

# The Creative Edge in Retail Media

A COMPREHENSIVE GUIDE



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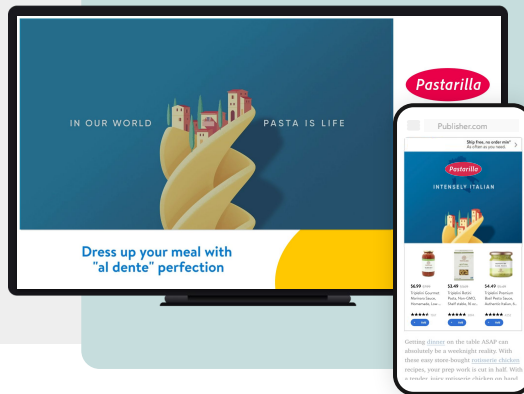
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THEN

THE SHIFT

NOW



Search and social media have dominated digital advertising for years, but a powerful third wave has emerged. Retail media has become the next major evolution in digital advertising, bringing fresh opportunities and impressive results. This rapidly expanding ecosystem connects brands with consumers through retail platforms and leverages powerful first-party data to drive measurable returns that are transforming how marketers approach their digital strategies.

As Taylor Stewart, TripleLift's Global Head of Retail Media Engagement explains...



... Retail media at its essence is leveraging the audiences and the proprietary backbone of e-commerce sites such as Amazon, Walmart, Target, Best Buy and Home Depot. It uses their data sets and offers great new targeting, audience building and conversion opportunities by leveraging customer data, new algorithms and new models to develop innovative and hyper-personalized approaches to reach those customers."

**Taylor Stewart**  
Global Head of Retail  
Media Engagement



What makes retail media especially compelling is its proven ability to drive measurable outcomes—linking ad exposure directly to sales. This closed-loop system not only provides clear attribution but also enables continual optimization, making retail media one of the most performance-driven channels in the digital advertising landscape.

As the leading Creative SSP in the industry, TripleLift has contributed to this transformation firsthand. While many focus solely on the targeting and measurement aspects of retail media, we understand that creative excellence is the true differentiator that drives performance for advertisers and publishers. As evidence from Kantar and WARC shows, creative ads are more effective and effective ads generate more than four times as much profit (Kantar & WARC, 2023).

This guide will help you navigate the retail media landscape with a focus on how creative technology can not only deliver but amplify advertising results.

## 01

# What Exactly is Retail Media?

At its core, retail media is advertising operated through a retailer. It creates targeted touchpoints with consumers as they browse and shop, offering timely relevance that traditional advertising often lacks.

The industry has evolved significantly from its early days of basic sponsored listings to today's sophisticated ecosystem of creative formats, targeting capabilities, and measurement solutions across on-site, off-site, and in-store environments. This maturation represents a significant advancement in how brands connect with consumers at critical decision points.

## THE MARKET OPPORTUNITY

Retail media is experiencing remarkable growth, significantly outpacing traditional media channels:

### \$179.5B

Projected global retail media market size by 2025 (Coresight Research, 2024)

### 15.4%

Projected year-over-year market growth rate in 2025 (Coresight Research, 2024)



### 64.1%

Projected growth for off-site retail media spending in 2024 (TripleLift/eMarketer research, 2024)



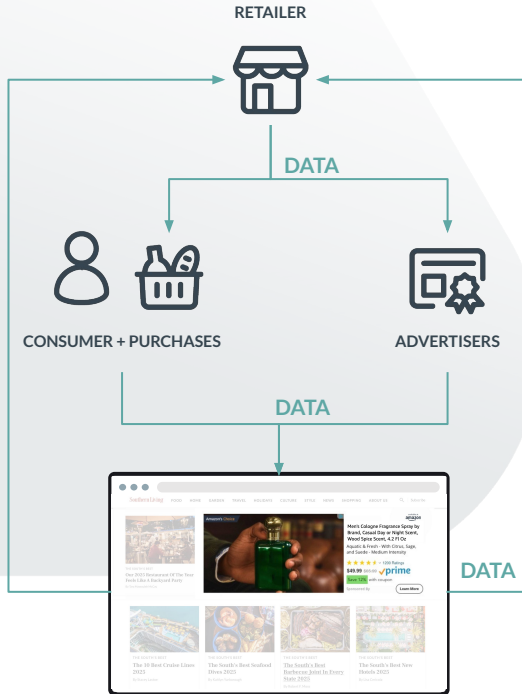
### 335.5%

Projected YoY growth for retail media ad spend on connected TV in 2024 (eMarketer, H2 2024)



In 2024 alone, retail media grew 16.6% year over year, compared to just 2.9% for linear TV, 4.4% for out-of-home advertising, 1.1% for audio advertising, and a decline of 3.3% for print advertising (Coresight Research, 2024).

This growth is reshaping the advertising landscape, with retail media projected to represent 23.2% of the global advertising market by 2025, up from 20.6% in 2024.

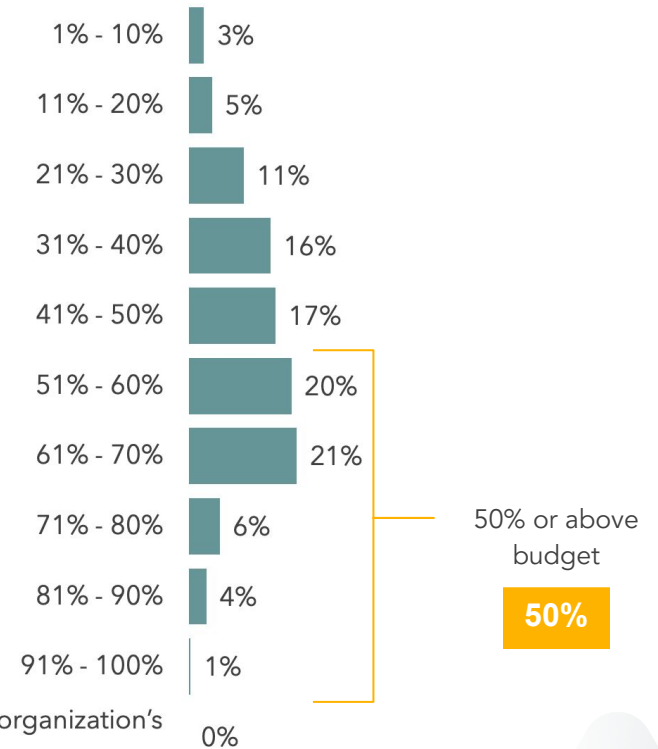


# Retail Media Advertising Budget Allocation

Retail media receives a significant share of digital programmatic budgets. Half of the companies (**50%**) allocate **over 50%** of their digital programmatic advertising budget to retail media, indicating a substantial investment within current digital advertising spend structures.

*Q: How much of your overall digital programmatic budget is allocated for any retail media advertising (i.e. search, on-site, off-site)?*

## Share of Digital Programmatic Budget Allocation of Retail Media Advertising



I do not have insight into my organization's digital programmatic budget

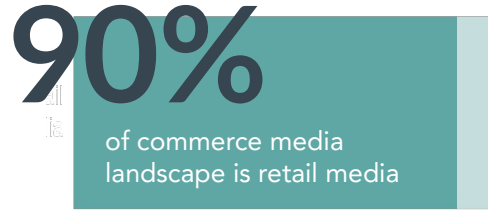


# Expert Insight: Sarah Marzano

PRINCIPAL ANALYST



“ What unites all players under the 'commerce media' umbrella is their use of first-party transaction data to sell targeted ads within their owned-and-operated digital ecosystems. Despite the growing diversity of players...



“ We're at a fascinating inflection point in retail media. The early leaders, with over a decade of experience, are significantly ahead of late movers.

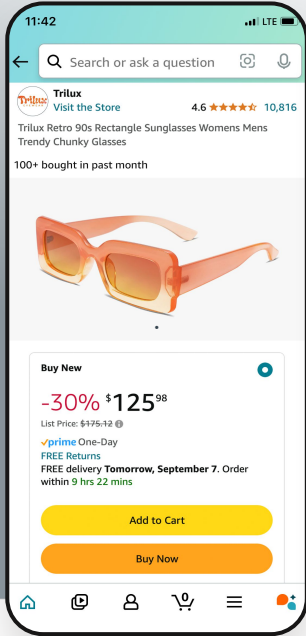
Yet the fact that **over 80% of retail media spend still goes to ad inventory on retailers' owned platforms** has universal implications."

“ One of the biggest factors helping retail media break out beyond traditional shopper and trade budgets is **the growing sophistication of retail media networks** in supporting off-site media buys."

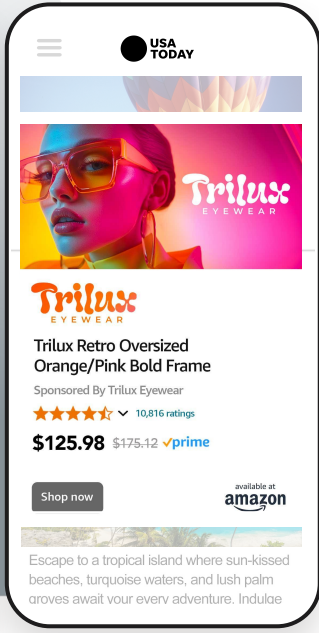
Retail media has evolved into a dominant digital advertising force powered by first-party transaction data, expanding beyond retailers to travel and financial services while Amazon claims three-quarters of the 90% market share held by retail.

The greatest opportunity for marketers lies in retail media networks' capacity to connect purchase outcomes to upper-funnel activities through off-site media buys, though platforms must carefully balance monetization with user experience to maintain effectiveness.

# 02



Onsite



TripleLift  
Native REC

## The Retail Media Ecosystem: Players & Platforms

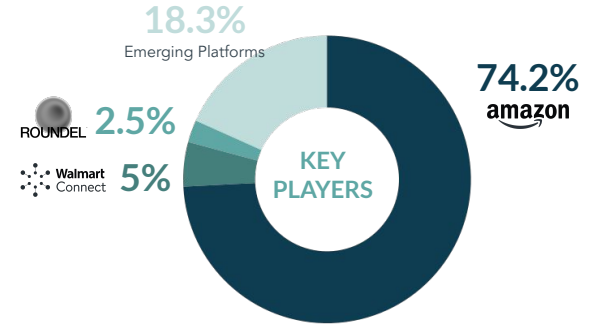
### TYPES OF RETAIL NETWORKS

**On-site retail media** operates directly on retailer websites, offering prime placement when shoppers are actively looking to buy. Think sponsored listings on Amazon or Walmart.com that appear when you search for products.

**Off-site retail media** extends a retailer's valuable first-party data beyond their own properties. This allows brands to reach consumers across the open web with the same targeting precision but at different points in their purchase journey. According to eMarketer (2024), US retail media off-site ad spend will grow by 64.1% in 2024 to reach \$11.04 billion and more than double by 2027, totaling \$24.02 billion.

**In-store retail media** bridges the digital-physical gap through tactics like digital displays, shelf advertising, and QR codes that connect offline shoppers to online experiences.

The retail media ecosystem features clear leaders and emerging challengers:



Emerging platforms include retailers like Kroger, Best Buy, and Home Depot, alongside non-traditional "commerce media" players like Uber, PayPal, and airline loyalty programs. As Ed Dinichert, CRO of TripleLift, explains:

“ Amazon has a disproportionately high share of the retail media dollars... because people follow the volume and where they're going to get the results at scale.”

Regarding the expansion into non-traditional retail sectors, Dinichert adds:

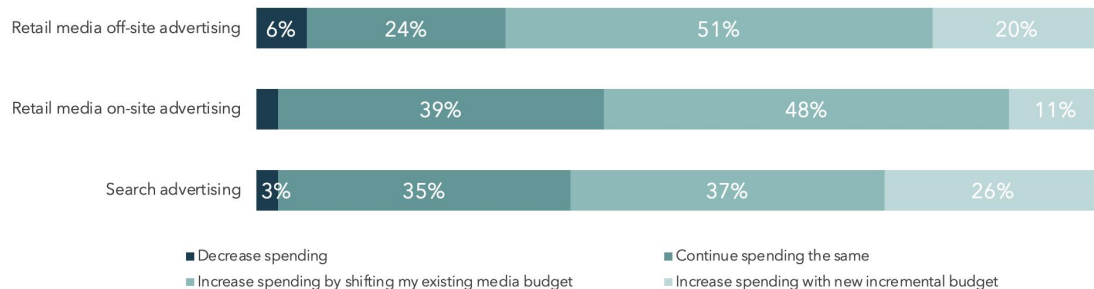
"I think you're going to see verticals being integrated in a very unique way that leverages retailer websites because these non-endemic verticals are going to see and explore paths that can explore and optimize the rich first-party data that retail media offers."

## Anticipated Shifts in Advertising Spend Across Channels

All forms of advertising are expected to see **increased** investment, with off-site retail media leading in budget reallocation.

More than half (**51%**) of marketer's plan to **boost off-site** retail media spend by shifting funds from existing budgets, with another 20% increasing it through new investment. On-site retail media follows closely, with 48% reallocating spend and 11% adding new funds. In comparison, search advertising is more likely to be supported by incremental budget (26%) than by reallocated spend, indicating that marketers continue to see its value without needing to reduce spend in other areas.

## Expected Shifts in Advertising Spending Over the Next 12 months



Q: How do you expect your spending/focus will shift among the following in the next 12 months?

## Anticipated Increases in Off-Site Retail Media Spending

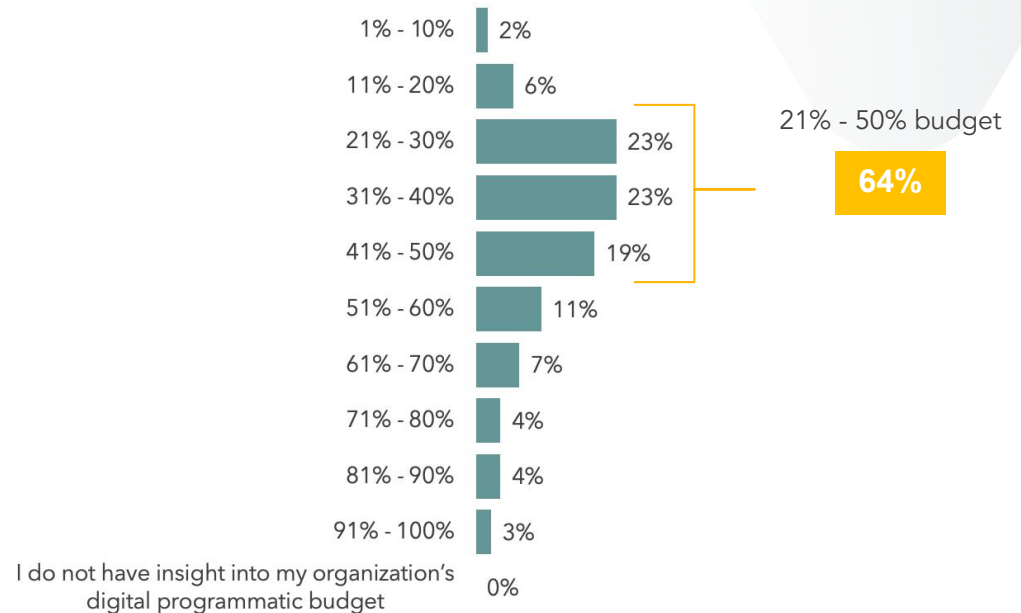
Retail media off-site ad spend is expected to grow modestly over the next 12 months.

Although **83%** of marketers expect off-site retail media ad spend to **increase**, the majority project increases **capped at 30%**, indicating a cautious and measured pace of investment.

*Q: What percentage do you anticipate your overall retail media off-site ad spend to increase in the next 12 months from your current investment? [Base: Anticipate an increase in ad spend in the next 12 months]*

## Retail Media Off-site Budget Allocation

Off-site retail media advertising typically receives a mid-level share of programmatic budgets, with 64% of marketers allocating between 21% and 50%, indicating a consistent, measured level of investment in off-site channels across retail media strategies.



*Q: What percentage of your digital programmatic budget is currently allocated to retail media off-site advertising?*

SOURCE: TRIPLELIFT ADVANIS RETAIL MEDIA SURVEY 2025



## Expert Insight: Amie Owen

GLOBAL CHIEF GROWTH OFFICER

**KINESSO**  
COMMERCE



“ Retail media started in the 1970s with in-store media — things like floor graphics in supermarkets. After COVID, we went from **four to five retail media networks to over 250 in the U.S. alone**. This digitization moved the space into true media budgets.”



“ Commerce media is about driving a sale using specific data. Think airlines, financial services, or Chase—they use their own data to create commerce media networks. These networks push inventory placements to drive a booking or sale on their own platforms.”

“ I like to say retail media networks are in their 'middle school' phase — trying to figure themselves out. The key is understanding the consumer, the category, and how people shop — because not every purchase journey should look like an Amazon ad.”

The retail media landscape has exploded from just 4-5 networks to over 250 since COVID, evolving from in-store floor graphics to a sophisticated ecosystem that now includes commerce media networks and aggregators influencing purchases across physical and digital environments.

Despite Amazon and Walmart's advanced platforms, the industry remains in a developmental "middle school phase," requiring marketers to recognize that effectiveness depends on matching specific brand goals with audience shopping behaviors that vary significantly by category.

# 03

## Why Creative Technology Matters in Retail Media



While targeting and measurement get most of the attention in retail media discussions, creative quality is often overlooked, despite how critical it is to performance. Kantar and WARC research shows that **creative and effective ads generate more than four times the profit** (Kantar & WARC, 2023).

While creative remains a key part of the puzzle, the focus has increasingly shifted towards targeting and measurement - often at the expense of developing creative that truly breaks through and resonates with the intended audiences.



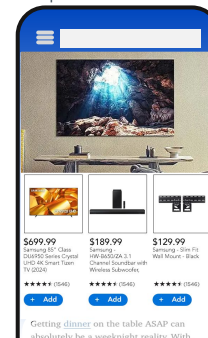
### BEYOND BASIC LISTINGS: The Creative Evolution

Retail media's creative journey started with basic sponsored listings—simple product images with price tags. But the landscape has dramatically evolved:

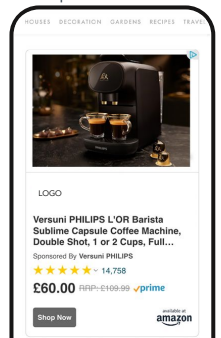
“It's interesting that the retail media evolution followed similar threads to search and how it transitioned into display,” explains Taylor Stewart, TripleLift's Global Head of Retail Media Engagement.

As these platforms expanded, brands wanted more engagement-focused creative formats—larger creatives, video, native units—to extend beyond just the digital retail space.”

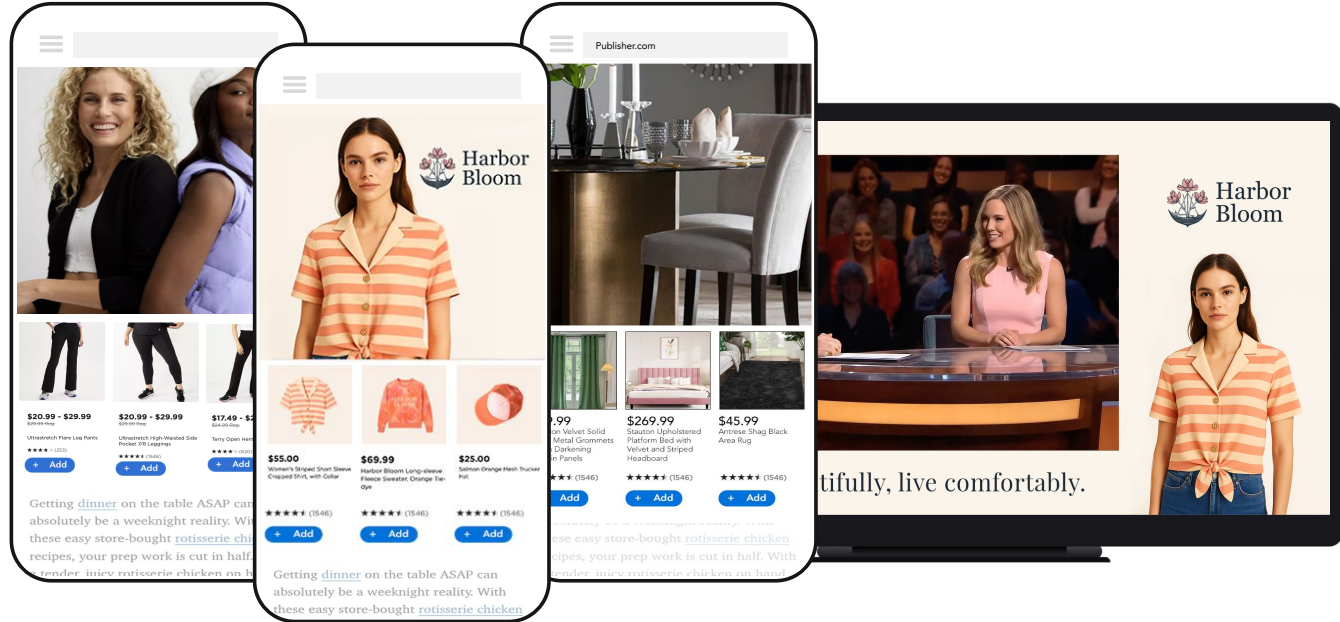
TripleLift Native REC



TripleLift Native REC



# Today's High-performing Retail Media Creative Includes



## DYNAMIC CREATIVE OPTIMIZATION (DCO)

Personalized creative that adapts in real-time based on shopper data.

## NATIVE RESPONSIVE ECOMMERCE (NREC)

Rich, contextually-relevant ads that match the look and feel of the retailer's site.

## AI-ENHANCED FORMATS





Creative that leverages AI to optimize messaging and visual elements. Data from Kroger's data arm, 84.51°, reveals **1.3X greater iROAS (incremental ROAS), 3.4X visits uplift and 3.7X sales uplift for AI-optimized audiences** across varied client campaigns (Coresight Research, 2024)

## VIDEO INTEGRATION

From native video to full CTV experiences with shoppable elements.

# The Native Advantage

Native formats consistently outperform standard display units because they provide:

- 
**Higher Viewability**  
 Placement directly in user attention flows rather than peripheral spaces
- 
**Seamless Integration**  
 Non-disruptive experiences that complement rather than interrupt content consumption
- 
**Enhanced Storytelling**  
 Space for both emotional connection and product details
- 
**Contextual Relevance**  
 Alignment with consumer mindset and content environment

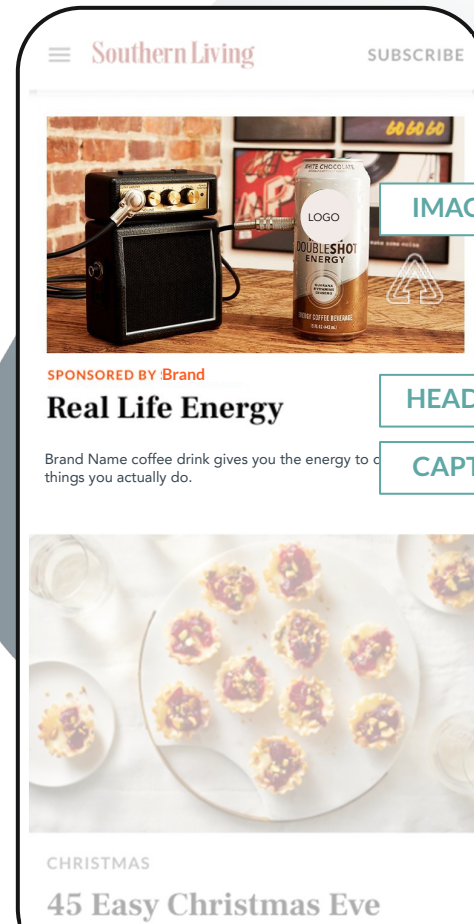
“ What TripleLift has done with our native formatting is create a very non-invasive way of getting in front of consumers when they're in a shopping mindset without distracting them from their original intent.”

**RC Casey**  
 Director of Sales  
 at TripleLift



**5x↑**

engagement from Native vs Display formats



# Real Results Through Creative Excellence

A leading consumer electronics brand partnered with TripleLift during Q4 2024, seeking to break through holiday noise with unique formats.



**75%**  
new-to-brand sales  
using unique formats

By leveraging high-impact native and online video, they drove 75% new-to-brand sales—reaching customers who had never previously purchased their products. Stewart noted:

“ We reached brand new customers at a time when it's hard to reach net new people, and for a brand that's very well known.

TripleLift Native REC

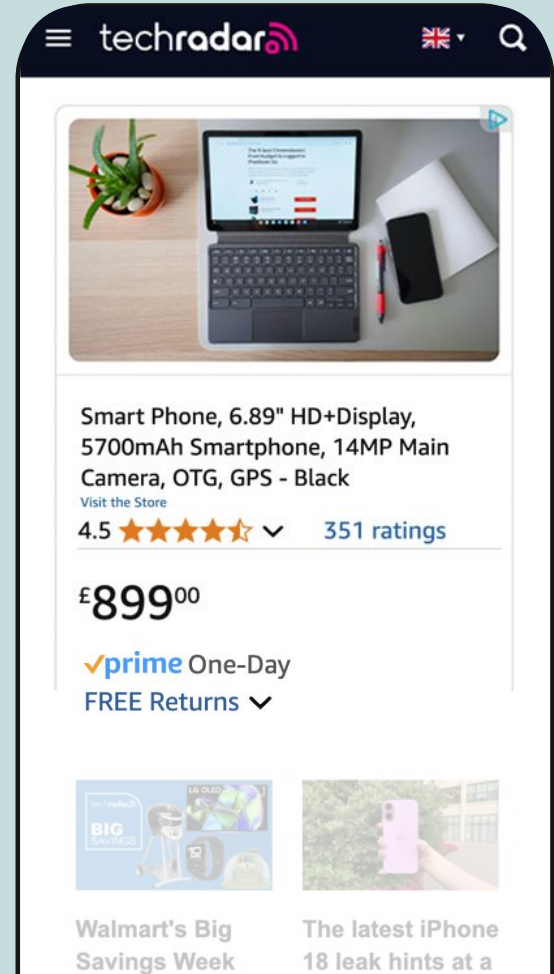
ANOTHER NATIONAL  
RETAIL PARTNER SAW...

**3.2x↑**

engagement rates when using  
native responsive eCommerce  
formats versus standard display

**40%↓**

Cost-per-acquisition



# Advertiser Satisfaction with Current Off-Site Retail Media Campaigns

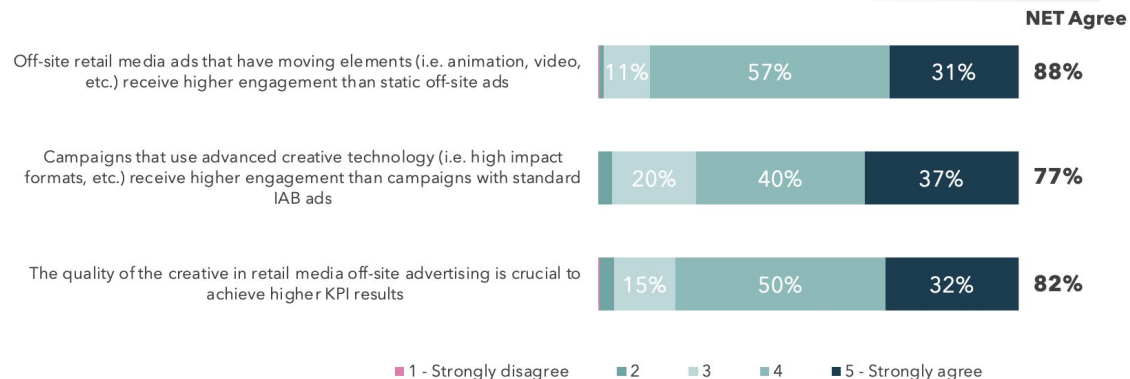
Advertisers are favorable of off-site retail media campaigns with over half (65%) of advertisers reporting positive satisfaction. Specifically, ad format type and high quality creative play a pivotal role in campaign performance.

Of all formats tested, **native ads (74%) generate the highest satisfaction**, with no reported dissatisfaction. Online video (73%) follows close behind. Marketers have mixed perceptions towards Display and **CTV, with a sizable neutral rating (47%)**, which indicates potential in market growth and innovation across these formats.

*Q: How satisfied are you with the performance of your current off-site programmatic retail media advertising campaigns?*

*Q: How satisfied are you with the performance of the following ad formats in your current off-site programmatic retail media advertising campaigns?*

## Impact of Creative on Retail Media Campaigns



*Q: Please rate your agreement with the following statements*

SOURCE: TRIPLELIFT ADVANIS RETAIL MEDIA SURVEY 2025



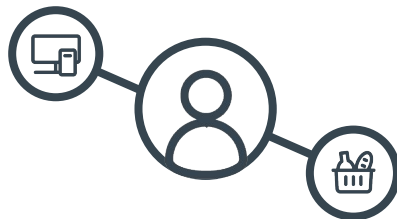
# Expert Insight: Julian Mintz

VP OF SALES



“ There has been more recognition that commerce data is very valuable, and thus there is a desire from all stakeholders to use it more. Has anyone perfected it yet? No. But everyone is very interested, and there is a lot of really cool white space.”

“ We want to help CPGs be **where the customer is bridging digital and physical shopping.**”



A lot of this is gauged on time spent. We're following consumers, which means lots of CTV and social media.”

“ The challenges come from a fragmentation perspective and a lack of standardization. Think about how differently CTV operates, versus social, in terms of tech, data, etc. versus how RM works. We've been on the forefront of trying to help on standards with the IAB.”

Commerce data's value is increasingly recognized in retail media, with brands pursuing media-agnostic strategies on CTV and social platforms to bridge digital and physical shopping experiences.

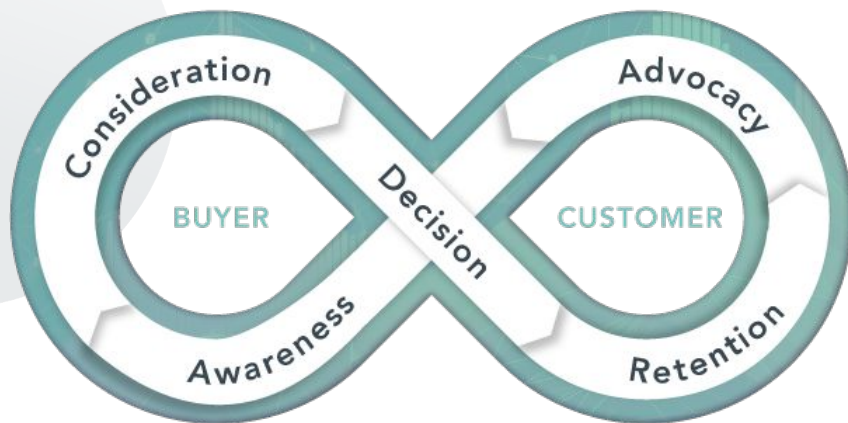
Despite significant interest and untapped potential, "off platform" strategies face fragmentation and standardization challenges, prompting industry leaders to work with organizations like the IAB on establishing standards and opening APIs to achieve truly omnichannel measurement that breaks down data silos.

## 04

## Building Your Retail Media Strategy

First-party data has emerged as a critical asset for brands developing retail media strategies. As third-party cookies fade away, retailers' first-party data offers a privacy-compliant way to understand consumer behavior and preferences.

Sofia Rabellino, SVP of Business Development at TripleLift, explains why first-party data has become so crucial, "As fears around losing addressability and user reconnection grew with the cookie apocalypse, retail media gained attention as a safe solution. Retailers can track shopping behavior without needing cookies, and they can provide closed-loop measurement to stretch marketing dollars efficiently."



## MAPPING THE SHOPPER JOURNEY

Understanding how consumers move through their shopping journey is essential for effective retail media strategies. The path to purchase typically involves multiple touchpoints across various channels. Taylor Stewart notes:

“ Retail media networks understand shoppers and their buying habits intimately. The real value proposition has shifted to a data value proposition beyond just reaching shoppers in-market for specific products.

Now, it's about using data to predict customer life stages or moving patterns, and combining retailer data with brand data to create more effective targeting models.”



# Creating Effective Audience Segments



When building audience segments for retail media campaigns, consider both demographic and behavioral factors:



## For Everyday Products

Target purchasers rather than end users (e.g., parents for toys, not children)



## For Specialized Products

Balance targeting loyal customers with conquest strategies to grow your customer base

### AUDIENCE SEGMENTATION APPROACH

1 Identify your core customer or desired demographic

2 Use retail media platforms to generate related audience segments with high overlap

3 Create campaigns targeting both your exact one-to-one customers and these growth segments to expand your reach

# Format Selection Across Environments

Different retail media environments call for different creative approaches:

## ON-SITE RETAIL MEDIA

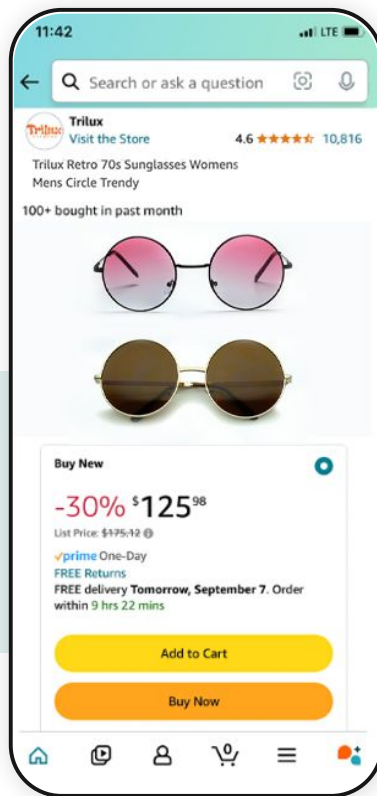
Native formats provide a seamless product integration that feels like a natural extension of the shopping experience. TripleLift's Native Responsive eCommerce (nREC) format allows dynamic display of product prices, ratings, and other real-time information while maintaining the look and feel of the retail environment.



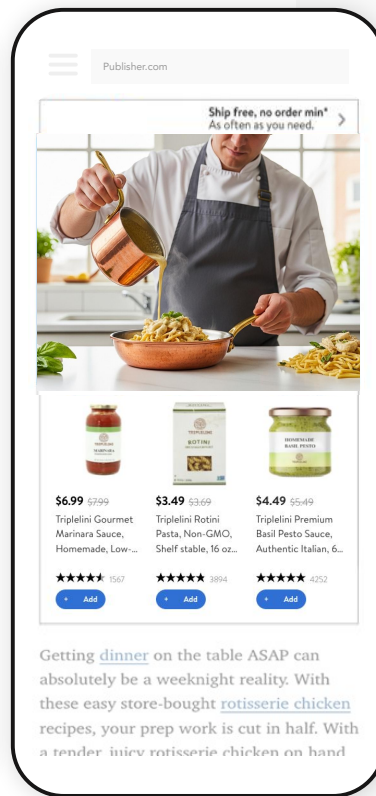
### RC CASEY EXPLAINS THE BENEFIT:

"The creative formatting is important because without that you don't have the opportunity with those optimization levers. This is especially important for reaching consumers off-site or through CTV, where upper-funnel brand messaging plays a crucial role in aligning with overall campaign strategy.

As demonstrated in a recent case study with a consumer health company, integrating nREC formats alongside display campaigns drove significant increases in Detailed Page Views and New-to-Brand Purchases on Amazon (TripleLift case study, 2024).



Amazon On-site



TripleLift Native REC

## OFF-SITE RETAIL MEDIA

Off-site formats extend your reach beyond the retailer's properties while maintaining the targeting precision of retail media. These formats connect with consumers earlier in their journey, building awareness before they actively shop.

Through TripleLift's partnership with Amazon, brands can transform existing creative assets into interactive, retail media units through a seamless setup process—as one global tech brand discovered when they achieved 75% new customer product sales through a strategic off-site campaign (TripleLift case study, 2025).



+ 75%

New customer product sales through a strategic off-site campaign

## CONNECTED TV (CTV)

CTV represents retail media's most exciting frontier, enabling brands to combine the emotional power of video with precise retail targeting.

**US retail media ad spend on CTV is projected to skyrocket 335.5% year-over-year in 2024 to reach \$3.64 billion (eMarketer, H2 2024).**

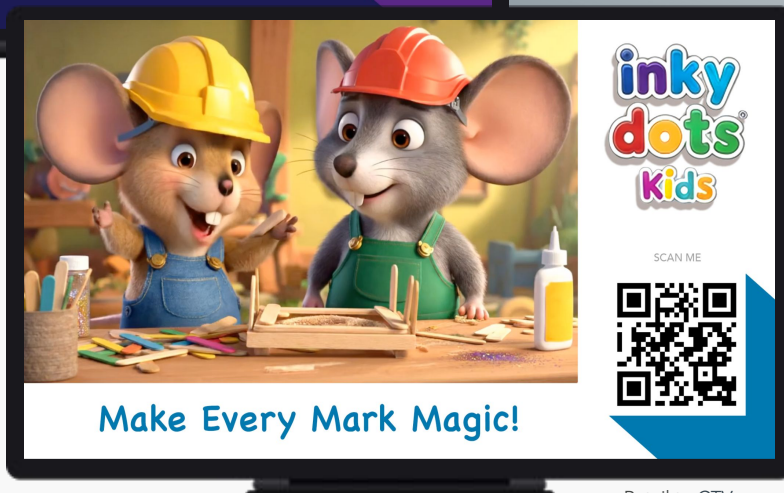
TripleLift offers high-performing CTV formats, including in-show placements like Split Screen and Dynamic Overlay, as well as enhanced spots with features like Product Spotlight and QR Spots—all designed to create shopping opportunities during viewing experiences.

# 335.5%

Projected YoY growth for retail media ad spend on connected TV in 2024 (eMarketer, H2 2024)



Retail to CTV



Retail to CTV

## Top Performing Audience Segments in Off-Site RM Campaigns

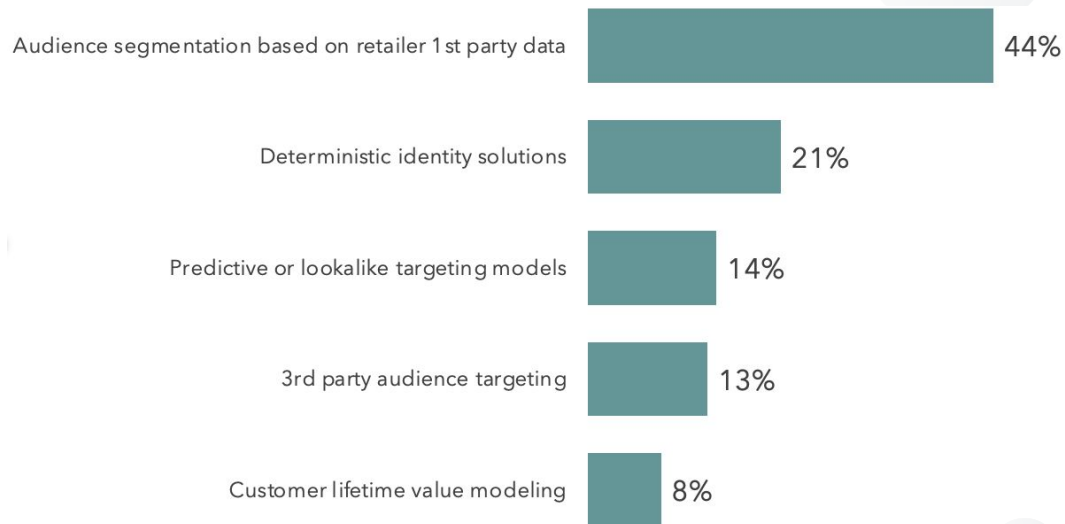
Segments rooted in past purchase behavior such as **brand buyers (66%), category buyers (62%), and purchase frequency (61%)** are reported to deliver the strongest performance in off-site retail media campaigns.

In contrast, psychographic segments (34%) and non-endemic audiences (12%) show significantly lower effectiveness, highlighting the challenges of reaching audiences less directly connected to purchase intent.

*Q: When implemented, which of the following audience segments have you experienced the highest performance within your retail media off-site campaigns?*

## Priority Targeting Solutions for Off-Site Advertising

Marketers place the highest emphasis on **retailer first-party data** for audience targeting, with **44%** selecting it as a priority. Deterministic identity (21%) and lookalike models (14%) follow, while customer lifetime value modeling trails at just 8%, reflecting a clear preference for precise, data-rich targeting methods.

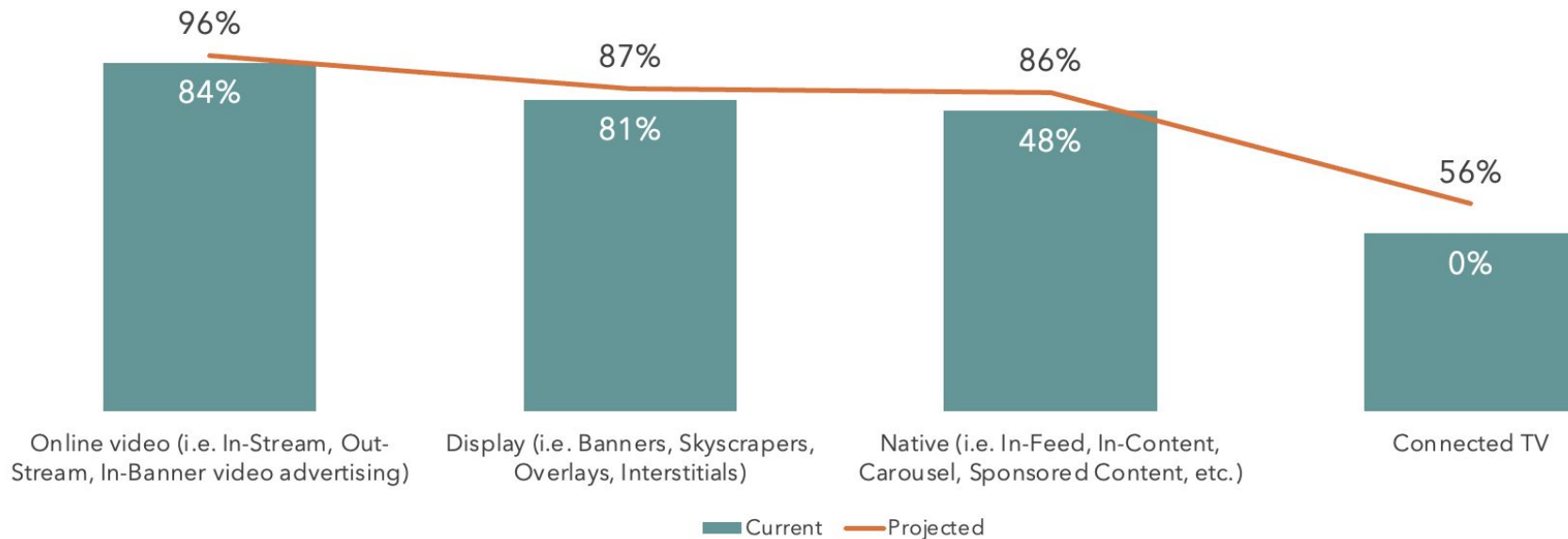


*Q: Which of the following audience targeting solutions are most important to you when working with a retail network to activate off-site advertising?*

SOURCE: TRIPLELIFT ADVANIS RETAIL MEDIA SURVEY 2025

## Multi-format Retail Media Off-site Strategy

Online video remains the **cornerstone** of off-site retail media, rising from **94% to 96%** usage (+2%), closely followed by display (+3%) and native formats (+5%). While gains among these formats are modest, they reflect continued confidence in high-performing channels. **Connected TV**, however, shows the **strongest growth (+8%)**, suggesting it's emerging as a key area of experimentation and expansion within off-site strategies.



Q: Which of the following formats do you currently use for off-site programmatic retail media advertising campaigns?



## Expert Insight: Brian Monahan

HEAD OF RETAIL MEDIA SOLUTIONS

**dentsu**



“ Retail media isn't just the next search, social, or programmatic channel, as it's often portrayed. It represents a fundamental reset in the relationship between brands, customers, and suppliers.

It's not just another media type to fit into the media planning jigsaw puzzle—it's arguably a move to disintermediate both media and retail.”

“ Right now, most of what we're seeing is shopper marketing dollars being re-categorized. Most brands don't actually need retail media's targeting data.

What retail media networks really have is the relationship with the merchants—and that's what's powerful.”

“ Just being able to see that someone was exposed to an ad on Roku and then went to Safeway to buy mac and cheese—that kind of attribution is powerful. Eventually, if we get to the point where a credit card is stored in the CTV ecosystem, that's when everything changes.”

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Retail media is fundamentally transforming brand-customer-supplier relationships by disrupting traditional intermediary roles, with its true value residing in merchant relationships rather than targeting capabilities.

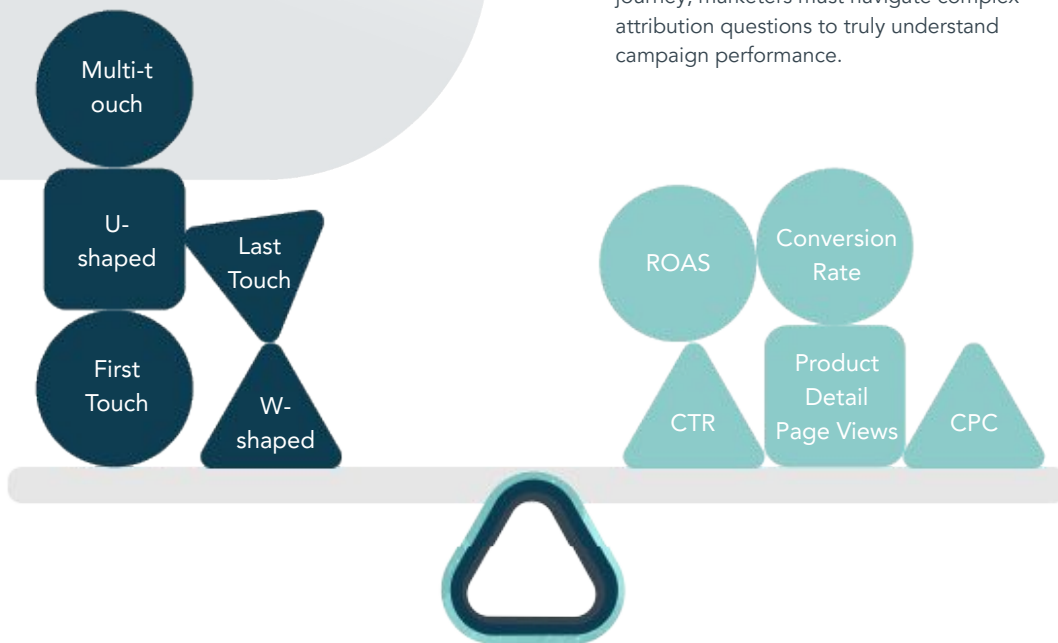
Brands should consolidate visibility across siloed media spending before developing holistic strategies, while connected TV offers promising growth through attribution capabilities that track journeys from ad exposure to purchase—with even greater potential when payment credentials become embedded within CTV ecosystems.

## 05

## Measurement & Attribution

Effective measurement is retail media's superpower—and its biggest challenge.

While the closed-loop environment offers unprecedented visibility into the customer journey, marketers must navigate complex attribution questions to truly understand campaign performance.



### KEY PERFORMANCE INDICATORS THAT MATTER

The most successful retail media campaigns focus on critical KPIs as Rebecca Cardona, VP of Sales at TripleLift, explains:

“Return on ad spend (ROAS) is definitely the KPI that most people are focused on out of the gate. After that, detail page views, detail page view rate, and any upper funnel metrics that would lend themselves to a typical branding or awareness KPI are also crucial measurements.”



**Rebecca Cardona**  
VP of Sales at TripleLift

## KPI

This focus is supported by recent industry research, with:



56%

of advertisers optimizing for conversion rate



54%

for return on ad spend



48%

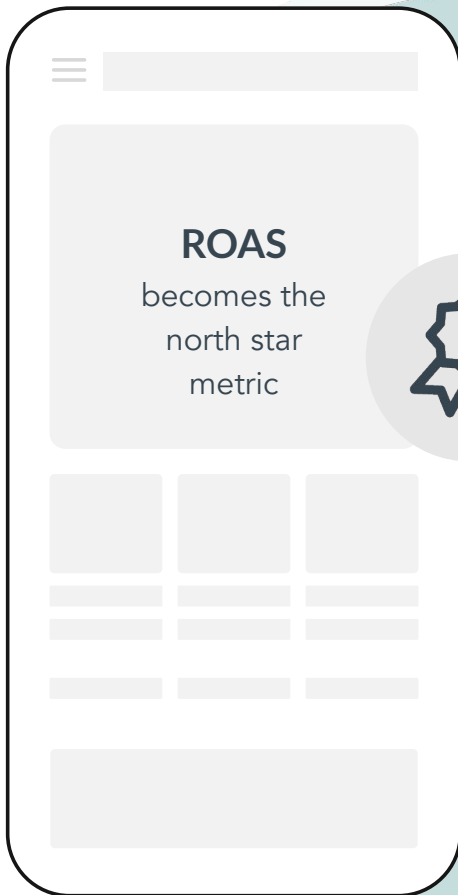
clickthrough



46%

cost per click

(in off-site retail media campaigns (TripleLift/ eMarketer research, 2024))



For newer products or brands, detail page views help gauge awareness, while click-to-cart indicates consideration. For more established products, ROAS becomes the north star metric.

## BEYOND THE BASICS

Many sophisticated advertisers track the following:



New-to-brand acquisition rates



Total ROAS (lift across entire brand, not just advertised products)



Detail page revisits



Incrementality metrics

## CLOSED-LOOP MEASUREMENT:

### The Double-edged Sword

Retail media's closed-loop measurement offers remarkable visibility into customer actions within the retailer ecosystem.

However, **limitations exist:**

- Attribution typically stays within each retail media network's walled garden
- Cross-channel attribution (online to in-store) remains challenging
- Limited visibility into incremental impact versus sales that might have happened organically
- Non-endemic advertisers face challenges connecting retail media exposures to conversions on their own properties



**64.1%**

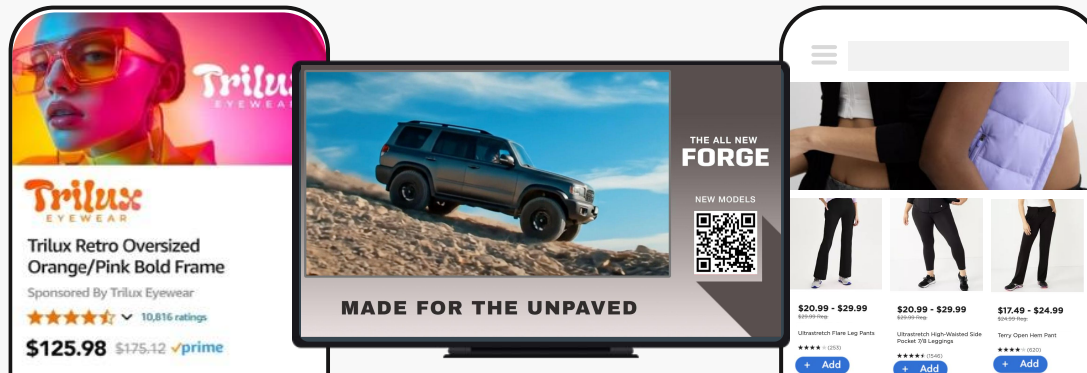
increase in off-site ad spend in 2024

These challenges are amplified as off-site retail media grows rapidly. With **US off-site ad spend projected to increase by 64.1% in 2024 to reach \$11.04 billion** and more than double to \$24.02 billion by 2027 (eMarketer, 2024), advertisers need attribution models that can bridge the gap between on-site and off-site activity.

## ATTRIBUTION MODELS:

### One Size Doesn't Fit All

Different campaign objectives demand different attribution approaches:



For ROAS-focused Campaigns

Last-click attribution works well for sponsored product ads and high-intent searches



For Awareness Campaigns

View-based attribution better captures the impact of native, display, and CTV formats



For Full-funnel Strategies

Multi-touch attribution provides a more complete picture of which touchpoints influenced conversion



What we're noticing more and more is that brands are realizing that they can't be so siloed in terms of video investment, online investment, and search investment. They have to be looking at things more holistically."

## BEYOND LAST-CLICK

### Understanding True Incremental Value

The true value of retail media extends far beyond capturing shoppers who would have purchased anyway. Smart marketers are implementing:

**Incrementality Testing**  
Running controlled experiments with matched audience segments where one group receives the campaign and one doesn't, then comparing conversion rates

**Branded Search Analysis**  
Measuring lift in branded search volume and performance after introducing upper-funnel tactics

**Market Testing**  
Comparing performance between markets with different media approaches to isolate campaign impact

**Clean Room Environments**  
Amazon Marketing Cloud and similar platforms allow brands to blend first-party data with retail data to understand true incremental impact

Rebecca Cardona emphasizes...

“...we need to figure out how holistically any sort of strategy is influencing that eventual sale. The biggest piece is really understanding how any retail media strategy is driving incremental performance.”

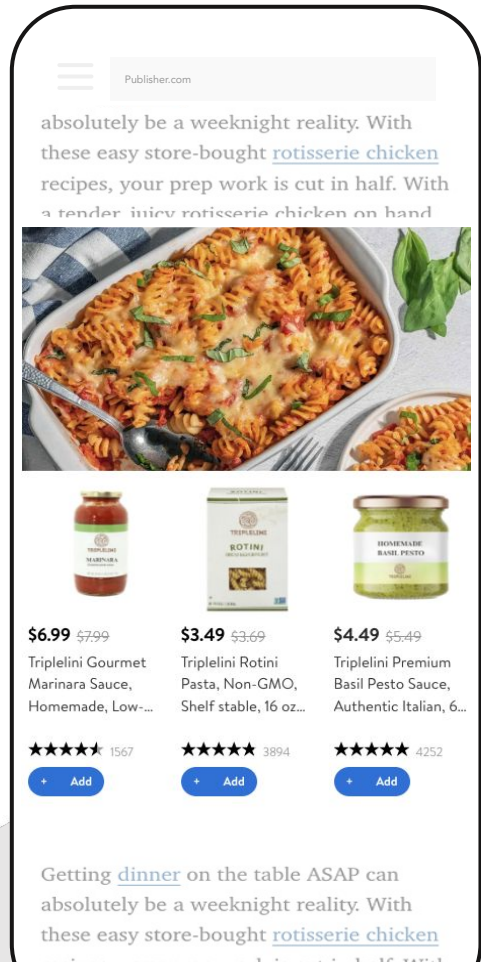
Taylor Stewart identifies a core challenge: "The biggest measurement issue is going to be around in-store. And then, if you are a brand running on like Amazon, Walmart, The Trade Desk, etc., how do you drive unique reach and incremental sales through each platform?"

Research shows **42% of advertisers report retailers are unable to close the attribution loop, while 34% find the lack of creative or reporting standards across retailers challenging.**

**43%** of advertisers cite a lack of transparency in audience targeting for off-site campaigns

(Coresight Research, 2024).

Native SKU

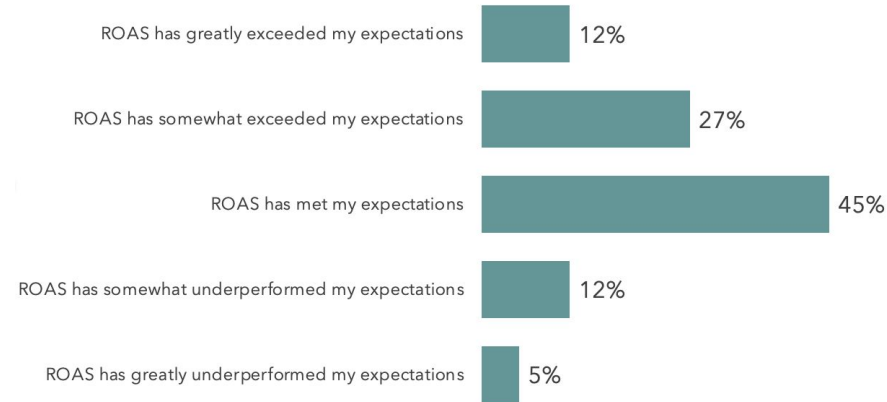


Getting [dinner](#) on the table ASAP can absolutely be a weeknight reality. With these easy store-bought [rotisserie chicken](#)

# ROAS Performance Meets and Exceeds Expectations

ROAS is performing **strongly for most**, with 45% reporting it meets expectations and 39% saying it exceeds them, reflecting broad satisfaction with its effectiveness as a performance metric.

## How ROAS From Off-site Campaigns Compares to Advertiser Expectations



Q: How has the ROAS (return on ad spend) for retail media off-site campaigns compared with your expectations?

## Top KPIs for Demonstrating Off-site Retail Media Value

**33%**

Return on ad spend

**17%**

Conversion rate

**10%**

Incremental return on ad spend

**8%**

In-store sales

**8%**

Engagement rate

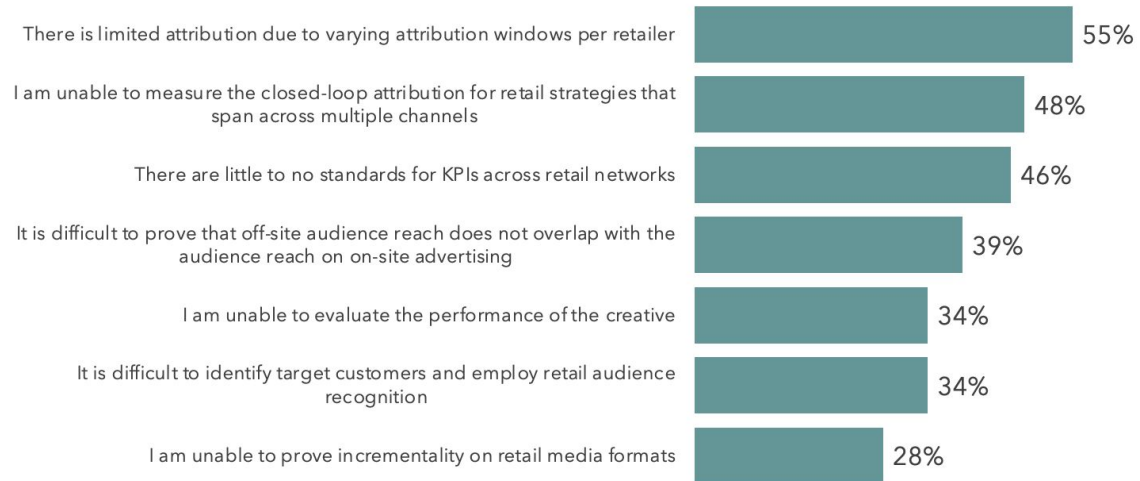
Q: From the KPIs you previously selected, please rank the metrics that are most important for demonstrating the value of retail media off-site advertising to business decision-makers.

# Advertisers Seek Attribution and Reporting Standards

**Attribution and standardization are the biggest hurdles in measuring off-site retail media effectiveness.** The top challenges marketers face include limited attribution due to varying retailer windows (55%), lack of closed-loop attribution across channels (48%), and inconsistent KPI standards across retail networks (46%).

Other notable barriers include audience overlap with on-site campaigns (39%) and difficulties evaluating creative performance (34%). This points to a fragmented measurement landscape that complicates performance evaluation and cross-channel strategy alignment.

## Measurement Challenges in Evaluating Off-Site Retail Media Effectiveness



*Q: Which of the following are measurement challenges or limitations that you face when evaluating the effectiveness of your retail media off-site advertising?*

SOURCE: TRIPLELIFT ADVANIS RETAIL MEDIA SURVEY 2025

# Expert Insight: Michael Becker

SENIOR DIRECTOR, PRODUCT

 instacart



“ We don't think of ourselves as a traditional retail media network—we're a marketplace, so everything we do has to perform. We were among the first to offer incrementality and encouraged our partners to evaluate both correlative and causal data—something that's becoming more common now.”

“ When you start extending into platforms like Meta, The Trade Desk, or CTV, maintaining a cohesive identity becomes more difficult. For many CPG brands, this performance-driven approach is still relatively new.

They're transitioning from relying on mass media and long-standing relationships to making data-driven decisions.”

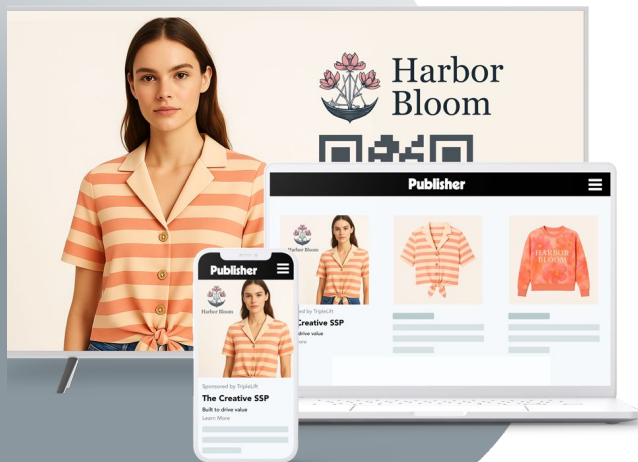
“ Embrace uncertainty. There are a lot of emerging tools, including new marketing mix models and startups focused entirely on solving these problems. For larger brands, don't assume you know how to win from the start. Focus on learning quickly through experimentation.”

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Retail media attribution is evolving rapidly as platforms like Instacart position themselves as performance-driven marketplaces, pioneering incrementality measurement and multi-touch attribution while expanding visibility into previously difficult-to-measure channels like Connected TV. For CPG brands transitioning from traditional mass media to data-informed decision-making, success depends on embracing uncertainty, rapid experimentation, developing technical capabilities around APIs and clean rooms, and prioritizing integrated data collection across channels to build unified performance views.

## 06

# Creative Best Practices for Retail Media Success



## 1. PRIORITIZE VISUAL APPEAL & BRAND CONSISTENCY

- Maintain consistent brand elements while adapting to each format's strengths
- Ensure your product is clearly visible and the main focus of the creative
- Use high-quality images that stand out in the retail environment

## 2. LEVERAGE DYNAMIC CREATIVE OPTIMIZATION

- Personalize content at scale based on shopper data and behavior
- Test multiple creative variations efficiently using AI-powered tools
- Build creative that acknowledges where customers are in their journey

## 3. CREATE FORMAT-SPECIFIC EXPERIENCES



### For Native REC Formats

- Focus on clear product benefits rather than just features
- Include pricing and ratings information prominently
- Ensure your message remains clear when templates adapt to different placements



### For Video & CTV Formats

- Front-load your brand and key message in the first 3 seconds
- Create content that works with or without sound
- Include clear calls to action and QR codes when appropriate



### For In-Store Digital Formats

- Keep messaging concise and easily scannable
- Use strong visual cues that connect to your online presence
- Consider proximity to the product when crafting your message

The importance of using the right creative for specific contexts lies in ensuring both effectiveness and compliance. For instance, when driving users to a purchase page, it's crucial to avoid targeting content that could be interpreted as appealing to underage audiences. This is especially important in categories like alcohol, where advertisers must stay within strict boundaries—not only around privacy but also legal regulations. Proper creative alignment helps maintain both ethical standards and campaign integrity.

# Perceptions and Challenges of Creative Quality's Impact on Off-Site Retail Media Performance

## 82%

of marketers agree that high quality and well-crafted creative is essential to driving stronger KPI outcomes

## 35%

Of marketers find that building creative formats that reflect their branding is challenging

## 34%

Of marketers find that there are no creative standards across retailers

## 14%

Of marketers agree that off-site creative experiences do not meet the quality of on-site creative experiences

## 13%

Of marketers claim that creative support is important in their decision to partner with a retail media network

## 5%

Of marketers claim that differentiated creative formats directly influences their decision to partner with a retail media network



Retail to CTV

# Expert Insight: Lynne Kjolso

VP OF GLOBAL PARTNERSHIPS  
& RETAIL MEDIA



“ Retail media has come a long way over the past four or five years. RMNs now have deep data on their users, which enables much more personalized and relevant advertising.

Relevance algorithms have significantly improved and will continue to do so, especially with the help of AI.”

“ We're moving toward highly personalized and relevant advertising, driven by generative AI.

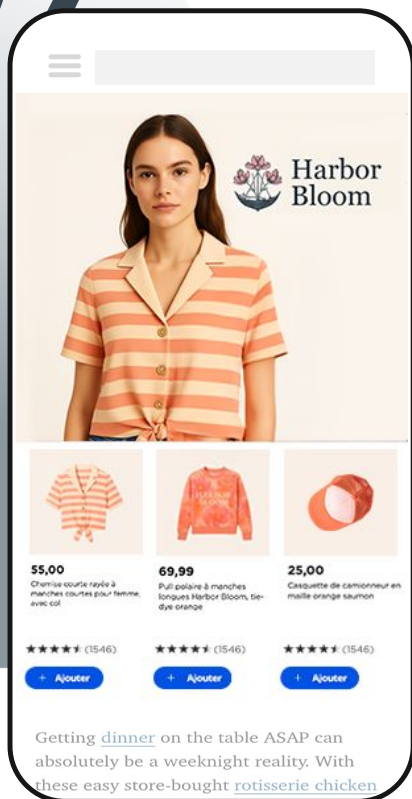
When a user types a natural language query in search or a chat session, it provides richer insight into their intent. That allows the algorithms to return more relevant and personalized responses.”

“ With AI, you can perform real-time A/B testing to determine what works best for specific consumers or contexts. Giving brands AI tools to automate campaign management, creative optimization, and performance tracking can significantly ease that burden.”

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Retail media creativity has evolved dramatically from basic sponsored ads to highly personalized experiences, driven by deep user data, improved relevance algorithms, and AI acceleration. As established networks expand into video and upper-funnel formats through connected TV partnerships, AI is transforming the landscape by enabling real-time testing, automating campaign management, and optimizing creative assets—with the future promising immersive AI-powered experiences and agentic marketplaces that could fundamentally redefine how consumers discover and interact with products online.

## 07



# The Future of Retail Media: Trends & Innovation

Retail media is evolving at breakneck speed, transforming from simple sponsored listings to sophisticated, AI-powered creative experiences. Several key trends are reshaping how brands connect with consumers:

## AI UNLEASHES CREATIVE POTENTIAL

AI stands poised to revolutionize retail media creative in ways that were unimaginable just a few years ago. We're moving beyond basic dynamic creative optimization toward intelligent systems that can generate and test dozens of creative variations simultaneously.

TripleLift's AI Detection technology enhances creative performance by analyzing content, context, and audience data in real-time. This ensures that ads are seamlessly integrated into publisher environments while maximizing engagement, contextual alignment, and overall ad performance.

## VIDEO & CTV TAKE CENTER STAGE

The convergence of retail media and connected TV represents one of the industry's most significant developments. With Amazon launching Prime Video Ads and Walmart acquiring Vizio, retail giants are moving aggressively into streaming environments.

## OMNICHANNEL INTEGRATION

The boundaries between online and in-store retail media will continue to blur. Digital displays in physical stores, connected packaging, and mobile-activated experiences will create seamless customer journeys across environments.

## ECONOMIC INCLUSION & DIVERSITY

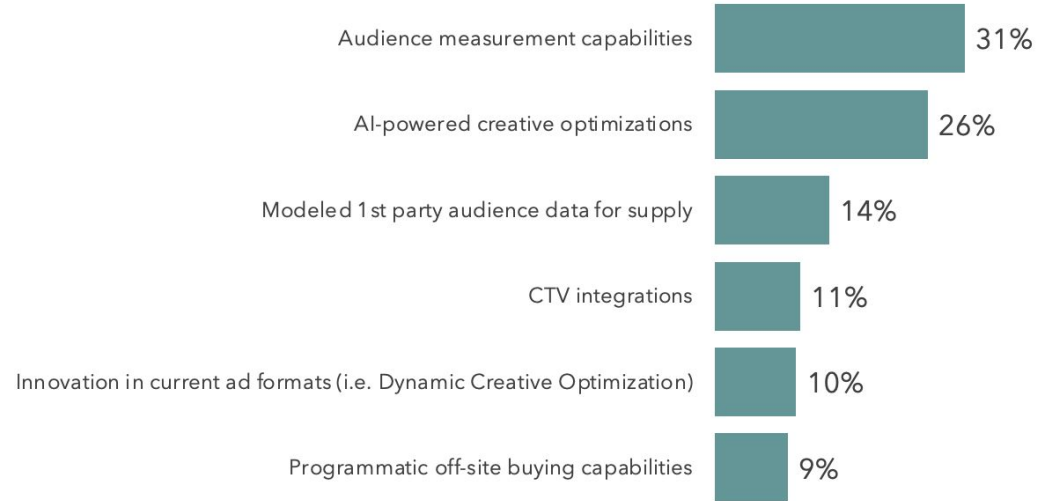
As brands seek to reach diverse audiences authentically, inclusive retail media strategies will gain importance. As the **largest minority-owned SSP certified by the National Minority Supplier Development Council (NMSDC)**, TripleLift is committed to supporting diverse publishers and driving economic inclusion through initiatives like our Underrepresented Voices (UNREP) package.

## Anticipated Innovation Driven by Measurement and AI

**Audience measurement (31%) and AI-driven creative optimization (26%) are the top areas** of interest for exploration in the next 12 months. Additional interest in first-party data modeling (14%) and CTV integrations (11%) reinforces the focus of prioritizing innovations that enhance targeting and performance intelligence.

In contrast, buying-related innovations such as programmatic off-site buying (9%) are attracting comparatively less attention, signaling a shift toward smarter, insight-led campaign strategies.

## Emerging Retail Media Innovations of Interest for Future Testing



*Q: Please rank the top 3 emerging retail media innovations that you and your team would be most open to testing in the next 12 months.*

SOURCE: TRIPLELIFT ADVANIS RETAIL MEDIA SURVEY 2025

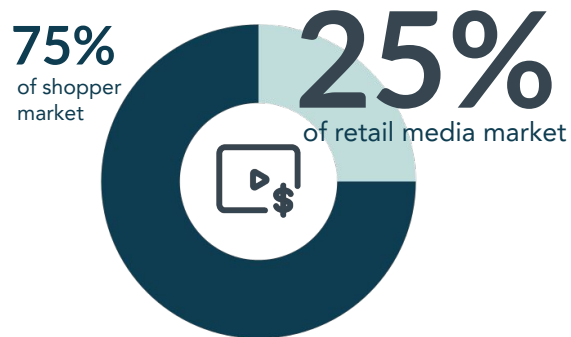
# Expert Insight: Rachel Dillon

EVP OF SALES

 STRATEGUS



“ We reach about 75% of the shopper market, but only 25% of the retail media market—primarily because of limited reach. We're just at the very front end of this evolution. Not all data is created equal, and not all data is uniform.”



“ I believe we'll see much more fragmentation and growth before we see consolidation. It's still too new and too early. That does create a challenge for advertisers, but it also presents opportunities.”

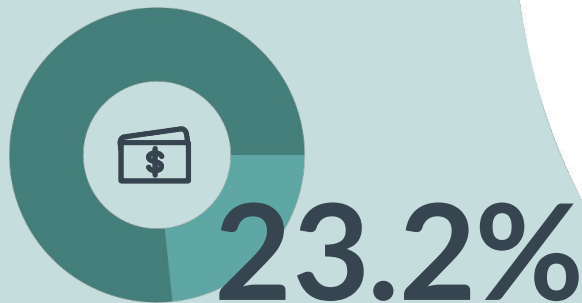
“ I think more players will enter the space—beyond retail media. Really, anyone with first-party data can participate. Many advertisers still find this approach foreign and unfamiliar. First-party data is incredibly valuable and directly linked to performance.”

The retail media landscape remains highly fragmented with programmatic capabilities reaching only 25% of the retail media market despite covering 75% of shoppers, signaling substantial untapped potential as the sector evolves beyond traditional retail to include any entity with valuable first-party data. Rather than consolidation, the industry is poised for further fragmentation and growth, presenting both navigational challenges and strategic opportunities for advertisers who can effectively leverage these emerging capabilities while overcoming the current channel-specific approach to social shopping and retail media.

## 08

## Executive Summary

As retail media continues its explosive growth—**projected to reach \$62 billion in US ad spending in 2025** and represent 23.2% of the overall \$772.4 billion advertising market—the brands that master creative excellence will capture disproportionate value.



\$62B of the overall \$772.4B advertising market

By expanding beyond on-site to off-site experiences, and leveraging top-performing formats like display (used by 36% of advertisers) online video (33%), and connected TV (26%), marketers can turn impressions into lasting customer relationships across the entire purchase journey.

## TO MAXIMIZE YOUR RETAIL MEDIA SUCCESS

**Lead with Creative Quality**

Invest in high-impact formats that tell your brand or product solution story effectively

**Build a Full-funnel Approach**

Combine awareness, consideration, and conversion tactics across the customer journey

**Measure What Matters**

Look beyond basic ROAS to understand new customer acquisition and lifetime value

**Test & Optimize**

Continuously refine your creative and targeting based on performance data

**Partner Strategically**

Work with platforms that offer both targeting precision and creative excellence

# 08

## About TripleLift

Powered by advanced AI and creative technology, we ensure personalized delivery, real-time optimization, and superior ROI for advertisers while helping publishers maximize revenue without compromising the user experience.

Through our focus on creative excellence, we can help you navigate the retail media landscape with solutions that drive measurable results.

By leveraging TripleLift's Creative SSP capabilities, you can transform standard ad placements into high-performing, scalable experiences that empower publishers, drive better outcomes for advertisers, and build better experiences for consumers.

[LEARN MORE](#)



TripleLift transforms standard ad formats into visually immersive and high-performing experiences across mobile, web, CTV, and retail media.

# A B O U T

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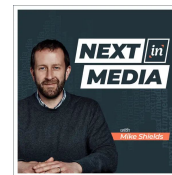
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Produced in  
Association with:



# METHODOLOGY

## ABOUT THE SURVEY

- 200 US residents completed a 27-minute survey
- Survey was conducted April 28th - May 14th, 2025
- Participants were recruited from an actively managed panel, recruited based on their LinkedIn profile
- Participants were incentivized using rewards points offered by their panel
- The survey was conducted in three countries (US, UK, France)
- This survey was conducted in English and French

