Welcome

Megan Clarken, Chief Executive Officer
Retail Media for All

Introducing the new commerce ecosystem
Uniting the Commerce Ecosystem
Deep Retailer Partnerships

Access to Commerce Data

Advanced AI
We Partner with the Biggest Retailers in the World

- macy's
- ULTA
- DARTY
- Staples
- TARGET
- fnac
- ASOS
- deliveroo
- Carrefour
- BEST BUY
- Boots
- Morrisons
- LARE DOIT
- meijer
- Shipt
- SEPHORA
- currys
- zavvi
- DELIARTE
- THE HUT
- E.Leclerc DRIVE
- CAMPZ
- COSTCO WHOLESALE
- bloomingdale's
- MediaMarkt
- NORDSTROM
- Walmart México
- Micromania
- ZING
- Boulanger
- LOWE'S
- RUNNINGPOINT
- DOUGLAS
- ASDA
- DERMSTORE
- RITE AID
- cult BEAUTY
- flaconi
- Leiner
- CVS pharmacy
- Walgreens
- Auchan
- Uber
- very
- Walmart Canada
- parfumdreams.de
- Littlewoods
- freshdirect
- myToys
- Dia
- metro
- LOOKFANTASTIC
- DELHAIZE
- BAUR
- SportScheck
- giant eagle
- fonQ
- Michaels
- INTERSPORT
- GALERIA
- fahrrad.de
- mirapodo
- Peek.Cloppenburg
- worten
- blokker.
- PRIMOR
- wehkamp
- expert
- NBB
- Stylefile
- au PAY
- CHEMIST WAREHOUSE
Our DSP is now OPEN TO ALL

DSP for Brands + Agencies

• Retail Media Onsite and Offsite
• Closed-Loop Measurement
• Actionable Commerce Insights
DSP for Brands + Agencies

- Retail Media Onsite and Offsite
- Closed-Loop Measurement
- Actionable Commerce Insights
Join us on the mission to achieve greater retail media success through unification.
Retail Media Opportunities

Brian Gleason, Chief Revenue Officer
30 Years of Retail Media Evolution

Promotions/Flyers/Coupons (1993-2000)
- S
- T

Large Few Retailers
- WAL-MART
- SEARS
- TOYS"R"US
- TARGET

Co-Marketing/In-Store (2000-2020)
- S
- T
- P

All Large Retailers & eCommerce
- Walmart
- CVS/pharmacy
- amazon.com
- Costco
- Home Depot
- Walgreens
- Kroger
- Target
- eBay

Retail Media Networks & Digital (2020-2023)
- S
- T
- P
- B

Retailers & Marketplaces
- amazon ads
- ROUNDDEL
- Walmart Connect
- Wegs
- Best Buy. Ads
- Instacart ads
- Albertsons Media Collective

Shopper Marketing
Trade Marketing
Performance Marketing
Brand Marketing
Hyper Growth Comes with Growing Pains for Retailers

Snapshot of Retail Media Network Pain Points

2025 RETAIL MEDIA SPEND EXCLUDING AMAZON & CHINA

$42B

Has grown roughly 3x faster than search, 2x faster than social, and to surpass linear TV by 2025

PAIN LEVELS

- Measuring effectiveness of retail media
- Competing with Amazon
- Building relevance and trust with shoppers
- Managing operational complexity
- Fighting for incremental budgets
- Staying ahead of the curve
- Upskilling teams and collaborating with all partners

Source: Criteo’s TAM estimates, Growth by Insider Intelligence, June 2023.
Retail Media Growth: Where Will $42B Come From?

Retail Media Networks Capture 60%-70% of Net New Media Budgets Outside of Amazon and China

GLOBAL RETAIL MEDIA MARKET SOURCES OF GROWTH 2021-2025

- New Dollars for Retailers to Capture: Approx. 60%-70%
- Evolution of Existing Spend: Approx. 30%-40%

Source: Adaptation of BCG Commerce Media Survey 2022 and BCG CPG Retail Media Benchmarking Survey 2022
Where Will $42B Go?

Retail Media Spend

Fragmentation of Retail Media Buying Growing Complexity and Difficulty of Justification for Incremental Dollars

Retail Media Budget Allocation

- **BRAND BUDGETS**
  - Sponsored Products
  - Onsite Display
  - Native Ads
  - Video Ads
  - Offsite & Audience Extension
  - In-Store
  - Social Media

- **PERFORMANCE BUDGETS**
  - Sponsored Products
  - Onsite Display
  - Native Ads
  - Video Ads
  - Offsite & Audience Extension
  - In-Store
  - Social Media

- **TRADE BUDGETS**
  - Sponsored Products
  - Onsite Display
  - Native Ads
  - Video Ads
  - Offsite & Audience Extension
  - In-Store
  - Social Media

- **SHOPPER BUDGETS**
  - Sponsored Products
  - Onsite Display
  - Native Ads
  - Video Ads
  - Offsite & Audience Extension
  - In-Store
  - Social Media

Retail Media Formats

- **Sponsored Products**
- **Onsite Display**
- **Native Ads**
- **Video Ads**
- **Offsite & Audience Extension**
- **In-Store**
- **Social Media**

Retail Media Buying Methods

- Media Agency
- In-House Media Buyer
- 3P DSP
- API Partner
- Open Market
- Private Market

Potential Loss of RMN Revenues Caused by Fragmentation: **20%**

Sources: Adaptation of 2022 Retail Media Association Study: Retail Media Survey, Forrester, eMarketer, 2023
When Unified, Everyone Wins

The brand gained a 440% conversion rate
The retailer gained 431% in ad revenue per user

Date range: 2023-06-21 to 2023-07-23.
Conversion considered on products advertised in the onsite campaigns, 30 days post-exposure.
Offsite and onsite campaigns
Brand & Agency Solutions

Todd Parsons, Chief Product Officer
Our DSP is Built for Commerce Across the Entire Consumer Journey

**OPEN INTERNET**

**AWARENESS**
Create your own story
Reach relevant audiences

**CONSIDERATION**
Connect with shoppers
Engage in-market consumers

**CONVERSION**
Transform interest into purchase

**ONSITE**
Driving More Transactions with Third-Party Demand & Agency Partners
What is New and Unique in Commerce Max?

Unifying the shopper journeys while driving measurable sales results

Retail Media Onsite and Offsite
Engage consumers across the entire buying journey with integrated workflows.

Closed-Loop Measurement
Understand the real value of your advertising dollars with holistic measurement and reporting.

Actionable Commerce Insights
Optimize campaigns from commerce, digital shelf, and category intelligence data.
Commerce Max
Engages Retailer Audiences Offsite

1200+ Direct Premium Publishers
+65 Marketplaces
Standardizing Measurement in Retail Media

IAS

Bringing first-to-market product for standardized measurement of retail media metrics.

Ad Fraud
Leverage AI to prevent fraudulent impressions and invalid ad traffic.

Brand Safety & Suitability
Avoid association with harmful or inappropriate content and ensure ads are displayed in suitable environments.

Viewability
Understand how many impressions meet industry viewability standards.
Leverage Actionable, Premium Commerce Insights

Optimize inventory to increase revenue

- Rate Card Optimization
- Brand Opportunity Reports
- Missed Opportunities
- Seasonal Marketing Insights
- Inventory Expansion

Monetize valuable insights and drive brand dollar investments

- Keyword Trends
- Cap Out
- SOV
- Book of Business
- Win Rate
- Brand Affinity
Campaign Optimization through Commerce Insights

Baby care brand boosts ROAS with keyword optimization

+139% ROAS
Our Solutions Are Built On 17 Years Of Advanced AI

$1 TRILLION
eCommerce transactions across our client base annually

100 MILLION
Predictions made per second

$30 BILLION
Criteo-driven sales across our partners’ network annually
We're committed to your retail and commerce media success.
Client Voices
RETAIL MEDIA FOR ALL
INTRODUCING THE NEW COMMERCE ECOSYSTEM
Retailer Solutions

Sherry Smith, General Manager, Global Enterprise
Consumers at the Center

- SECURITY
- TRANSPARENCY
- CHOICE
- CONSENT
The Industry looks to Retail Media Leaders as Data-Driven Leaders

Data is better when it’s
- COLLABORATIVE
- SUPPORTING DAILY DECISIONS
- PRIVACY-PRESERVING
Retail Media 1.0
PRODUCT SEARCH + DISPLAY
Where retailer asset monetization meets the demand for first-party data & digital closed loop
Triggered by Amazon ad revenues

Retail Media 2.0
FULL-FUNNEL & IN-STORE
About the convergence with other channels & incremental budget justifications
Triggered by standardization, omnichannel attribution, in-store & full-funnel
Fueling Retail Media 2.0 Growth
Criteo’s COMMERCE YIELD: Your Ultimate Monetization Solutions

COMMERCE YIELD RETAIL + INSIGHTS
Enterprise-grade monetization across the digital shelf

COMMERCE YIELD MARKETPLACE
Self-service monetization technology for online merchants

COMMERCE YIELD IN-STORE
360° physical and store-level digital media asset management and activation
RETAIL MEDIA FOR ALL

INTRODUCING THE NEW COMMERCE ECOSYSTEM
Final Thoughts

Brian Gleason, Chief Revenue Officer
A remarkable $42B ecosystem
RETAIL MEDIA FOR ALL

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