

IAB EUROPE: PAVING THE WAY FOR RETAIL MEDIA TO SUCCEED IN EUROPE



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Industry Development & Insights Director

WHAT I WILL COVER TODAY

1. Basics - what is retail and commerce media?
2. Trends - what is driving the growth, barriers and drivers
3. The role of IAB Europe

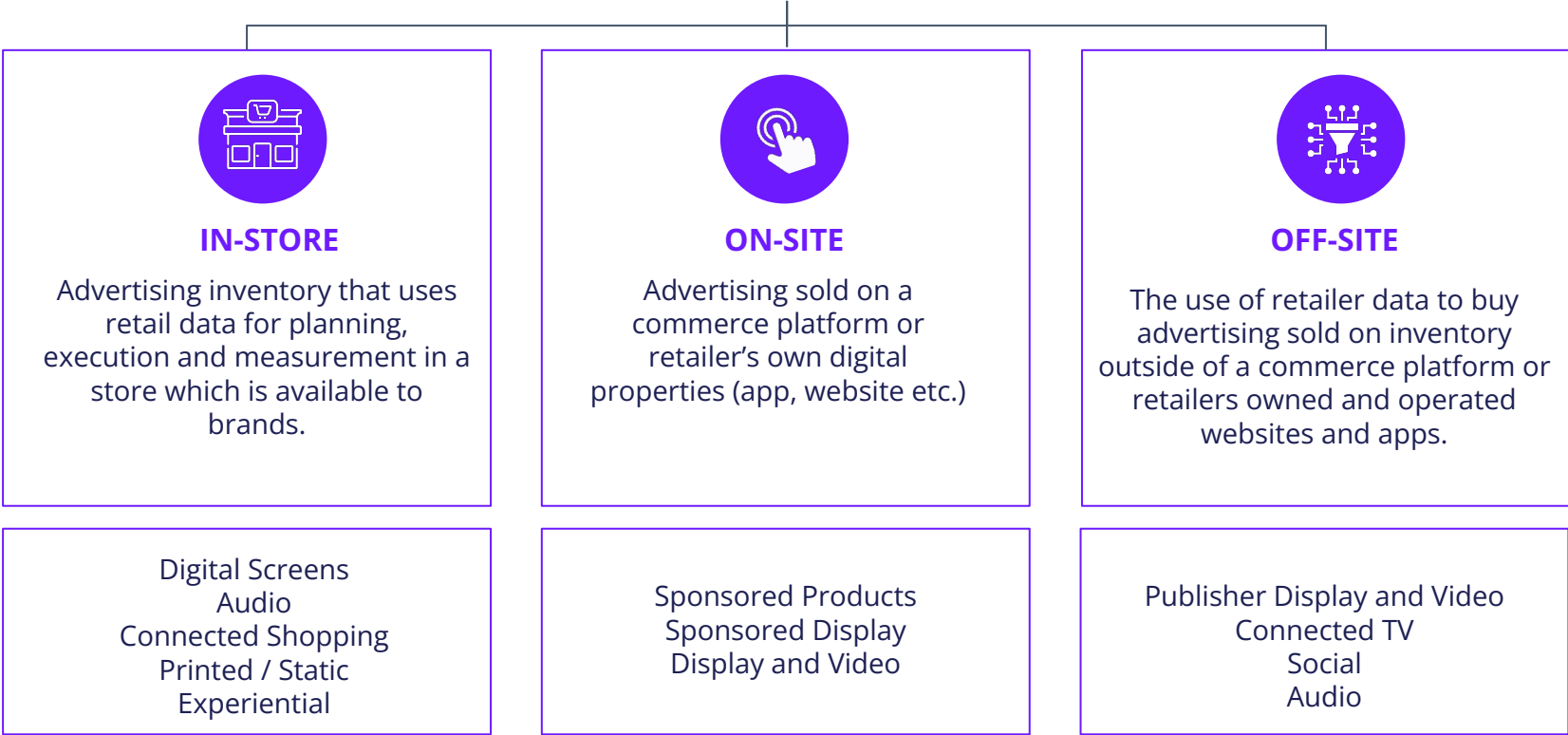
WHAT IS RETAIL MEDIA?

HOW WE DEFINE THINGS MATTERS

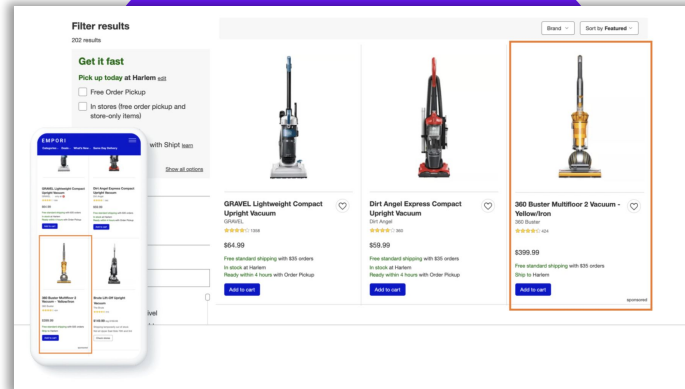
Commerce Media Networks, which includes Retail Media Networks, allows brands and merchants to address shoppers with products and services throughout their buying journey on and off owned platforms. It uses commerce/retail data for planning, execution and measurement. Commerce media includes an increasing range of activations on-site, off-site and in-store environments.



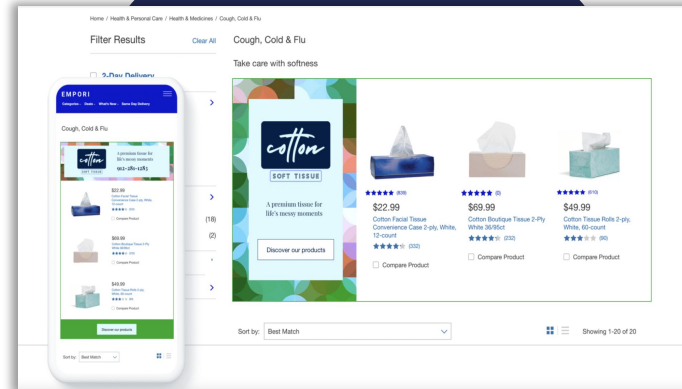
COMMERCE & RETAIL MEDIA



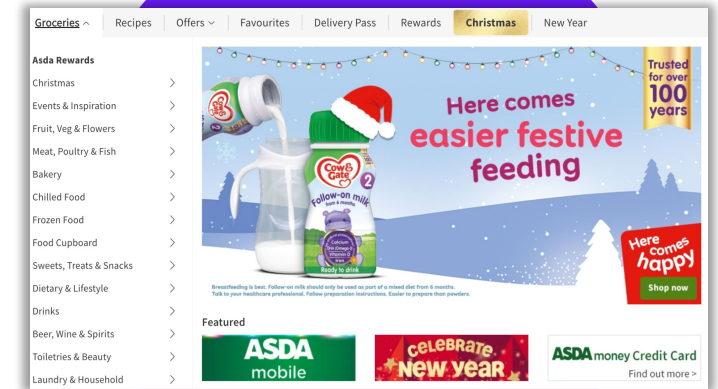
ON-SITE FORMATS



Sponsored Products

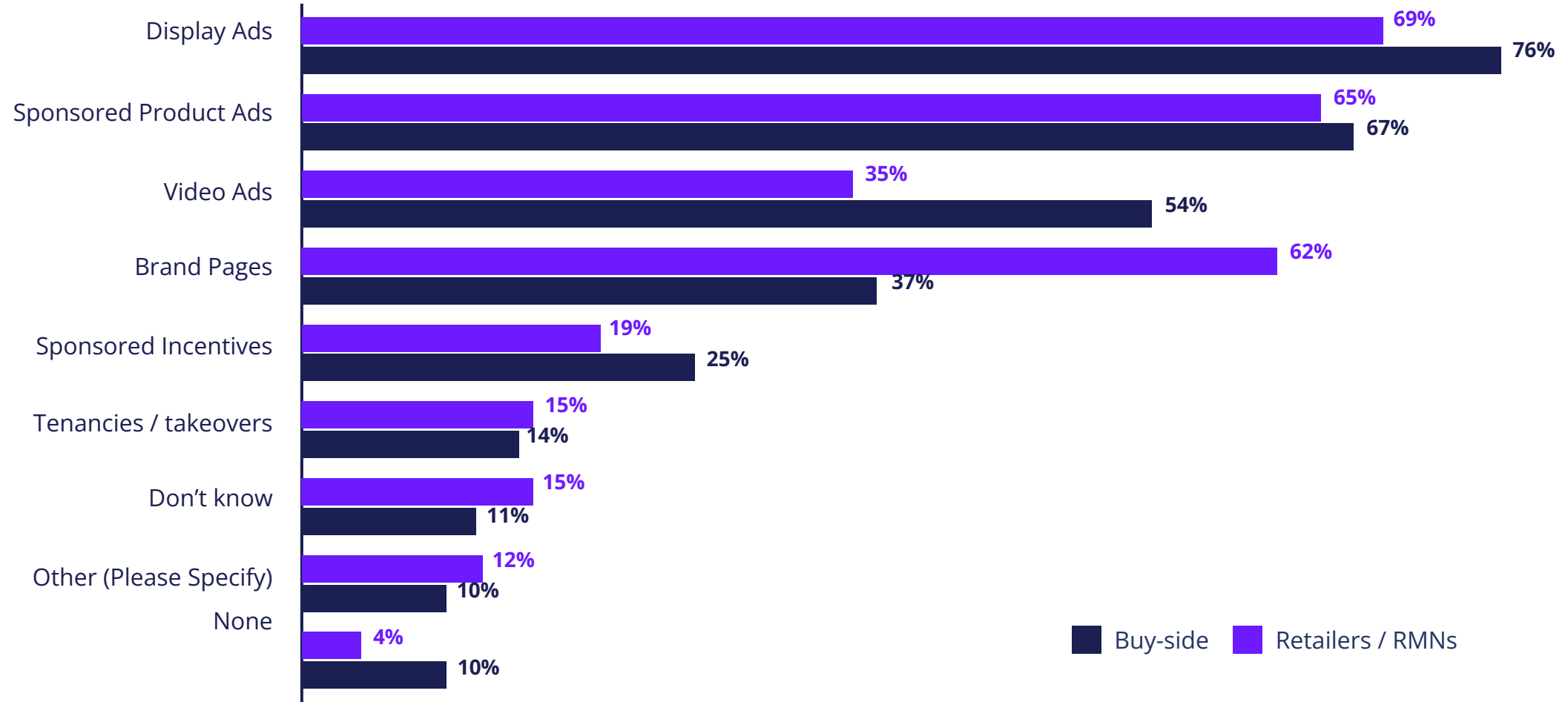


Sponsored Display



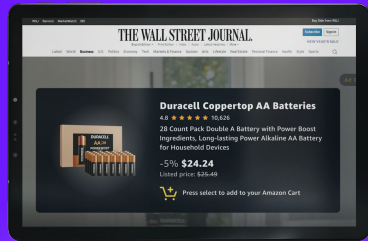
Display and Video

ON-SITE ADS



What retail media digital on-site ads/channels are you investing in/do you offer

OFF-SITE FORMATS (ALL USE RETAIL DATA)



Publisher Display or Video



Connected TV

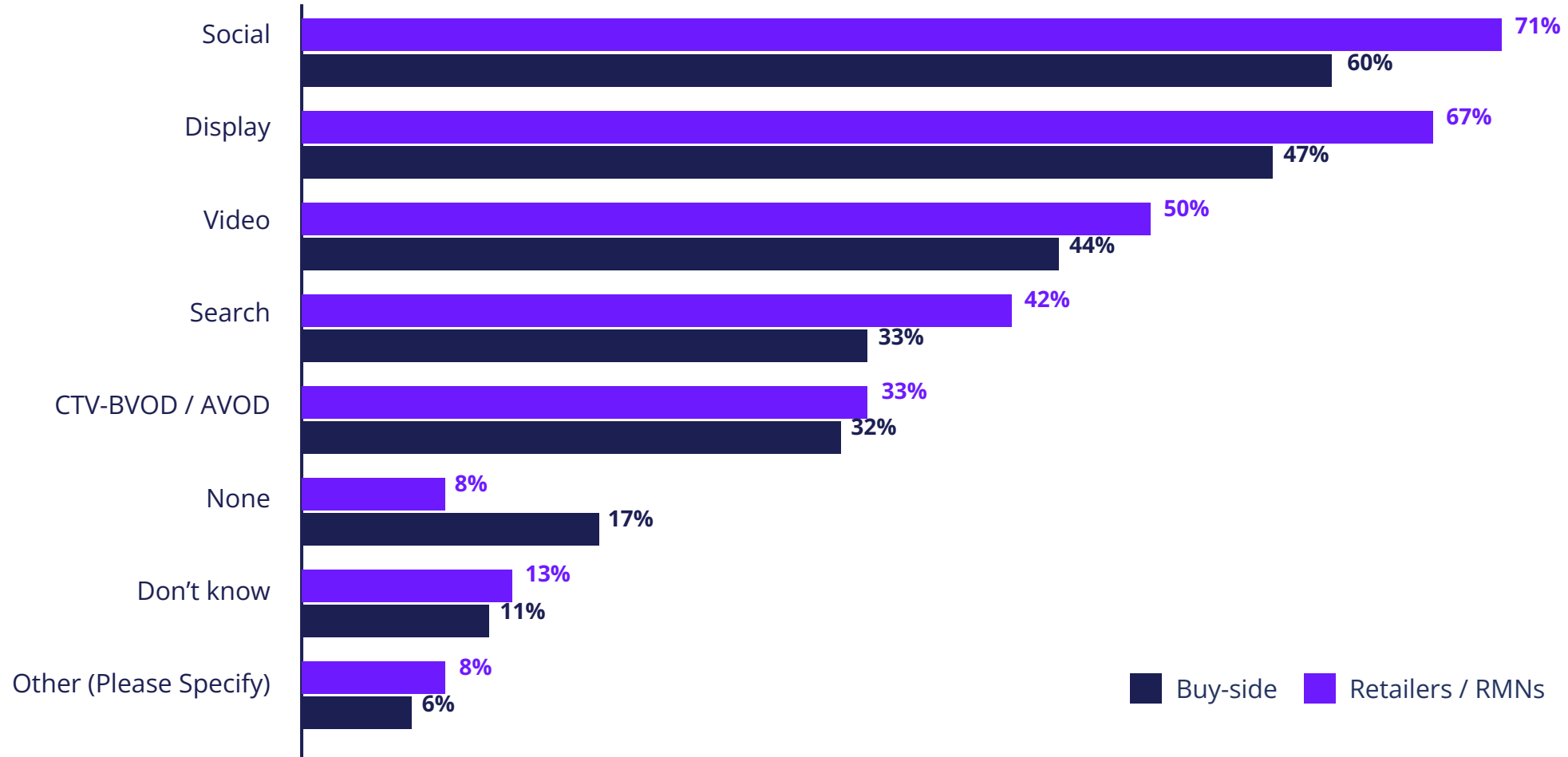


Social



Audio

OFF-SITE ADS

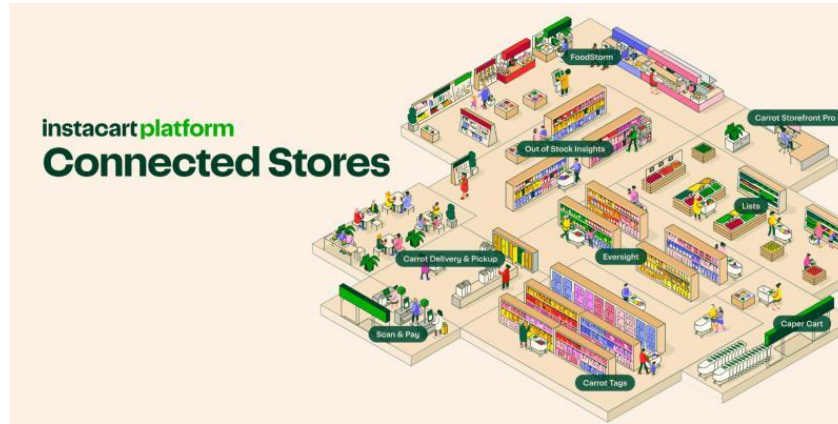


What retail media digital off-site ads/channels are you investing in/do you offer

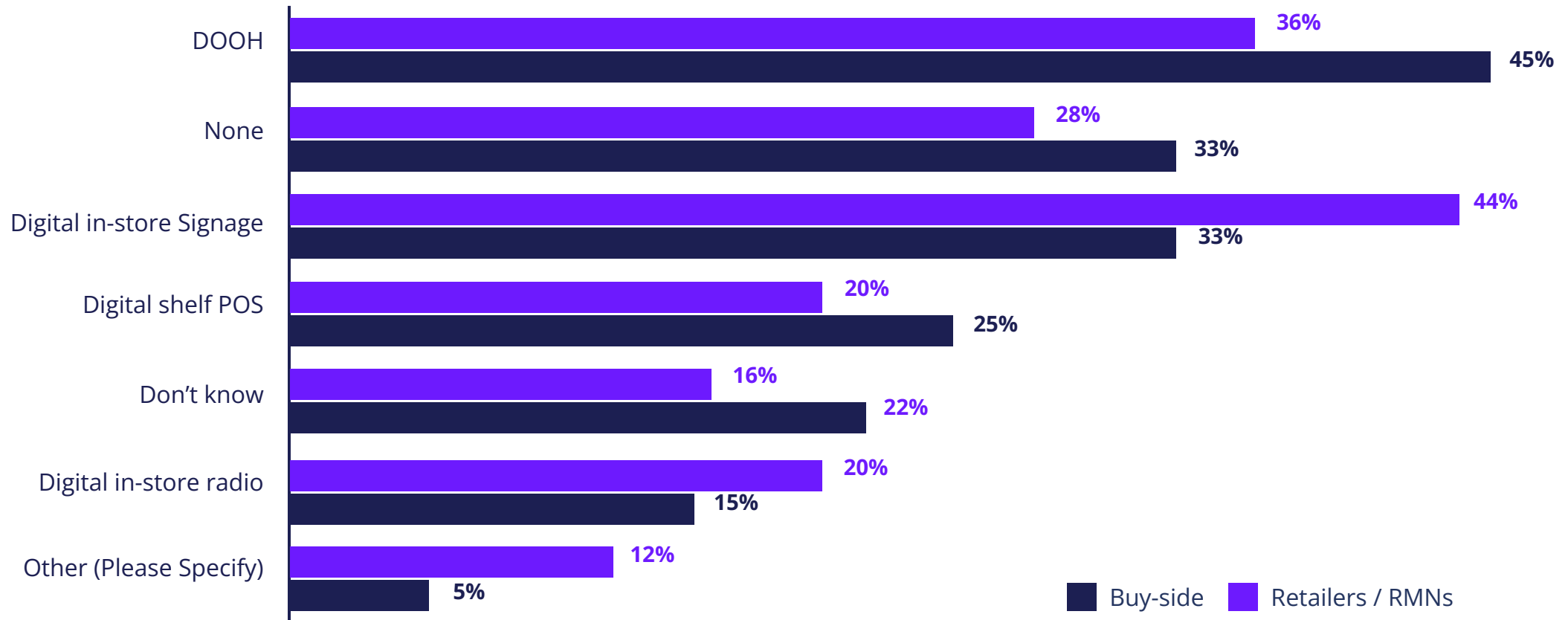
Source: IAB Europe's Attitudes to Retail Media Report, 2024

ALL IN-STORE MEDIA IS RETAIL MEDIA

some surfaces front of store, checkout aisle, end caps, smart cart and cooler need to be digitised...



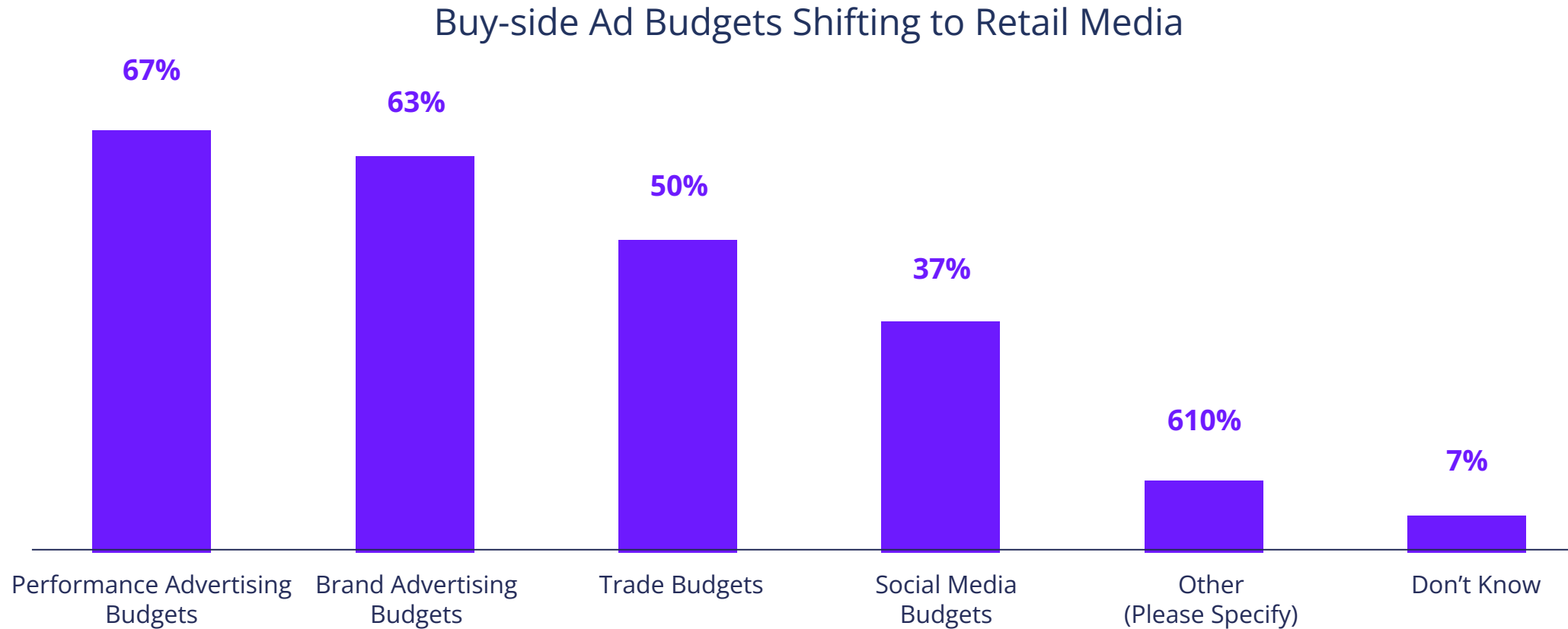
DIGITAL IN-STORE ADS



What retail media digital in-store ads/channels are you investing in/do you offer

HOW HAS RETAIL MEDIA EVOLVED?

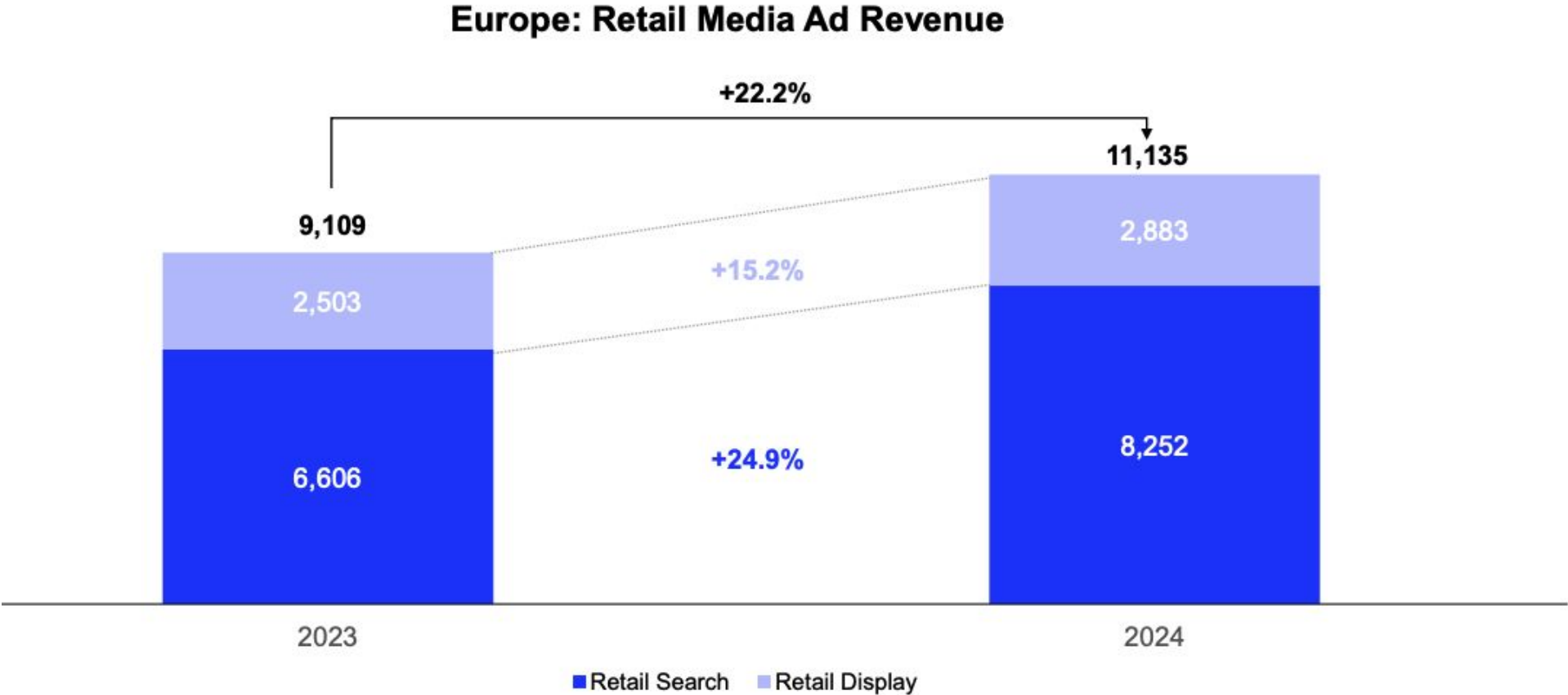
PERFORMANCE & BRAND BUDGETS ARE SHIFTING TO RETAIL MEDIA



Which budget(s) are you shifting spend from for retail media investments?

Source: IAB Europe's Attitudes to retail Media Report, 2024

RETAIL MEDIA (ON-SITE) IN EUROPE GREW DOUBLE-DIGIT TO EXCEED €10BN

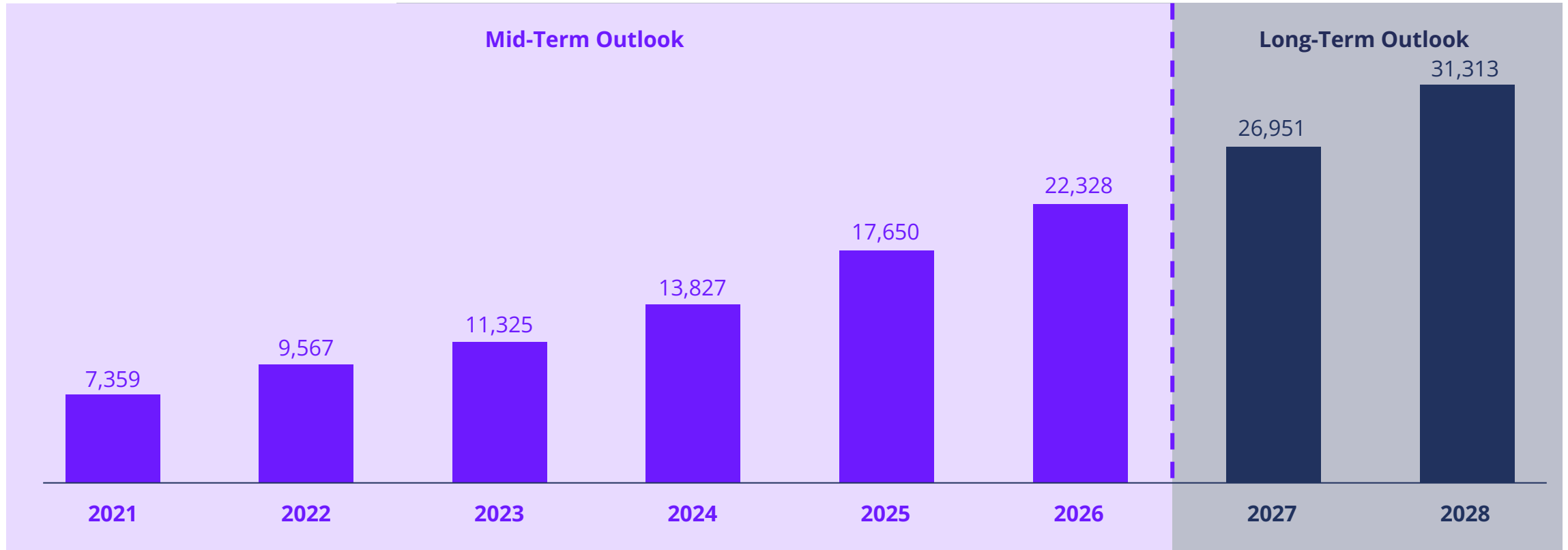


Source: IAB Europe's AdEx Benchmark 2024 Report



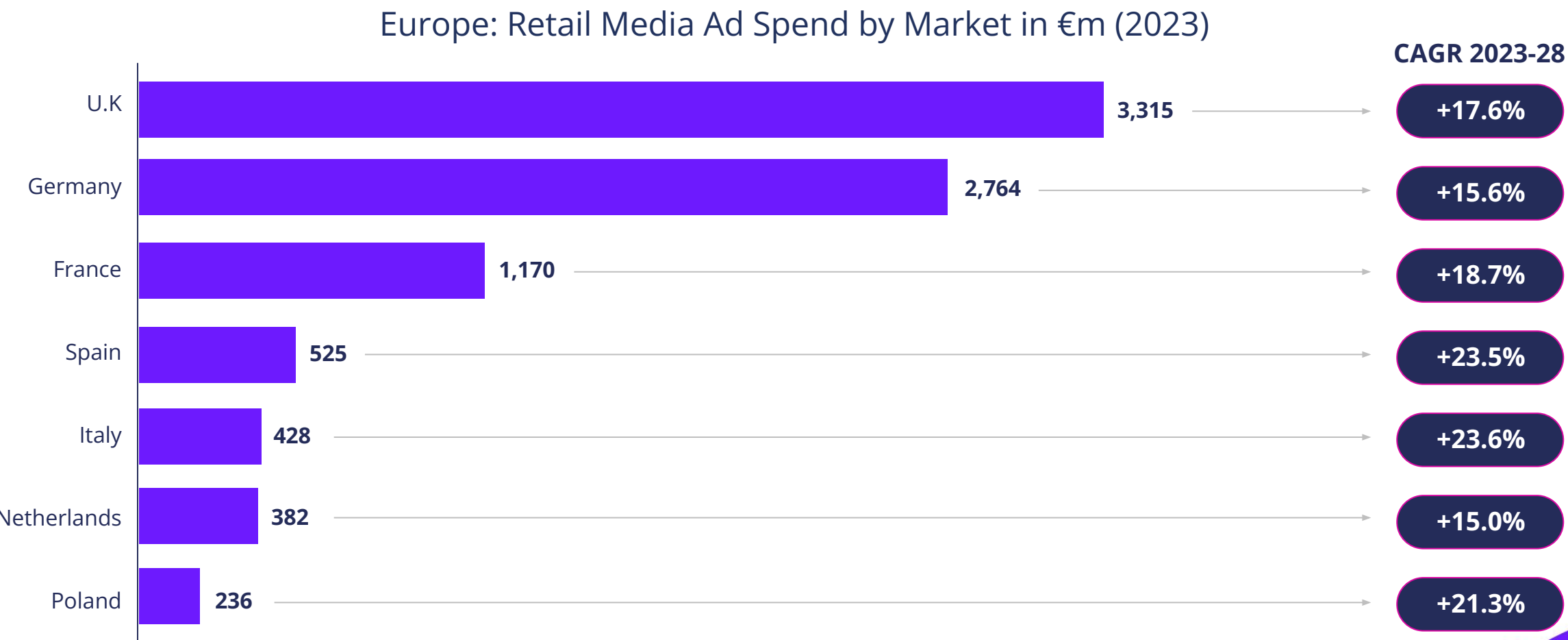
RETAIL MEDIA IN EUROPE WILL BE WORTH €31BN IN 2028

Europe: Retail Media Ad Spend (€m)



Source: IAB Europe

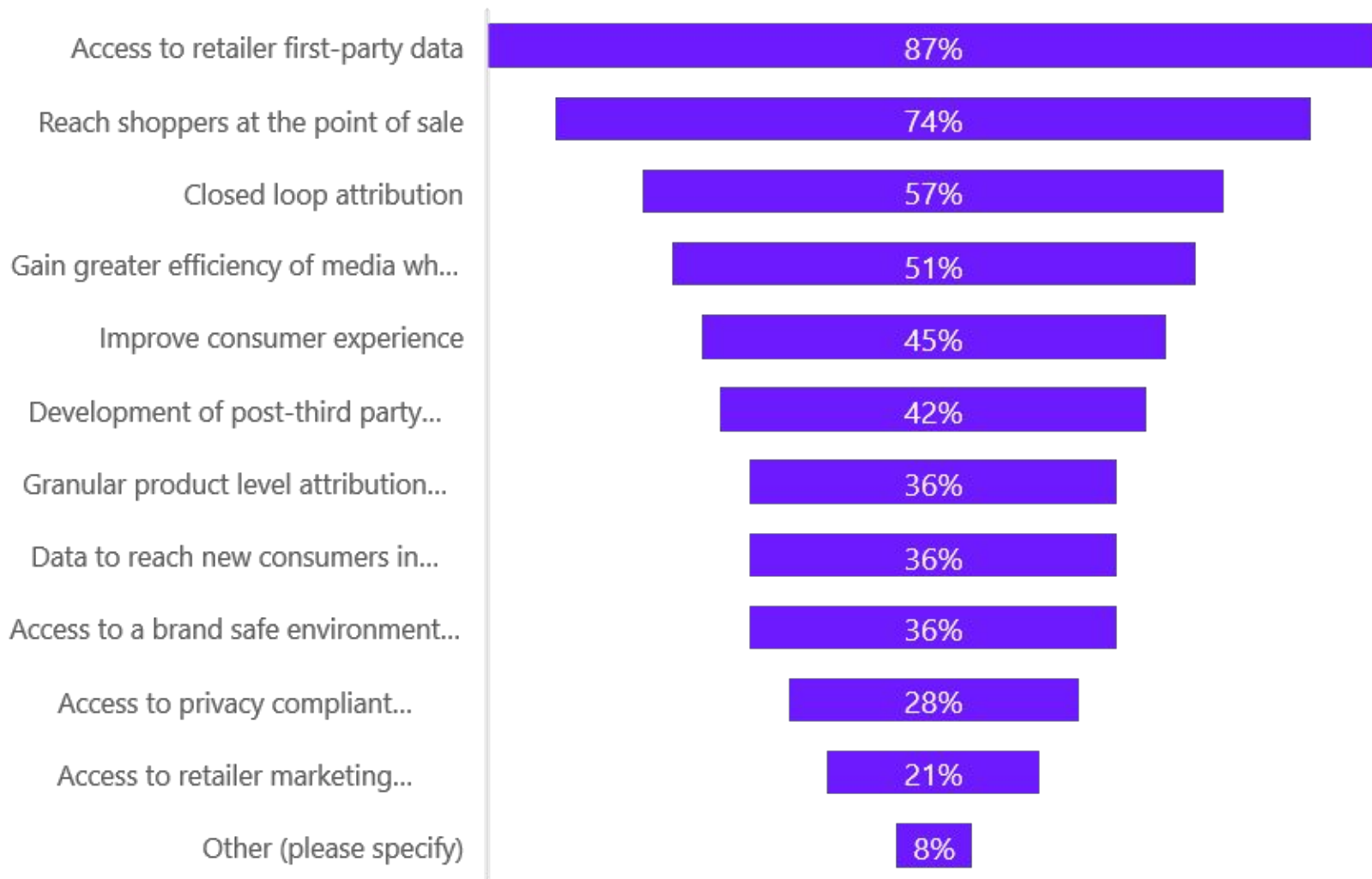
UK IS THE LARGEST MARKET BUT SOUTHERN EUROPE GROWING FASTEST



Source: IAB Europe



RETAILER DATA AND REACHING SHOPPERS AT POS DRIVES INVESTMENT



Source: IAB Europe's Attitudes to Retail Media Report, 2024

FRAGMENTATION, LACK OF STANDARDS AND TECH LIMITATIONS HINDER INVESTMENT



58% of buy-side stakeholders cite **fragmentation and the lack of standardisation** as barriers to retail media investment

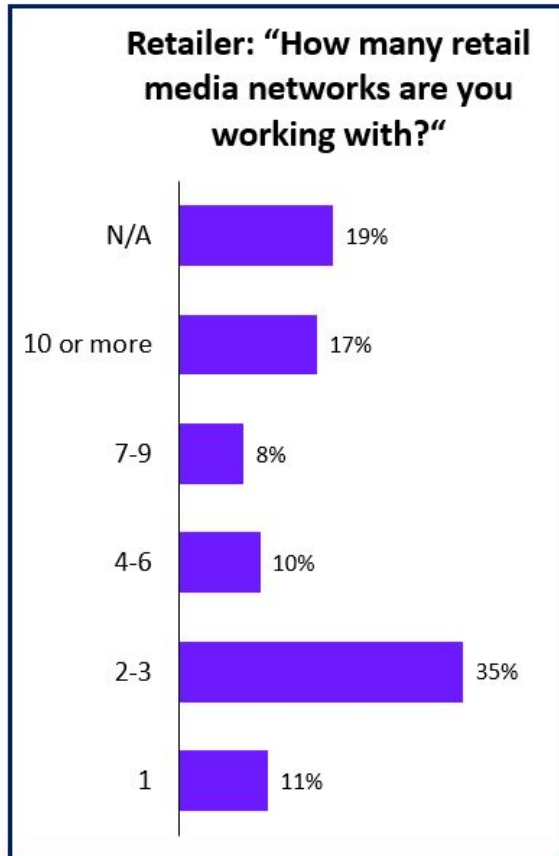


53% also cite the fact that **retail media networks are not integrated with other technology** as a barrier



A further 50% cite the **lack of technology** available as an investment barrier

ADDRESSING FRAGMENTATION IS KEY TO FUELING FURTHER GROWTH



**Retail Media Networks
active in EMEA**

Circa.
140

**Further retail-like media
networks**

Revolut

Klarna.

PayPal

Marriott
INTERNATIONAL

kinective
Media by United Airlines



**IAB EUROPE IS PAVING THE WAY
FOR SCALE AND SUCCESS**

IAB EUROPE'S RETAIL & COMMERCE MEDIA COMMITTEE

IAB Europe's Retail Media Committee is a multi-stakeholder pan-European group which comprises retailers, retail media networks, media agencies, advertising technology providers and data companies, the group has developed a focused work plan to help scale the retail media opportunity across Europe.

Join the following companies already actively participating in the Committee:

DOUGLAS

bol.com^{go}

 **Ahold
Delhaize**

ICA
GRUPPEN

**SCHWARZ
MEDIA**

allegro

MediaMarkt **SATURN**

amazonads

OBI **FIRST
MEDIA
GROUP**

 **unlimitail**
The Retail Media PowerHouse

**Tesco Media
and Insight
Platform.**
» Powered by dunnhumby

REWE GROUP
RETAIL MEDIA
CONNECT


JUST EAT

Uber Advertising

iab.europe

IAB EUROPE'S PLAN TO EMPOWER RETAIL MEDIA'S GROWTH



Industry Education & Definitions

Comprehensive educational plan aimed at industry professionals and retail media newcomers.

- [Guide to Sponsored Products](#)
- Review and Update Definitions (one pager / infographic)
- 101 Guide to Retail Media Update
- Review and Update Retail Media Glossary
- Review and Update Product Matrix
- [RM Essentials Training Programme](#)



Standardisation & Guidelines

Develop standardisation and best practice guidelines to allow retail media to scale in Europe.

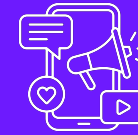
- V2 of On & Off-site Measurement Standards
- [Full Launch of Certification Programme](#)
- [Incremental Sales Msmt Guidelines](#)



Market Intelligence

Provide market intelligence to equip members and stakeholders with valuable insights into the retail media market.

- Regular Market Sizing Updates
- Capability Map of RMNs Update
- Annual Attitudes to Retail Media Survey
- [Pan-European Retail Media Landscape Overview](#)



Thought-Leadership & Networking

Facilitate thought-leadership and networking opportunities to provide opportunities to share insights, best practices, explore trends and foster dialogue.

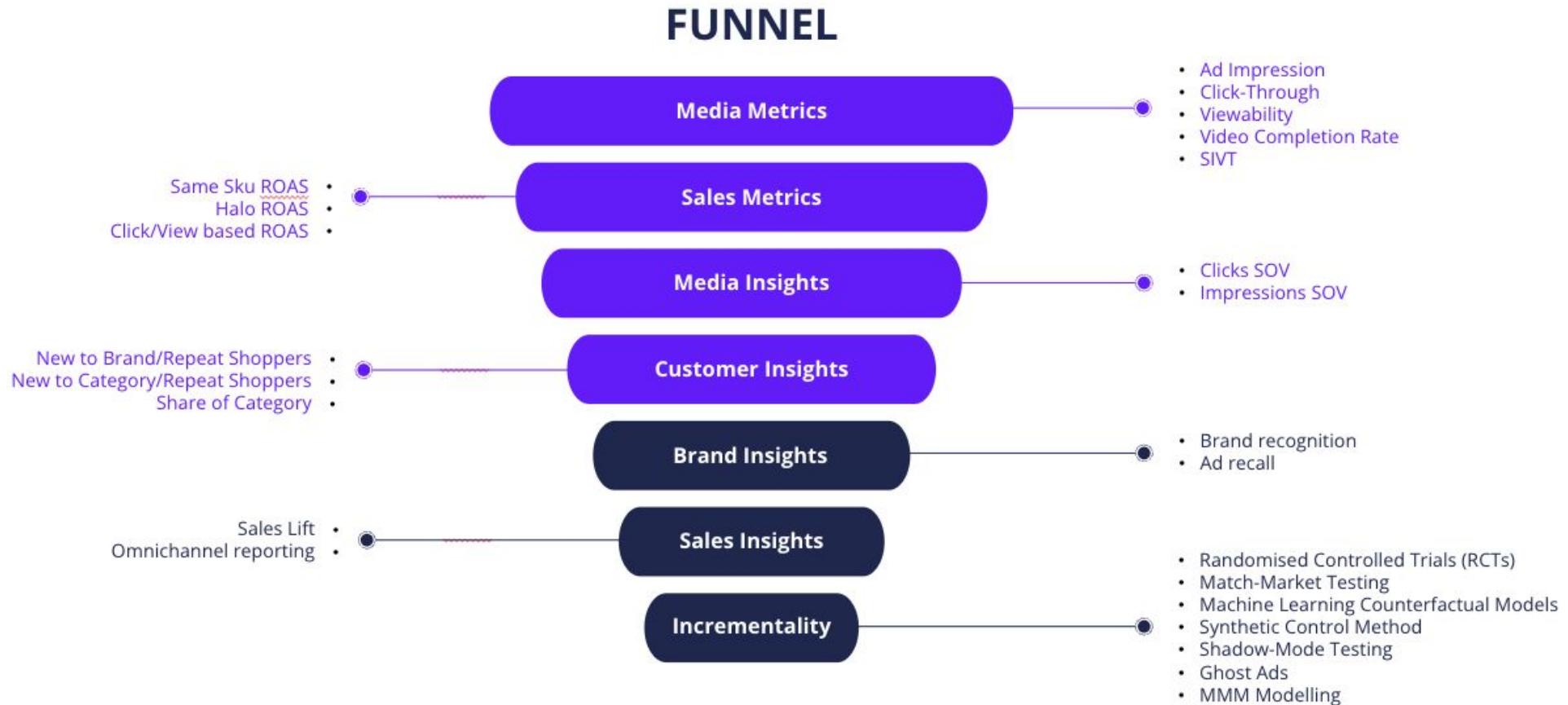
- The Great Debate virtual event
- [Retail Media Impact Summit \(Leadership style event\)](#)
- Quarterly Retailer Council meetings
- Speaking & networking opportunities at owned and partner events
- Monthly Spotlight sessions
- Q&A Blog series

NEW for 2025

OUR STANDARDS COVER THE ENTIRE DIGITAL RETAIL MEDIA ECOSYSTEM FROM ON-SITE TO DIGITAL IN-STORE



WHAT IS COVERED IN THE MEASUREMENT STANDARDS?



NEXT STEP IS TO CERTIFY COMPANIES THAT SHOW COMPLIANCE WITH STANDARDS

IAB Europe's Retail Media Certification is an industry recognised certification rewarding those that adhere to the IAB Europe standards across on-site and off-site retail media measurement. Compliance with these standards promotes a level playing field, enabling fair competition and fostering confidence in the validity of measurement outcomes. We aim to certify retailers in 2025 and envision certifying other companies in the ecosystem in 2026 and beyond. All certified retailers will be able to feature the 'IAB Europe Retail Media Certified' logo.

Core aims of the Programme:

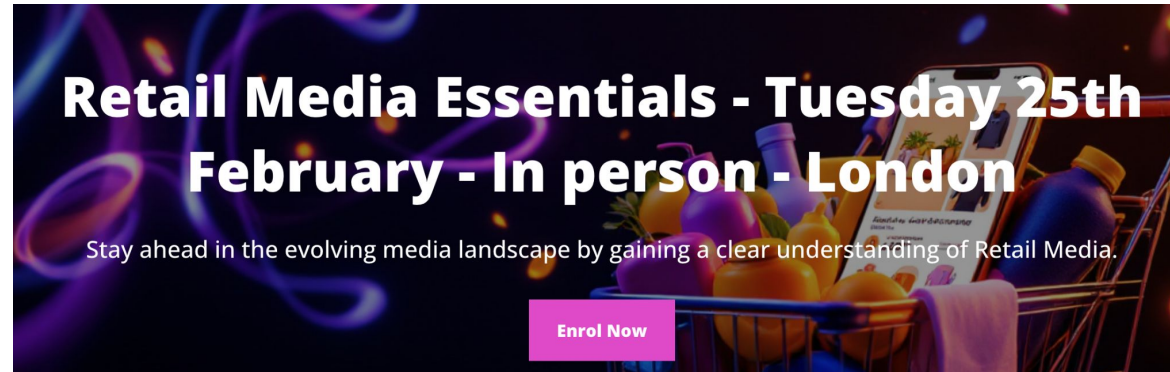
- Promote a level playing field and enable fair competition
- Promote transparency in the reporting of retail media campaigns
- Ensure retail media is held to the same standards as other digital media investments
- Support industry self-regulation



"I am very pleased with the new IAB Europe's Certification Programme, as it marks a significant new milestone in the industry's development. It fosters credibility and trust, simplifies cross-retailer comparisons, and ensures advertisers receive reliable data."

Casper Van-Wandelen, Retail Media Lead, Unilever

HIGHLIGHTS FROM OUR RETAIL MEDIA COMMITTEE - EDUCATION



HIGHLIGHTS FROM OUR RETAIL MEDIA COMMITTEE - INSIGHTS & THOUGHT-LEADERSHIP


| GROCERY | | | | | | | | |
|--|---|------------------------------|------------------------|---|-------------------------------|---|--|--|
| | N | C | LS | M | E | T | SM | m |
| MARKETS ACTIVE | UK | UK | UK | UK | REPUBLIC AND NORTHERN IRELAND | UK | EUROPE | NETHERLANDS |
| MEDIA / ADVERTISING OFFER IN HOUSE | YES FOR ALL OF OUR OFFERING | YES FOR SOME OF OUR OFFERING | NO | | | | | |
| MEDIA / ADVERTISING VIA A THIRD PARTY | YES | NO | | | | | | |
| AD TECHNOLOGY AND DATA PARTNERS FOR ON-SITE ADS | Epision | N/A - all managed in-house | Criteo, Source | Criteo, Criteo, IMA, Contextful, Engage2x | | Epision, Google Ad Manager, Playtika | Own edelman technology, Schwan Media, Truist, Promote2 | Adress Segment, Segment, Promote2, Adress, BlueVista, King, Admanila |
| AD TECHNOLOGY AND DATA PARTNERS FOR OFF-SITE ADS | Infusion, Experian, Meta, DV360, YouTube, The Trade Desk, Channel 4, Sky, Publisher | Blue State Media | Meta, Criteo, LiveRamp | Meta, The Trade Desk, Sublime | | Meta, Pinterest, Google, The Trade Desk, LiveRamp, Infusion, TV, C4, Sky, Display | Trade Desk, DV360, Visual Studio, Adman, Active Agent | Adress Segment, Segment, Promote2, Adress, BlueVista, King, Admanila |
| AD TECHNOLOGY AND DATA PARTNERS FOR IN-STORE DIGITAL ADS | Clear Channel | Imagebound | Clear Channel, Skym | Skym, IMA, new signage | Broadsign, Skym | Broadsign, Post, Playtika | SPF (One Tech Group), Adman | Visualize, Adman, Admanila |




IAB EUROPE'S ATTITUDES TO RETAIL MEDIA REPORT

July 2024





October 2024



RETAIL MEDIA ADVERTISING IN EUROPE

IAB Europe has compiled key stats on the current state of Retail Media advertising in Europe

Retail Media advertising spend in Europe is set to reach

€31BN

by 2028


In 2023 Retail Media advertising in Europe grew by

22%+

compared to total ad market growth of

6%

Source: IAB Europe



Channels From Which Existing Budgets Are Being Shifted to Retail Media

| | |
|--------------------------|-----|
| Linear TV | 52% |
| Traditional Advertising | 48% |
| Programmatic Advertising | 45% |
| Display Advertising | 45% |
| Print Advertising | 32% |
| Connected TV | 26% |
| Other | 26% |

Source: IAB Europe (data collected in Report Month 2024)

54%

of retailers cite operational elements as the barrier to investing in a RM proposition

113

Retail Media Networks (RMNs) currently active in EMEA

Get more insight!

Find out the full story on [Retail Media](#) 2024. Get more insight in the full report to be published in 2024.

Get involved!

In 2024, Europe's top 100 retailers are expected to be the first to launch their RMNs. Find out the full story on [Retail Media](#) 2024. Get more insight in the full report to be published in 2024.



THE GREAT DEBATE

RETAIL MEDIA

LIVE WEBINAR FROM IAB EUROPE



30TH OCTOBER | 12:00 CET

REGISTER NOW



THE RETAIL MEDIA ROUNDTABLE



FEATURING:

ANDREW LIPSMAN, INDEPENDENT ANALYST & CONSULTANT, MEDIA, ADS + COMMERCE

MARK BURTON, HEAD OF PRODUCT, PENTALEAP









MARIE-CLARE PUFFETT, INDUSTRY DEVELOPMENT & INSIGHTS DIRECTOR, IAB EUROPE





IAB EUROPE'S RETAIL MEDIA HUB: ONE PLACE TO ACCESS ALL OF OUR RETAIL MEDIA RESOURCES

Latest News and Resources

| | | | |
|---|---|--|--|
|  <p>IAB EUROPE RETAIL MEDIA DEFINITIONS A KEY OVERVIEW OF THE IAB EUROPE RETAIL MEDIA DEFINITIONS</p> |  <p>IAB EUROPE RETAIL MEDIA GLOSSARY A KEY OVERVIEW OF THE IAB EUROPE RETAIL MEDIA DEFINITIONS</p> |  <p>RETAIL MEDIA: WHAT IS THE BUY-SIDE LOOKING FOR? A Q&A WITH MEMBERS OF OUR RETAIL MEDIA COMMITTEE</p> |  <p>UNLOCKING THE POWER OF RETAIL MEDIA: A DEEP DIVE INTO SALES INCREMENTALITY MEASUREMENT</p> |
| <p>IAB Europe's Retail & Commerce Media Definitions One Pager</p> <p>Read more</p> | <p>IAB Europe's Updated Retail & Commerce Media Glossary - March 2025</p> <p>Read more</p> | <p>Retail Media: What is the Buy-Side Looking For? A Q&A with Members of Our Retail Media Committee</p> <p>Read more</p> | <p>Unlocking the Power of Retail Media: A Deep Dive into Sales Incrementality Measurement</p> <p>Read more</p> |
|  <p>IAB EUROPE'S GUIDE TO NATIVE AD FORMATS FOR RETAIL MEDIA NETWORKS</p> |  <p>RETAIL MEDIA: GROWTH TRENDS & OPPORTUNITIES AND FIVE FACTORS FOR SUCCESS</p> |  <p>THE RETAIL MEDIA ROUNDTABLE</p> |  <p>THE RETAIL MEDIA ROUNDTABLE</p> |
| <p>IAB Europe Guide to Native Ad Formats for Retail Media Networks</p> | <p>February 19, 2025 IAB Europe at E-Commerce Berlin</p> | <p>Retail Media Roundtable - Retail Evolution: From Retail to Commerce Media</p> | <p>Retail Media Roundtable - The Retail Media Flywheel</p> |



Thank you

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