



Survey

FMCG Eretail Media in 2024

Perception & strategy of 67 manufacturers

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Executive summary

Budget

Global eretail media investment up 10% in 2024

- Generally, manufacturers make budget & strategy decisions locally
- Budgets are divided among retailers and categories based on their market influence and level of collaboration
- US makes budget earlier than other countries

Strategy

90% of brands have an always-on strategy

- Eretail media is mainly used to boost specific products
- Back-of-shelf product activations are used more in France than other countries
- Cross-merchandising is rarely used outside of France and UK

Monitoring

Eretail media monitoring is a must have

- Nearly every manufacturer monitors their competitors' eretail media strategies and adjusts their own strategies accordingly
- Globally brands are focused mainly on sales and ROI to evaluate campaigns, but improvements needed on the methodology and comparison of results

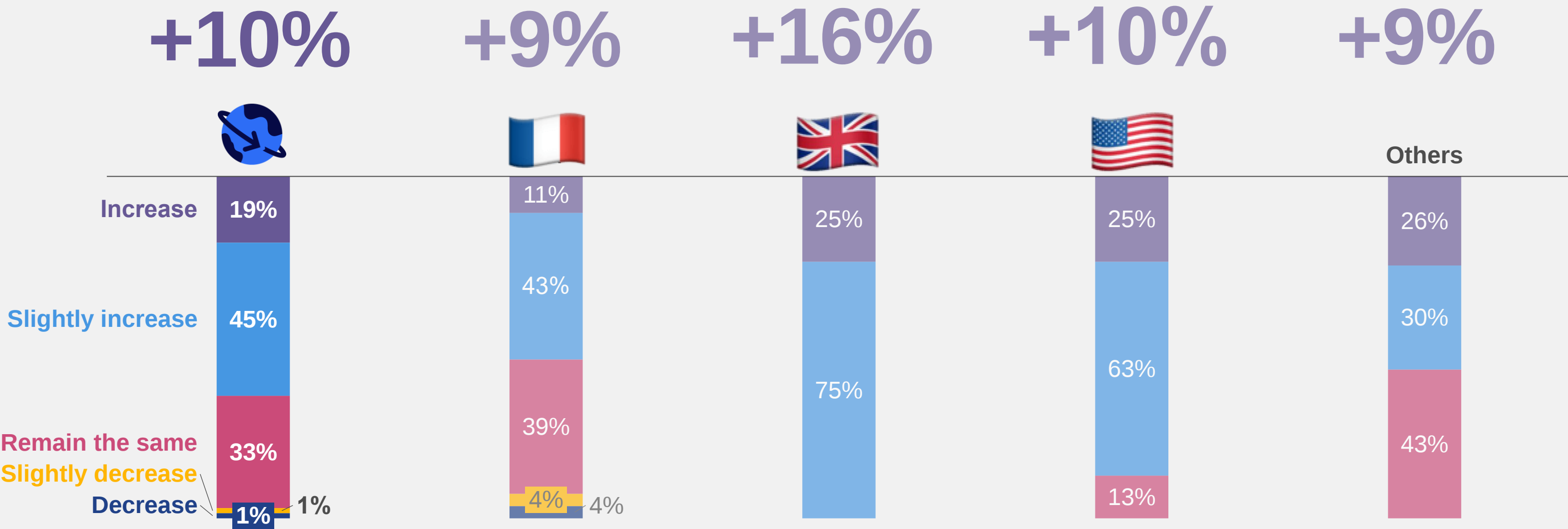


Eretail media--Budget

Global investment up 10% in eretail media in 2024

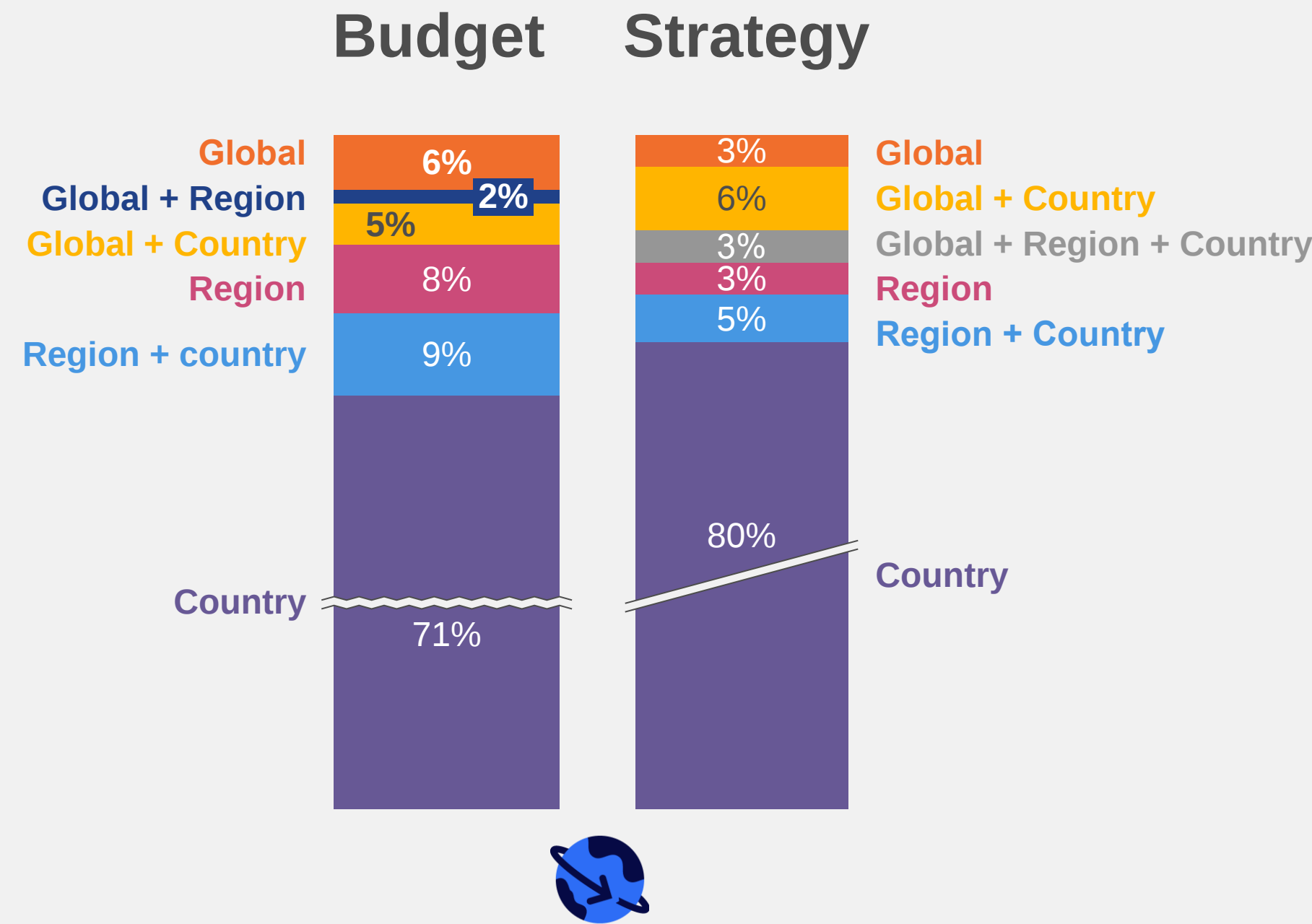
The largest increases seen in the UK

? What is your average planned investment increase?



Majority of brands decide budget & strategy locally

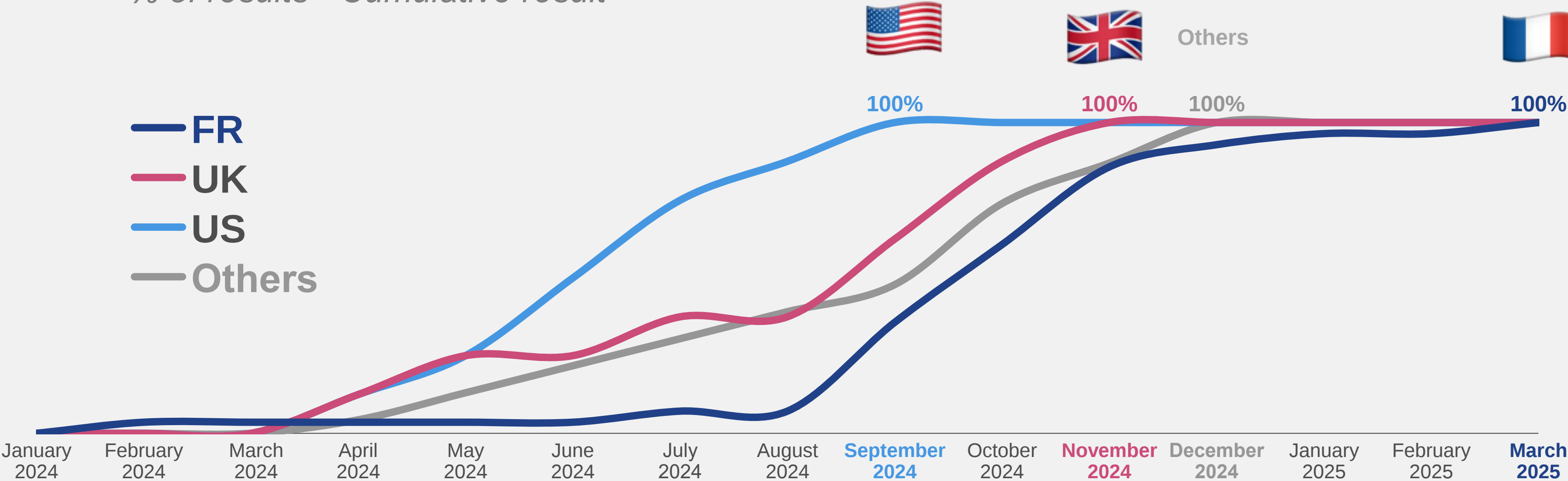
? Who decides the eretail media budget and strategy for your country?



US determine their budget earlier than other countries

? When will you validate the budget for 2025?

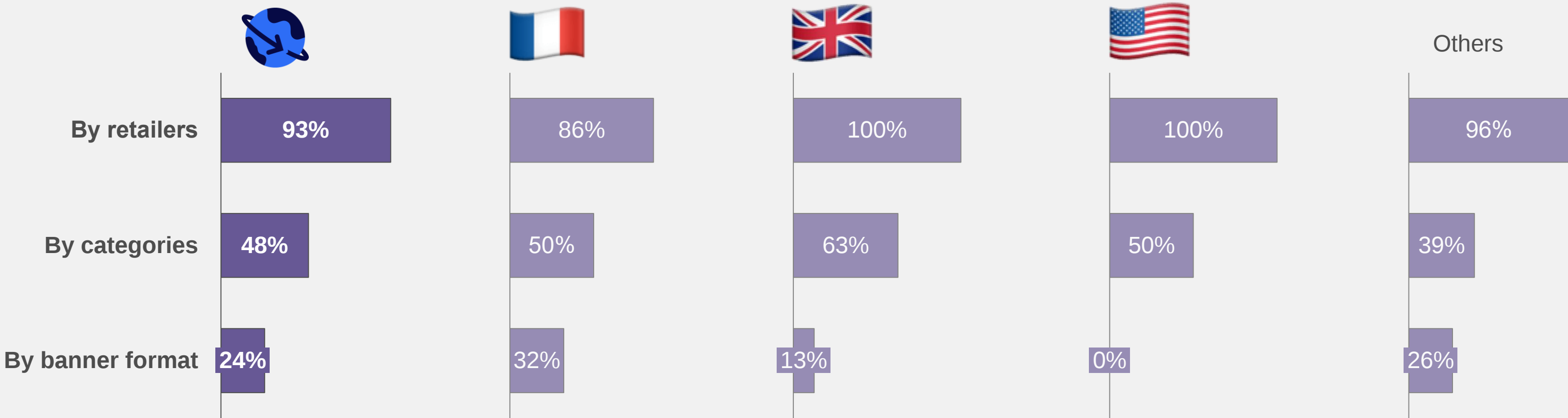
% of results - Cumulative result



Nearly all manufacturers split their budget according to retailers

48% do so according to their categories. Banner format is important for budget allocation only in France.

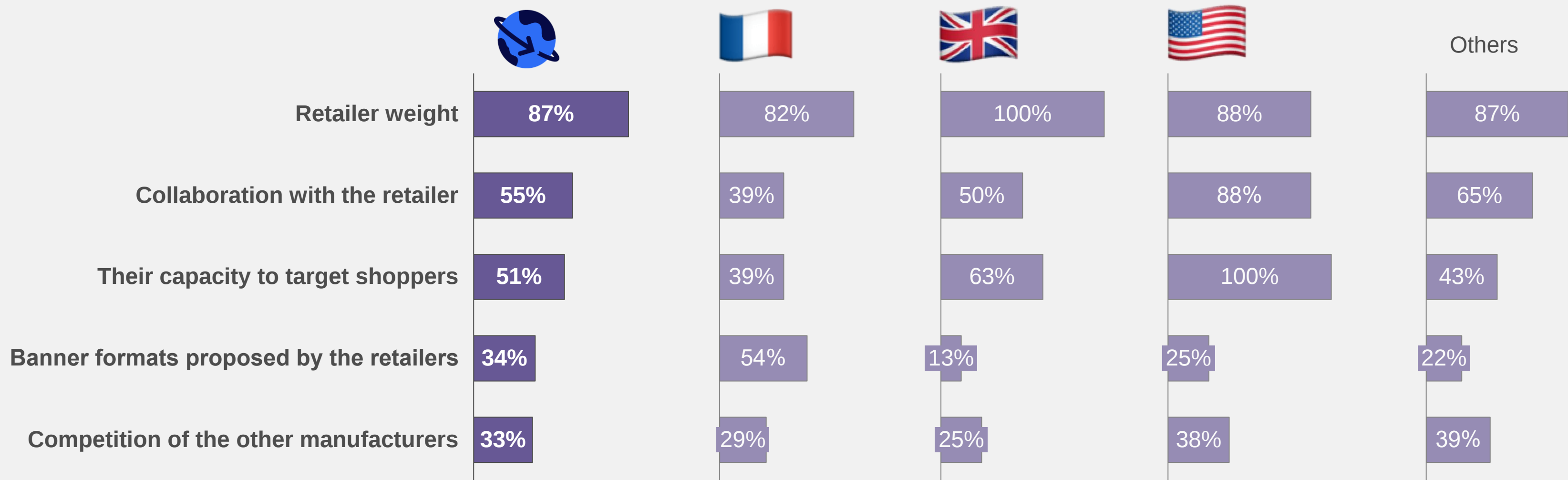
? How do you split your eretail media budget?



The budget is split by retailer according to their market weight

The targeting skills of retailers are very important in US. Format is primarily considered only in France.

? When splitting your eretail media budget by retailer, what factors do you consider in your budget distribution? *Base 100 = manufacturers splitting budget according to retailers*

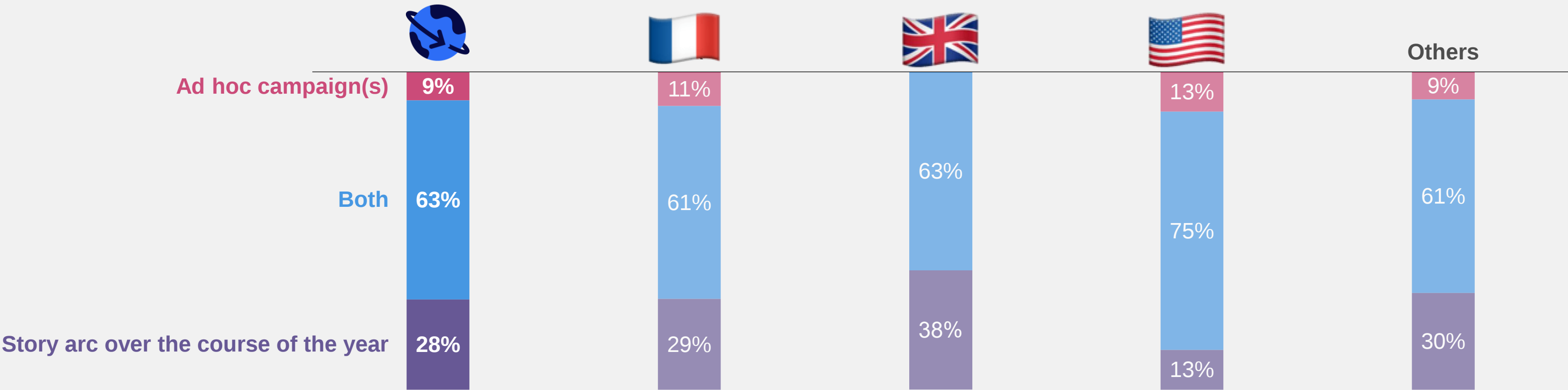




Eretail media--strategy

90% of brands have an always-on strategy

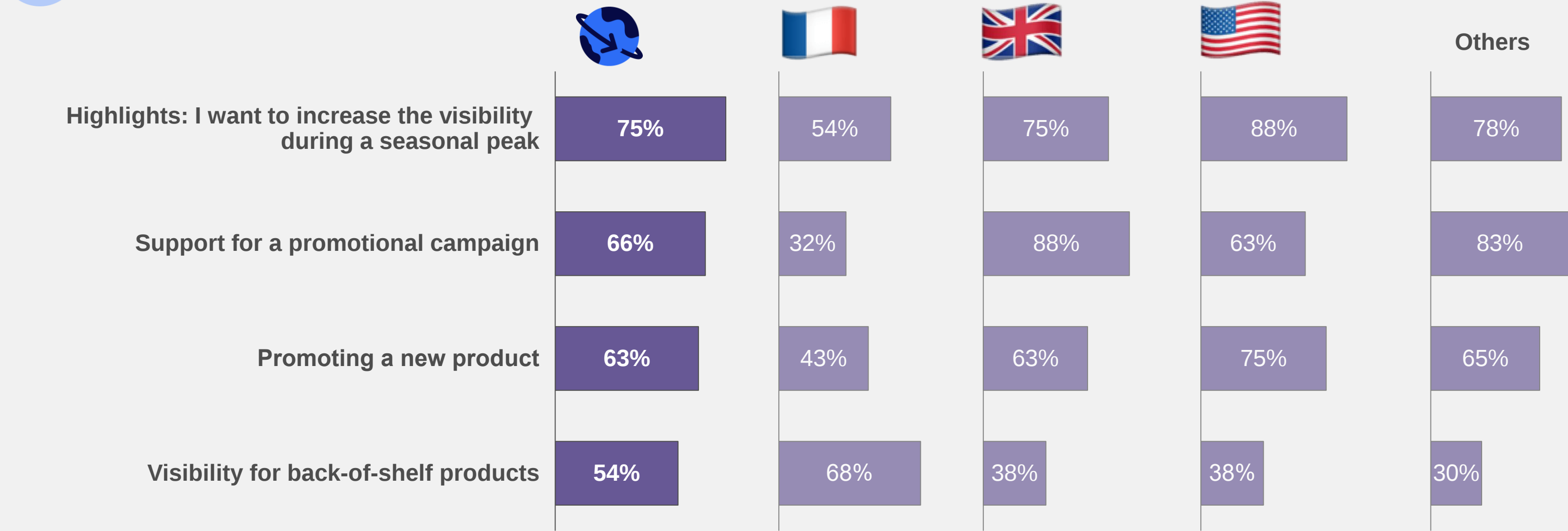
? Which eretail media strategy do you prefer?



Eretail media is mainly used to boost specific products

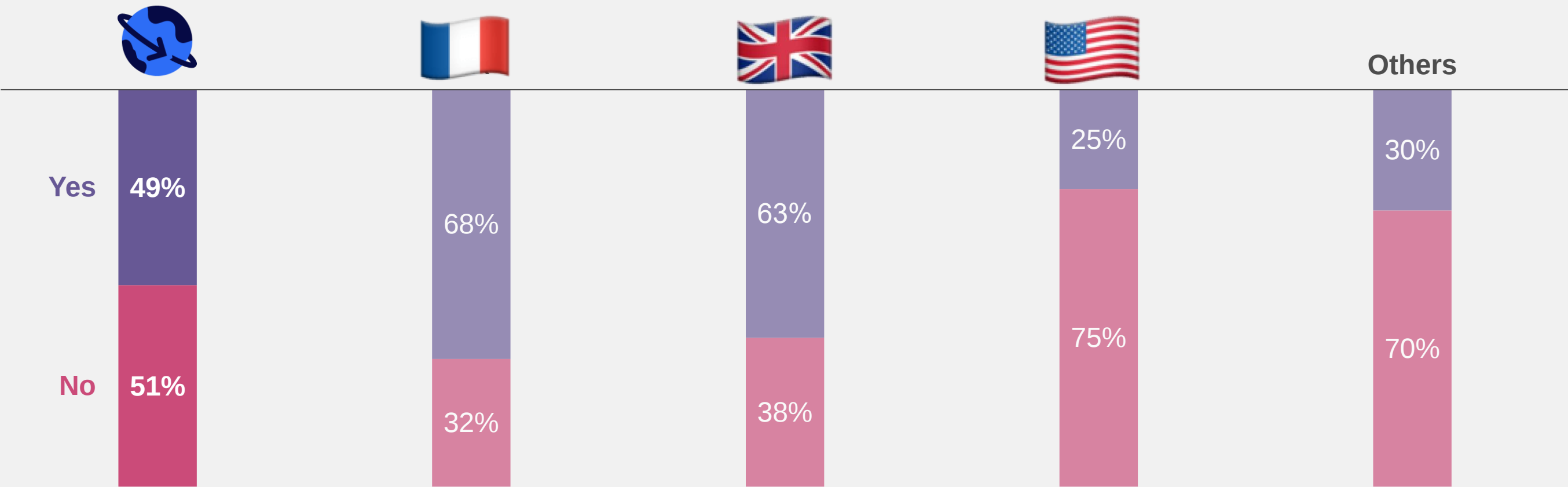
Activating back-of-shelf products is more common in France than other countries

How do you use eretail media?



France and UK use a cross-merchandising strategy

? Do you practice a search or shelf activation strategy outside of your domestic markets?



Sponsored products are the preferred format internationally

Preference may be influenced by formats offered in different countries

What banner format do you prefer?

76%
 86%
 63%
 88%
Others 65%

Sponsored product

42%
 25%
 88%
 13%
Others 57%

Native

40%
 32%
 25%
 50%
Others 52%

Video ads

39%
 68%
 38%
 0%
Others 17%

Butterfly

39%
 50%
 13%
 38%
Others 35%

Showcase / sponsored brand ads

37%
 14%
 63%
 63%
Others 48%

Home page banner / ads

21%
 14%
 25%
 50%
Others 17%

Shelf banners / display ads



Eretail media--monitoring

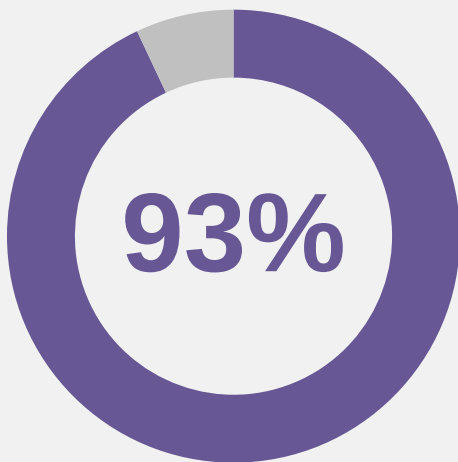
Eretail media monitoring is a must have for adapting your strategy to competitors



Do you track the eretail media strategy of your competitors?



How do you adapt your strategy in response to your competitors?



Track the eretail media strategy of their competitors

"Sometimes" through Data Impact, retailer dashboards or technical service provider dashboards

61% Modification of the **shelf/keyword targets**

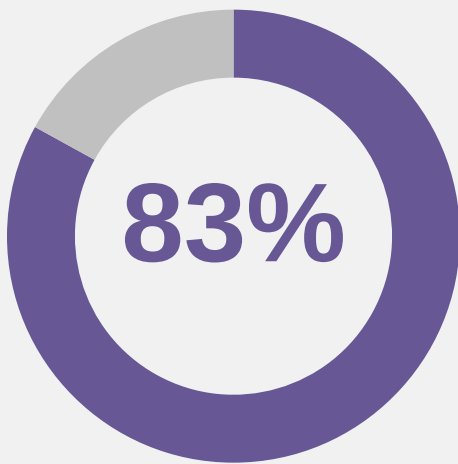
45% Adaptation of **calendar** of activations

36% Increase in **investments**

33% Working on campaign **Visuals**

24% Changing **formats** (e.g. butterfly, video ads, etc.)

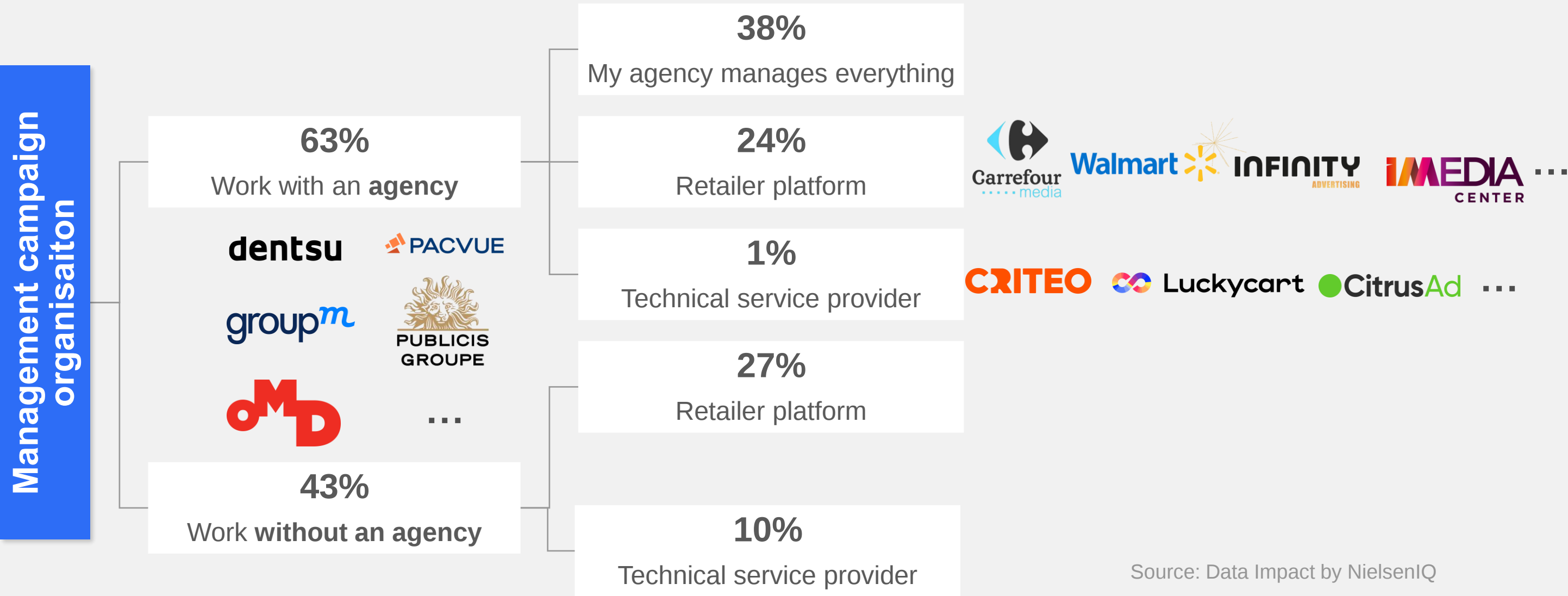
Adapt their strategy to competitors



How brands are organized to manage campaigns

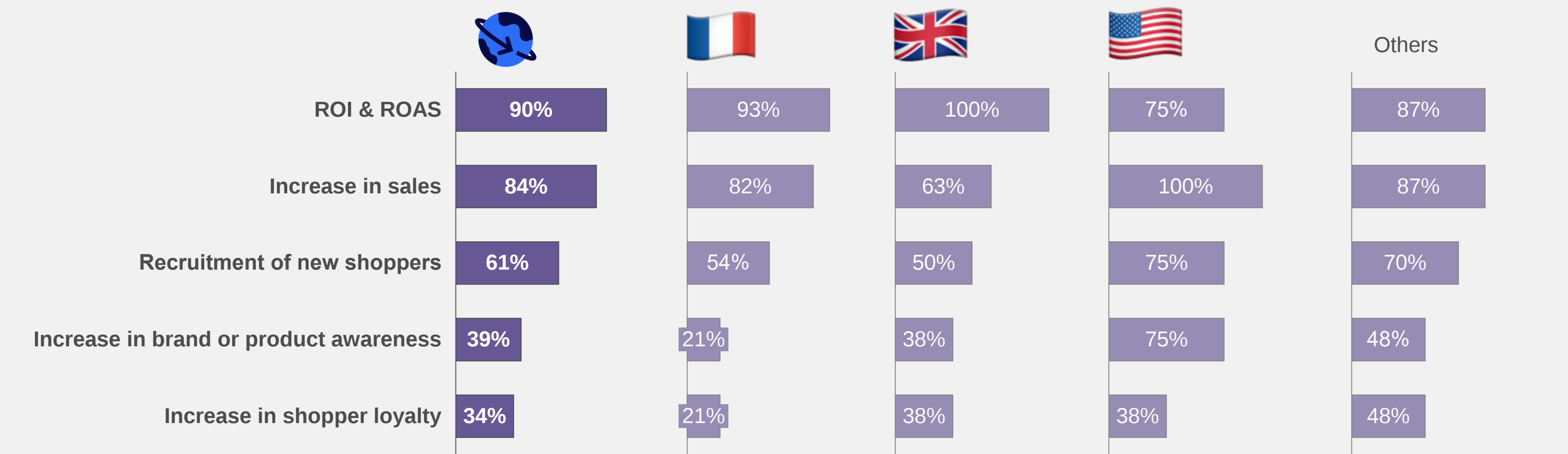
? Do you work with an agency for the planning and strategy of your eretail media campaigns?

? When you can choose, who do you prefer to work with?



Internationally, brands are mainly focused on sales and ROI to evaluate campaigns

? What are the performance indicators used (or that you'd like to use) to track the success of your campaigns?



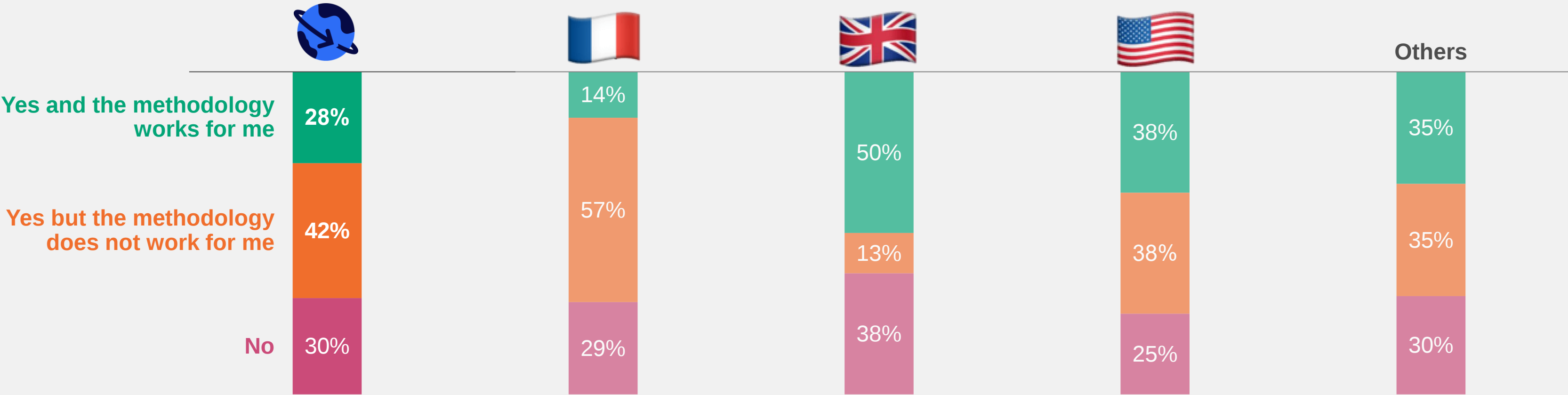
2/3 of brands are unsatisfied with ROI calculation

Pain points:

- Do not consider **real incremental** contribution of eretail media on sales (online & offline)
- **Different methodology** among retailers--so difficult to compare
- Based on sales so does not consider **margins**



Have you succeeded in calculating your ROI?



Take the 2024/2025 survey now



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