

RETAIL  
MEDIA



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**interact.**  
2023

# AGENDA

- 01.** A FEW WORDS ABOUT RETAIL MEDIA
- 02.** WHAT OPPORTUNITIES DOES RETAIL MEDIA OFFER?
- 03.** OUR AMBITION WITH  
CARREFOUR & PUBLICIS JOINT VENTURE

# A FEW WORDS ABOUT RETAIL MEDIA

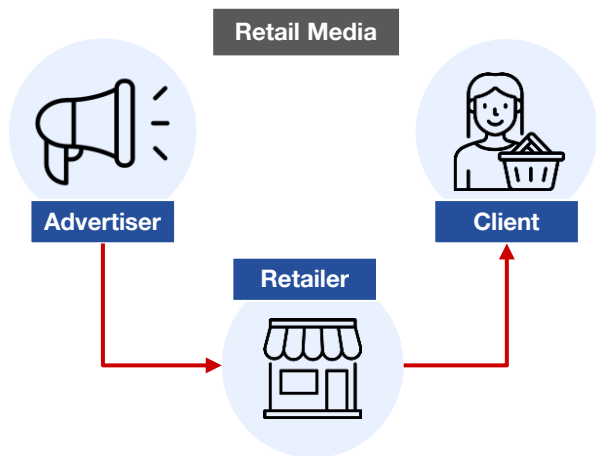


# WHAT IS RETAIL MEDIA ?

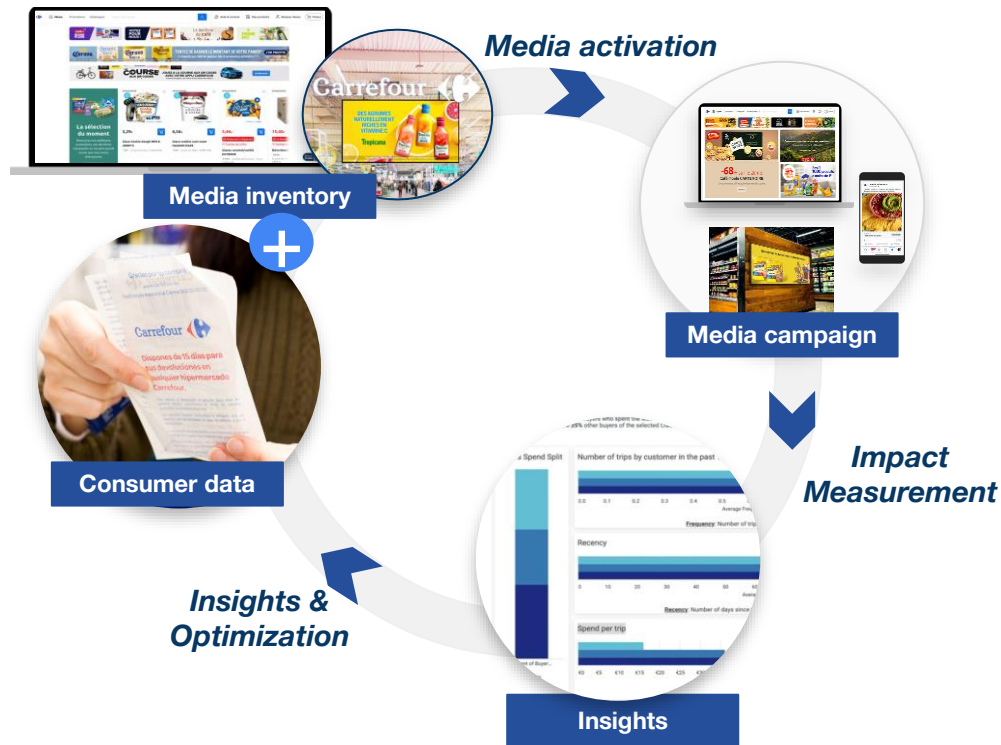
## Description

Media placements along the purchasing journey both **online & offline** allowed or powered by retailers

## Principle

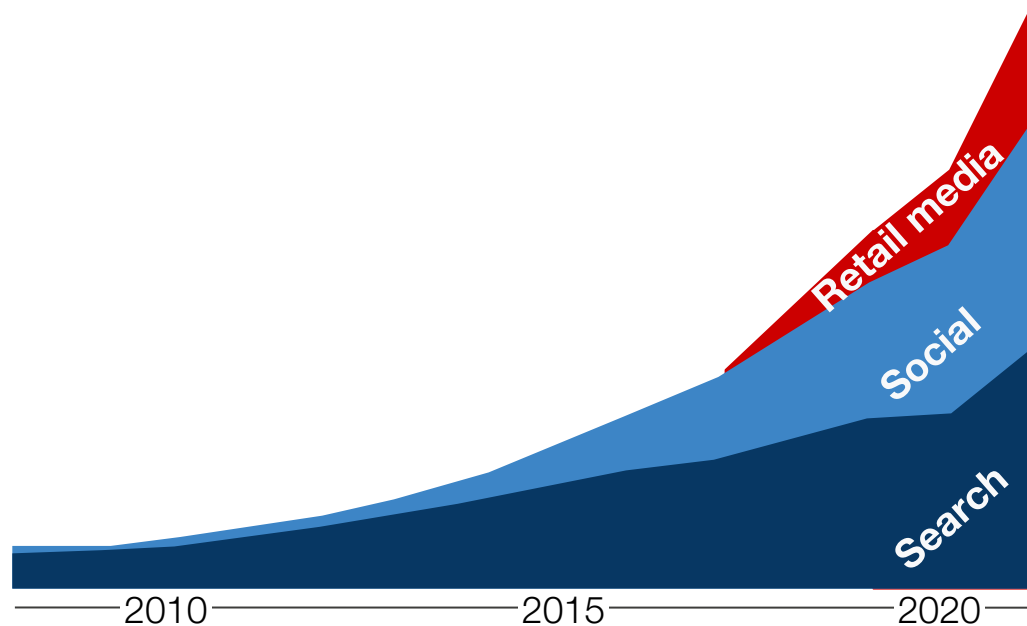


## Functioning



# RETAIL MEDIA: RIDING THE THIRD WAVE OF DIGITAL ADVERTISING WITH A WHOPPING \$100BN FOOTPRINT AND GROWING

## Retail media is the 3rd wave of digital advertising



Source: eMarketer, Oct 2021

## Key stats on Retail Media

**\$100BN**

worldwide revenue  
in 2022

**25%**

digital spend within 4 years

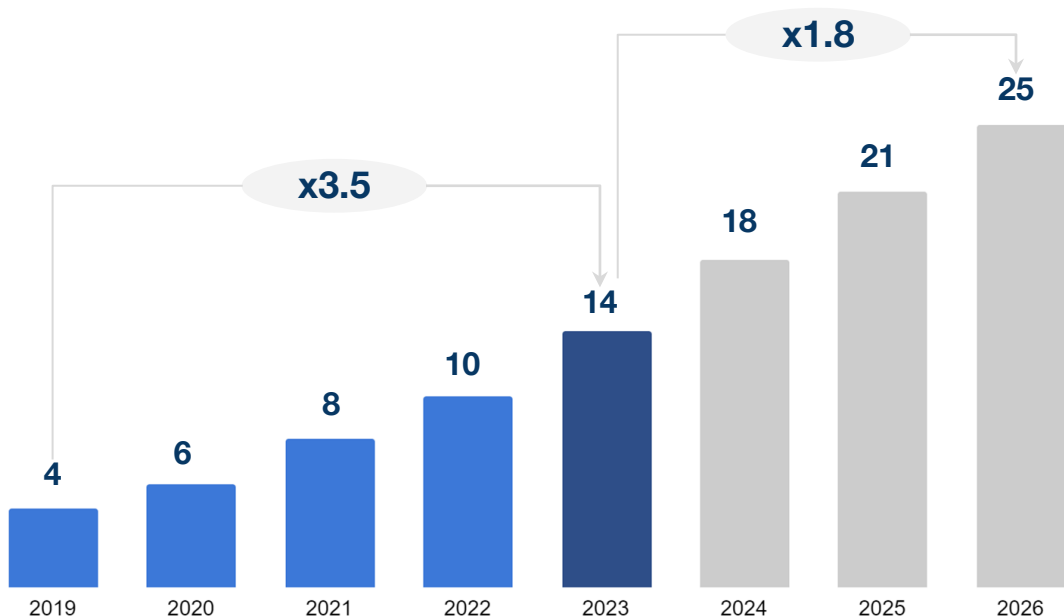
**Overpass TV**

spends by 2025 in the US for  
CPG players

# THE EUROPEAN MARKET SET TO SKYROCKET €25BN BY 2026



Europe's Retail Media market, 2019-2026F in €BN



## Key drivers



**Ecommerce acceleration**



**1st party data & Brand-safe environment**  
in a post-cookie world



**Closed-loop measurement** and ROI based on transactions

# PERFORMANCE, CUSTOMER REACH, AND INSIGHTS: THE TRIAD POWERING RETAIL MEDIA SUCCESS

**WHY DO ADVERTISERS  
INVEST IN  
RETAIL MEDIA?  
(TOP MOTIVATIONS)**

€

1. Reasonable cost of media



2. Access to audiences otherwise not reachable



3. Best performance delivery



4. Unique Shopper / Brand Insight

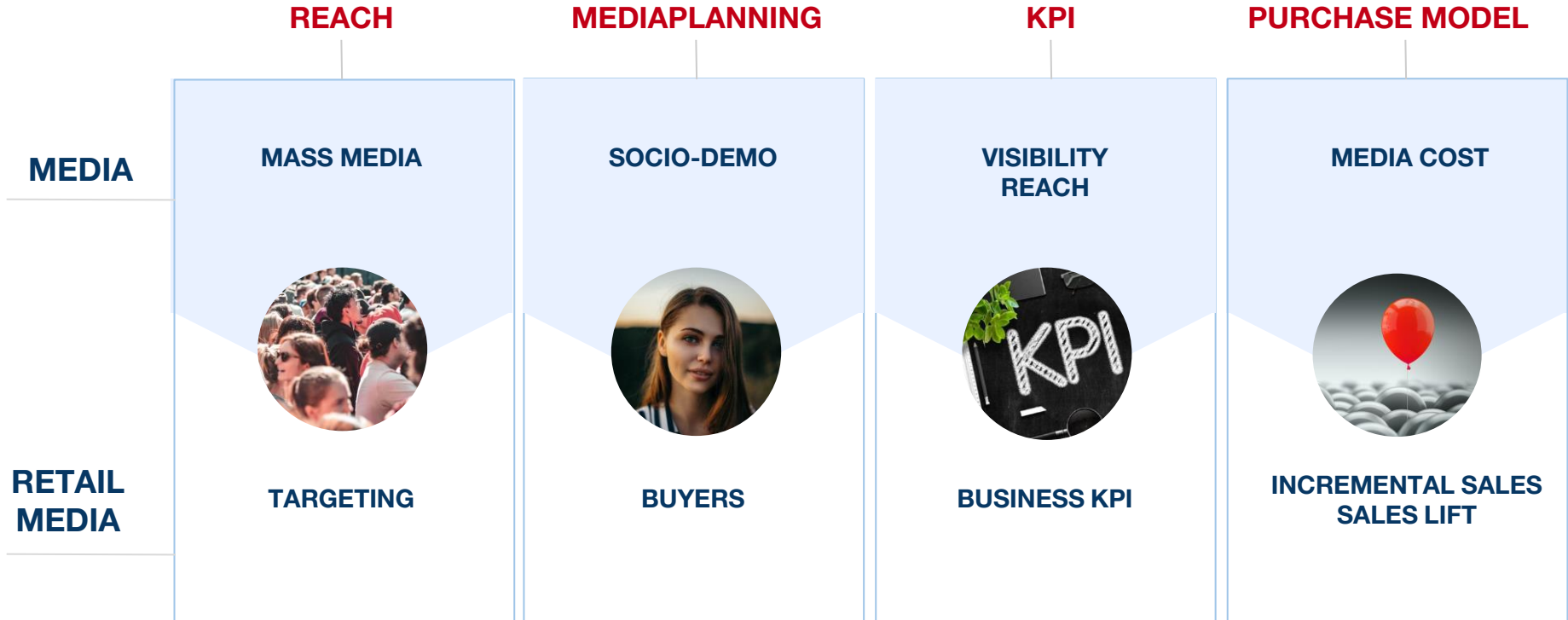


5. Scale/size of audience



6. Omnichannel measurement

# MEDIA AND RETAIL MEDIA: ALLIED IN PURPOSE, DISTINCT IN EXECUTION – SIBLINGS, NOT TWINS





# RETAILER TRANSACTIONAL DATA: THE POWERHOUSE FUELING MEDIA BUYING AND MEASUREMENT EXCELLENCE

ADDRESSABLE TV



SOCIAL MEDIA



DISPLAY

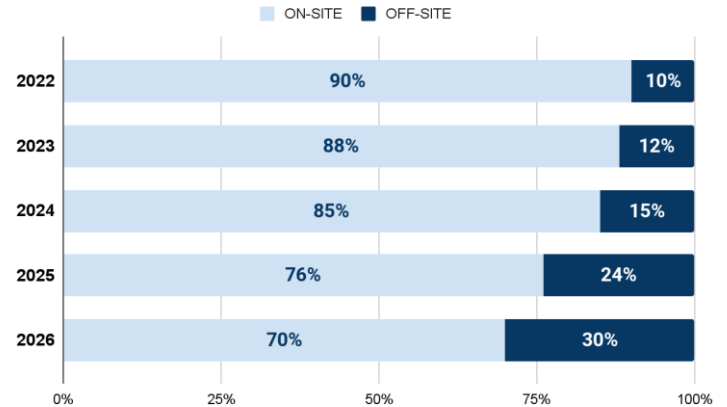


ENRICHED WITH RETAILER TRANSACTIONAL DATA

RETAIL MEDIA



An association that will be more and more present in the future



Source IAB Europe

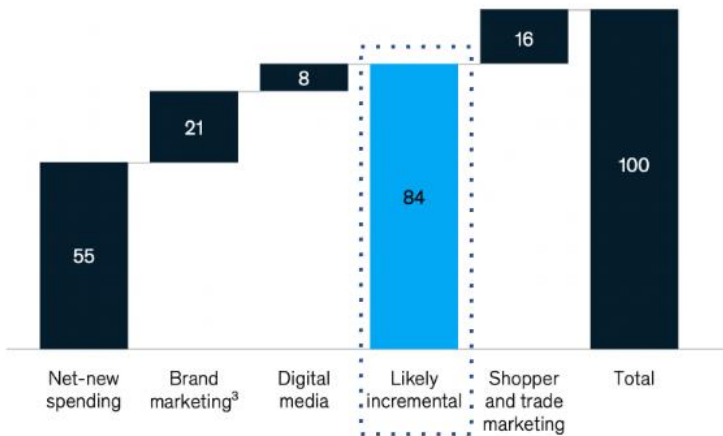
# RETAIL MEDIA AND TRADE MARKETING: COMPLEMENTARY FORCES NECESSITATING HARMONIOUS ALIGNMENT IN A UNIFIED GLOBAL STRATEGY

Budgets split...



... for different objectives and actionable levers

+80% of Retail media budgets are incremental



		TRADE MARKETING	RETAIL MEDIA
Products	Assortments / Promotion / Appointments	✓	✗
	Ad formats / Data / Audience Extension	✗	✓
Inventory	Display banners / Search advertising / Sponsored Products	✗	✓
	Product ranking	✓	✗
Insights / Reporting	Merch & Supply KPI's	✓	✗
	Conversion / ROAS / Sales lift	✗	✓
	Media KPI's	✗	✓

# WHAT OPPORTUNITIES DOES RETAIL MEDIA OFFER?

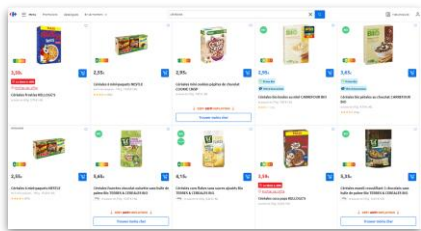


# RETAIL MEDIA: DIRECTING THE OMNICHANNEL JOURNEY TO FOSTER UNPRECEDENTED SHOPPER ENGAGEMENT



# E-COMMERCE ACTIVATIONS: SECURING A STRATEGIC FOOTHOLD FOR BRANDS IN THE DIGITAL MARKETPLACE

## Key fact

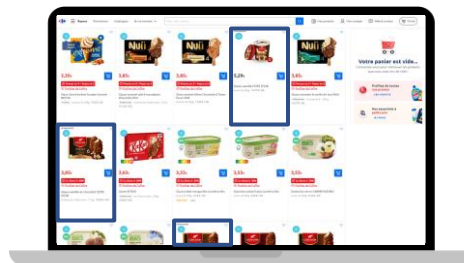


**90%**

Sales made on 1st search page

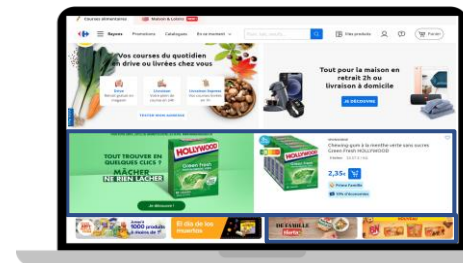
## Efficient campaigns at scale

### SPONSORED PRODUCTS



ROAS **x6,3**

### DISPLAY



ROAS **x5,9**

# DATA COLLABORATION: UNLEASHING POTENTIAL AS A DYNAMIC GROWTH ACCELERATOR

## INSIGHT

### 🛡️ Data CLEANROOM

#### DATA COLLABORATION

Customer Attributes

Brand Sales info

Customer Behaviors

Media response

#### ANALYSIS & SEGMENTATION

(DATA SCIENCE access)



## ACTIVATION



OPEN WEB



RETAILER WEBSITE



SOCIAL



## MEASUREMENT



**INCREMENTAL SALES LIFT**

**+ 8%**

Incremental turnover per customer on average\*



**TV MEASUREMENT**

**SELF OR MANAGED SERVICE**

# CEMENTING PRESENCE IN THE FINAL MILES: NAVIGATING THE CRUCIAL END STAGES OF THE CUSTOMER JOURNEY

## MEDIA PLANNING

Transactional & external **data is at the core of activation...**

**...For better media planning & personalized messages** based on various factors (e.g., Weather, moment (day, hour..))

## SCREENS ACTIVATION



**GAS STATIONS**



**INSTORE**



**SHOP WINDOW**

## MEASUREMENT

**Reconciliation with offline sales to measure Sales uplift**

# REVOLUTIONIZING COUPONING: EMBRACING TARGETED AND PERSONALIZED APPROACHES FOR ENHANCED CUSTOMER ENGAGEMENT

**ONLINE**

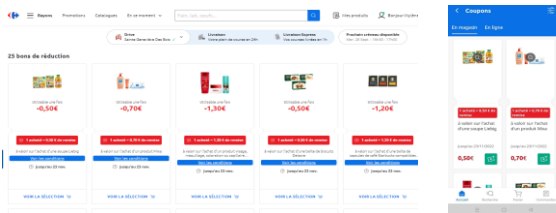
**+**

**INSTORE**

**ONSITE**



Smart pop'in



Integration into promotions hub

**DATA OFFSITE**



Brand coupon via display offsite



From a printed Coupon...



To a 100% digitized Coupon

**45% OF CPG PURCHASES ARE INFLUENCED BY COUPONING**



# DIRECT SALES IMPACT: HOW RETAIL MEDIA TRANSLATES CAMPAIGN PERFORMANCE INTO TANGIBLE SALES SUCCESS

Analytics of campaigns ...



... with advanced precision in insights



## Sales

Sales & Sales lift  
Business equation



## Shoppers

New buyers  
Buyers' profile

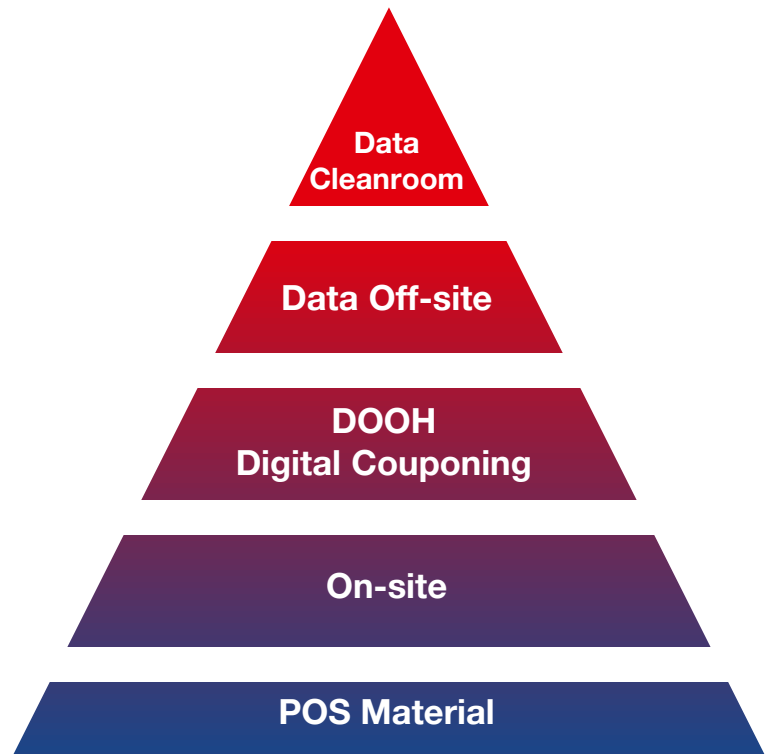
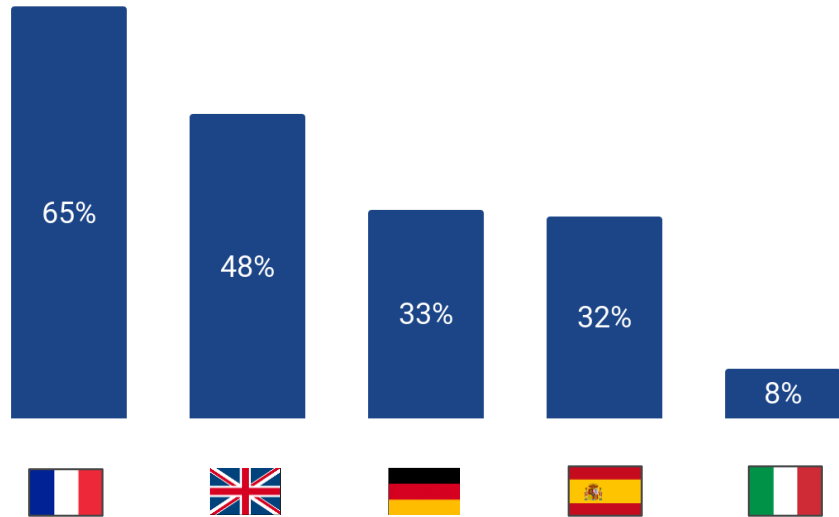


## Media

Reach  
Conversion rate

# DIVERSITY IN RETAIL MEDIA MATURITY: A CROSS-COUNTRY, CROSS-RETAILER PERSPECTIVE

% of European retailers with a retail media offering by country





Carrefour



Carrefour  
LINKS

# USES CASES AND APPROACHS

# UNLEASHING THE POWER OF CARREFOUR'S OFFSITE DATA: A GAME-CHANGER FOR BUSINESS IMPACT

BUDGET	INCREMENTAL TURNOVER	ROAS	NEW BUYERS
<b>300 K€</b>	<b>708 K€</b>	<b>2,4</b>	<b>47 000</b>

## 2 SIMULTANEOUS OBJECTIVES

- #1 Increase customers average basket
- #2 Recruiting new shoppers among Carrefour customers



## 5 STEPS

- Insights generation** Who are my buyers / my non-buyers?
- Segment creation** Which population should I target?
- Campaign strategy** Which distribution channel is most appropriate? Which landing page?
- Activation** How much activation?
- Measurement** What impact on KPIs?

— CLIENT EXAMPLE FROM THE BEAUTY SECTOR —

# LEVERAGING RETAILER TRANSACTIONAL DATA TO TAILOR ACTIVATION & CREATIVE APPROACHES

## #1 INCREASE BASKET

### Segments

Buyers of the brand  
Heavy / Regular / Occasional / POS brand

### Activation

Open Web  
Redirection : Landing page Carrefour website

**Advertising pressure strategy:  
4 to 6 times a month**



## #2 RECRUITMENT

### Segments

Non-brand category buyers  
Segments around the buying mix

### Activation

Social Media  
Redirection : Landing page Carrefour website

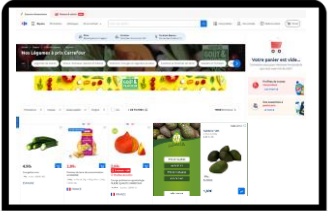
**Advertising pressure strategy:  
12 times a month**

ADAPTATION OF THE CREATIVES TO THE OBJECTIVE

# EMPOWER YOUR ADVERTISING WITH OMNICHANNEL STRATEGIES: AMPLIFY YOUR MESSAGE ACROSS ALL TOUCHPOINTS

— CLIENT EXAMPLE : AVOCADO —

**OBJECTIVE: STIMULATE SALES BY INCREASING CONSUMPTION OPPORTUNITIES**



**ONSITE E-COMMERCE CAMPAIGN**

Sponsored product  
format on the shelf

**6%**

CTR

Butterfly and Flagship  
format in search

**19%**

CTR



**DATA OFFSITE  
(SOCIAL CAMPAIGN)**

from 8 June to 31 August  
Meta formats,  
Cooking content  
Recipe ideas

**16.8M**

impressions

**2.1%**

CTR



**DOOH CAMPAIGN**

from 27 June to 10 July  
Promotional relay  
Cooking content

**630+**

activated screens

**4M**

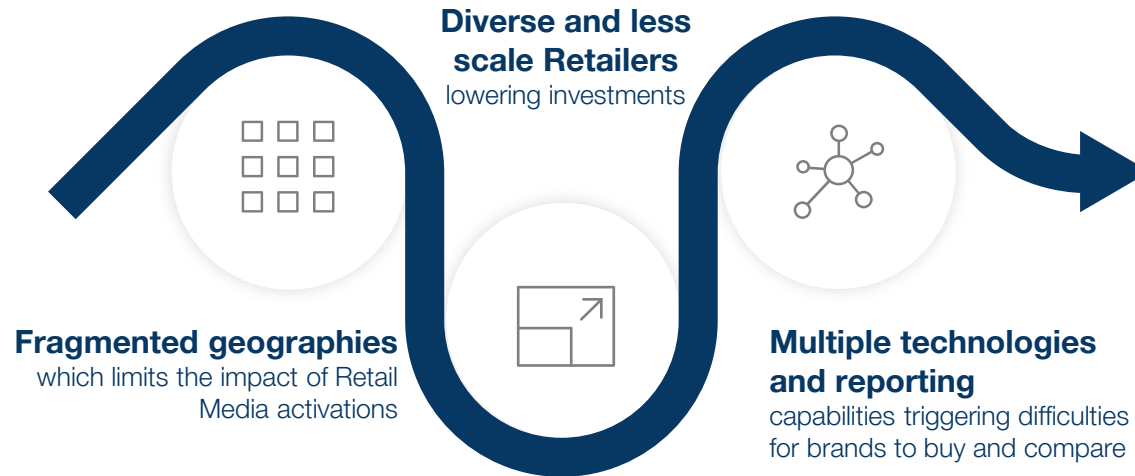
spots

# OUR AMBITION WITH THE JOINT VENTURE



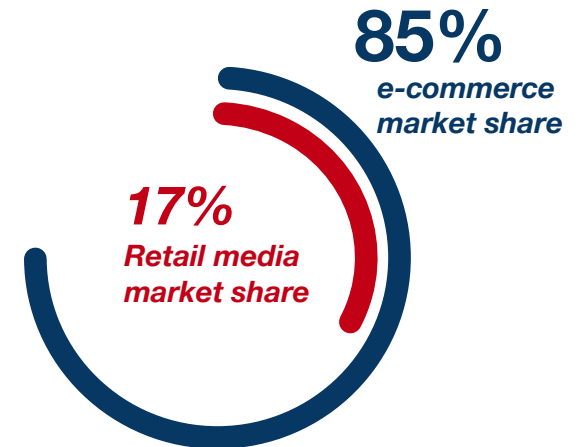
# UNLOCKING EUROPE'S POTENTIAL: ADDRESSING 3 KEY CHALLENGES IN THE ACCELERATING RETAIL MEDIA LANDSCAPE

## Europe's main challenges ...



... An opportunity to restore balance in favor of retailers

*Retailers market shares (excl GAFA)*





# CARREFOUR & PUBLICIS: A POWERFUL PARTNERSHIP REDEFINING THE RETAIL MEDIA LANDSCAPE WITH A COMPREHENSIVE ONE-STOP-SHOP SOLUTION

Our asset synergies will build a strong Retail Media offering...



**Expertise**

Retail & Retail media expertise



**1st Party data**

1st party transactional data at scale

**Tech**

Cutting edge technology  
Native Fullstack Platform



... which will have a multi-continental scale

**30+  
Countries**

**80M+  
Customers**



# FOSTERING COLLABORATION: OUR JOINT VENTURE'S AMBITION TO EMPOWER RETAILERS AND SUPPORT ADVERTISERS ACROSS DIVERSE VERTICALS



*strictement confidentiel - ne pas diffuser*

Ce document repose sur des hypothèses de travail. Toute décision pouvant entraîner une évolution de l'organisation sera mise en œuvre dans le respect des procédures légales et sociales en vigueur

# Thank you, any questions?



**Alexis Marcombe**

Managing Director  
Carrefour Links



Carrefour

