



TRACKING REAL BEHAVIOR

# THE IMPACT OF RETAIL MEDIA

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VERBORGEN KRACHT VAN RETAIL MEDIA:  
Bouwen aan duurzame merkgroei



**KANTAR**

Shape your brand future.



# BLUEPRINT FOR BRAND GROWTH

We took

**5.4bn**

**attitudinal data**  
points for over

**21,000 brands** in  
**540 categories** and  
**54 markets...**

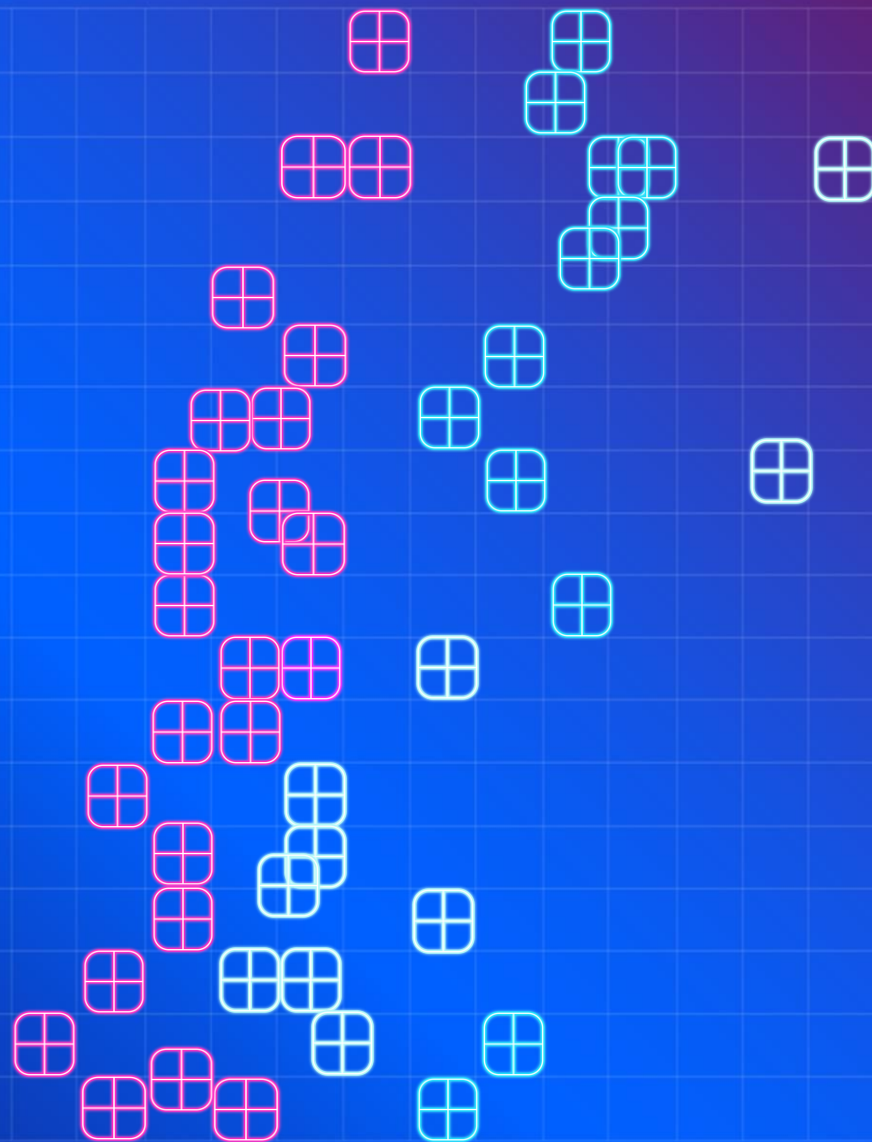
...and

**1.1bn**

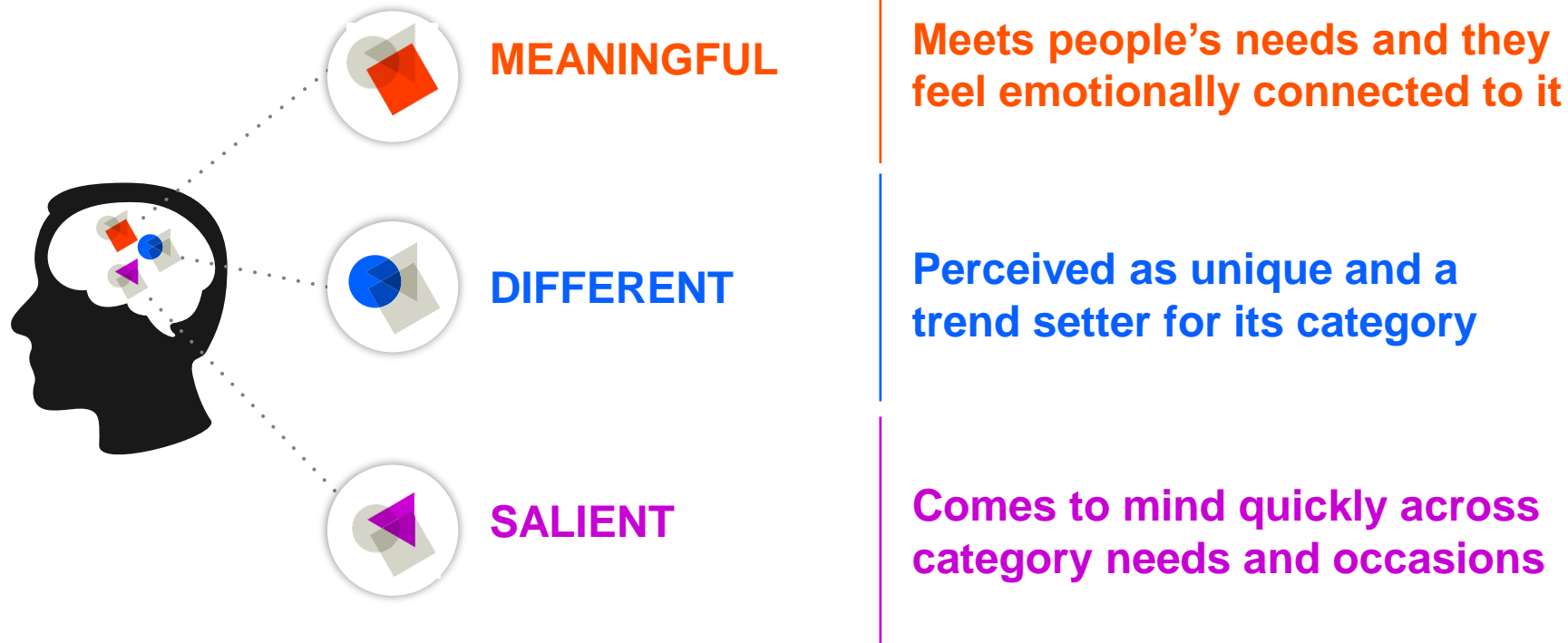
**purchase data**  
points for

**20,000 brands** in  
**100 categories** and  
**25 markets...**

spanning over **10 years** and **analysed** the results



# Our foundation: The core brand equity building blocks





# BRANDS

GROW BY BEING  
MEANINGFULLY  
DIFFERENT  
TO MORE PEOPLE

Growth accelerators for winning marketers to operationalise effectively

PREDISPOSE MORE PEOPLE

BE MORE PRESENT

FIND NEW SPACE

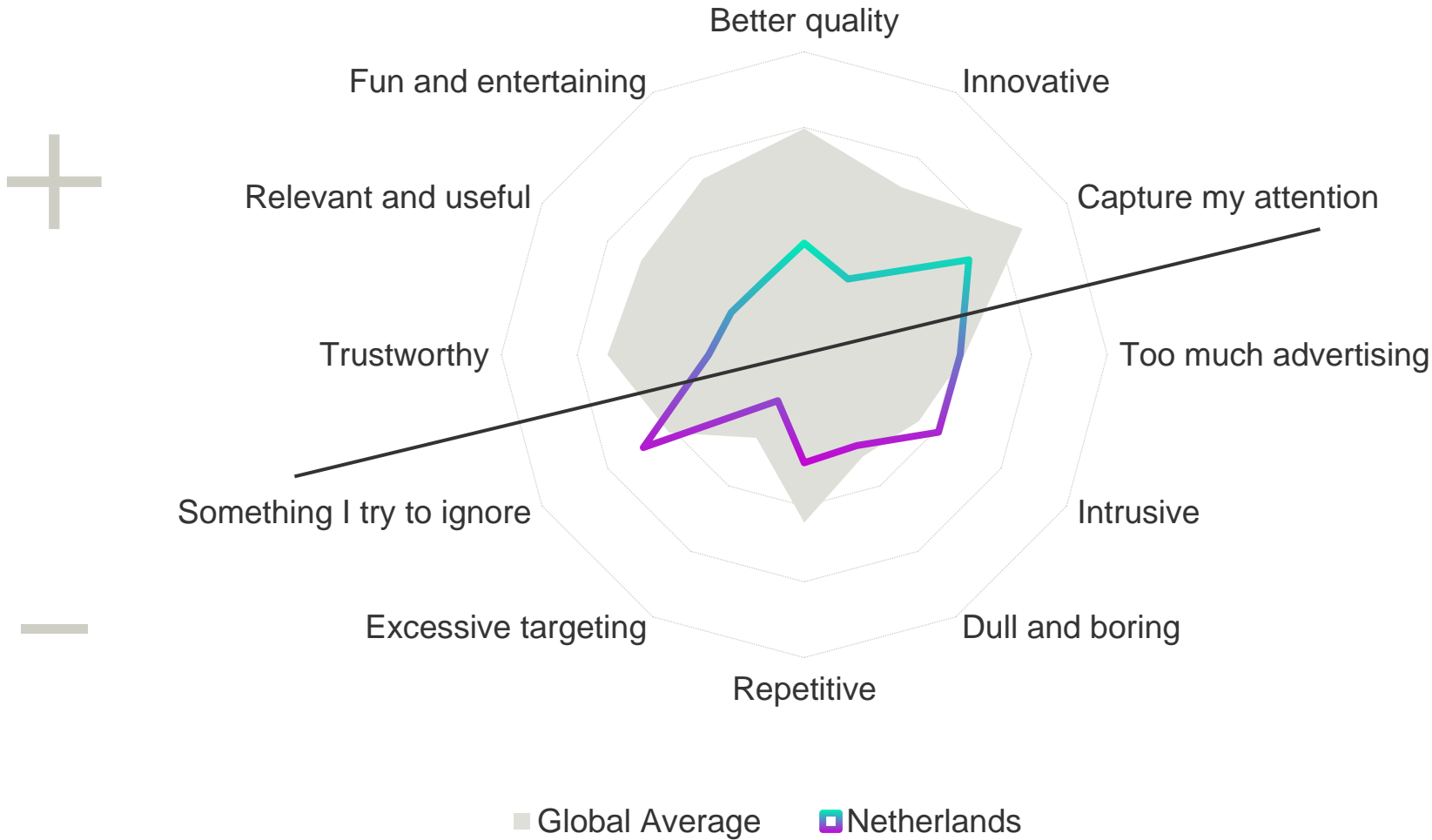
BEHAVIOURS: CONSISTENT, CONNECTED, OPTIMISED

POWERED BY THE MEANINGFUL DIFFERENT AND SALIENT FRAMEWORK AND MOST MEANINGFUL DATA

KANTAR

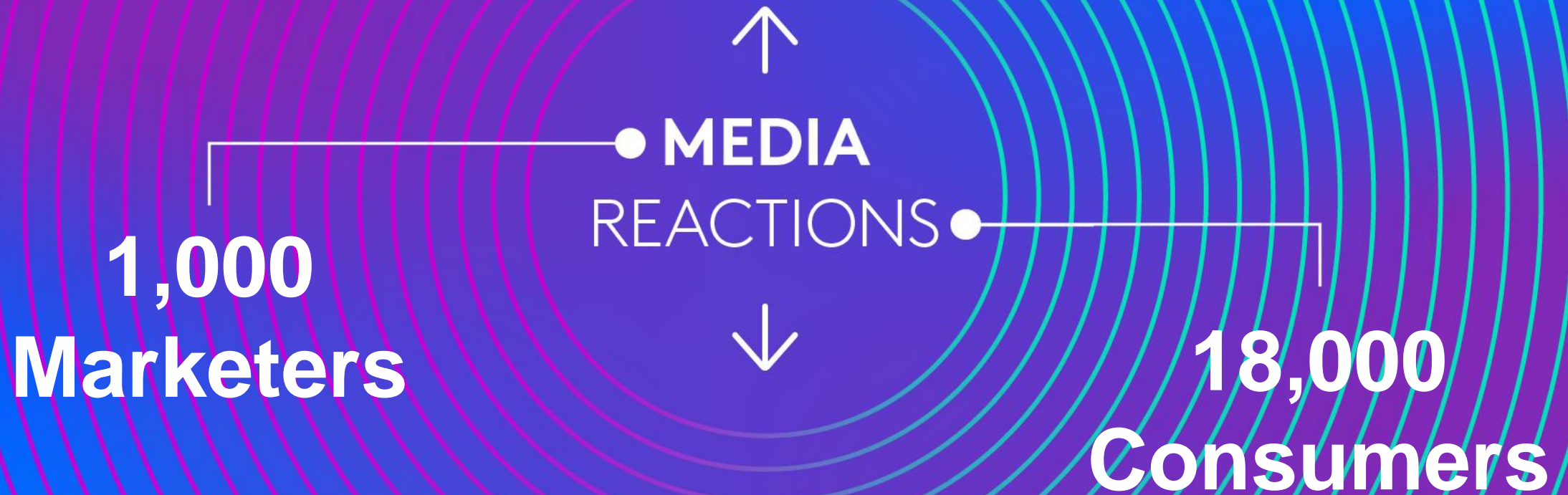
**Are Dutch consumers  
hard for marketers to win over?**

# Yes, we, the Dutch, are much more critical towards media than global consumers





# Media Reactions, what's it about?



Retail Media  
perform **strongly**  
**on positive ad**  
**characteristics** ►

And low on the negatives ►

+

TRUSTWORTHY

+

RELEVANT

+

BETTER QUALITY

-

TOO MANY ADS

-

INTRUSIVE

-

REPETITIVE

# Advertising through POS is highly evaluated across generations

## Top 5 media channels

Gender		Generation			
Female	Male	Gen Z	Gen Y	Gen X	Boomers
Retail Media (POS)	Cinema	Sponsored events	Sponsored events	Cinema	Cinema
Cinema	Sponsored events	OOH	Retail Media (POS)	Sponsored events	Retail Media (POS)
Sponsored events	Retail Media (POS)	Retail Media (POS)	OOH	Newspaper	Newspaper
OOH	Digital OOH	Cinema	Digital OOH	Retail Media (POS)	Sponsored events
Newspaper	OOH	Digital OOH	Cinema	Digital OOH	Magazines

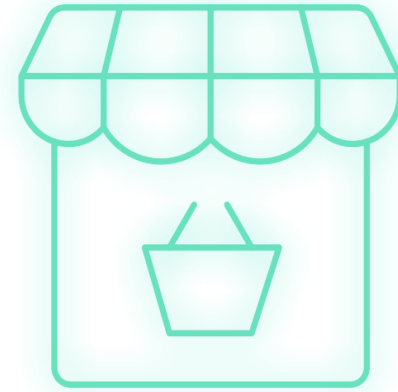


ADS ARE  
**7X MORE**  
**IMPACTFUL**  
AMONG A  
RECEPTIVE  
AUDIENCE



## Trends & Predictions

Buyers and sellers  
need media-agnostic,  
independent  
measurement to  
support **proof of  
channel performance**



# 41%

of marketers  
globally are  
planning to increase  
their advertising  
investment in retail  
media in 2025

-NEXT GEN CROSSMEDIA ANALYTICS-

# Unravelling the True Value of **Retail Advertising** on Brand & Sales



# Tracking real-time behaviours

with passive measurement



Real-time locations (OOH, stores, etc.)

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Media exposure (audio recognition/OTS)

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Direct conversations (Brand Lift)

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Direct video feedback (deep-dive)

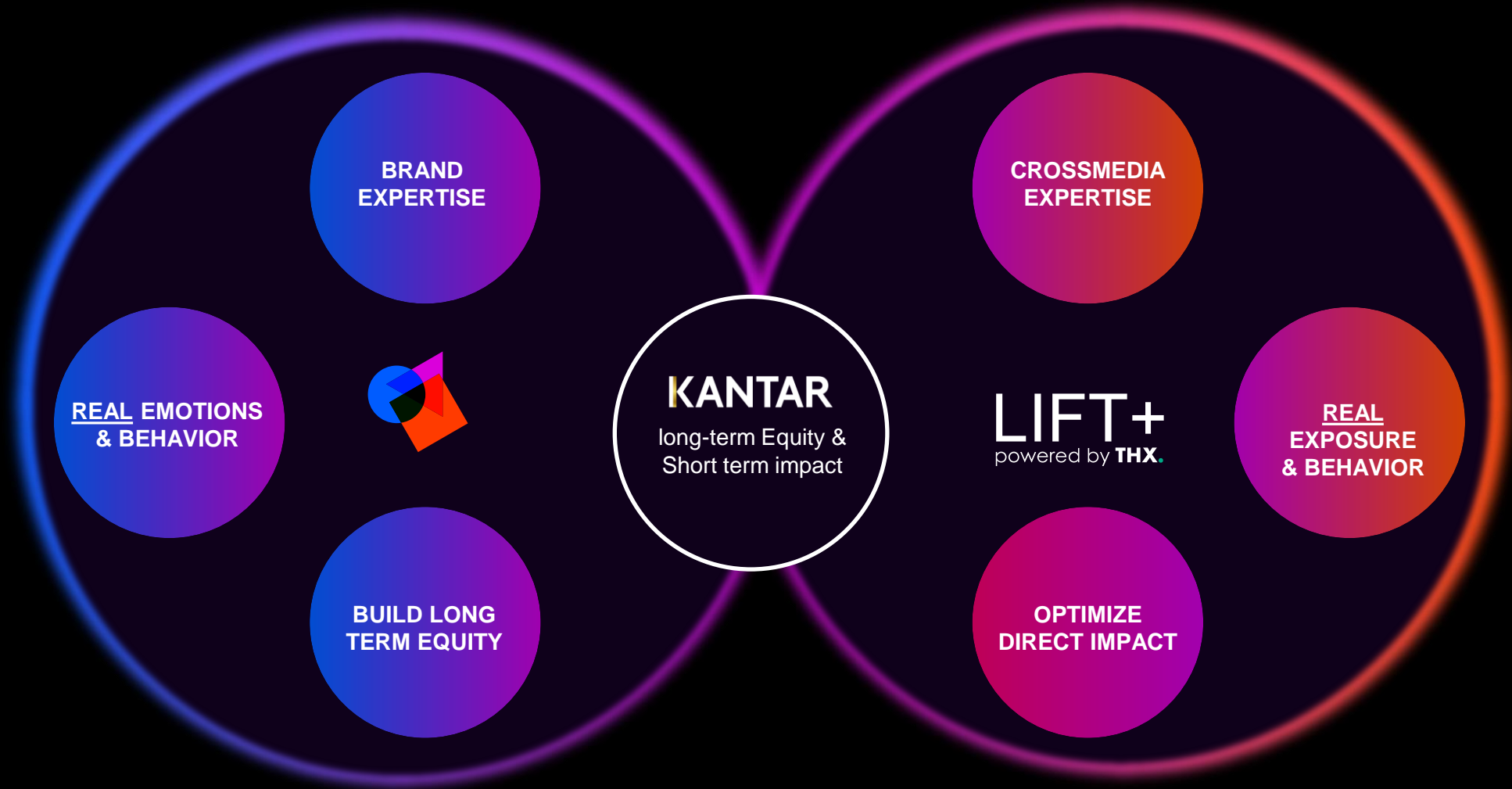
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50,000+ daily users, 500+ variables



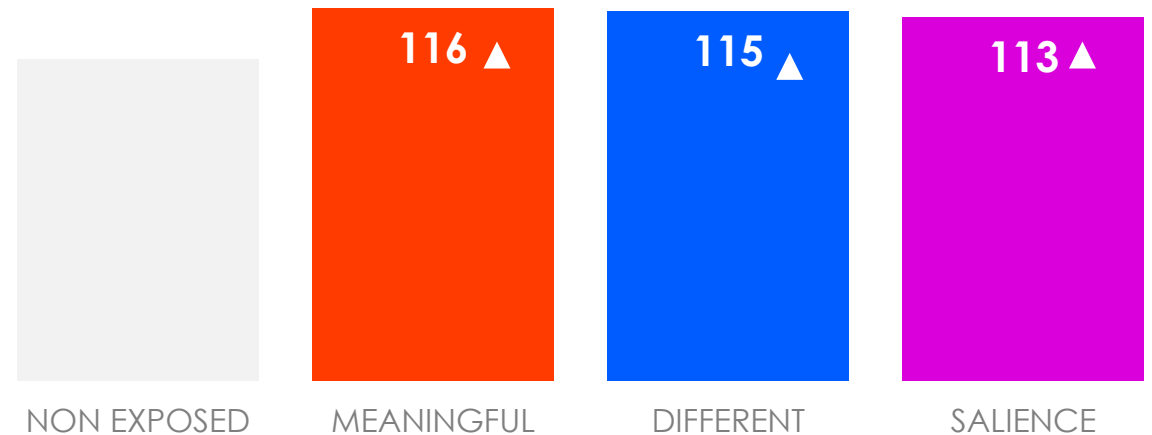
**INTEGRATED PROGRAM** = Long term equity & short term impact



# RETAIL MEDIA: *DRIVER OF BRAND EQUITY?*

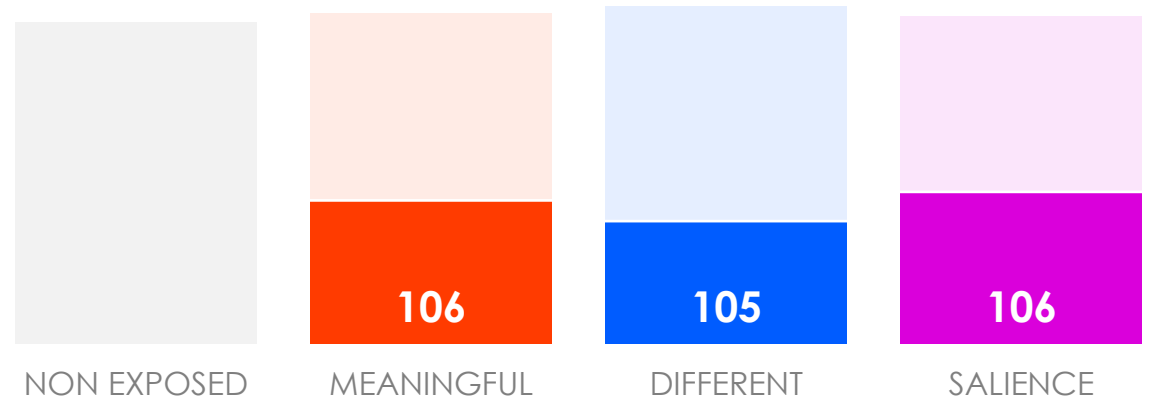
Retail Media proven  
effective on  
increasing  
Brand Equity ►

AVG LIFT BRAND POWER  
x RETAIL MEDIA



**BUT,** merely  
reaching your  
consumers doesn't  
mean you will be  
effective ►

1/3 LOWEST PERFORMING  
x RETAIL MEDIA





# KANTAR

1. Dutch consumers are **critical** towards advertising
2. **Retail Media** provides **trustworthiness & relevance**
3. **Retail Media** resonates **across generations**
4. **Marketers** need **proof of channel performance**
5. **Retail Media** effective for **long-term brand building**

How to make **Retail Media** truly  
work for your brand?

**RETAIL MEDIA**  
**=**  
**MASS MEDIA**  
**ONLINE &**  
**OFFLINE** ▶

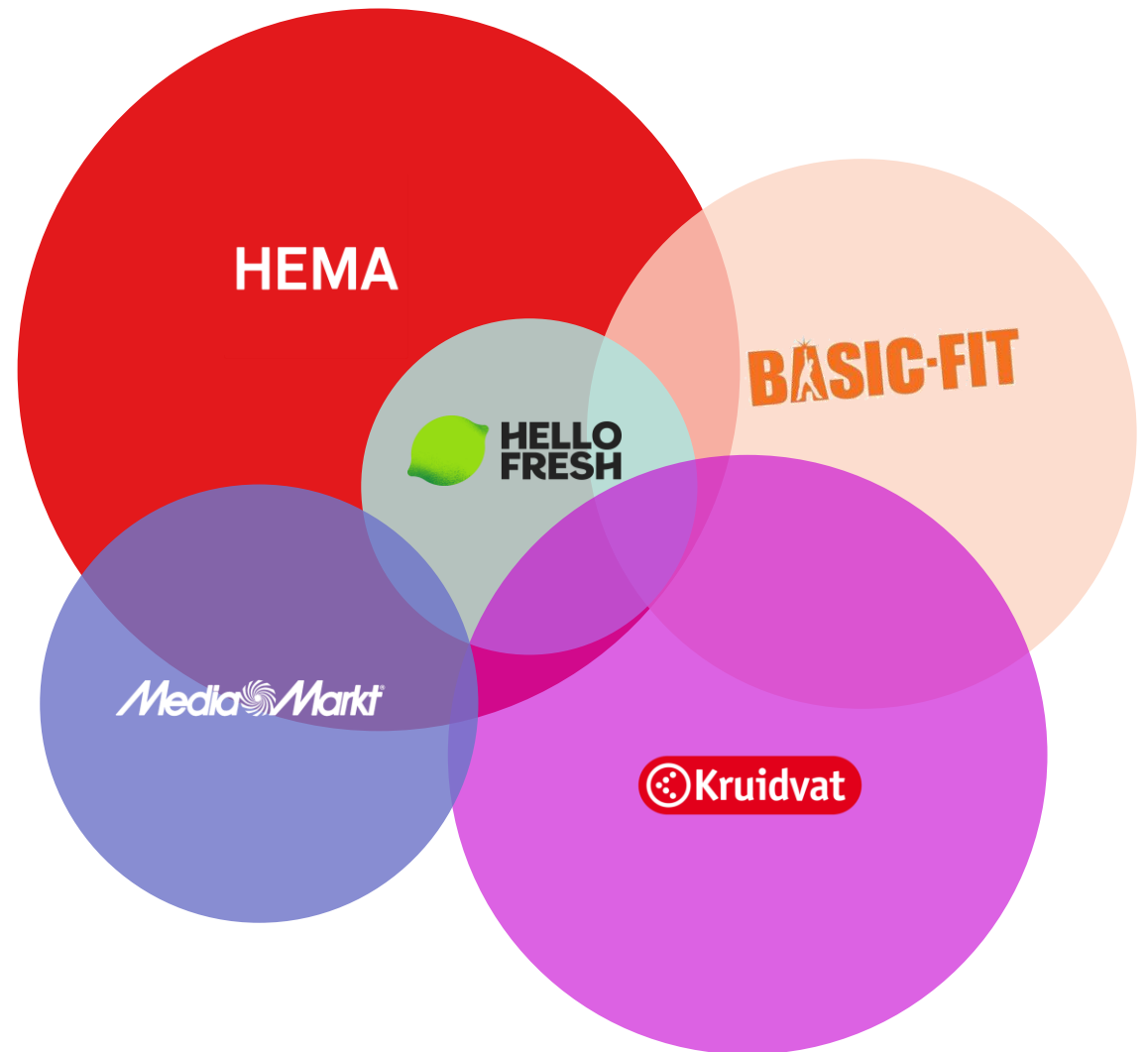


# RETAIL MEDIA

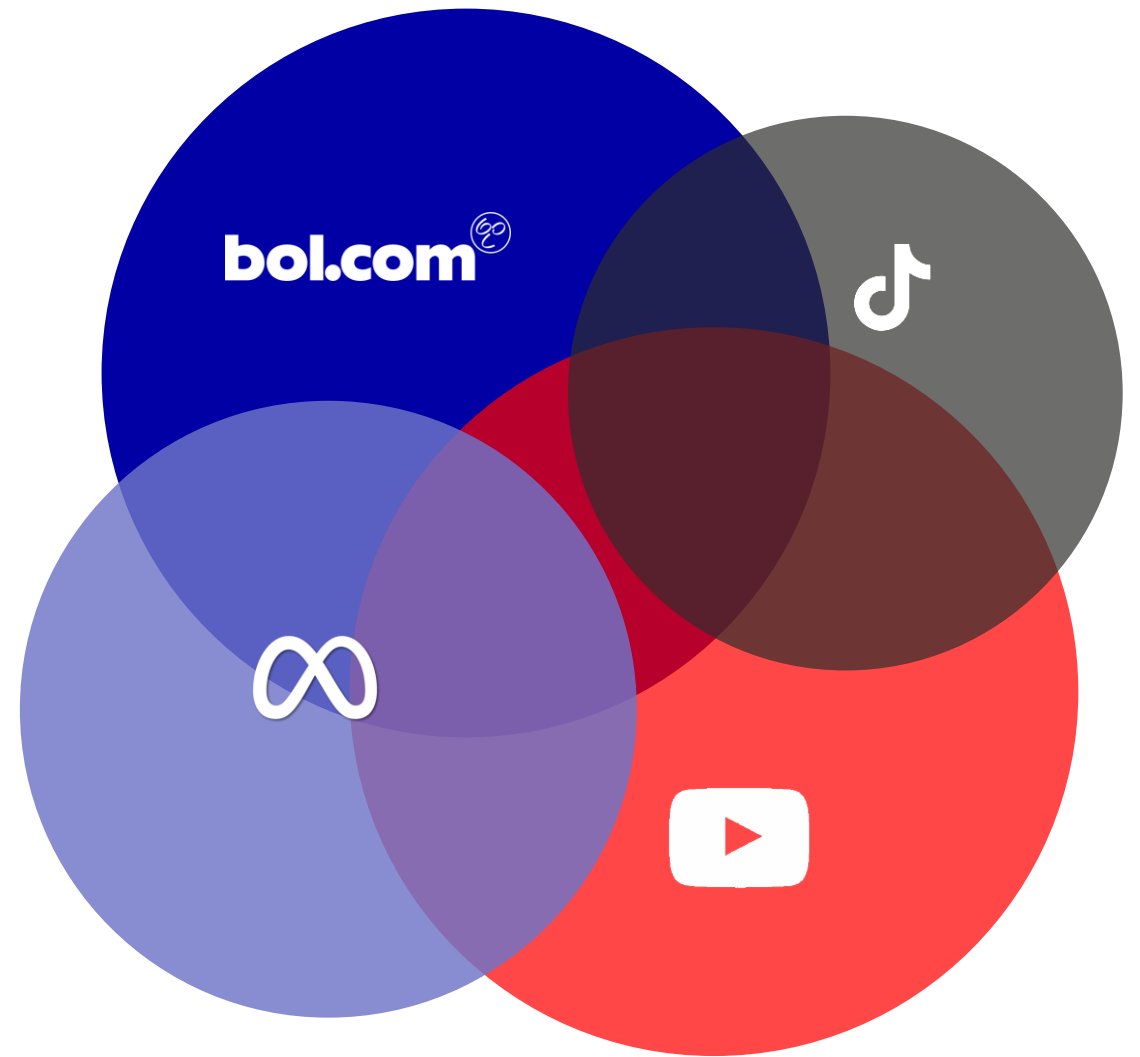
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# MASS MEDIA

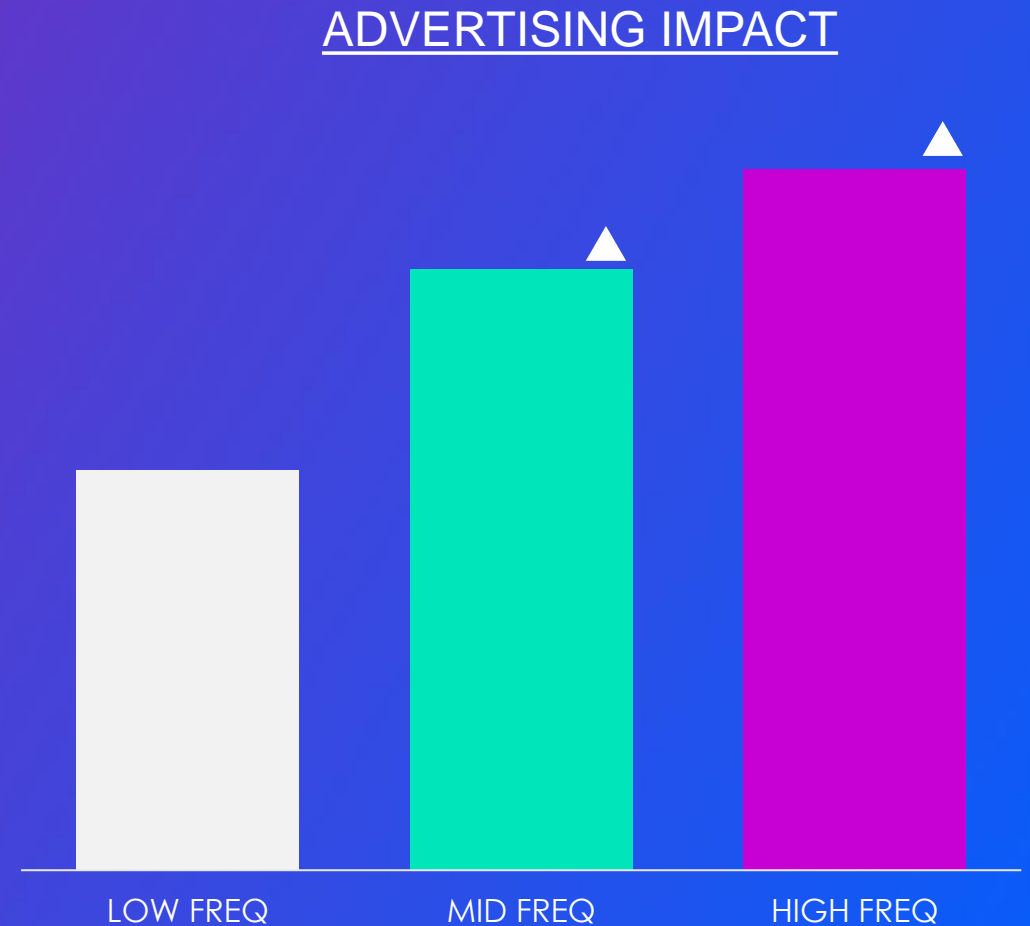
Broad range  
of retailers ►



**RETAIL MEDIA**  
=  
**MASS MEDIA**  
**ON-SITE &**  
**OFF-SITE** ►

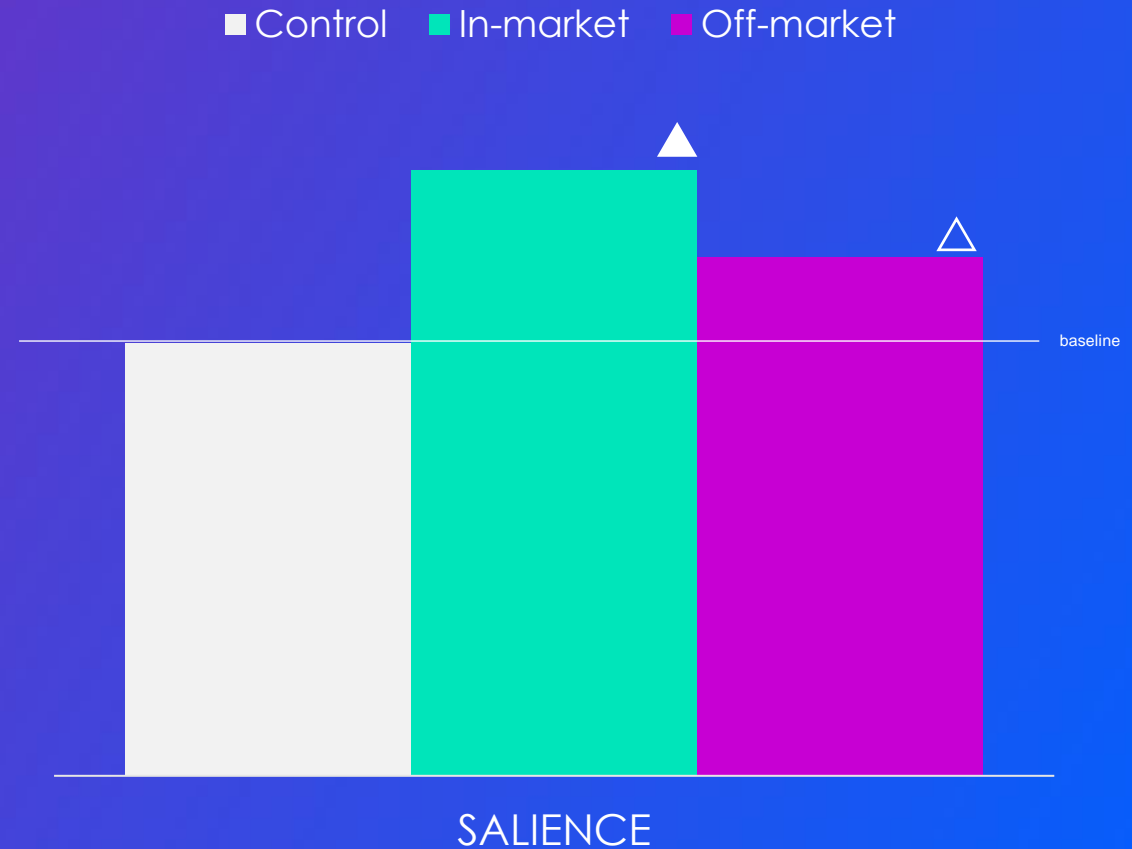


**Frequency  
matters**  
whether it's  
# touchpoints,  
duration or  
# weeks ►



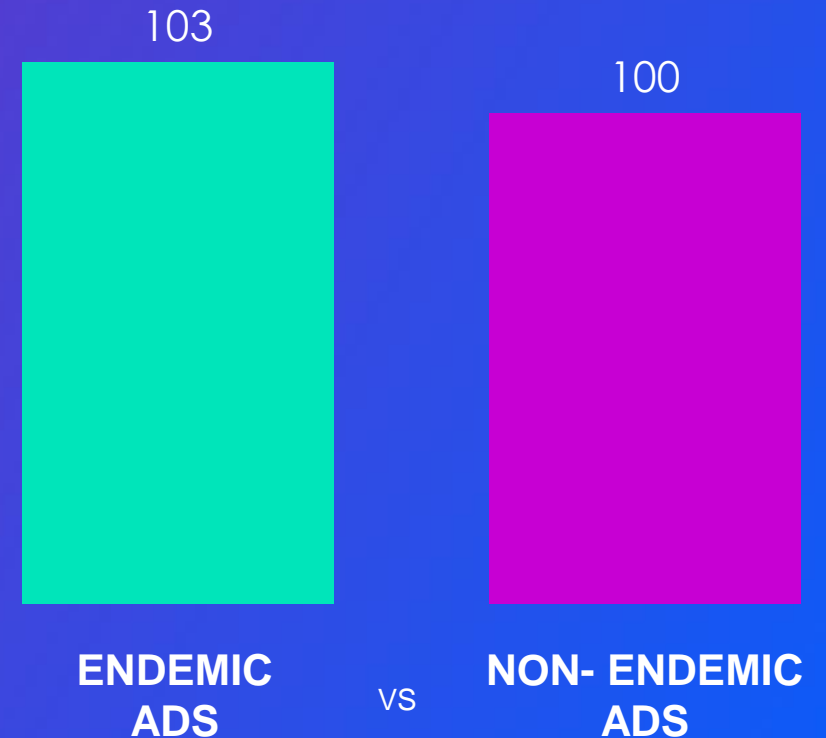


Retail Media  
ads have  
**more impact**  
on the in-market  
audience ►

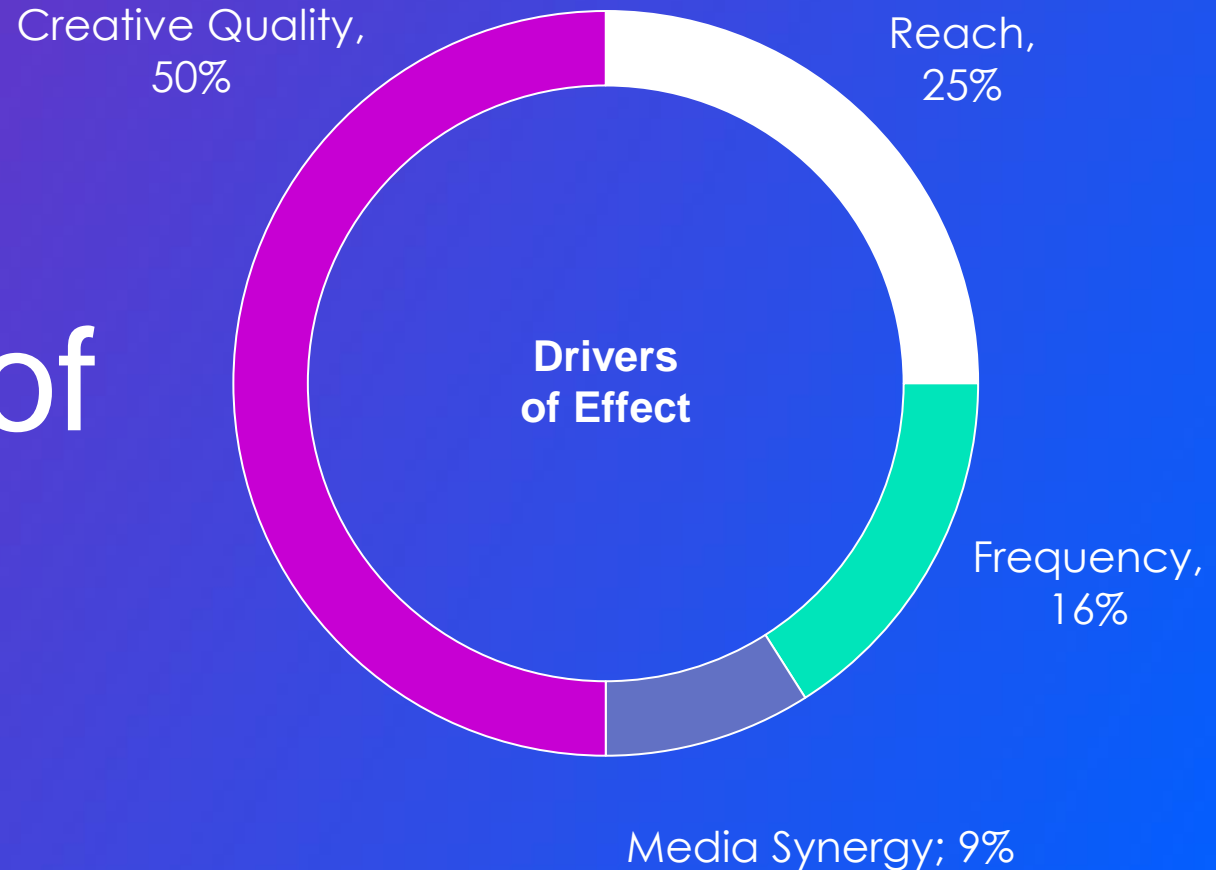


**The power of  
Retail Media;  
is all about trust  
& relevance ►**

ADVERTISING IMPACT



**Strong creative  
is crucial;  
on average it  
accounts for 50% of  
the effect in  
campaigns** ►



BEN &  
JERRY'S  
ENJOYABLE  
CONTENT  
SMART &  
EFFECTIVE ►



# COCA-COLA x AHRMS ▶



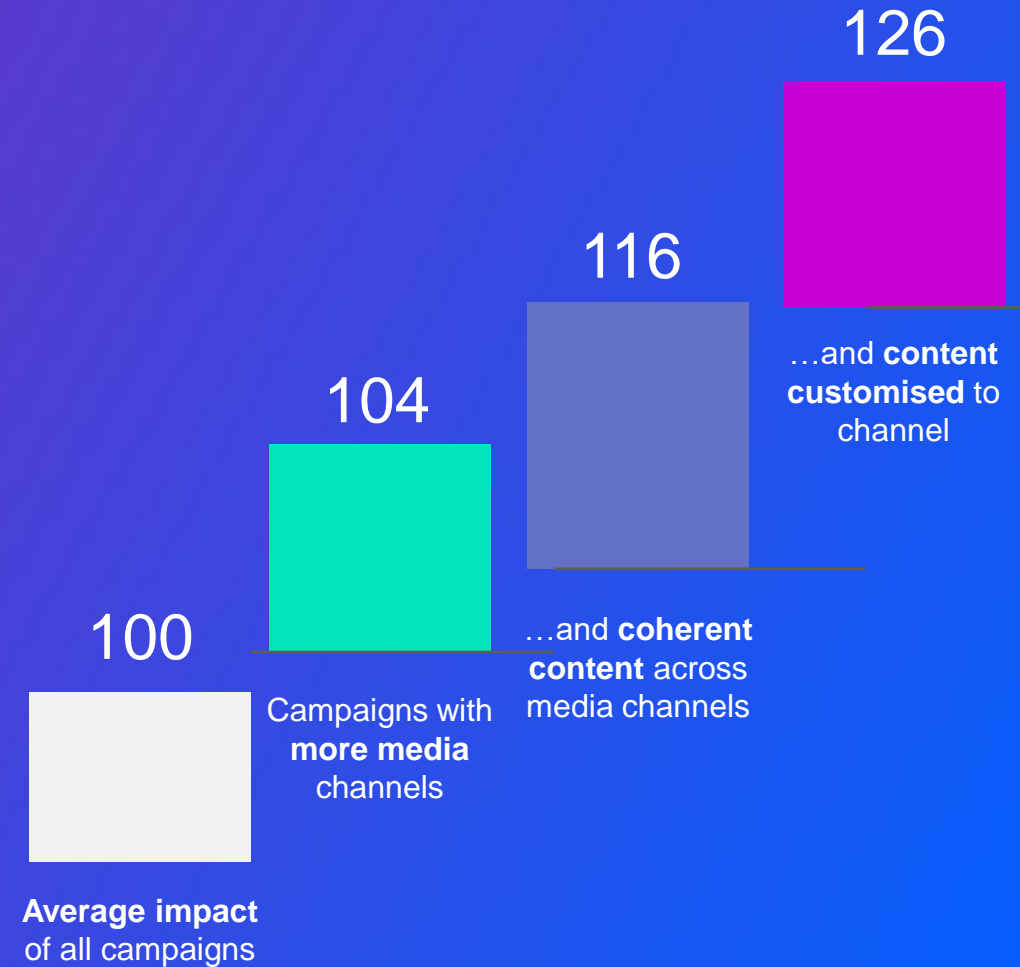


# STRONG CREATIVE FIT ACROSS CHANNELS





# Customizing content to the platform results in the highest lift ►





# HIGH ENGAGEMENT IN THE RIGHT CONTEXT ▶



# KANTAR

1. Use Retail Media to extend your **cross-media reach**
2. Unique opportunity to reach **In-Market audiences**
3. **Non-Endemic ads** can be just as effective as Endemic
4. The best content is **emotionally engaging**
5. Experiment with advertising in **new ways & contexts**



KANTAR

# BEERS powered by THX.

Meet us for drinks @ 17:15





# KANTAR

## Q&A



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**VERBORGEN KRACHT VAN RETAIL MEDIA:**  
Bouwen aan duurzame merkgroei