

The background of the slide is a light gray color, overlaid with a large, abstract graphic of numerous blue and purple spheres of varying sizes. These spheres are clustered together, creating a sense of depth and movement, particularly on the right side of the slide. The spheres have a glossy, 3D appearance with highlights and shadows.

NielsenIQ

The true ROI of Retail Media

Navigating a path to success

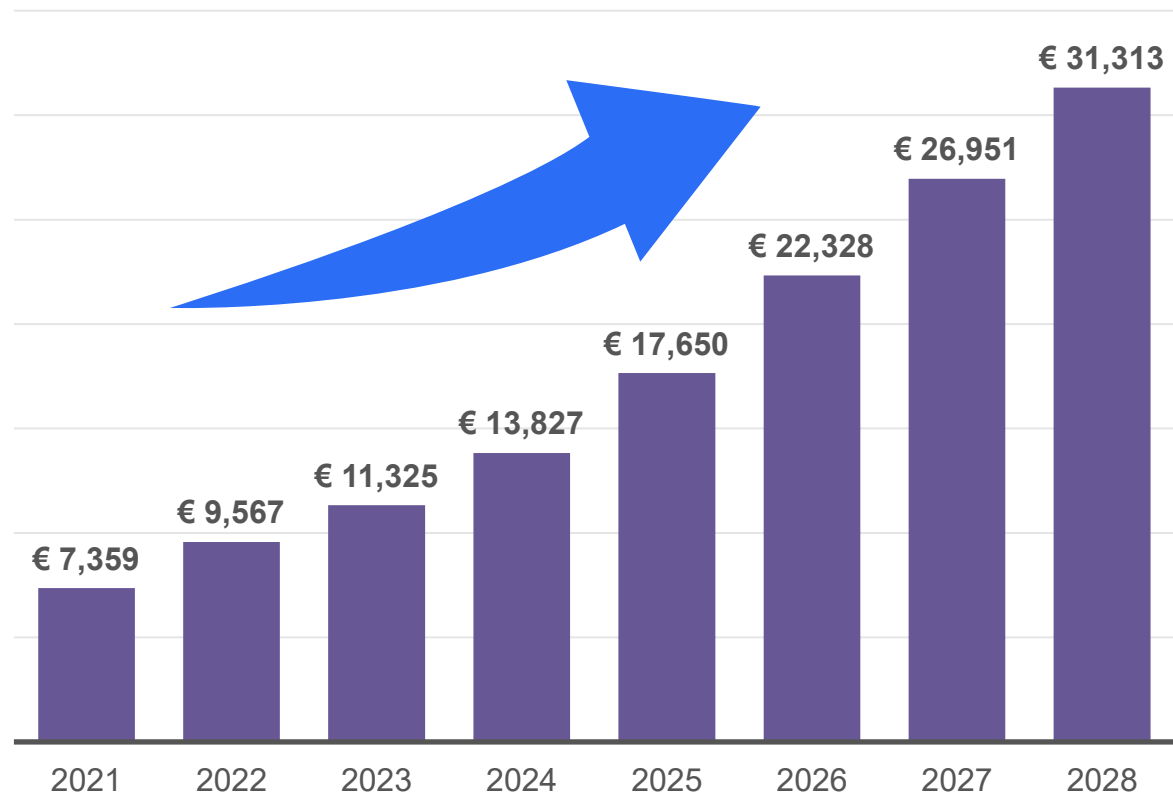
**insight
summit**
2025

Paul Sturgeon

*Commercial Director, Media Effectiveness
WEU | Strategic Analytics & Insights, NIQ*

Retail Media is the *hottest trend* in advertising.

Europe: Retail Media Ad spend 2021-2028 (€m)



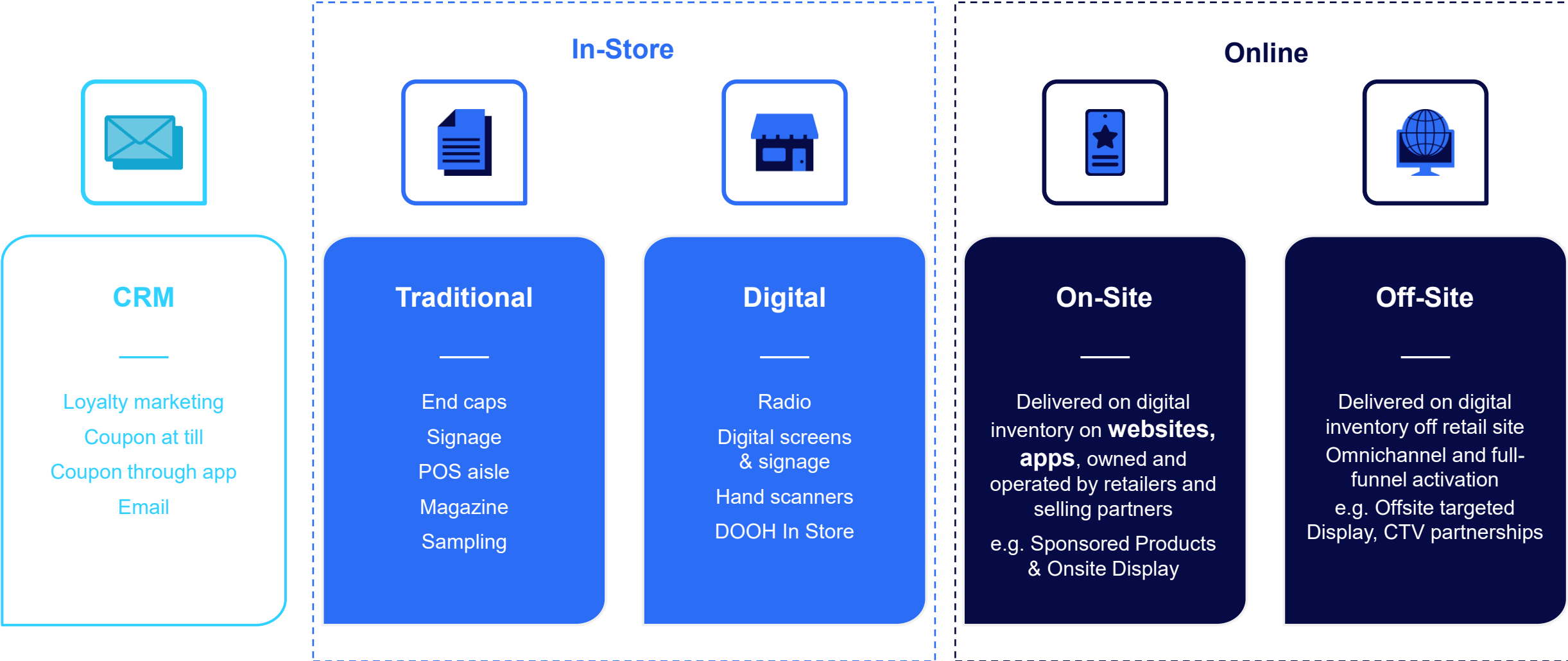


**‘Retail Media
advertising spend in
Europe is set to reach
€31bn by 2028’**

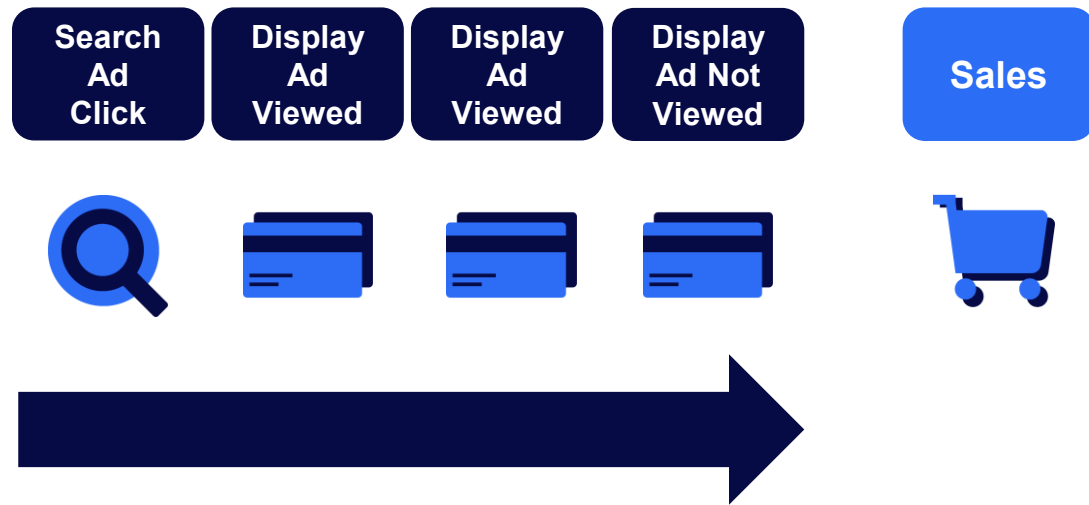
IAB Europe

Source: IAB Europe

The expansion of Retail Media has provided the power to *reach customers who matter at scale.*



Directly linking ad spend to sales outcomes - *the promise of closed-loop measurement.*

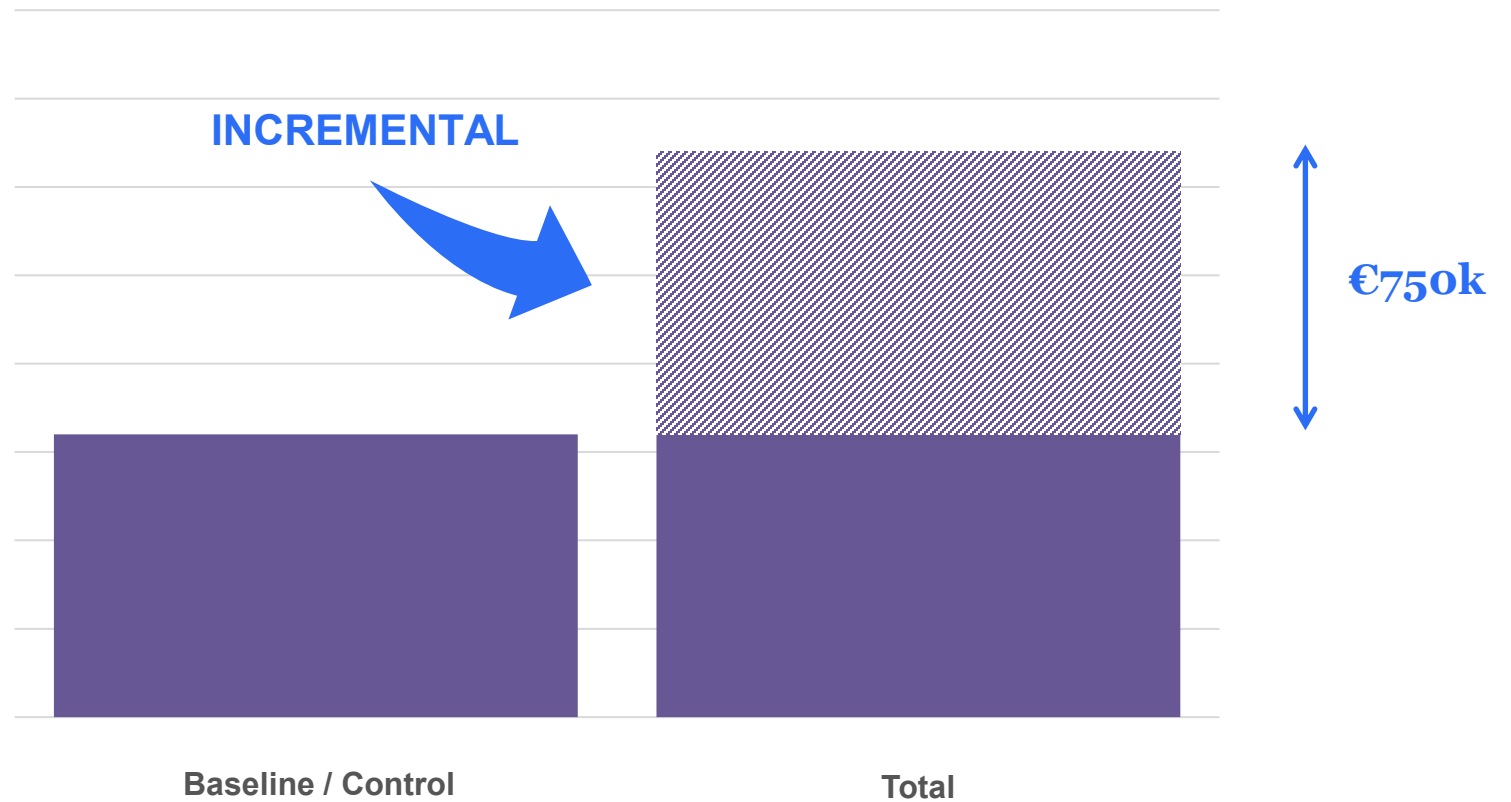


A broken promise? *In reality, there are numerous measurement challenges.*

- ➔ Lack of **standardization** in metrics and effectiveness measurement
- ➔ Current measurement practice for RMNs is still predominantly based on **1P data only**
- ➔ (Last-click) attribution assessment impossible due to signal loss and **media fragmentation**

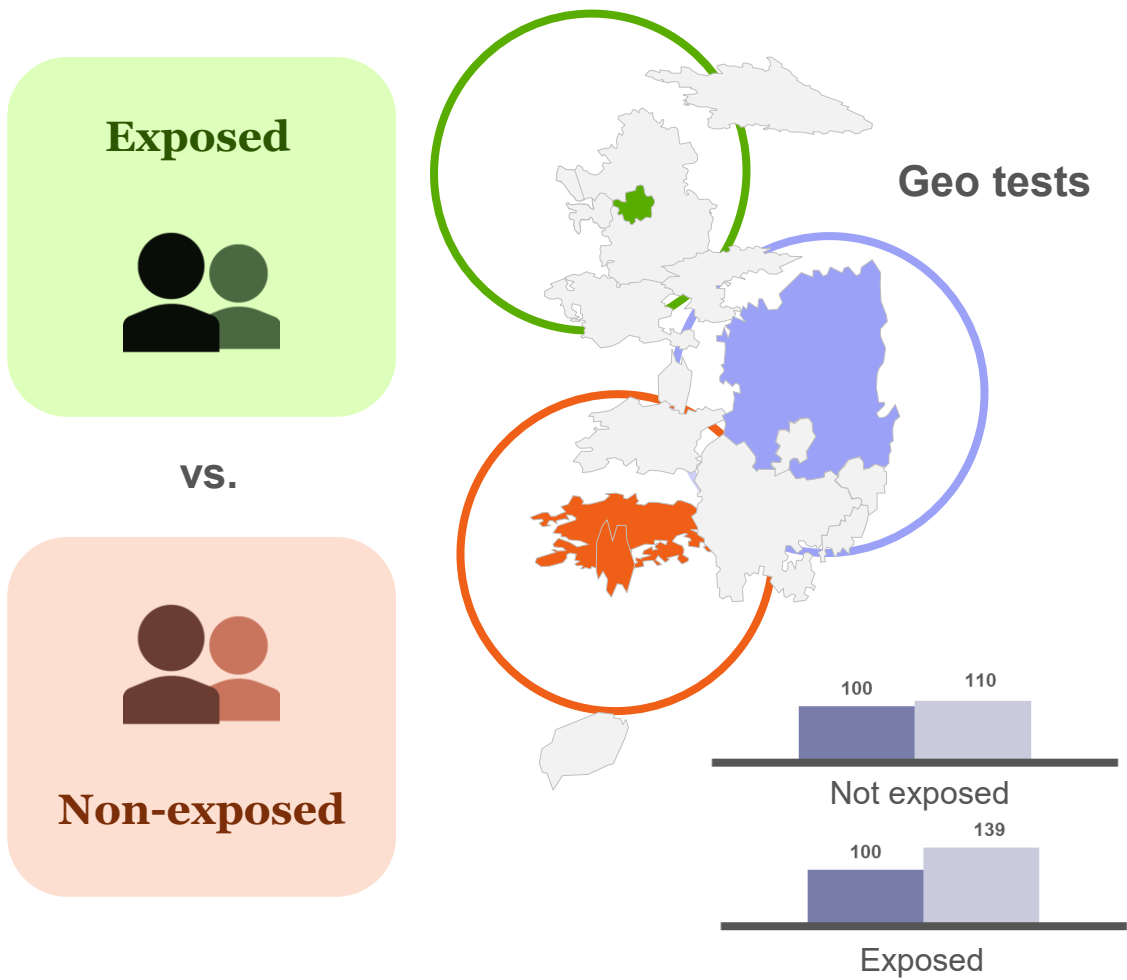
Uncovering true ROI requires the calculation of marketing incrementality.

“Incrementality”: *if we spend an additional €500k, how many additional sales will that generate?*



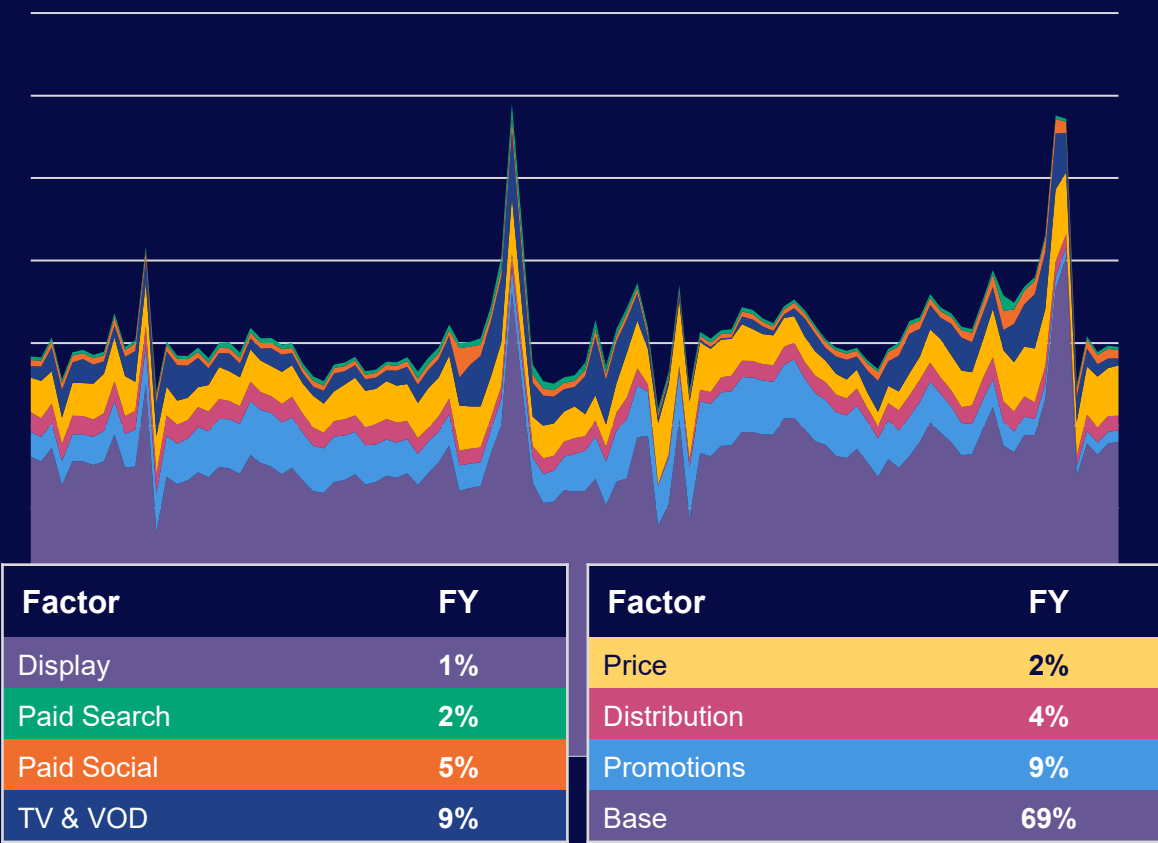
Incrementality measurement has been cited by 40% of buyers as a top retail media growth driver in 2025.

Experimentation controls for all other factors by design



MMM establishes the impact over time of all other factors

Decomposition of weekly Sales Revenue



*We consistently
find Digital Retail
Media to be a
strong driver of
growth.*

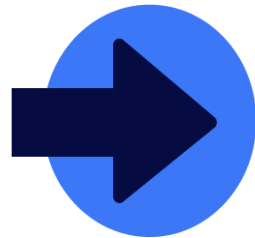


NIQ Digital Retail Media ROI Benchmarks

FMCG



Sales uplift
+6.3%



ROI
€4.1

T&D

Sales uplift
+5.1%

ROI
€2.5

But, ensure you view performance through the right lens; don't fall into the ROAS trap.

Example: Discrepancy of Retail Media 'Search' results provided by attribution



Measurement frameworks aligned to *decision-making*



*Integration of measurement solutions enable
ongoing learning & continuous improvements*

1 Evaluate.
*Measure
performance of
the media plan*

3 Experiment.
*Design & test
new tactics in
real-world*

4 Implement.
*Apply learning
and scale to
full plan*

2 Innovate.
*Leverage insights
to identify new
tactics*

*Marketing
Mix
Modelling*

*Matched
Market
Tests*

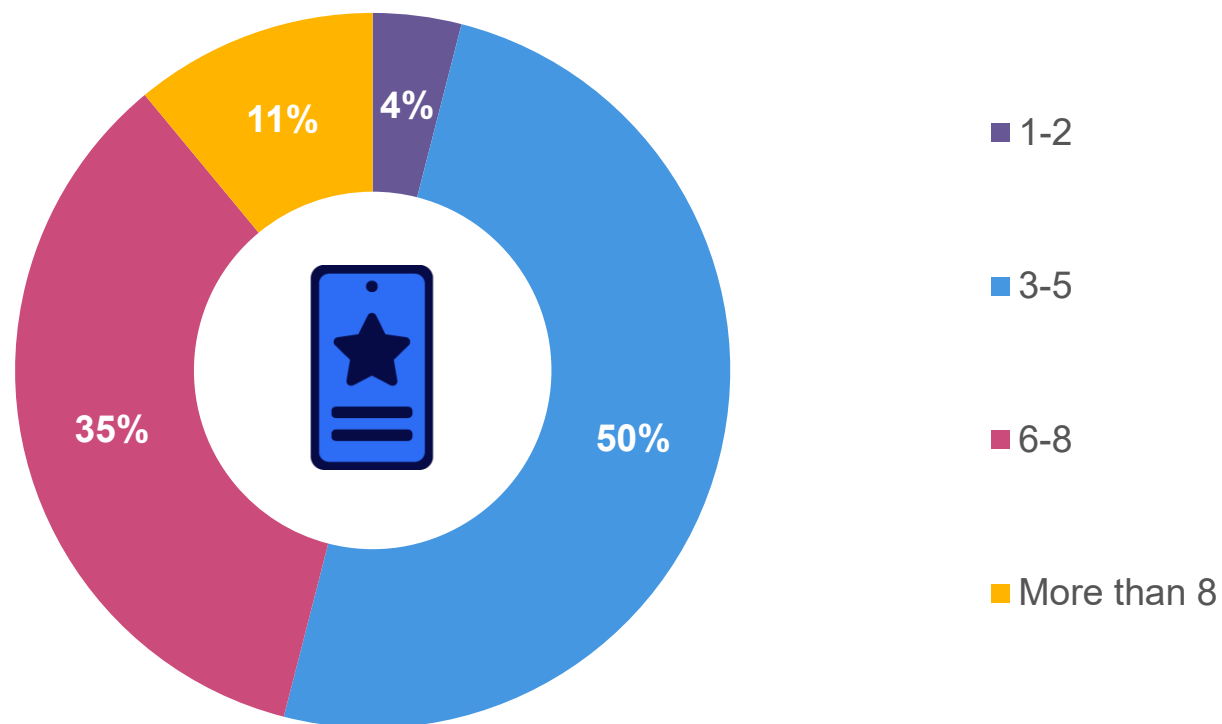
**Client
challenge #1**
*A need to
compare
performance
across RMNs.*

149

Retail Media Networks (RMNs) active in EMEA

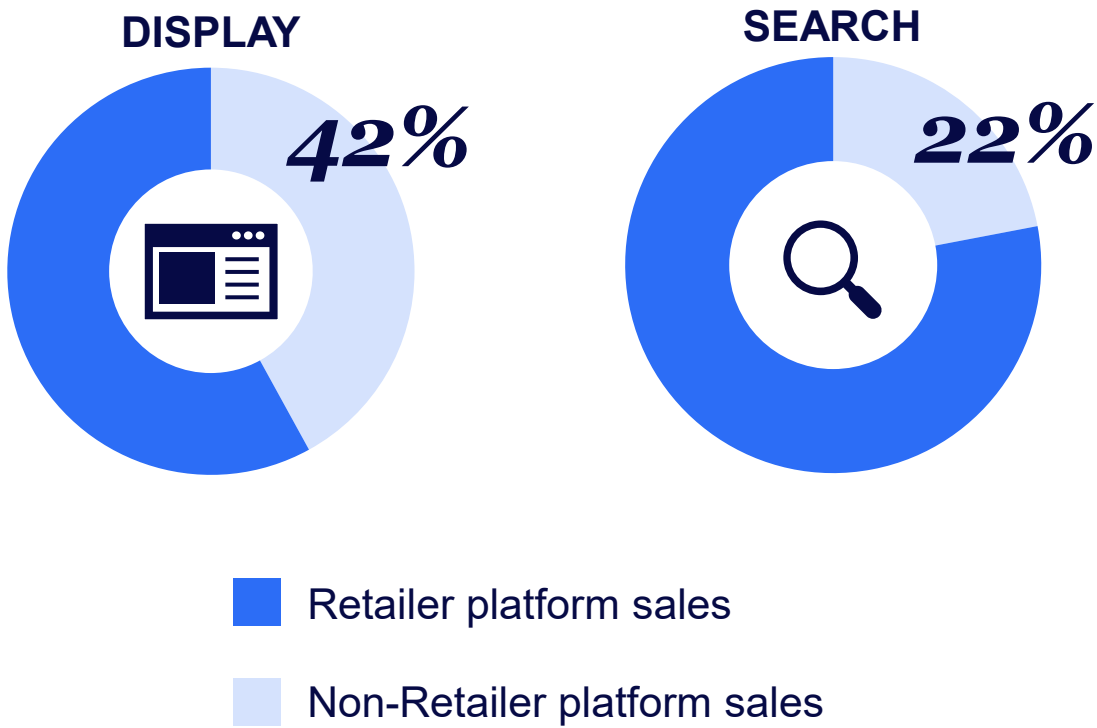
Mimbi, 2025

Number of RMNs used by large brand advertisers in last year (% of respondents)



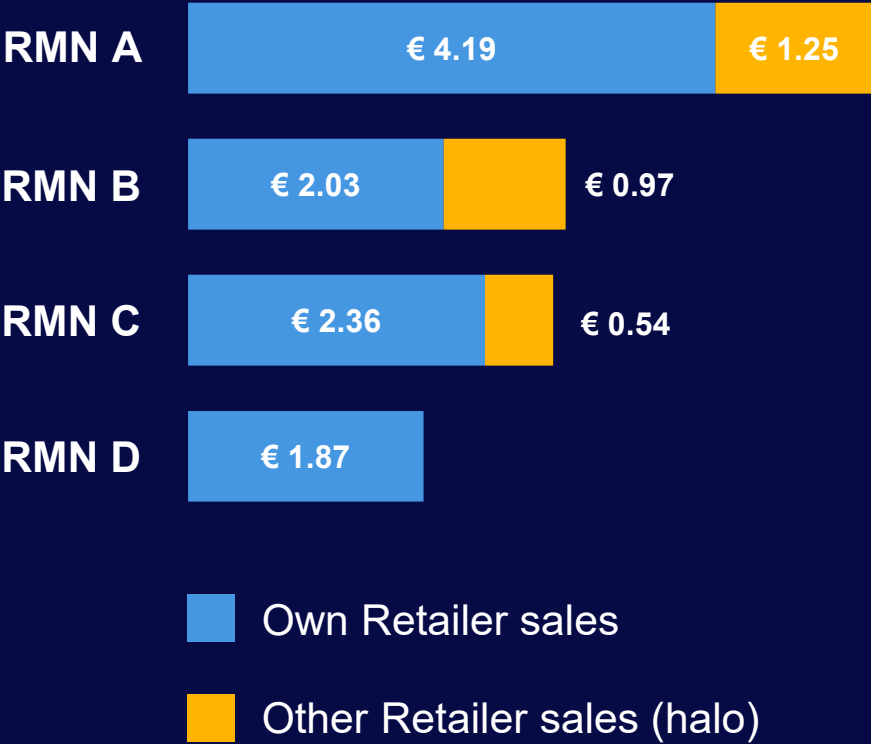
Digital Retail Media delivers impact for both online & offline sales.

Proportion of impact ‘On’ Retailer platform vs ‘Off’ Retailer platform



Total ROI across online & offline sales, plus halo effect across retailers.

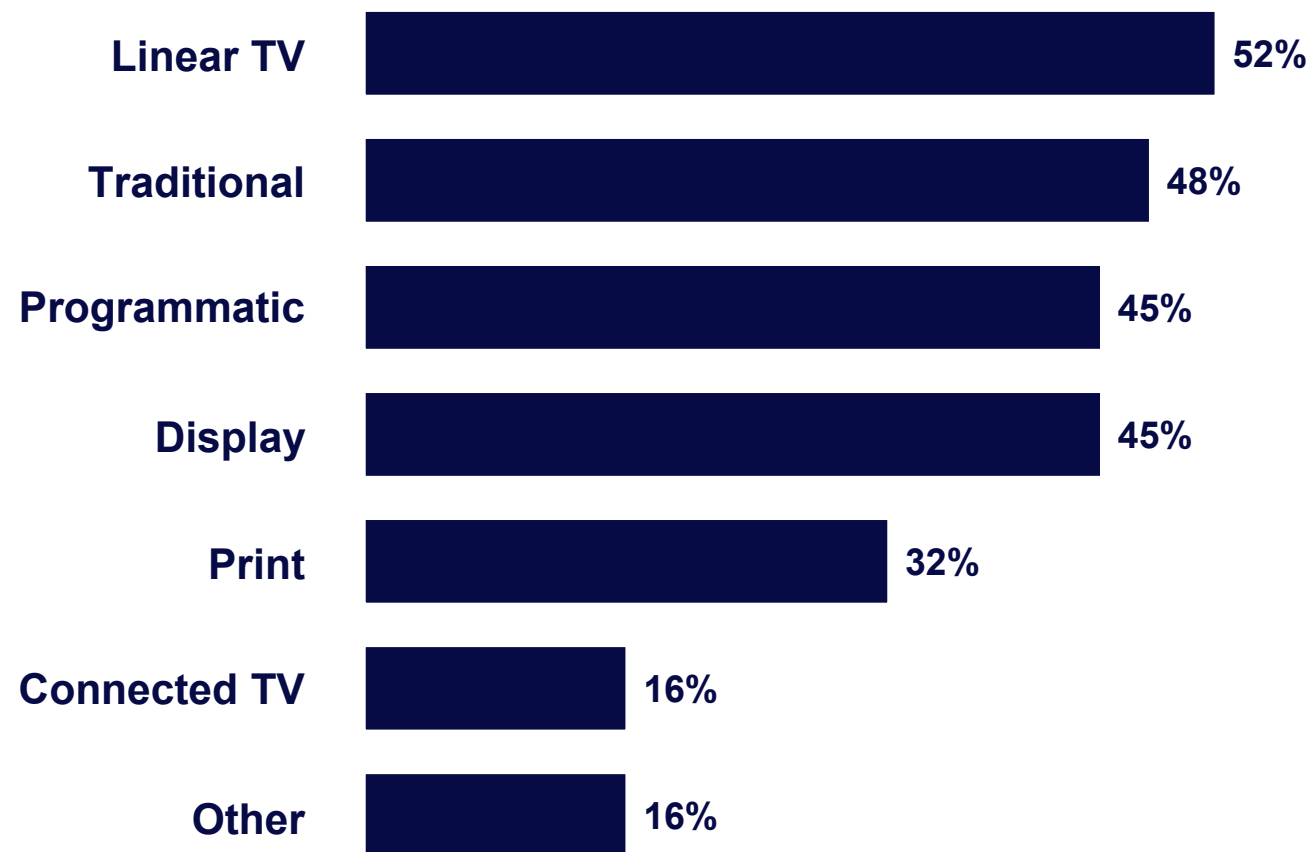
Direct & Halo impact for different Retail Media Networks (RMN)



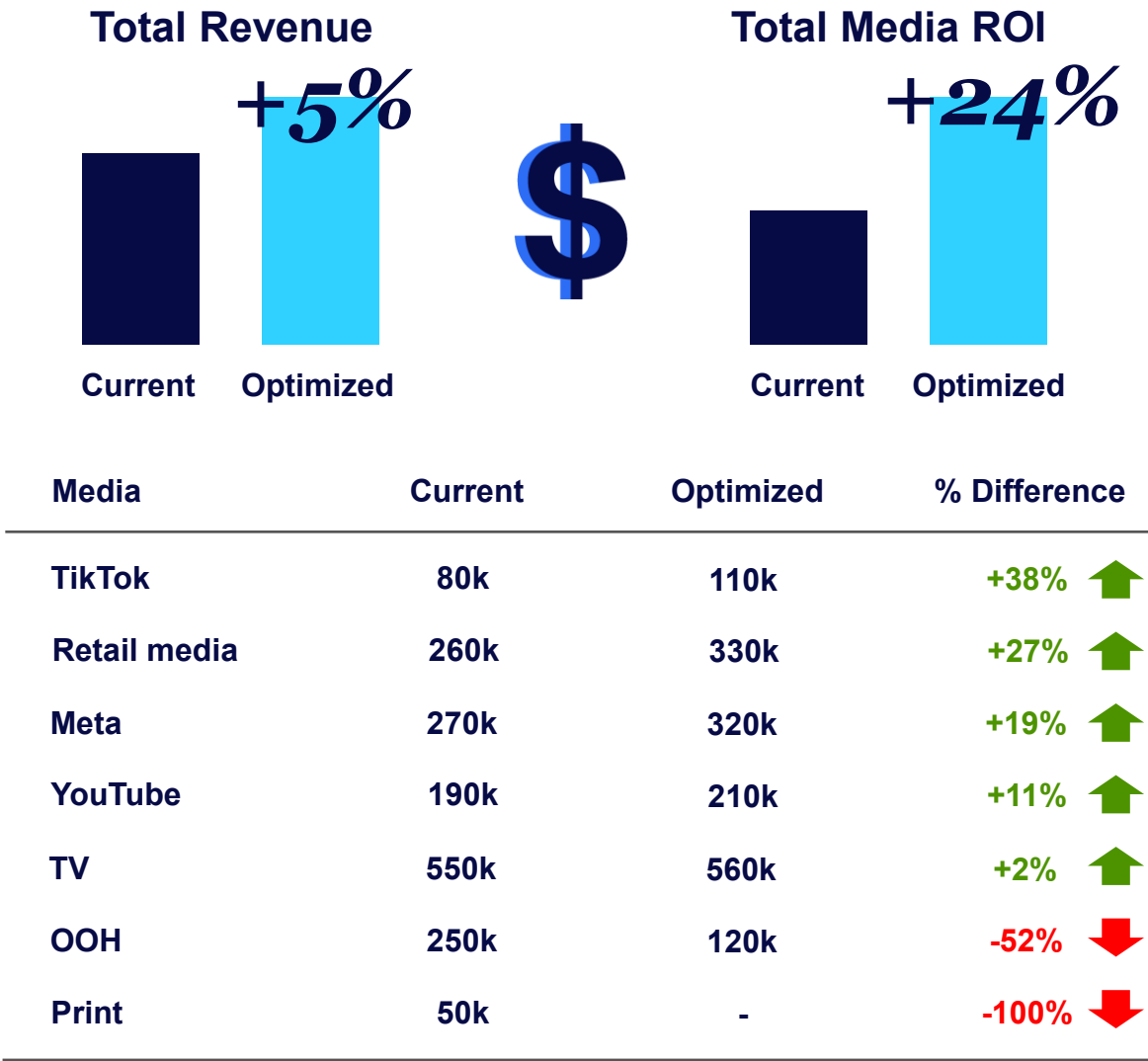
Client challenge #2

A need to compare performance across the media plan.

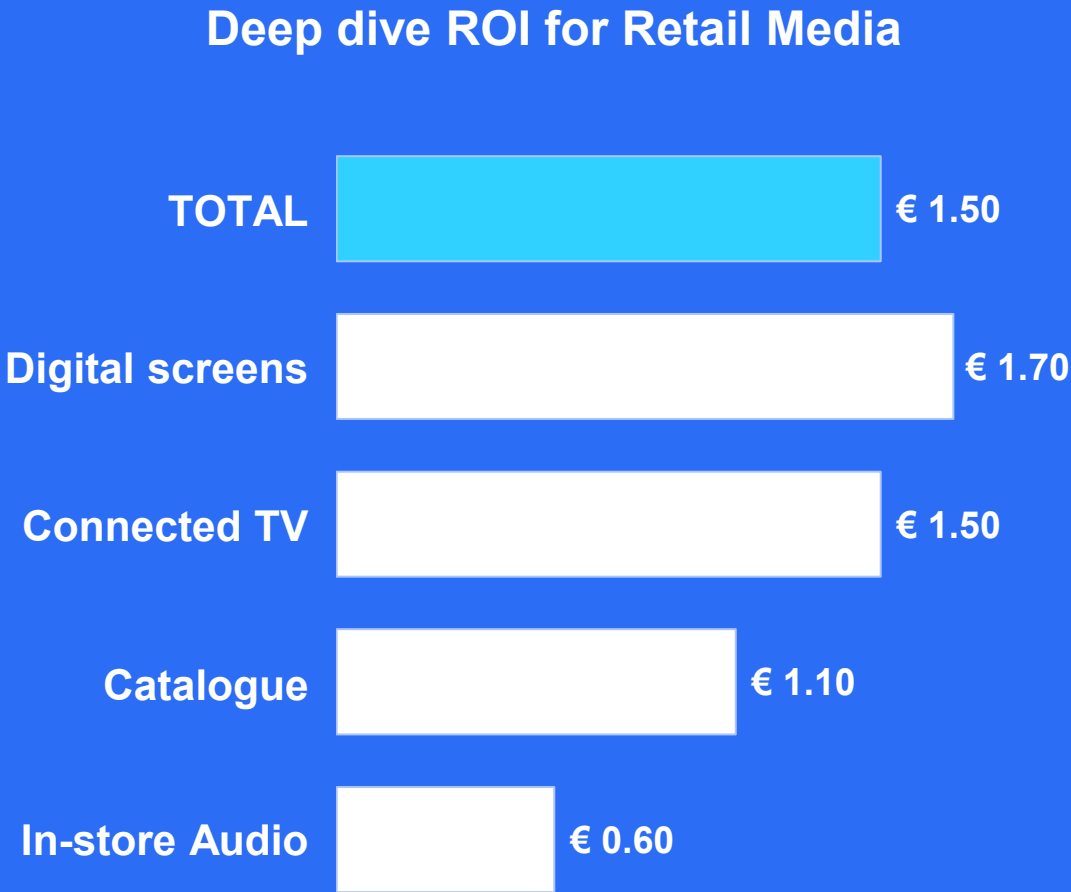
Advertising channels from which existing budgets are being shifted to Retail Media



A Beauty brand was able to **boost ROI** by rebalancing the Media budget.



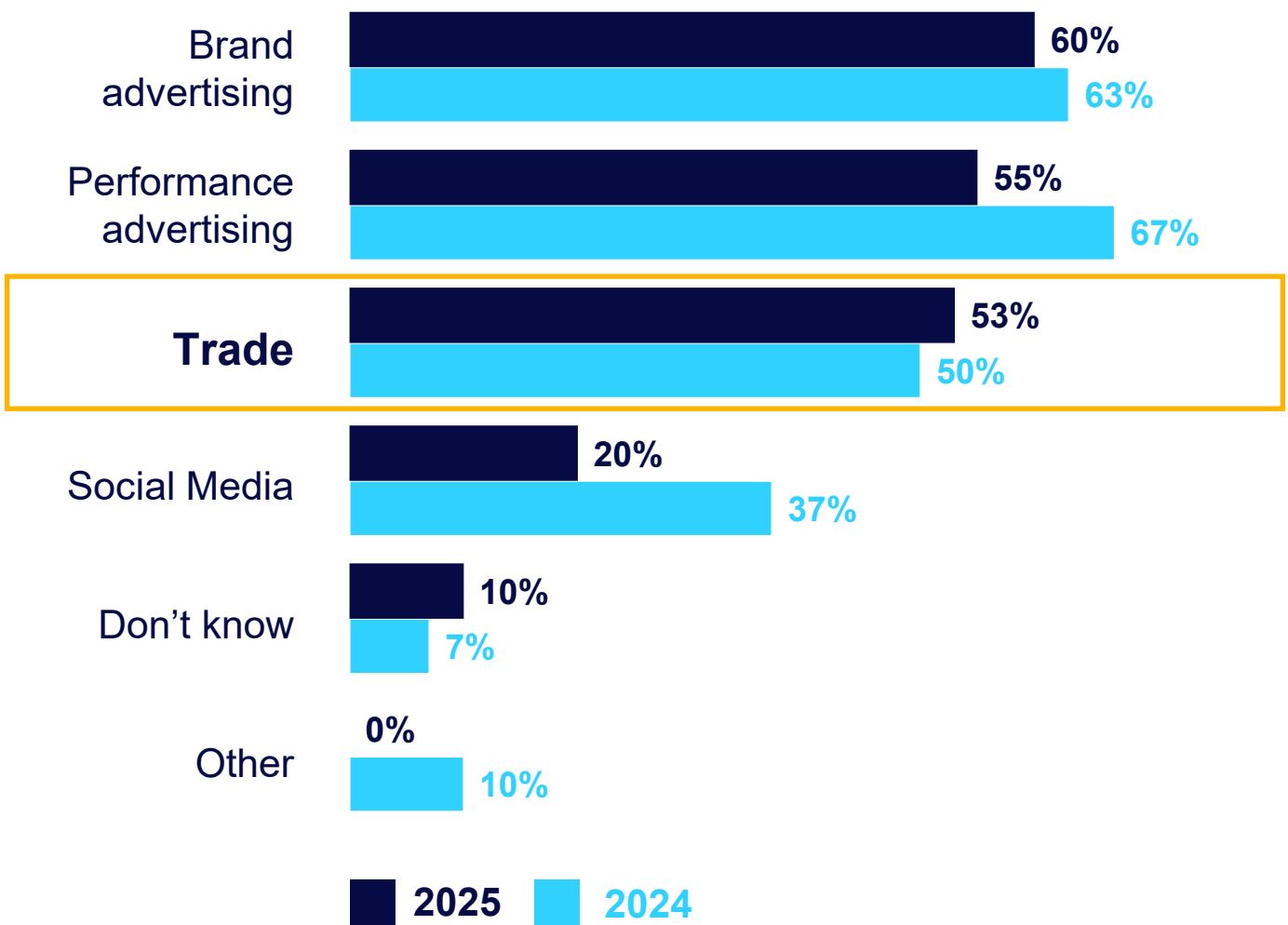
Further increasing ROI by identifying specific formats within Retail Media.



Client challenge #3

A need to compare performance with the Trade plan.

Budgets shifting to Retail Media

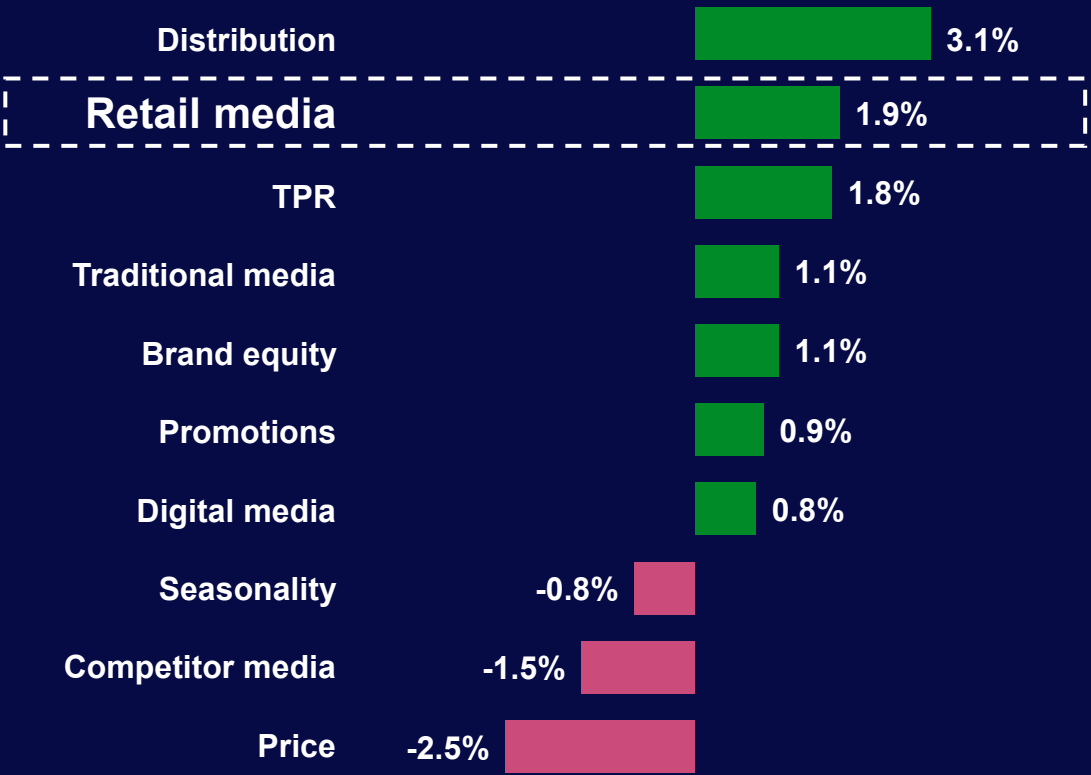
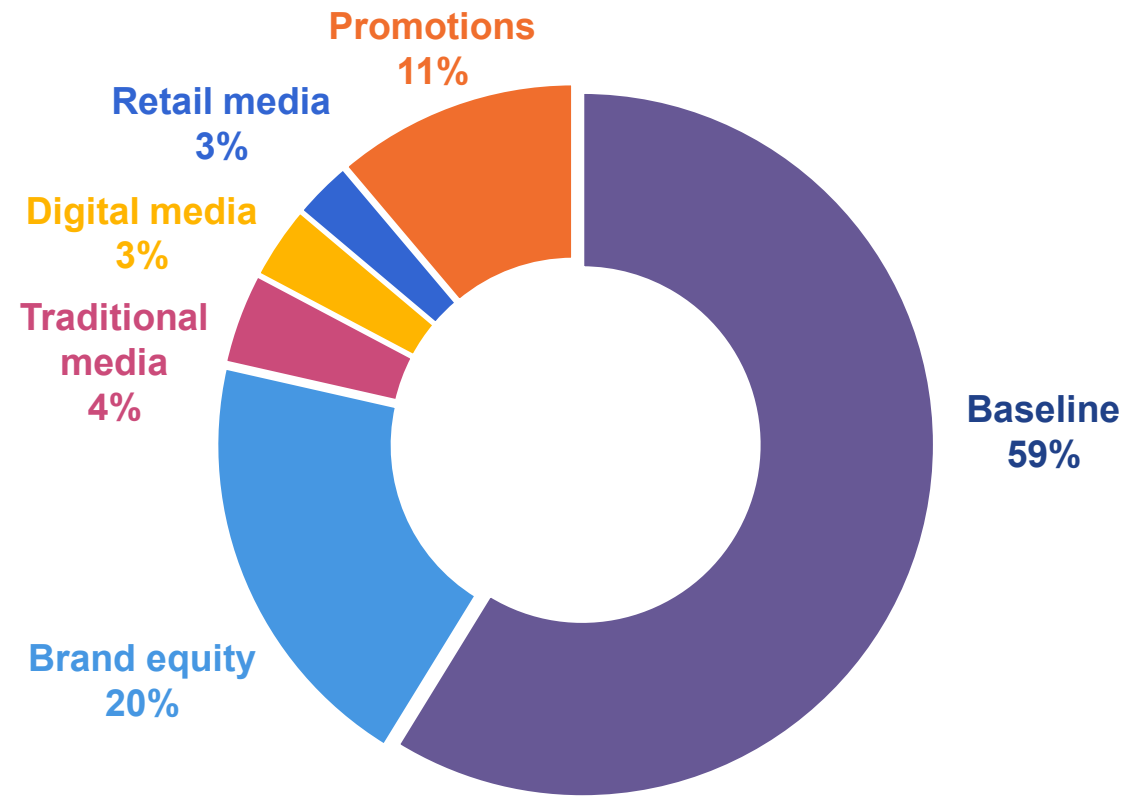


We helped this global food manufacturer quantify the Full Mix.

Understanding how all key factors were driving brand growth.

Percentage contribution to Total Revenue

Brand growth analysis : Year 2 vs Year 1



Key recommendations from NIQ to marketers on measuring the impact of Retail Media.



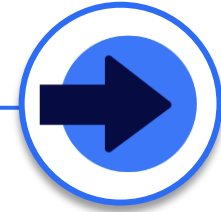
Think strategically

- Measure holistically
- Leverage solutions that are privacy-compliant and 'built to last'
- Determine the incremental impact



Align to decisions

- Build a measurement framework
- Align measurement solutions to specific decisions
- Continually grow knowledge



Partner for success

- Align with RMNs on metric definitions
- Co-operate on data for measurement
- Align on measurement of performance and build learning agendas



The right measurement will help you navigate the Retail Media landscape & find your clear path to growth.

The background of the slide is a light gray color, overlaid with a large, abstract graphic of numerous spheres. These spheres are in various shades of blue and purple, ranging from light, airy tones to deep, saturated colors. They are scattered across the frame, with some appearing in dense, overlapping clusters and others as single spheres. The spheres have a glossy, 3D appearance with highlights and shadows, giving them a sense of depth and movement. In the top left corner, there is a dark blue, rounded rectangular box containing white text.

Thank You

The Full View™

NIQ deliver the Full View, the world's most complete and clear understanding of consumer buying behavior that reveals new pathways to growth.

NielsenIQ