation at the store level.

**Best Buy Ads:** In-store media enhancements have included “Curbside Cinema” screens targeting BOPIS shoppers and multi-tactic, storewide brand takeovers.

**Chesapeake Media Group:** An in-house account team is giving select brand partners a consolidated point of contact.

**Costco Retail Media:** New ad opportunities on Google Shopping and YouTube have significantly extended the network’s reach.

**CVS Media Exchange:** The proprietary CorIQ intelligent media platform is designed to deliver greater campaign precision along with stronger results and accountability.

**Dollar General Media Network:** An enhanced, AI-enabled in-store audio network offering measurable, localized engagement opportunities is now available across 12,000 stores.

**Gulp Media Network:** Incrementality measurement is now available for campaigns on Meta through a partnership with LiveRamp.

**Instacart Ads:** Integration with Anthropic’s Claude conversational search agent lets U.S. users build grocery carts directly in the platform.

**Kroger Precision Marketing:** A pact with Google made KPM the first network to make its audiences available for YouTube ad campaigns.

**Orange Apron Media:** Recent offsite expansion has included a strategic partnership with Pinterest and a first-of-its-kind self-service integration with Reddit.

**Sam’s Club MAP:** A new influencer program gives brands access to the Sam’s Club Creator Network while an Expert Review Video offering integrates credible content directly into PDPs.

**Shipt Media:** “Sponsored Substitutions” position a product as the ideal replacement for out-of-stock orders.

**Walmart Connect:** Connect Select is a curated marketplace within the Walmart DSP that makes recommendations on CTV and other omnichannel ad inventory.

# EVALUATED RETAIL MEDIA NETWORKS



Walmart



Sam's Club



Retail Media



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

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		●	●		●		●	●	●	●	●	●			●	

ND = Not disclosed; NA = Not applicable

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

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



	Grid	Starburst	Diamond	COSTCO WHOLESALE	Target	a	Shopping Cart	Triangle A	AD retail media   USA	H	CONNECTS	Wakefern	W	Heart	DG	Person
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 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.

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				●	●	●

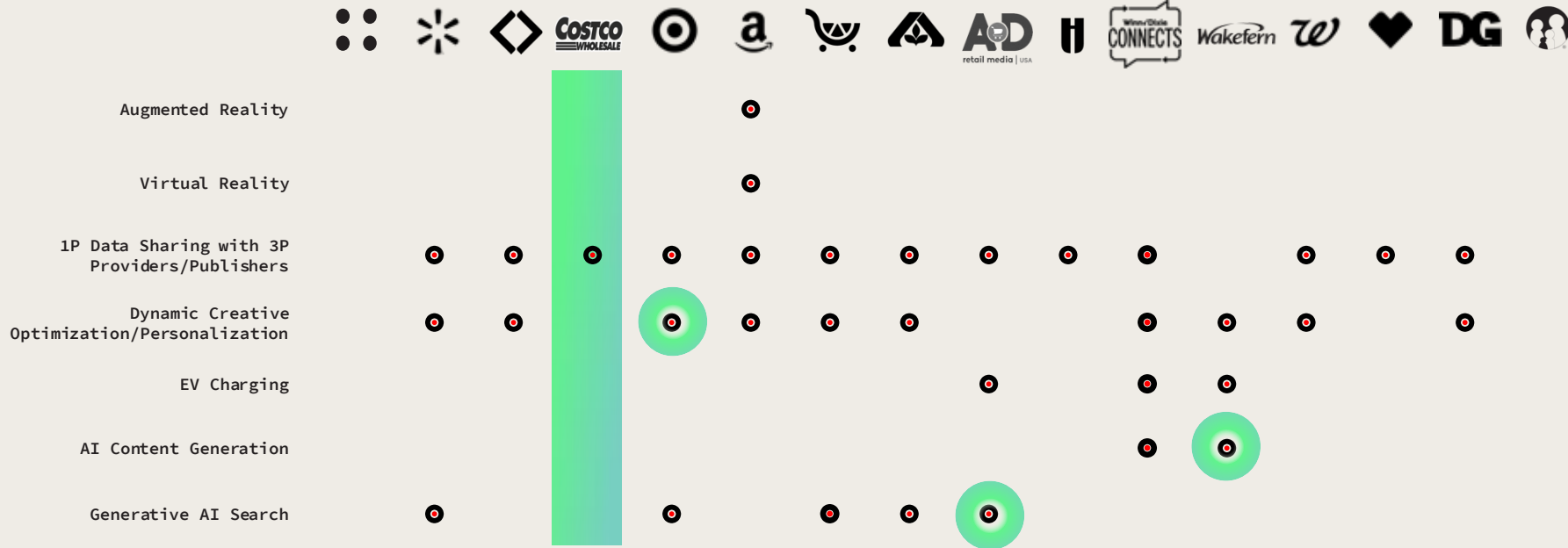
Note: Networks earn a circle if the opportunity can be purchased directly through the network as part of a campaign. Opportunities that can only be secured separately through a retailer's merchant or marketing team do not qualify.













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












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



												
Augmented Reality		●										
Virtual Reality		●										
1P Data Sharing with 3P Providers/Publishers	●		●	●	●	●		●				●
Dynamic Creative Optimization/Personalization				●				●				●
EV Charging	NA	NA	NA	NA	NA							
AI Content Generation								●				
Generative AI Search	●		●					●				●

																	
JBP Process for Retail Media	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Retailer-Level JBP Integration	●				●	●	●	●	●	●	●	●	●	●	●	●	●
Annual Planning/ Top-to-Tops	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
In-Store Opportunity Leverage <small>(e.g., Distribution/ incremental display)</small>		●				●	●	●	●	●	●			●			
Partner Training Programs/ Certifications		●	●			●	●	●	●		●				●	●	
Dedicated Account Reps	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●
Dedicated Data Analytics/ Other Resources		●	●		●	●	●	●	●	●	●	●	●	●	●	●	●
Creative Flexibility <small>(Incl. self-service certification)</small>	●	●	●			●	●	●	●	●	●	●	●	●	●	●	●
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		●		●	●		●		●		●

NA = Not applicable

# CAPABILITY SPOTLIGHT

## Generative AI Enhancements

The use of generative AI tools to improve retail media planning, activation, management, and measurement is fast becoming commonplace at retail media networks in the U.S. and could quickly graduate to table stakes in a marketplace where the competitive landscape continues to intensify – and, ironically, where the technology itself is viewed as a potential threat to future growth.

AI-enabled capabilities have become widespread enough across networks that Mars United is featuring them more prominently in this edition: Our Platform Profiles (see page 27) now contain a special section outlining each network's current AI Capabilities in five key areas of back-office functionality (with a representative example for each):

**Audience Building** (available at 10 networks): Costco has teamed with ad tech firm Moloco to enable campaigns that target “Reserved Display” onsite ads to members based on their full omnichannel shopping history rather than a single browsing session.

**Content Generation/Creative Development** (7 networks): Amazon has a free-for-advertisers Creative Agent that combines conversational guidance with the retailer's data signals and brand intelligence to quickly generate high-quality video and display ads. The agent also ensures that the content aligns with brand identity, tone, and messaging.

**Insights Reports** (6 networks): Walmart's proprietary Scintilla Media Data Feed lets advertisers securely share the retailer's first-party data with agency and tech partners through scalable API access while providing “granular visibility at both the brand and product level, a clearer picture of cross-halo effects across brick & mortar and dot-com, and the ability to measure ROI across onsite and offsite media with far greater precision,” according to the company.

**Performance Reporting** (6 networks): Gopuff Ads recently enhanced the always-on measurement tool it developed with tech partner Koddi to track shopper behavior up to 270 days post-event and measure long-term campaign impact.

**Media Optimization** (10 networks): Dollar General Media Network offers in-flight optimization for its in-store audio network that facilitates store-level programmatic targeting and synchronized delivery to ideal dayparts.

At the moment, these back-end capabilities are most often being introduced individually. But we ultimately expect the rollout of all-encompassing, holistic agentic platforms that give advertisers everything they need to manage their campaign activity — and even let the platforms themselves do most of the work.

The Ads Agent that Amazon introduced at unBoxed last fall is likely the farthest along in this regard: the automated tool simplifies campaign planning and optimization across all Amazon services to foster more efficient ad strategies. It can even use an uploaded media plan to create campaign structures, ad groups, and optimized workflows, including audience targeting recommendations. *(cont'd)*

# CAPABILITY SPOTLIGHT

## Generative AI Enhancements

### The Future of Product Discovery

Of course, the most prominent application of generative AI thus far has been the rollout of shopping assistants and search agents. While these tools may already be having an impact on shopper engagement and behavior, they aren't yet directly affecting retail media activation.

**Generative AI Search** (11 networks): Although paid ad programs are being tested in the proprietary agentic search platforms of retailers including Amazon and Walmart, they haven't formally become part of any network's offering.

The same is true at retailers that have partnered with third-party agents to launch embedded apps that let users search and shop directly without leaving the native environment, such as the tool Target recently rolled out to Google's Gemini. Gemini will soon surface Target's product listings within relevant prompts and let shoppers make purchases directly from the retailer without leaving its own environment.

In another recent activation, Instacart's integration with Anthropic's Claude lets shoppers build grocery carts from recipes, weekly lists, and other natural-language prompts within the chatbot environment. Claude then surfaces live inventory from nearby stores tailored to the logged-in shopper's staples and preferences while syncing with Instacart's website or app for ordering.

Meanwhile, Amazon's newly unveiled "Alexa for Shopping" assistant combines data from the erstwhile Rufus search engine, the longstanding Alexa+ personal assistant, and a user's native shopping history to deliver personalized product insights, comparisons, price tracking, shopping guides, and automated purchasing tools directly within Amazon's main search function.

Ultimately, nearly all retailers are expected to transition their internal search engines to generative AI models. (Amazon is now making its proprietary tools publicly available.) And that means sponsored listings and other advertising formats will also become a universal part of retail media toolkits.

### Future Watchouts

A sidebar debate to the agentic commerce discussion is how this potential shift in shopper behavior will affect the relevance of retail media. If product discovery increasingly takes place within third-party search agents that direct shoppers to a retailer's website only after they've determined which product to buy, will onsite media lose its purchase-decision relevance? More broadly, will agent adoption significantly reduce traffic to retailer sites?

For now, at least, the impact seems minimal: Results of a [jointly published study](#) from Publicis Commerce and EMARKETER found that 60% of shoppers using these agents still conduct their own research after receiving a recommendation.

# PLATFORM PROFILES

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**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

# Introducing the New 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			
	Clean Room Audiences			
	Predictive/Look-Alike			
Retargeting/Pixeling				
MEASUREMENT/REPORTING	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
- Limited Media Optimization
- Performance Reports

**RECENT DEVELOPMENTS**

Enhancements have been made to the login process and first-time user verification for Edge, the self-service platform launched by AD Retail Media in January. Additionally, the advertiser reporting API is now available for key partners.

Now operating on owned technology, AD Retail Media launched phase one of an enhanced algorithm designed to deliver step-change opportunities to improve the relevance and performance of sponsored product ads.

Offsite media improvements are highlighted by the introduction of TikTok as a channel, the migration of all social posts from the Savory program to retail brand handles, and the implementation of a add-to-cart functionality on Chicory's contextual offsite media for all five retail brands.

In-store initiatives include finalization of a comprehensive plan to deploy digital screens that will include both front-of-store and pharmacy locations.

**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	NA		X
	Keyword	X	X	X
	Behavioral			
	Contextual		X	X
	Geo-Targeting	X	X	X
	Demographic			
	Competitive Conquesting	X	X	X
	Clean Room Audiences	NA	NA	X
	Predictive/Look-Alike			X
MEASUREMENT/REPORTING	Retargeting/Pixeling	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
	Viewability/Fraud	NA	X	X
Audience-Level Reporting	NA			
Rest of Market Analysis	NA			

# Albertsons Media COLLECTIVE

## RETAILER HIGHLIGHTS

Key Fact: Largest grocer in Western U.S.  
 Store Count: 2,234  
 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

Fetch Rewards  
 Neptune Retail Solutions  
 Perion  
 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

- Generative AI Search
- Performance Reports

## RECENT DEVELOPMENTS

A matched market measurement framework is being used to directly attribute sales, orders, and unit lift to in-store media activation. The store-level analysis compares performance in test sites against a rigorously selected control set, leveraging nearly 60 variables. The Collective continues building out its in-store digital network, which will expand to 800 more locations in 2026.

A new offsite format named “Add-It” lets shoppers place advertised products into an Albertsons shopping cart with one click without leaving the native digital environment. The tool currently spans display ads and shoppable content.

An enhanced partnership with NBCUniversal is providing Albertsons shopper data for campaigns running on the media company’s streaming TV services.

An expanded partnership with Google DV360 allows brands to activate Albertsons shopper data directly within DV360 including YouTube inventory, with SKU-level sales measurement to understand impact across the full shopper journey.

## TARGETING & MEASUREMENT OPPS

		Onsite Search	Onsite Display	Offsite Display
TARGETING	Capability Available	X	X	X
	Managed Service	X	X	X
	Self-Service	X	X	X
	Purchase-Based	NA		X
	Keyword	X	X	
	Behavioral			X
	Contextual	X	X	
	Geo-Targeting	X	X	X
	Demographic			X
	Competitive Conquesting	X	X	
MEASUREMENT/REPORTING	Clean Room Audiences	NA	NA	X
	Predictive/Look-Alike			X
	Retargeting/Pixeling	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	NA			



**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: 275 million

**JBP-APPROVED MEDIA PARTNERS**

No approved partners at present

**PLATFORM PARTNERS**

No external partnerships at present

**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 categories. With deep integration across shopping, 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 innovations streamline campaign execution and empower 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**

- Content Generation
- Generative AI Search

**RECENT DEVELOPMENTS**

Amazon discontinued its Rufus chatbot, integrating the search engine's recommendation features and shopping history into a new Alexa for Shopping tool that will now be its primary agentic shopping platform. Access is available through the "A" icon on the Amazon website, mobile app, and Echo Show devices.

Alexa for Shopping allows users to ask questions, compare products, and schedule purchases.

**TARGETING & MEASUREMENT OPPS**

	Onsite Search	Onsite Display	Offsite Display
<b>TARGETING</b>			
Capability Available	X	X	X
Managed Service	X	X	X
Self-Service	X	X	X
Purchase-Based	NA	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/Pixeling	NA	X	X
<b>MEASUREMENT/REPORTING</b>			
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	NA		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

## KEY CAPABILITIES

Clean Room

IAB Compliance

In-Store Opportunity Leverage

Off-Platform Strategic Vendor Partnerships

Retail Media JBP

Retailer-Level JBP Integration

## OVERVIEW

The No. 1 consumer tech specialty retailer in the U.S., Best Buy serves a diverse customer base that ranges from everyday shoppers to enthusiasts seeking the latest devices and smart home solutions. 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. More than 93% of the retailer's transactional revenue ties back to a customer ID.

The Best Buy Ads retail media network merges commerce, content, and culture to create surprise-and-delight moments that drive loyalty and conversion. The network reaches more than 200 million consumers – who account for one-third of computer and TV sales in the U.S. Its omnichannel footprint gives brands direct access to tech-savvy, high-intent consumers across the full purchase funnel. Best Buy Ads helps brands unlock deep, actionable data in smarter, privacy-safe ways, from clean rooms to custom audience graphs.

Tapping into Best Buy's NFL sponsorship and other partnerships, ad messages are placed in premium, context-rich environments (such as streaming TV) that match brands with content and platforms that their audiences love. All this has led to proven results. These opportunities also support relevant non-endemic advertisers.

Best Buy Ads earned 2026 Commerce Media Network of the Year and President Lisa Valentino was named Commerce Media Leader by The Drum, a strong indication of the platform's strategic momentum.

## JOINT BUSINESS PLANNING

Conducted within the Best Buy JBP

## SELF-SERVICE OPTIONS

Offsite: The Trade Desk, Google DV360, Magnite  
Onsite Search and Display: Criteo, Google Ad Manager, Magnite

## REPORTING OPTIONS

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

## AI CAPABILITIES

Generative AI Search

## RECENT DEVELOPMENTS

Best Buy Ads continues to roll out high-impact ad inventory and capabilities that help brands stand out when it matters most. Recent updates have included:

**Curbside Cinema:** Brand-exclusive video ads that run on out-of-store screens while customers wait for their pickup orders.

**In-Store Takeover:** A multi-touchpoint opportunity for advertisers to surround shoppers with brand messaging.

**Predictive Audiences:** New targeting tools allow brands to identify and engage likely-to-buy audiences.

The network is actively shaping how brands can best reach shoppers as their behavior evolves toward AI-driven discovery and conversational commerce. Best Buy was one of the first retailers to launch on platforms like ChatGPT and is participating in early pilots with other industry leaders.

## TARGETING & MEASUREMENT OPPS

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



**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 retail chain 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 format 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 reach 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**

An in-house account team has been created to provide select brand partners with a consolidated point of contact.

The upcoming roadmap includes testing of in-store radio, in-store WiFi, and expanded loyalty initiatives. These developments are designed to further strengthen omnichannel reach, enhance shopper engagement, and unlock addressable media and data-driven opportunities for advertisers.

Also in the plan for 2026 is the addition of TikTok to the social media menu.

**TARGETING & MEASUREMENT OPPS**

	Onsite Search	Onsite Display	Offsite Display
<b>TARGETING</b>			
Capability Available	X	X	X
Managed Service	X	X	X
Self-Service			X
Purchase-Based	NA		X
Keyword	X		
Behavioral			
Contextual	X	X	
Geo-Targeting			X
Demographic			X
Competitive Conquesting			
Clean Room Audiences	NA	NA	
Predictive/Look-Alike			X
Retargeting/Pixeling	NA		
<b>MEASUREMENT/REPORTING</b>			
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	NA		

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



## Retail Media

### RETAILER HIGHLIGHTS

Key Fact: Costco is the largest warehouse club retailer in the United States by revenue.

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-warehouseTV 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 US, offering members a wide selection of bulk groceries, electronics, household goods, and exclusive brand offerings at value-oriented prices. Costco’s membership model — anchored by Gold Star, Business, and Executive memberships — drives strong customer loyalty. Shoppers visit 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 membership behavior and promotional calendars. These tools help advertisers connect with highly loyal members at key purchase moments within the warehouse club environment. A new platform branded 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

New “Reserved Display” ads bring AI-powered personalization to Costco.com. Using real-time member behavior and other first-party data, the highly relevant “digital endcap” placements are designed to drive seamless audience activation, product discovery, and sales for onsite campaigns.

The Performance Ads launched in March extend Costco’s retail media reach by placing products in high-intent offsite environments like Google Shopping. This will allow brands to capture shoppers during the research phase of the journey, driving qualified traffic to Costco.com and optimizing for conversion-based KPIs via closed-loop measurement.

Another partnership with Google announced in May extends commerce data to DV360, enabling brands to reach high-value Costco audiences with YouTube video and display ads while tying media exposure directly to SKU-level sales measurement and closed-loop attribution.

In the first quarter, NET Revenue was onboarded as the network’s official agency growth team.

### TARGETING & MEASUREMENT OPPS

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

\*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  
 Vibonomics

**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 over 9,000 retail 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 healthcare 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 shoppers at CVS. Founded in 2020, CMX is helping brands engage their most valuable consumers through first-party front-of-store data from over 90 million addressable members of the ExtraCare® loyalty program. 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
- Limited Media Optimization
- Performance Reports

**RECENT DEVELOPMENTS**

Experiential parking lot events are now available to help brand partners build emotional connections with consumers through hands-on sampling, product education, and targeted media.

CMX has launched its proprietary CorIQ intelligent media platform. The AI-driven platform is built on the differentiators that define CMX: first-party ExtraCare loyalty data and a tech foundation that’s designed to assure greater precision while bringing stronger performance and accountability to media campaigns.

CorIQ lets CMX move faster and optimize more intelligently to ensure that campaigns efficiently reach the right shoppers, adapt in real time, and deliver stronger business outcomes. It also enhances insights-driven execution across the full campaign lifecycle.

**TARGETING & MEASUREMENT OPPS**

	Onsite Search	Onsite Display	Offsite Display
<b>TARGETING</b>			
Capability Available	X	X	X
Managed Service	X	X	X
Self-Service	X		X
Purchase-Based	NA		X
Keyword	X		
Behavioral			X
Contextual	X	X	
Geo-Targeting			X
Demographic			X
Competitive Conquesting		X	
Clean Room Audiences	NA	NA	X
Predictive/Lookalike			X
Retargeting/Pixeling	NA		
<b>MEASUREMENT/REPORTING</b>			
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	NA		



**RETAILER HIGHLIGHTS**

Key Fact: Largest value chain in the U.S.  
 Store Count: 20,000  
 Footprint: National  
 Banners: Dollar General, DG Market, DGX, pOpshelf  
 Loyalty Program: DG Rewards  
 Addressable U.S. Audience: 90 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 a rapidly growing onsite and ecommerce business, DGMN offers brands the ability to connect with rural, suburban, and urban communities often underserved by traditional media and retail channels throughout the U.S.

**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
- Limited Media Optimization
- Performance Reports

**RECENT DEVELOPMENTS**

DGMN completed the rollout of an enhanced, AI-enabled in-store audio network to 12,000 locations through a new partnership with retail audio specialist Qsic. The network delivers relevant, localized audio experiences to shoppers while providing brand partners with data-driven, measurable engagement opportunities across one of the largest, most accessible U.S. retail footprints.

A new collaboration with Kevel and The Trade Desk connects onsite and offsite campaign activation with consistent, full-funnel measurement. The integration enables advertisers to plan, activate, and measure campaigns across the full path to purchase within a single framework, marking a meaningful step forward in DGMN’s flexibility, transparency, and performance.

Similarly, a new collaboration with Google’s Commerce Media Suite enables advertisers to activate Dollar General’s first-party purchase signals through offsite channels including DV360 and YouTube. The integration lets brands reach high-intent audiences beyond DGMN’s owned properties while delivering SKU-level measurement and attribution that drives full-funnel performance by directly connecting media exposure to in-store sales.

**TARGETING & MEASUREMENT OPPS**

	Onsite Search	Onsite Display	Offsite Display
<b>TARGETING</b>			
Capability Available	X	X	X
Managed Service	X	X	X
Self-Service	X	X	X
Purchase-Based	NA		X
Keyword	X		
Behavioral	X	X	
Contextual	X	X	
Geo-Targeting	X	X	X
Demographic			X
Competitive Conquesting		X	
Clean Room Audiences	NA	NA	X
Predictive/Look-Alike			X
Retargeting/Pixeling	NA		
<b>MEASUREMENT/REPORTING</b>			
Custom Analysis			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	NA		



**RETAILER HIGHLIGHTS**

Key Fact: No. 1 U.S. third-party marketplace for grocery and retail based on 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 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  
 Offsite: Symbiosys  
 Social/Google: Symbiosys

**REPORTING OPTIONS**

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

**AI CAPABILITIES**

Generative AI Search

**RECENT DEVELOPMENTS**

A new sales lift measurement tool leverages industry gold-standard ghost ads to help brands understand the true causal impact of ad campaigns.

New keyword targeting enhancements for onsite search enable brands to custom bid on up to 1,000 keywords, including branded and competitive options.

Managed service brand pages are now available to help brands direct offsite traffic to custom site experiences.

DoorDash has completed integrations with CommerceIQ for campaign management and reporting, and with Salsify and Syndigo for automated digital shelf updates.

With the introduction of Dollar Tree's 9,000-plus stores nationally, DoorDash now covers all three major value retailers (along with Family Dollar and Dollar General).

Additionally, DoorDash expanded SNAP benefit eligibility to more than 2,700 Kroger stores.

**TARGETING & MEASUREMENT OPPS**

	Onsite Search	Onsite Display	Offsite Display
<b>TARGETING</b>			
Capability Available	x	x	x
Managed Service	x	x	x
Self-Service	x	x	x
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	NA	NA	
Predictive/Look-Alike			x
Retargeting/Pixeling			
<b>MEASUREMENT/REPORTING</b>			
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	NA		



**RETAILER HIGHLIGHTS**

Key Fact: Tenth-largest convenience store retailer in the U.S.  
 Store Count: 1,174  
 Footprint: 13 states in the Mid-Atlantic, Midwest, and Southeastern U.S.  
 Banners: Wawa  
 Loyalty Program: Wawa Rewards  
 Addressable U.S. Audience: Not disclosed

**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

**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 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 within the retailer JBP

**RECENT DEVELOPMENTS**

There are no new updates this quarter.

**SELF-SERVICE OPTIONS**

None currently available

**REPORTING OPTIONS**

- Real-time reporting dashboard
- End of Campaign reporting

**AI CAPABILITIES**

None currently available

**TARGETING & MEASUREMENT OPPS**

	Onsite Search	Onsite Display	Offsite Display
<b>TARGETING</b>			
Capability Available	X	X	X
Managed Service	X	X	X
Self-Service			
Purchase-Based	NA		X
Keyword			
Behavioral			
Contextual	X	X	
Geo-Targeting			X
Demographic			X
Competitive Conquesting	X		
Clean Room Audiences	NA	NA	
Predictive/Look-Alike			X
Retargeting/Pixeling	NA		
<b>MEASUREMENT/REPORTING</b>			
Custom Analysis		X	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	NA		

\*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**

GSTV  
 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
- Insights Reports
- Performance Reports

**RECENT DEVELOPMENTS**

In May, Gopuff Ads became a launch publisher for data company Seek's Insight Cloud intelligence, an analytics tool that queries pre-built business logic rather than raw data. Gopuff's purchase, behavior, and demographic data is now exclusively available through Insight Cloud, giving brand partners analyst-ready answers to questions about attribution, customer segmentation, and media performance in minutes instead of weeks.

Gopuff recently unveiled proprietary research on Gen Z'ers that features key findings about an audience critical to its business: TikTok is their top discovery driver; they over-index for late-night purchases; eye-catching packaging and merchandising matter more; they're the most loyal generation for sweets and snacks brands when great taste, value, and authentic brand purpose align with their own needs. The research positions Gopuff as a bridge between social discovery and immediate purchase, which has been proven through such activations as Mars Wrigley's "Rescue Squad" campaign in 2025.

**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	NA		X
	Keyword	X		
	Behavioral	X		
	Contextual			
	Geo-Targeting			X
	Demographic	X		X
	Competitive Conquesting			
	Clean Room Audiences	NA	NA	
	Predictive/Look-Alike	X		X
	Retargeting/Pixeling	NA	X	X
MEASUREMENT/REPORTING	Custom Analysis	X	X	X
	Closed-Loop Attributed Sales/ROAS			
	% New Buyers	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	NA			

\*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, 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
- Limited Media Optimization

**RECENT DEVELOPMENTS**

The network is busy enhancing the measurement capabilities of the fully implemented Gulp Radio in-store system.

Incrementality measurement has been added to select offsite campaigns on Meta platforms, where Gulp is partnering with LiveRamp to enable closed-loop sales attribution providing direct linkage between ad exposure and in-store sales.

Brands now can activate managed service programmatic campaigns with full measurement through Viant Technology’s DSP. Media options include display, video, CTV, streaming audio, and DOOH.

The at-pump video partnership with GSTV will add 1,000 more stores this summer.

In-store digital menu boards will be available for promotional messaging beginning in the third quarter.

Limited opportunities are now available for approved tobacco vendors via programmatic DSP (determined by specific product, legal status, and merchant approval).

**TARGETING & MEASUREMENT OPPS**

	Onsite Search	Onsite Display	Offsite Display
<b>TARGETING</b>			
Capability Available			X
Managed Service			X
Self-Service			
Purchase-Based	NA		X
Keyword			
Behavioral			X
Contextual			
Geo-Targeting			X
Demographic			X
Competitive Conquesting			X
Clean Room Audiences	NA	NA	X
Predictive/Look-Alike			X
Retargeting/Pixeling	NA		X
<b>MEASUREMENT/REPORTING</b>			
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	NA		



**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 closed-loop multi-touch 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 brands 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

**RECENT DEVELOPMENTS**

RedMedia recently rolled out shoppable display and video capabilities on both website and app.

**SELF-SERVICE OPTIONS**

Onsite Search and Display: Instacart Carrot Ads

The network is also building out new reporting metrics and capabilities, including:

- benchmarking by category and brand size.
- the use of custom regression models to calculate ROAS for social channels.
- share of voice metrics for display and sponsored products.

**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

**TARGETING & MEASUREMENT OPPS**

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



**RETAILER HIGHLIGHTS**

Key Fact: Largest grocery ads ecosystem  
 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's 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.

**JOINT BUSINESS PLANNING**

Conducted within the retailer JBP  
 Instacart Ads and data programs can be aligned with broader JBPs at retailer partners

**RECENT DEVELOPMENTS**

Instacart has integrated with Anthropic's Claude conversational search agent, allowing U.S. users to build grocery carts directly in the platform by pulling live inventory and personalized results from their Instacart account.

The company is now serving as exclusive on-demand delivery fulfillment partner for all 2,600+ Aldi stores in the U.S.

**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**

Generative AI Search

**TARGETING & MEASUREMENT OPPS**

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



**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**

Kroger Ad Platform (internal platform)  
 Prism (internal platform)  
 The Trade Desk  
 Yahoo DSP  
 Meta  
 Google DV360

**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 unmatched 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**

- Generative AI Search
- Insights Reports

**RECENT DEVELOPMENTS**

Kroger recently announced a partnership with Google that will enable brands to reach precise audiences across DV360 inventory while also unlocking SKU-level retail conversion reporting. The agreement made Kroger the first retailer to make its audiences available for YouTube ad inventory.

The Custom Influencer program is now available as a consolidated offering that combines creator content with paid amplification and Kroger's first-party audiences to drive measurable results.

An in-store partnership with Barrows has deployed digital screens in multiple locations, including endcaps, bunkers, seasonal areas, entryways, frozen sections, and pharmacies.

Interactive performance dashboards are now live in the 84.51° Stratum self-service insights platform, consolidating KPI reporting and delivering faster time-to-insight with flexible views, real-time toggling, and streamlined exports.

**TARGETING & MEASUREMENT OPPS**

	Onsite Search	Onsite Display	Offsite Display
<b>TARGETING</b>			
Capability Available	X	X	X
Managed Service	X	X	X
Self-Service	X	X	X
Purchase-Based	NA	X	X
Keyword	X		
Behavioral	X	X	X
Contextual		X	X
Geo-Targeting	X	X	X
Demographic		X	X
Competitive Conquesting		X	X
Clean Room Audiences	NA	NA	
Predictive/Look-Alike	X	X	X
Retargeting/Pixeling	NA	X	X
<b>MEASUREMENT/REPORTING</b>			
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	NA		X



**RETAILER HIGHLIGHTS**

Key Fact: Has 38 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 38 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**

In the last year, LMN has advanced its offering through focused investments in performance, transparency, and advertiser enablement. These enhancements align with the network's emphasis on first-party data activation, scalable optimization, and an improved partner experience.

LMN continues to enhance its self-service media insights and performance dashboard to provide faster, more actionable access to near-real-time campaign results. Ongoing refinements are driven by advertiser feedback and designed to support more efficient optimization and planning.

Performance capabilities have been strengthened through a platform partnership with Criteo, which includes the enablement of adaptive cost-per-click pricing for sponsored product campaigns. This algorithmic optimization adjusts bidding and delivery based on performance signals to help drive efficiency and incremental results.

In support of offsite activation, LMN introduced high-impact creative development services spanning low-touch to complex video executions, helping brands deploy compelling creative across programmatic and social channels.

LMN complements these capabilities with premium cultural and sports partnerships that let brands align with high-visibility social moments while maintaining measurable commerce outcomes.

**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	NA		X
	Keyword	X	X	
	Behavioral	X	X	X
	Contextual	X	X	
	Geo-Targeting		X	X
	Demographic			X
	Competitive Conquesting			
	Clean Room Audiences	NA	NA	
	Predictive/Look-Alike			X
Retargeting/Pixeling	NA		X	
MEASUREMENT/REPORTING	Custom Analysis		X	X
	Closed-Loop Attributed Sales/ROAS	X	X	X
	% New Buyers		X	
	Incrementality (Test vs. Control)			
	Incrementality (True Incrementality)			
	Viewability/Fraud	NA		X
Audience-Level Reporting	NA	X	X	
Rest of Market Analysis	NA			

\*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 off-platform 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

**AI CAPABILITIES**

- Audience Building
- Generative AI Search
- Insights Reports

**RECENT DEVELOPMENTS**

Enhanced targeting capabilities for paid search launched this year include negative-keyword targeting, audience targeting, and keyword multipliers for product listing ads. These additions, alongside new share of metrics reporting, give advertisers sharper bidding control and enhanced transparency into the competitive landscape.

OAM also introduced leaderboard placements on category landing pages; advanced banner audience targeting is on the horizon.

In-store audio has launched nationwide, and OAM will soon debut the In-Store Network Kitchen Display, a premium placement featuring 75-inch digital screens in approximately 1,400 stores.

At the third-annual InFronts marketing event, OAM reinforced its commitment to advancing advertiser partnerships and strengthening merchandising connectivity. Announcements included expansion of offsite reach through a strategic partnership with Pinterest which, coupled with a first-of-its-kind self-service integration with Reddit, will let non-endemic brands leverage OAM’s first-party data. Additionally, a new analytics program gives brands a seamless way to connect campaign performance with overall business trends.

**TARGETING & MEASUREMENT OPPS**

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



**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**

Kargo

**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, 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**

Brand partners now have creative flexibility for offsite and onsite display campaigns.

They also can now target shoppers on Reddit leveraging custom data feeds built with Petco.

Dynamic creative optimization is coming soon.

**TARGETING & MEASUREMENT OPPS**

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



**RETAILER HIGHLIGHTS**

Key Fact: Largest retailer-owned hardware cooperative in the world  
 Store Count: 5,200  
 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\*

**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. Approximately 75% of U.S. residents live within 15 miles of an Ace store. 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.

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: 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.

Launched in 2025, 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 geographical 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 comes only 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.

**RECENT DEVELOPMENTS**

A new “Category Driver” solution helps brands action against Ace merchant objectives by letting multiple advertisers team up to invest in full-funnel activation that supports shared business goals.

**SELF-SERVICE OPTIONS**

None currently available

**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
- Limited Media Optimization

**TARGETING & MEASUREMENT OPPS**

	Onsite Search	Onsite Display	Offsite Display
<b>TARGETING</b>			
Capability Available	X	X	X
Managed Service	X	X	X
Self-Service			
Purchase-Based	NA		X
Keyword	X	X	
Behavioral			X
Contextual		X	X
Geo-Targeting			X
Demographic			X
Competitive Conquesting			X
Clean Room Audiences	NA	NA	
Predictive/Look-Alike			X
Retargeting/Pixeling	NA		X
<b>MEASUREMENT/REPORTING</b>			
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		
Audience-Level Reporting	NA		X
Rest of Market Analysis	NA		

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



**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-Serve  
 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 delivery 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-vendor selling events, sampling, and other storefront activations that leverage the internal Precision Plus data-sharing capabilities for planning and Kiosk insights dashboard to evaluate 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
- Generative AI Search
- Comprehensive Media Optimization

**RECENT DEVELOPMENTS**

Roundel has enhanced its audience targeting and data capabilities with faster audience refreshes, near real-time activation, in-market retargeting, and more granular reporting — all aimed at improving campaign relevance and performance insights.

The network also has expanded premium digital media offerings through new high-impact ad formats, broader placements, and accelerated third-party search capabilities that strengthen full-funnel engagement opportunities.

Continued investment in Precision Plus and automation tools is delivering smarter audience scaling, expanded guest signal utilization, and more efficient campaign optimization across the Roundel ecosystem.

On the roadmap, Target is testing emerging engagement channels, including integrations with OpenAI’s ChatGPT, CTV, and additional social platforms. It also is enhancing self-service reporting and measurement tools within Roundel Kiosk and RMS.

**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	NA		X
	Keyword	X	X	
	Behavioral			X
	Contextual	X	X	
	Geo-Targeting		X	X
	Demographic			X
	Competitive Conquesting	X		
MEASUREMENT/REPORTING	Clean Room Audiences	NA	NA	
	Predictive/Look-Alike			X
	Retargeting/Pixeling	NA	X	
	Custom Analysis		X	X
	Closed-Loop Attributed Sales/ROAS	X	X	X
	% New Buyers	X	X	X
	Incrementality (Test vs. Control)			
	Incrementality (True Incrementality)			X
	Viewability/Fraud	NA	X	X
	Audience-Level Reporting	NA	X	X
Rest of Market Analysis	NA		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.

The Sam's Club Member Access Platform (MAP) bills itself as the first Retail Experience Network™. Powered by first-party, deterministic membership data, MAP delivers physical and digital ad experiences backed by closed-loop measurement. By connecting brands with members at every stage of the shopping journey (including online, in-club, and offsite) MAP helps drive engagement and measurable growth for advertisers of all sizes.

**JOINT BUSINESS PLANNING**

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

**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
- Limited Media Optimization

**RECENT DEVELOPMENTS**

A new MAP influencer program gives brands access to the Sam's Club Creator Network to turn inspiration into in-club and online sales. An Expert Review Video offering integrates credible, expert-led video content directly into a brand's product detail page.

New fuel screen ads are available at more than 500 locations. In-club audio ads are running through Sam's Club Radio, a curated, live broadcast in all locations nationwide. Shopper-facing tablets have been added to the demo cart experience, which allows members to easily rate and review the items they've sampled.

The "Race to the Club" marketing program returns in partnership with INDYCAR's Andretti Global team and is expanding to more races and communities. The program offers brands visibility on six-time INDYCAR race winner Kyle Kirkwood's suit, car, and trackside.

The "Sam's Football Club" experience targets passionate soccer fans with immersive experiences that bring members closer to the game.

Push notifications went live in February.

**TARGETING & MEASUREMENT OPPS**

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

**RECENT DEVELOPMENTS**

A distinct “Sponsored Substitutions” opportunity in the shopper app positions a product as an ideal replacement when a customer’s ordered item is out of stock. The placement provides brands with organic integration at a critical point in the shopper journey.

Shipt is optimizing high-value real estate on the order confirmation page of Target’s digital platforms to offer brands premium placement that can drive repeat traffic and increase order volume. The ads create a direct funnel to the Shipt marketplace.

Visibility is being enhanced site-wide by integrating rich media such as video display units to capture both search intent and user discovery.

**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	NA		X
	Keyword	X		
	Behavioral			X
	Contextual	X	X	
	Geo-Targeting			X
	Demographic			X
	Competitive Conquesting			
MEASUREMENT/REPORTING	Clean Room Audiences	NA	NA	X
	Predictive/Look-Alike			X
	Retargeting/Pixeling	NA		
	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	NA		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 rides and deliveries of food, grocery, alcohol, and convenience items through a single app. These 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 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 reported

## RECENT DEVELOPMENTS

The ads API for sponsored product listings and sponsored search now enables programmatic campaign creation and management across the merchant base, supporting onboarding, activation, and ongoing campaign management at scale.

## TARGETING & MEASUREMENT OPPS

	Onsite Search	Onsite Display	Offsite Display
<b>Capability Available</b>	X	X	X
<b>Managed Service</b>	X	X	X
<b>Self-Service</b>	X	X	X
<b>Purchase-Based</b>	NA	X	X
<b>Keyword</b>	X	X	X
<b>Behavioral</b>	X	X	X
<b>Contextual</b>	X	X	X
<b>Geo-Targeting</b>	X	X	X
<b>Demographic</b>	X	X	X
<b>Competitive Conquesting</b>	X	X	X
<b>Clean Room Audiences</b>	NA	X	
<b>Predictive/Look-Alike</b>	X	X	X
<b>Retargeting/Pixeling</b>	NA	X	X
<b>Custom Analysis</b>	X	X	X
<b>Closed-Loop Attributed Sales/ROAS</b>	X	X	X
<b>% New Buyers</b>	X	X	X
<b>Incrementality (Test vs. Control)</b>		X	X
<b>Incrementality (True Incrementality)</b>	X		
<b>Viewability/Fraud</b>	NA	X	X
<b>Audience-Level Reporting</b>	NA	X	X
<b>Rest of Market Analysis</b>	NA		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, PriceRite 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 include endemic national and regional CPG advertisers focused on performance, incrementality, and SKU-level attribution, particularly in high-frequency grocery and household categories. Wakefern's sizeable 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**

Wakefern Media Exchange recently introduced offsite predictive targeting by layering incentive data from Inmar Intelligence with its own transactional data.

**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
- Limited Media Optimization

**TARGETING & MEASUREMENT OPPS**

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

TARGETING

MEASUREMENT/REPORTING



### 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

### 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, offering 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

Limited Media Optimization

### RECENT DEVELOPMENTS

Walgreens has embraced a new operational philosophy grounded in tighter alignment and shared accountability as its ad group and merchant teams come together as a unified organization focused on common priorities and outcomes.

Meanwhile, Walgreens Advertising Group continues to invest in high-impact digital experiences across the website and app with premium placements designed to capture intent and convert shoppers in real time. The network also is expanding its ability to reach high-value audiences through deeper technology and platform partnerships. With more precise targeting across critical segments like GLP-1 users and senior shoppers, WAG is sharpening its ability to deliver meaningful campaign ROI.

Overall, WAG continues to evolve partnerships and develop solutions tailored to its unique positioning at the intersection of retail pharmacy and convenience to unlock new ways of driving both online engagement and in-store visits and set the stage for the future of retail.

### TARGETING & MEASUREMENT OPPS

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

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

# Walmart Connect

## 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 in-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
- Generative AI Search
- Insights Reports
- Performance Reports

## RECENT DEVELOPMENTS

Walmart Connect recently upgraded its audience identity and attribution capabilities.

It also launched two capabilities to simplify and scale connected TV activation: Connect Select is a curated marketplace within the Walmart DSP that makes recommendations on omnichannel ad inventory, with a focus on CTV. At launch, the tool carried inventory from Walmart's own Vizio streaming service, along with premium CTV publishers and supply-side platforms. Meanwhile, Walmart DSP integration expanded with technology partners Pacvue and Skai.

Walmart Data Ventures introduced the Scintilla Data Feed, which lets advertisers share the retailer's first-party data with agency and tech partners through scalable API access.

Elsewhere, Walmart is unifying the login procedure for new Vizio TVs to let customers use their retail accounts to access smart TV features. The goal is to link streaming viewership directly to store purchases, enabling audience-based targeting and more accurate measurement for advertisers across all Vizio ad inventory.

Also rolling out are shoppable product placements within Vizio's operating system that facilitate creative elements linking directly to Walmart.com product pages and other engagement touchpoints.

## TARGETING & MEASUREMENT OPPS

	Onsite Search	Onsite Display	Offsite Display
<b>TARGETING</b>			
Capability Available	X	X	X
Managed Service			X
Self-Service	X	X	X
Purchase-Based	NA	X	X
Keyword	X	X	
Behavioral			X
Contextual	X	X	
Geo-Targeting			X
Demographic			X
Competitive Conquesting	X		
Clean Room Audiences	NA	NA	X
Predictive/Look-Alike			X
Retargeting/Pixeling	NA	X	
<b>MEASUREMENT/REPORTING</b>			
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	NA	N	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 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, it is committed to helping brands understand, interpret, and predict customer behavior and meet their objectives for driving growth and loyalty.

**JOINT BUSINESS PLANNING**

No retail media JBP at this time

**RECENT DEVELOPMENTS**

There are no new updates this quarter.

**SELF-SERVICE OPTIONS**

No options currently available

**REPORTING OPTIONS**

End of Campaign reporting

**AI CAPABILITIES**

- Content Generation
- Limited Media Optimization

**TARGETING & MEASUREMENT OPPS**

		Onsite Search	Onsite Display	Offsite Display
	Capability Available	X	X	X
	Managed Service	X	X	X
	Self-Service			
TARGETING	Purchase-Based	NA		X
	Keyword	X	X	X
	Behavioral			X
	Contextual			X
	Geo-Targeting			X
	Demographic			X
	Competitive Conquesting			X
	Clean Room Audiences	NA	NA	X
	Predictive/Look-Alike			X
	Retargeting/Pixeling	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	NA		X	



# GLOSSARY

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Details and definitions for evaluation  
criteria across the Key Performance Areas

# GLOSSARY

## TARGETING

<b>Audience Scale</b>	The retail media network has a targetable audience in the U.S. of at least 50 million shoppers.	<b>Demographic Targeting</b>	The ability to target campaigns to specific personal characteristics.
<b>Purchase-Based Targeting</b>	The availability of a proprietary first-party database of shopper sales data.	<b>Competitive Conquesting</b>	The ability to target campaigns to your competitors' shoppers.
<b>Keyword Targeting</b>	The ability to buy top-of-page placement in the search results of keywords or target ads based on keyword searches.	<b>Templated Audience Segments</b>	The ability to leverage pre-built audience segments (such as holiday entertaining or Millennial shoppers) that are available to all advertisers.
<b>Geo-Targeting</b>	The ability to target campaigns to specific locations such as ZIP codes or store footprints.	<b>Custom 1P Audiences</b>	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.
<b>Behavioral Targeting</b>	The ability to target campaigns based on specific shopping activity on the retailer's website such as browsing or search.	<b>Clean Room/ Brand Audience Ingestion</b>	The ability to share anonymized brand data for targeting and measurement.
<b>Contextual Targeting</b>	The ability to place ads in specific locations on the retailer's website or within relevant content off-platform.		

# GLOSSARY

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## 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., Ralphps 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

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

<p><b>Self-Service Onsite Search</b></p>	<p>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.</p>	<p><b>Livestream Shopping</b></p>	<p>The network hosts live sponsored shopping events on digital platforms or has partnerships available to stage them.</p>
<p><b>Self-Service Onsite Display</b></p>	<p>The network has a platform allowing advertisers to directly manage onsite display campaigns.</p>	<p><b>Managed Service Brand Store</b></p>	<p>Brands can provide a variety of content to populate a landing page dedicated to their product portfolio.</p>
<p><b>Self-Service Programmatic</b></p>	<p>The network has a demand side platform (DSP) or private marketplace (PMP) that lets advertisers directly manage offsite programmatic campaigns.</p>	<p><b>Self-Service Brand Store</b></p>	<p>Brands are able to directly manage the content that populates their brand store.</p>
<p><b>Shoppable Content</b></p>	<p>The network offers opportunities for advertisers to create shoppable content (such as recipe pages or click-through videos).</p>	<p><b>Associate Engagement</b></p>	<p>Advertisers can directly target the retailer's employees with advertising campaigns or can leverage them in the store to influence shopper purchases.</p>

# GLOSSARY

## INNOVATION

<p><b>AR/VR</b></p>	<p>The retail media network is driving shopper engagement through the use of augmented/virtual reality tools and environments.</p>	<p><b>EV Charging</b></p>	<p>The network offers advertising opportunities at the electronic vehicle charging stations in store parking lots.</p>
<p><b>1P Data Sharing</b></p>	<p>The platform lets advertisers use its 1P data for campaigns handled by 3P service providers/publishers outside of its own partner network.</p>	<p><b>AI Content Generator</b></p>	<p>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.</p>
<p><b>Dynamic Creative Optimization</b></p>	<p>Advertisers can use 3P creative tools (such as AdForm or Flashtalking) to mass-personalize ad experiences to drive shopper engagement.</p>	<p><b>Generative AI Search</b></p>	<p>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.</p>

# GLOSSARY

## PARTNERSHIP

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

<p><b>Generative AI Search</b></p>	<p>The network has an advanced AI tool that lets shoppers conduct product searches by asking questions or using contextual phrases to receive conversational recommendations rather than traditional product listings.</p>	<p><b>AI-Generated Insights Reports</b></p>	<p>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.</p>
<p><b>AI Creative Development</b></p>	<p>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.</p>	<p><b>Comprehensive or Limited Media Optimization</b></p>	<p>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.</p>
<p><b>AI-Enabled Audience Building</b></p>	<p>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.</p>	<p><b>AI Content Generation</b></p>	<p>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.</p>
<p><b>AI-Generated Performance Reports</b></p>	<p>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.</p>		

MEET THE TEAM



Kandi Arrington  
EVP, Retail Consultancy



Andy Howard  
Senior Commerce Media Director,  
Small Format, Target, Tech & Pet



Erin Taylor  
Senior Commerce Media Director,  
Grocery & Home



Melissa Wightman  
Vice President, Ecommerce



Heather Luna  
Senior Commerce Media Director,  
Ecommerce



Evin Caffrey  
Commerce Media Director,  
Ecommerce



Lauren Welch  
Senior Commerce Media Manager,  
Ecommerce

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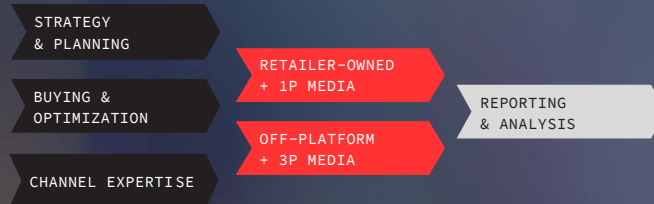
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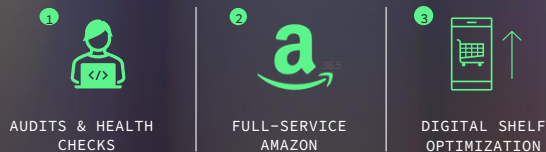
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