

Retail Media Playbook: A Data-Driven Guide for Marketers

April 2025



Retail Media Playbook

Key Takeaways

Capitalize on Retail Media's Rapid Growth

With retail media growing faster than any other ad channel, now is the time to establish a strong brand presence and stay ahead of the competition.

Select the Right Retail Media Partners

Map the landscape, analyze category investment trends, and assess competitive noise to make data-driven partnership decisions.

Strategically Budget for Maximum Impact

Benchmark against category spend, maintain an omnichannel perspective, and closely monitor competitor investments.

Navigate Seasonality with Precision

Strategically align ad spend with key sales periods and assess competitive flighting strategies to maximize visibility during high-impact moments.

Optimize your Channel Selection

Develop a channel strategy that leverages retailer strengths, purposefully balances onsite & offsite investments, and outmaneuvers competitors.

Implement a Full-Funnel Approach

Align investment, channel selection, and messaging to engage consumers and drive impact at every stage of the funnel.

Develop a Winning Mobile-Led Strategy

Prioritize high-engagement platforms and tailored messaging to extend reach and create authentic connections in a mobile environment.

Stay Ahead in Amazon's Retail Media Ecosystem

To capitalize on Amazon's dominant position, consider leveraging onsite display ads to engage high-intent shoppers near the point of purchase.

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This playbook is your strategic guide to winning at retail media

Retail media is the fastest growing force in digital advertising. Retailers are rapidly evolving into major advertising platforms, and brands that understand how to leverage this shift stand to gain a massive competitive edge.

Using data from Sensor Tower's Retail Media Insights, we'll uncover where brands are investing, which strategies are working, and how you can stay ahead. From category benchmarks to competitive flighting strategies, this guide will equip you with the knowledge needed to make well-informed, strategic decisions.

We'll explore data-driven approaches to:

- Evaluating Retail Partners
- Strategic Budget Planning
- Flighting Strategies
- Channel Optimizations
- And more!

Are you ready to unlock the full potential of retail media?

Introduction

What is Retail Media?

A retail media network (RMN) is a retailer-owned advertising platform where marketers can purchase digital advertising directly from a retailer, and leverage the retailer's first-party data for audience targeting and reporting. You know how you punch in your phone number every time you check out at the grocery store? That's one way that retailers collect their first party data. Retail media networks can include a wide range of advertising channels. The Interactive Advertising Bureau (IAB), an organization that develops standards for the digital advertising industry, categorizes retail media channels into three groups: OnSite, OffSite, and In-Store.

Across all digital channels within a retail media network, advertising efforts are often directed by a retailer's first-party shopper data, giving marketers access to highly targeted and otherwise inaccessible audiences.

3 Types of Retail Media



OnSite

Advertising that occurs on a retailer's owned properties, such as their website and mobile app. This can include display ads, search ads, sponsored product listings, and more.



OffSite

Advertising on a digital property that is not owned by the retailer, such as social media networks, connected TV, and third-party websites (e.g., Espn.com).



In-store

Advertising that is displayed in a physical retail store, such as product displays, signage, and video displays.

The Key Benefits of Retail Media

For all stakeholders, retail media is full of potential and possibilities. Outlined here are the most significant advantages for retailers and brands. Consumers also stand to benefit, as these capabilities all add up to a more personalized and relevant shopping experience.

This playbook is designed with brands in mind, providing data-driven insights to help maximize the full potential of retail media.

Key Benefits of Retail Media

For retailers

A New, High-Margin Revenue Stream

By selling their first-party data and digital real estate, retailers can diversify their revenue sources, often while earning higher margins than traditional retail sales.

Incremental Sales

Retail media has a proven track record of outperforming other media channels when it comes to conversion, leading to increased sales for retailers.

Remaining Competitive

The retail media industry is growing and evolving quickly. Retailers hoping to secure their share of advertising dollars will need to build out a compelling offering for marketers.

Brand Partnerships

Retail media is a chance for retailers to collaborate with brands in a deeply integrated way, providing value by creating omnichannel consumer experiences with a measured outcome.

For brands

Access to First-Party Data

By leveraging a retailer's first-party data for targeting, marketers unlock a high level of precision, delivering the right message to the right customer, often when they're in a high-intent mindset.

Closed Loop Measurement

With retail media, there's a direct link between ad exposure and sales, enabling precise measurement, even if a purchase occurs in-store.

Proximity to Point of Sale

Retail media engages consumers when they're already in a purchasing mindset. Ads within a retailer's ecosystem are more likely to feel relevant and drive conversion.

Omnichannel Experiences

Many RMNs offer a diverse range of channels that can address the full marketing funnel, enabling marketers to create holistic brand experiences that bridge in-store and online touchpoints.

Growth

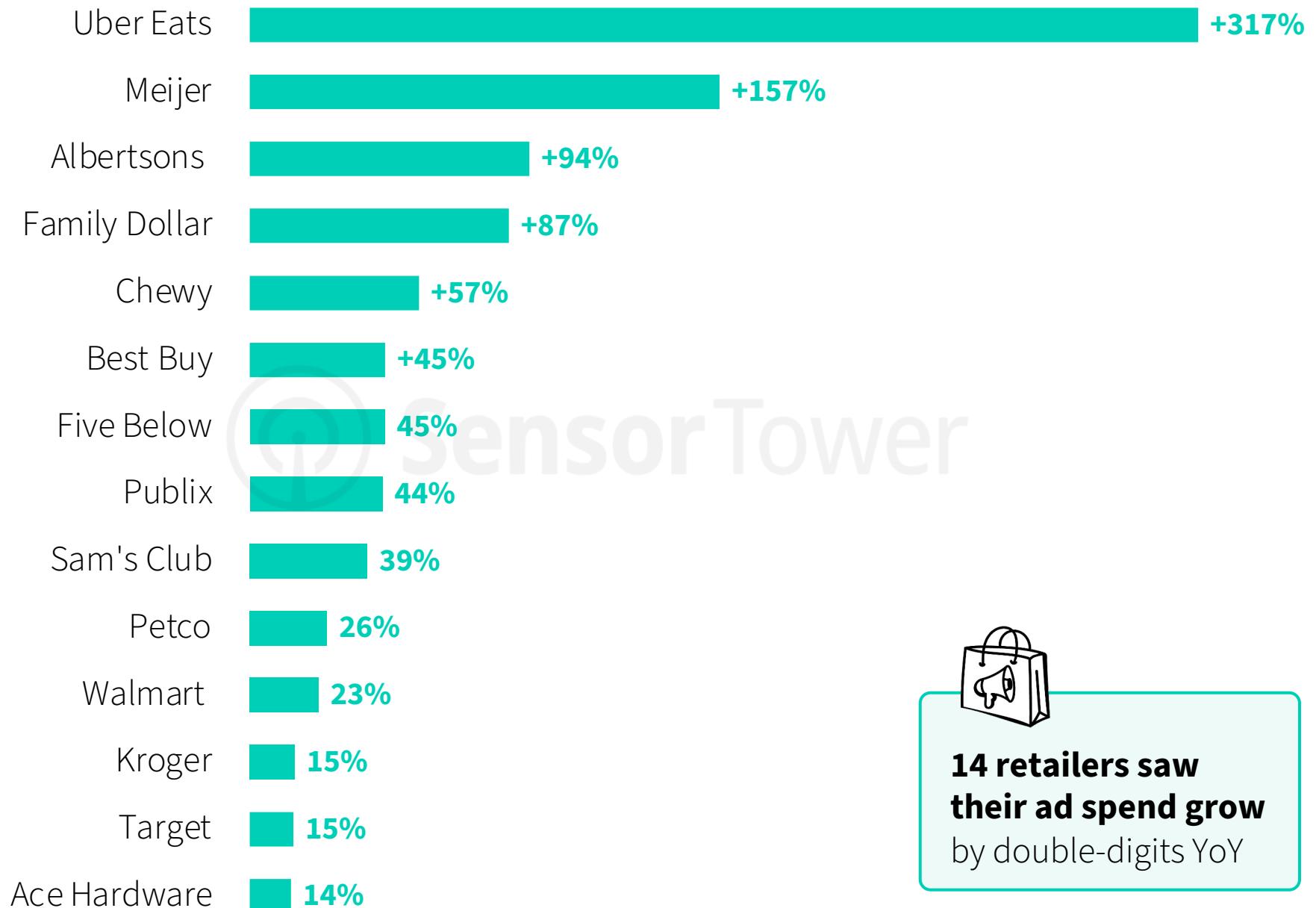
The Rapid Growth of Retail Media

As the fastest growing ad channel in the U.S., retail media is revolutionizing the advertising landscape. eMarketer referred to retail media as the third big wave in digital advertising, following search and social media.¹ They're predicting that total U.S. retail media ad spend will reach \$130 billion by 2028, up from \$55 billion this year. At that rate, retail media will represent nearly a quarter of all U.S. media spend by 2028.²

Data from Sensor Tower's Retail Media Insights shows that retail media growth is happening across the board, from emerging players like Uber Eats (+317%), Meijer (+157%), and Albertsons (+94%) to more established retailers like Walmart (+23%) and Target (+15%).

Fastest Growing Retail Media Networks

2H 2024 vs. 2H 2023*



14 retailers saw their ad spend grow by double-digits YoY

1. eMarketer, [Analyst Take: Why retail media is destined to be the biggest of digital advertising's three big waves](#)
2. eMarketer, [Retail media will account for almost a quarter of all US media ad spend in 2028](#)

Source: Sensor Tower's Retail Media Insights

*YoY growth compares 2H 2024 vs. 2H 2023, as all measured retailers have data starting from July 2023 or earlier.

About This Data

This playbook is powered by Pathmatics by Sensor Tower's Retail Media Insights, a marketing intelligence product that provides full visibility into the co-branded digital advertising ecosystem and retail media networks. Customized marketing insights reports empower brands with a view into spend, media mix, impressions and share of voice for display, video, mobile, OTT, and paid social across their selected retail partners and competitors.

Pathmatics by Sensor Tower's Retail Media Insights

Retail Media Insights is the first and only ad intelligence product to measure co-branded advertising on retail media, solving a critical blind spot for marketers.

[Learn More & Request a Demo Here](#)

Co-branded Advertising Examples:

Retailer: Chewy
Advertiser: Purina ProPlan

Retailer: Best Buy
Advertiser: Samsung

Retailer: Target
Advertiser: Colgate



Evaluating Retail Media Partners

Evaluating Retailers

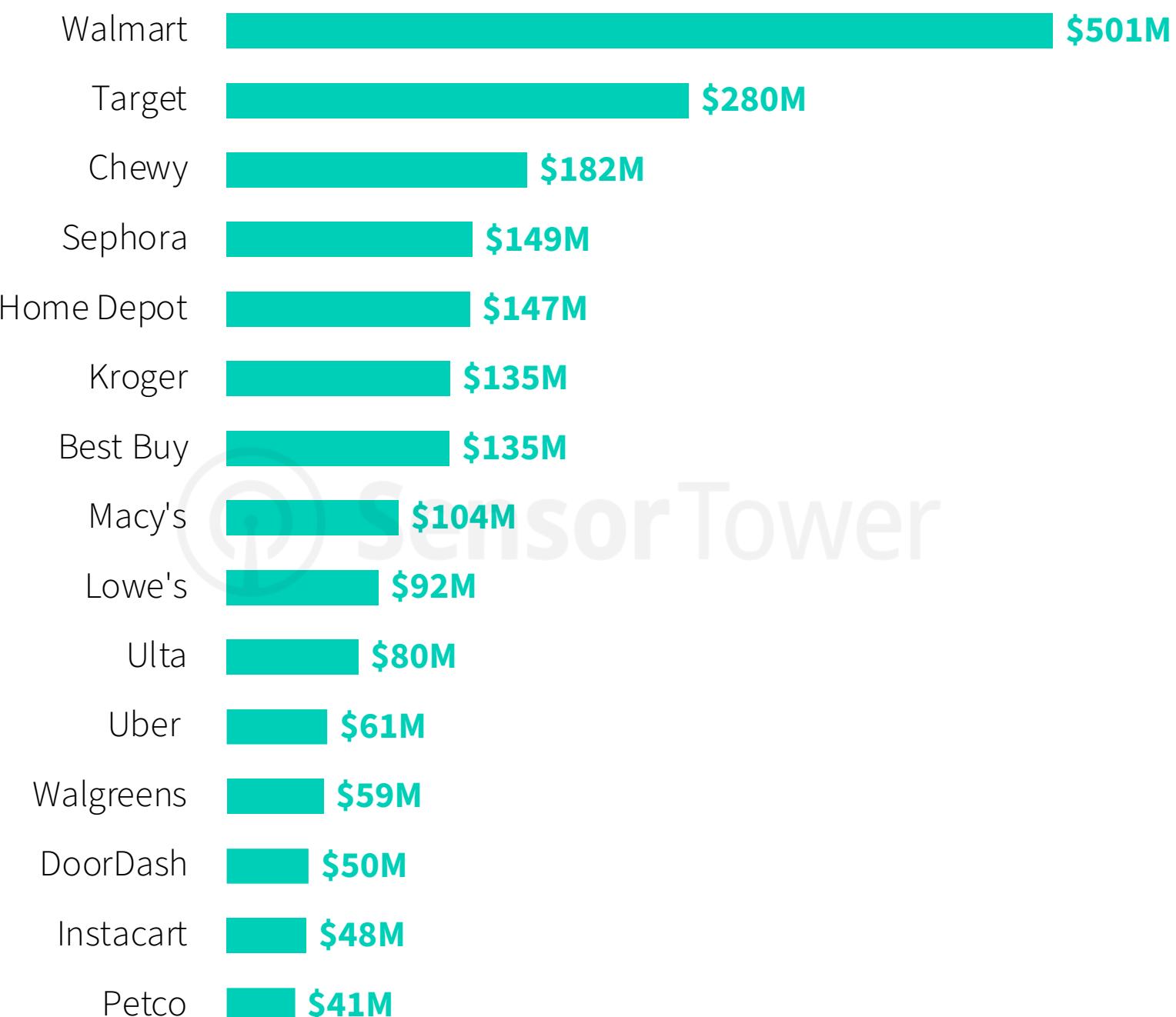
The Top RMNs: Who's capturing the most ad spend?

While growth in the retail media industry is happening fast, not all retailers are scaling at the same pace.

Walmart and Target are leading in terms of total ad spend, driven by their large shopper bases and their broad appeal to a wide range of brands. Notably, category-specific retailers like Chewy, Sephora, and The Home Depot aren't far behind, proving that more niche audiences can drive significant investment.

Top Retailers: 2024 Retail Media Spend

US Only, Top 15 Shown



Source: Sensor Tower's Retail Media Insights

Evaluating Retailers

RMNs by Category: Find the best strategic fit for your brand

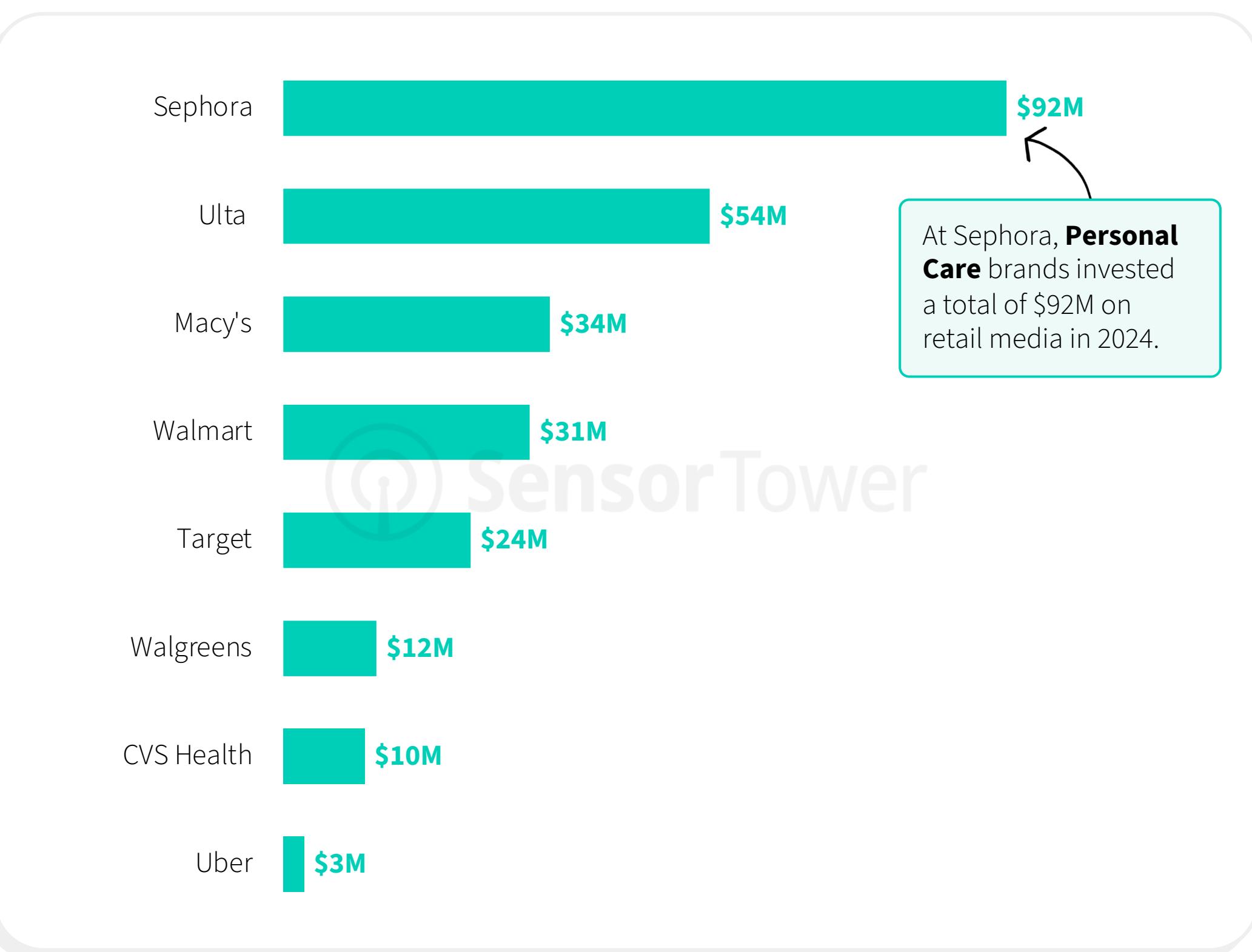
It's important to note that the top retailers vary significantly by product category. Often times, as shown in this example, specialty retailers are the top performers within their relevant categories.

In Personal Care, for example, Sephora and Ulta lead in ad spend, outperforming their big-box and drugstore competitors.

When evaluating retail media partners, it's important to consider the level of competitive noise within your category, as well as the breadth of data available for targeting. A cosmetics brand, for example, may find that Sephora's first-party data enables more precise targeting options than other retailers.

Personal Care: Top Retail Media Networks

2024 Spend



Source: Sensor Tower's Retail Media Insights

Evaluating Retailers

Identifying Strategic Opportunities:

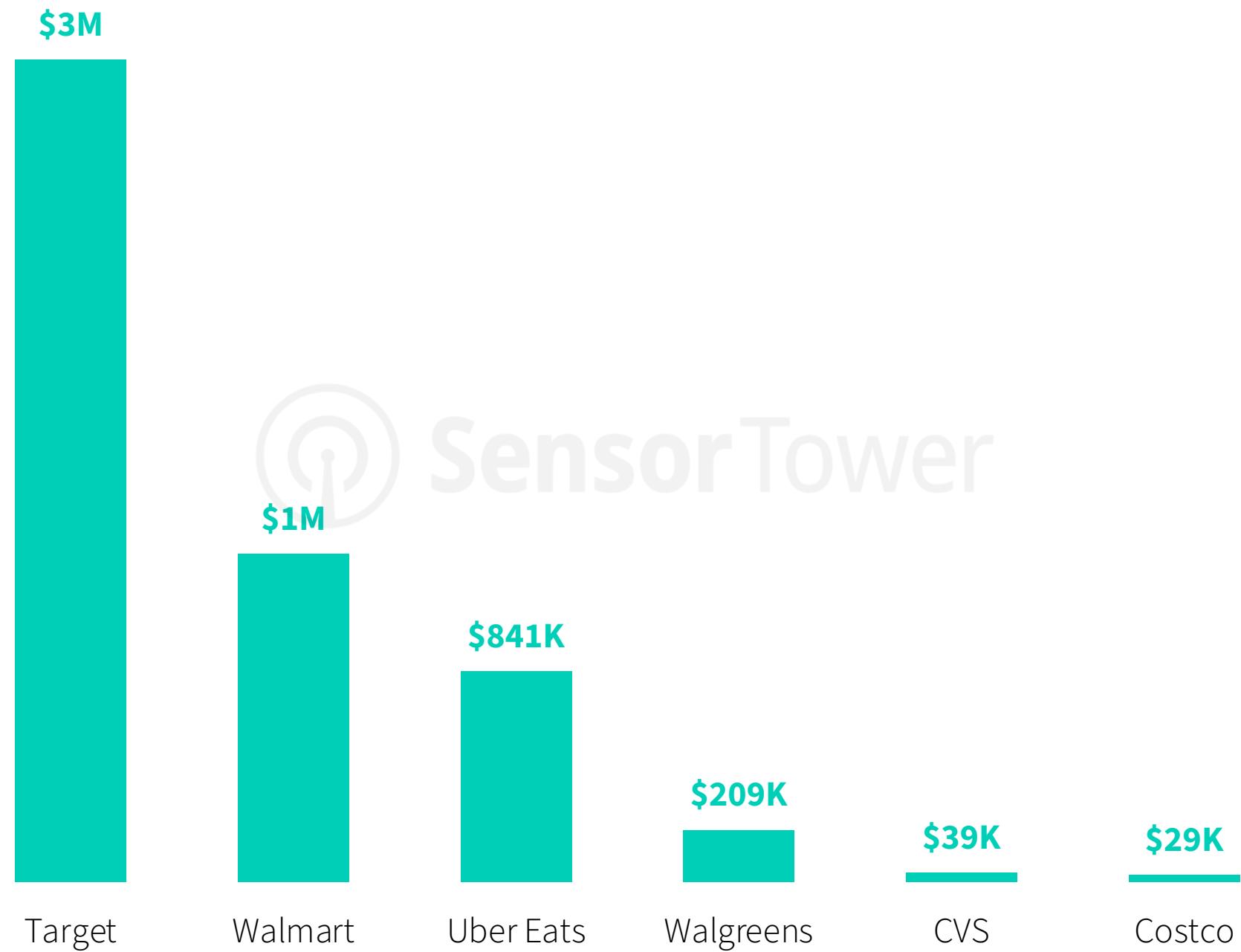
Where are your competitors investing?

When selecting retail partners, brands should also consider the retailer strategy of key competitors.

In this example, we see that Colgate prioritized their partnership with Target in 2024, spending \$3M with the retailer. For competing brands, this presents a strategic choice: go head-to-head with Colgate at Target or look to alternative retail partners like Walgreens and CVS? By analyzing competitor retail media investments, brands can identify high-potential partners and optimize their own retailer strategy.

Colgate: Retail Media Spend by Retailer

2024 Retail Media Spend, Top 6 Shown



Source: Sensor Tower's Retail Media Insights



Strategic Budget Planning

Budget Planning

Budget Setting:

How category benchmarks guide investment

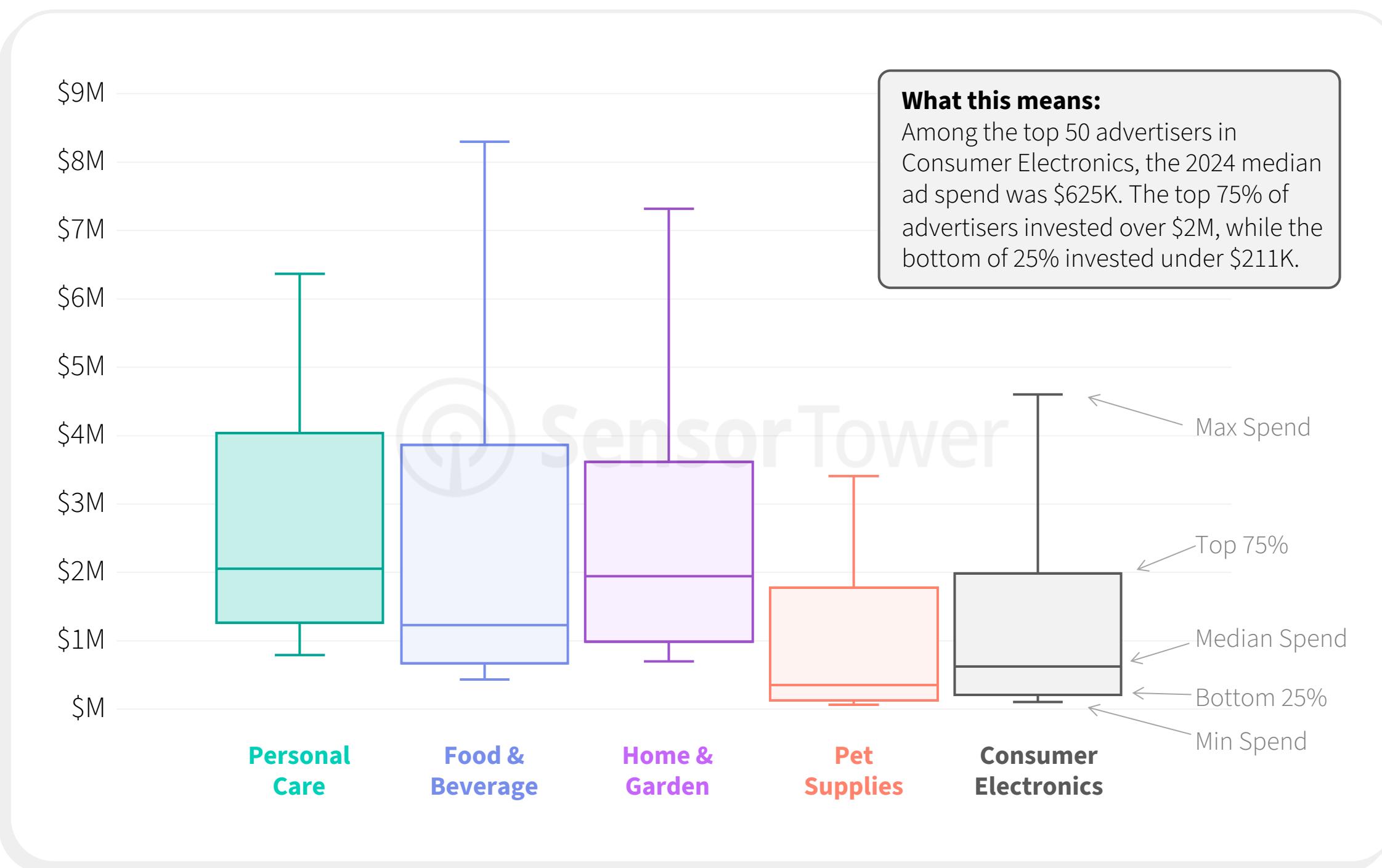
When setting a retail media budget, understanding category benchmarks can provide a valuable starting point. As shown here, retail media investment levels vary widely across product categories. For example, in 2024 the median spend among the top 50 Personal Care advertisers was \$2M, while the median spend in Food & Beverages was \$1.2M.

Even within a single category, retail media spend can range significantly from the top-tier spenders to those with a more modest budget allocation. Within Food & Beverages, for example, the top 25% of brands spent over \$3.8M, while the bottom 25% invested less than \$671K.

Evaluating competitive benchmarks can help brands set realistic budgets based on their competitive positioning and market ambitions.

Retail Media Spend: Category Benchmarks

Based on Top 50 Spenders Within Each Category, 2024



Excludes spend by retailers and advertisers not measured by Sensor Tower

Each category is based on the top 50 retail media spenders in 2024. Outliers are not shown.

Budget Planning

An Omnichannel View:

Retail media as a share of total digital ad spend

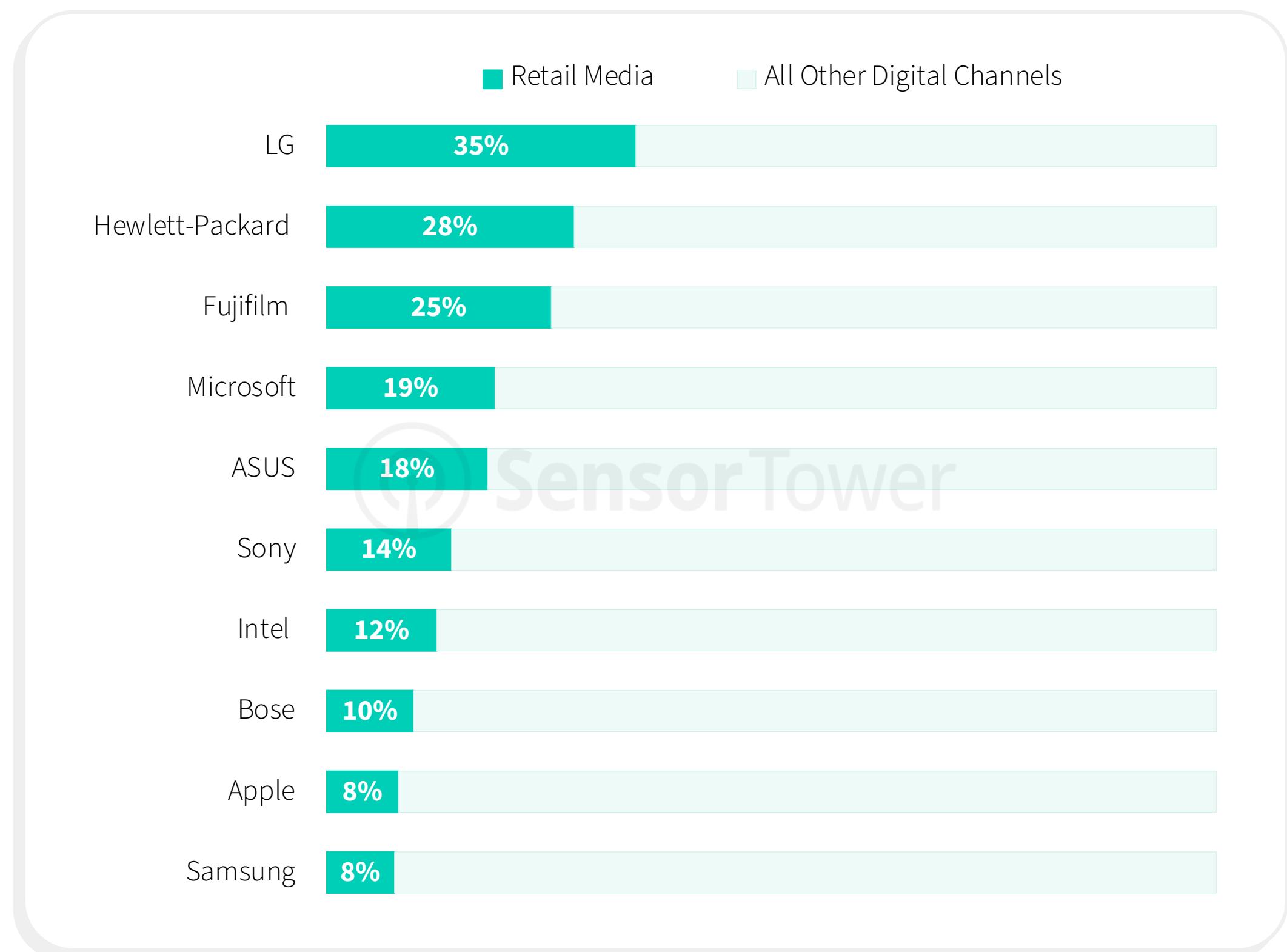
Another way to approach budgeting is to determine what portion of your total digital advertising spend should go toward retail media.

In this example, we're looking at leading Consumer Electronics advertisers to see how they've handled this allocation. LG, for instance, allocated 35% of their total digital advertising dollars to retail media, demonstrating their strong commitment to the channel. On the lower end of the range, retail media represented 8% of dollars for Apple and Samsung.

This wide range underscores the importance of evaluating competitive retail media spend within the broader context of a brand's overall digital strategy.

Consumer Electronics: % of Retail Media Spend

2024, Retail Media as a % of Total Digital Ad Spend



Source: Sensor Tower's Retail Media Insights

Budget Planning

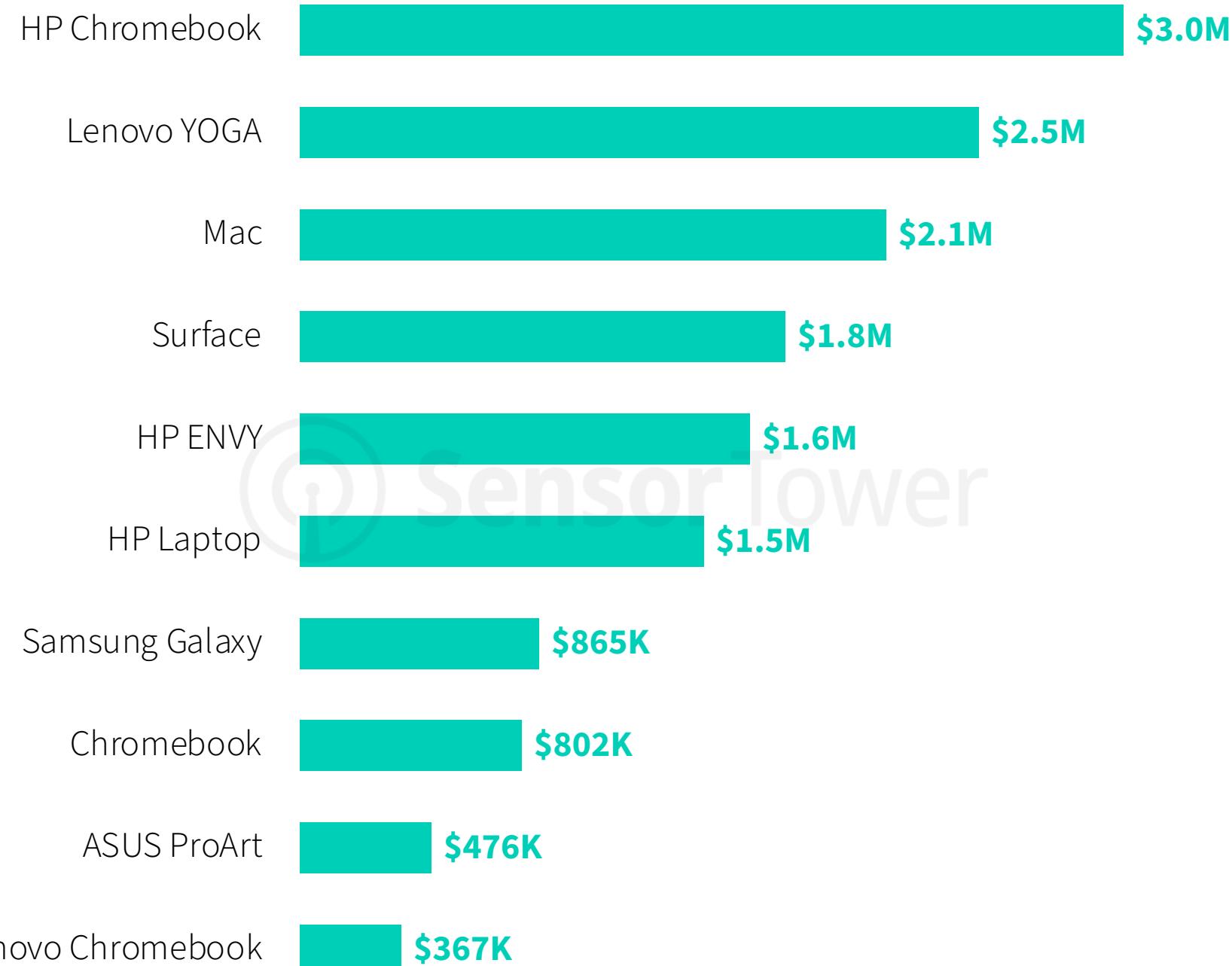
A Bottom-Up Approach: Budget planning at the product level by retailer

When setting a retail media budget, it's critical to understand how much investment is needed to remain competitive within a specific product category at a given retailer.

While we examined spend at the advertiser level previously, this represents a deeper dive into product-level spend. In this example, a laptop brand might be asking, how much do I need to spend at Best Buy in order make an impact and secure an effective share of wallet (SOW)?

Top Laptop Advertisers at Best Buy

2024 Retail Media Spend



Source: Sensor Tower's Retail Media Insights





Navigating Seasonality

Seasonality

Retail Media Timing:

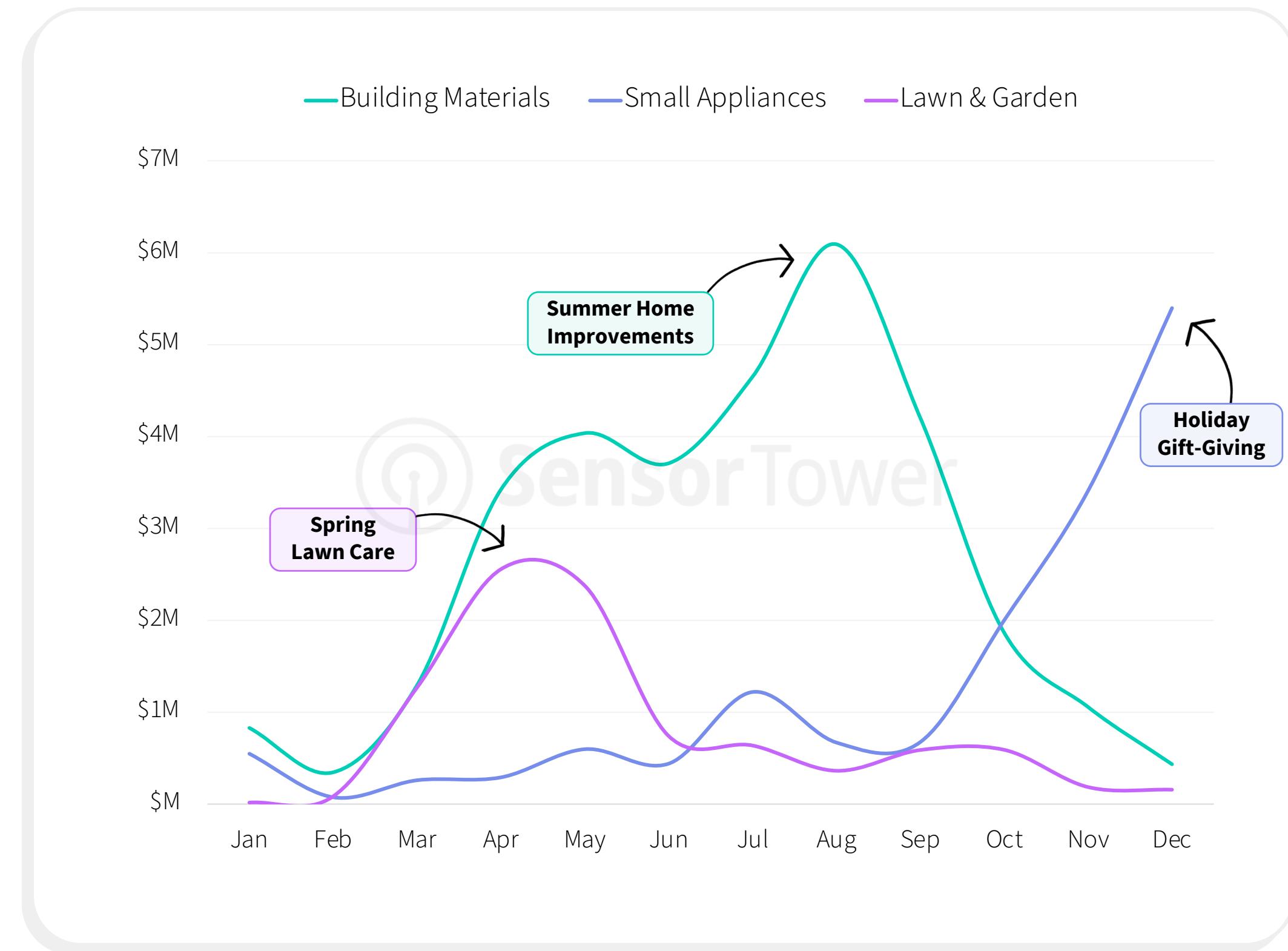
How seasonal trends influence ad spend

Once you've identified retail partners and established some budget parameters, a natural next question is, *when* should I advertise? Retail media can be heavily influenced by seasonality, as competition intensifies around key shopping periods.

This graph highlights monthly spend trends within the Home & Garden sector, demonstrating how competitive levels can fluctuate based on seasonal events, like spring lawn care and summer home improvements. To maximize impact, brands must consider the unique patterns for their category and make strategic decisions about when to compete and what it will take to make an impact.

Seasonality: Monthly Home & Garden Spend

2024 Retail Media Spend by Sub-Category



Source: Sensor Tower's Retail Media Insights

Seasonality

Flighting Strategies:

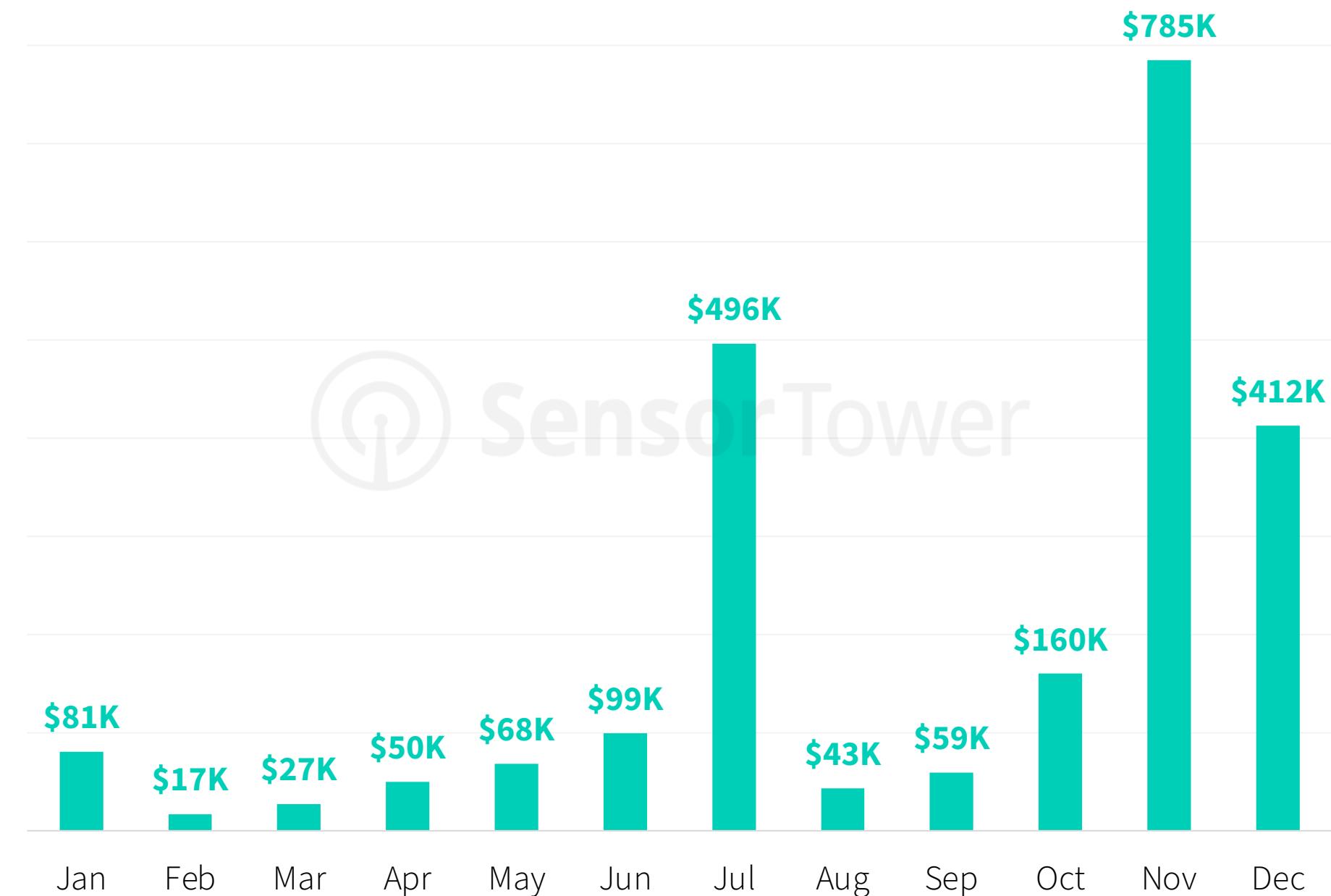
Evaluating the timing of key competitors

As an example of one brand's flighting strategy, here we're looking at SharkNinja, a leading advertiser for Small Appliances. In 2024, the brand concentrated 74% of spend into just three months: July, November, and December – aligning with key promotional periods such as summer sales and holiday shopping. Outside of these peak months, SharkNinja maintained a lower but consistent spend level, using an always-on strategy to sustain visibility.

For advertisers who are setting their own flighting strategies, Retail Media Insights can enable similar views for your most important competitors, empowering you to anticipate their moves and plan accordingly.

SharkNinja: Monthly Small Appliances Spend
2024 Retail Media Spend

Shark | NINJA



Source: Sensor Tower's Retail Media Insights

Seasonality

Competing When it Matters Most:

SOW planning during key promotional periods

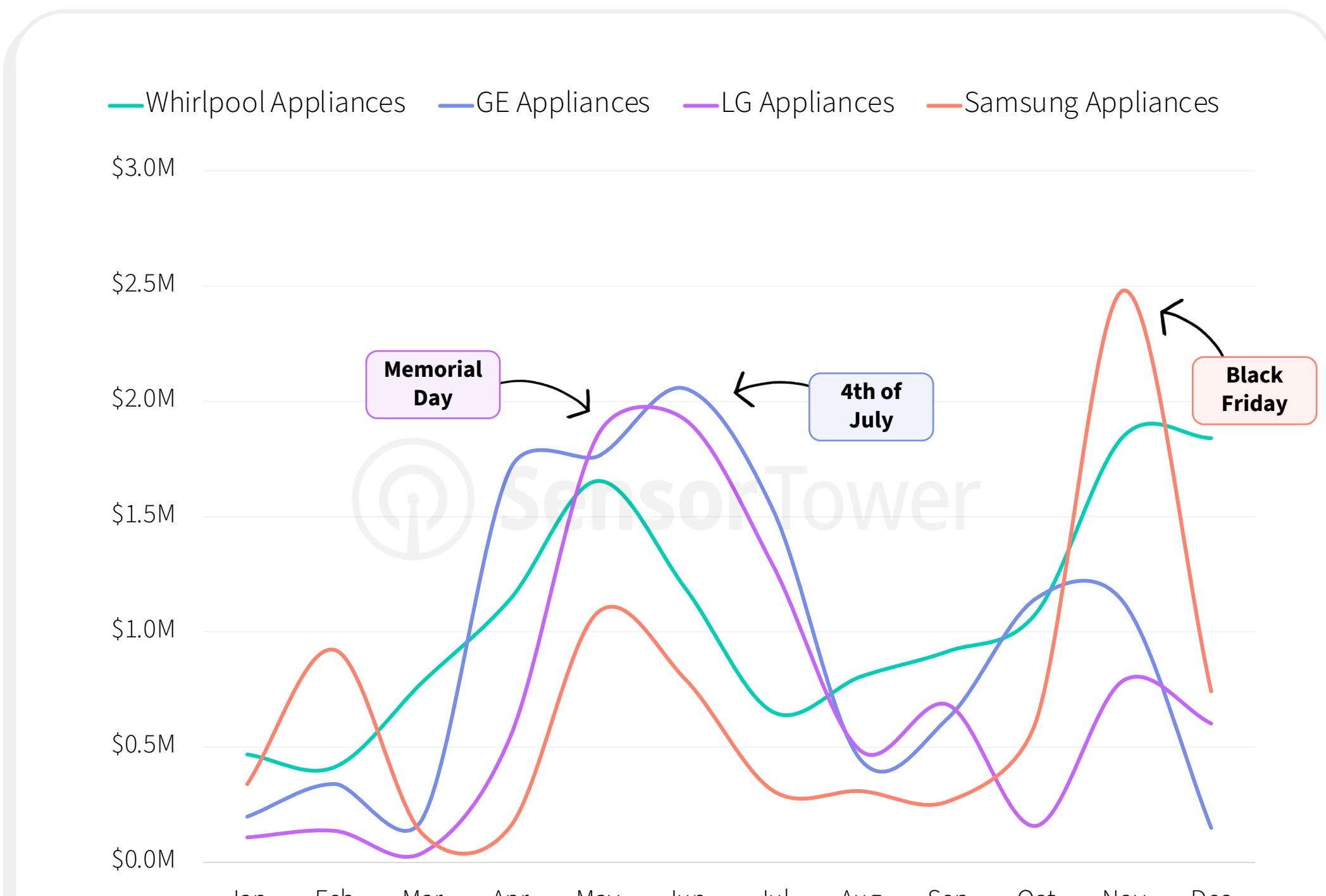
Related to seasonal trends, retail media spend often spikes significantly during major promotional periods. For example, the Home Appliances category is largely driven by key sales events like Memorial Day, Fourth of July, and Black Friday.

As retailers leverage promotions to fuel sales, brands should evaluate how much investment is needed to maintain a competitive share of wallet (SOW) during these key windows.

For brands, Retail Media Insights can help answer questions like, how much should I spend at Lowe's to have high visibility surrounding Memorial Day?

Home Appliances: Key Promotional Periods

2024 Monthly Retail Media Spend



Source: Sensor Tower's Retail Media Insights



Optimizing Channel Selection

Channel Selection

OnSite vs. OffSite: Where should you invest?

When it comes to digital advertising, retail media channels fall into two categories: OnSite (ads displayed directly on a retailer's website) and OffSite (ads served through external platforms like social media and OTT).

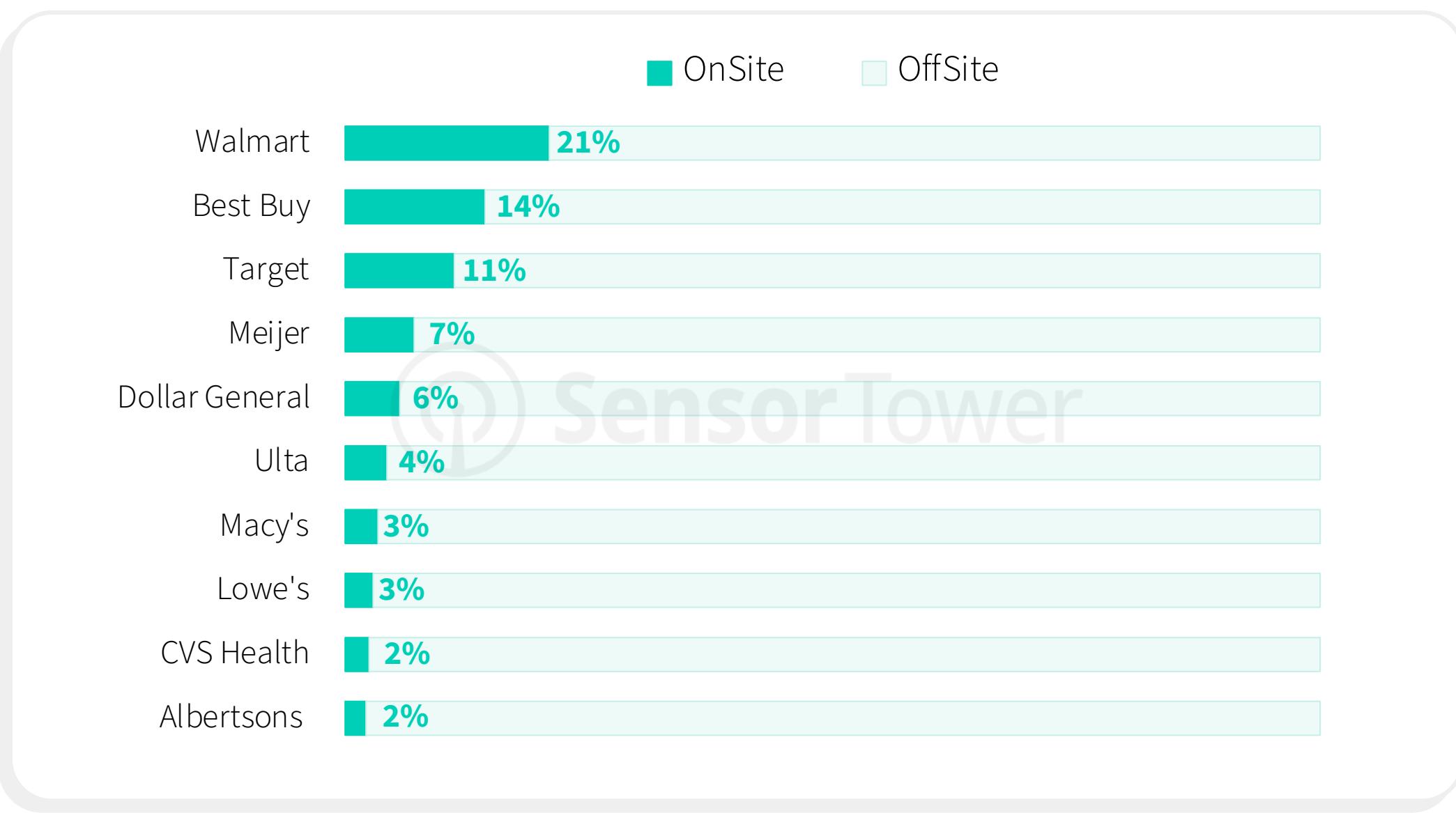
For advertisers, OnSite ads are often leveraged to connect with consumers when they're already in a high-intent mindset, close to the point of purchase. Walmart, Best Buy, and Target have emerged as leaders in the OnSite space. As shown here, 21% of Walmart's 2024 ad spend ran on their own website. Comparatively, OffSite channels typically offer broader reach while still utilizing a retailer's first-party data for precision targeting.

Brands should balance these options based on campaign goals. Consider using OnSite channels for reaching high-intent shoppers and OffSite for full funnel visibility.

Source: Sensor Tower's Retail Media Insights

OnSite vs. OffSite Spend

% of 2024 Retail Media Spend, Top 10 OnSite Retailers Shown



Definitions:

Onsite: Ads displayed on the retailer's website (for example, ads displayed on Walmart.com). Note that this includes onsite display only, not inclusive of search, sponsored results, or proprietary ad units per retailer.

Offsite: Ads displayed on other websites, social media platforms, or OTT. For example, this includes co-branded advertisements on Facebook, TikTok, and YouTube.

Channel Selection

The Top Retail Media Channels:

Where are brands investing?

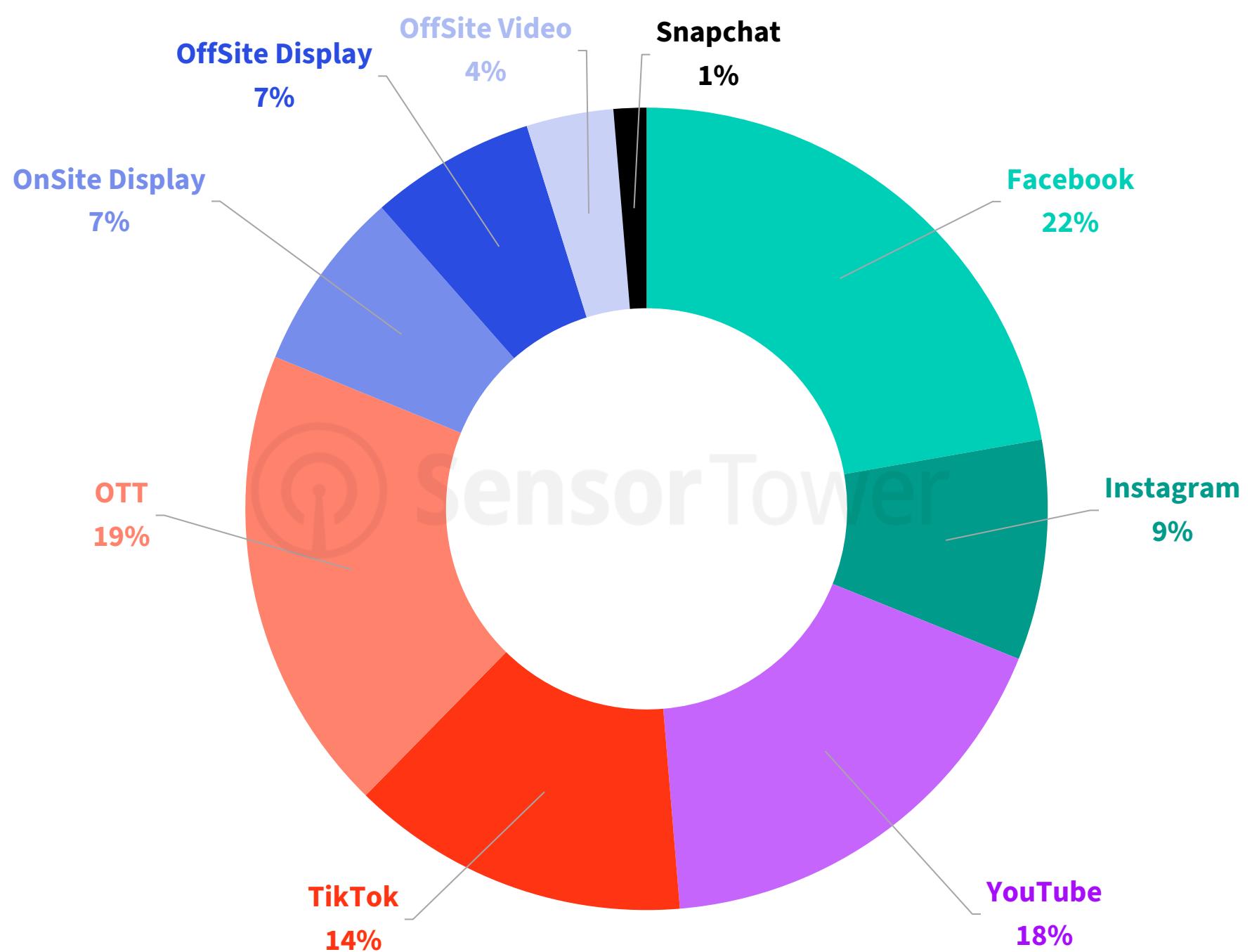
Retail media networks can be comprised of a wide range of digital media channels, each playing a unique role in reaching consumers.

In 2024, Facebook captured the largest share of retail media ad spend (22%), followed closely by three video-driven platforms: OTT (19%), YouTube (18%), and TikTok (14%).

In the following slides, we'll dive deeper into these channels and explore how Retail Media Insights can help brands develop data-driven channel strategies.

Spend by Channel

2024, % of Retail Media Spend, US Only



Source: Sensor Tower's Retail Media Insights

Channel Selection

The Fastest Growing Channels:

How is retail media evolving?

As the retail media landscape matures, brands are refining their channel mixes and retailers are diversifying their network offerings. Combined, these two forces are driving a constant evolution in terms of retail media spend by channel.

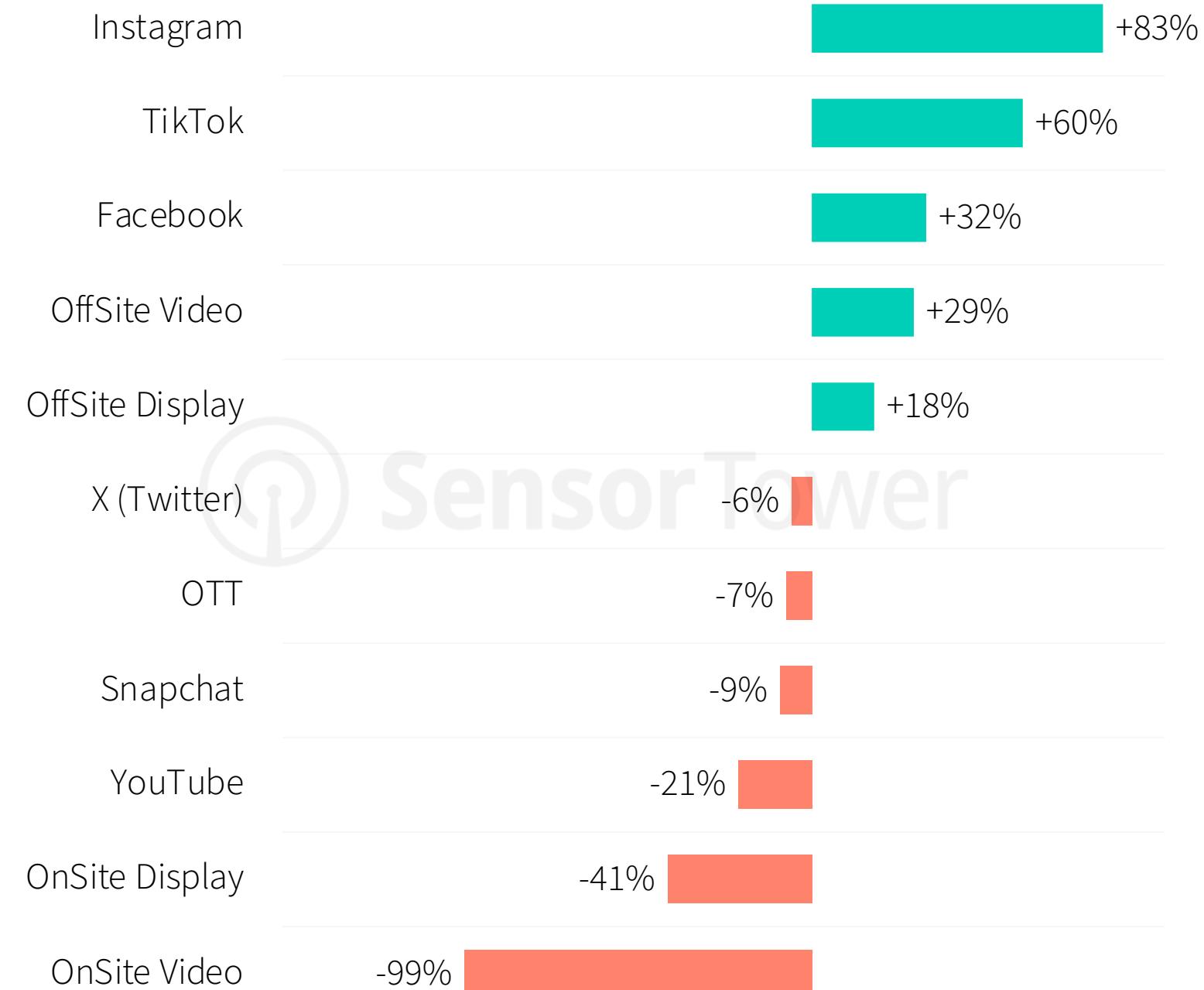
As shown on the right, Instagram was the fastest growing channel in the second half of 2024, seeing an ad spend increase of +83%. Notably, OnSite channels saw the largest YoY declines, suggesting a potential industry shift toward OffSite engagement. Keeping a pulse on these trends can help brands remain competitive in a rapidly evolving marketplace.

Source: Sensor Tower's Retail Media Insights

*YoY growth compares 2H 2024 vs. 2H 2023, as all measured retailers have data starting from July 2023 or earlier

Fastest Growing Retail Media Channels

2024 Retail Media Spend, YoY (2H 2024 vs. 2H 2023*)



Channel Selection

Retailer Media Mix:

Optimizing channel strategy by retailer

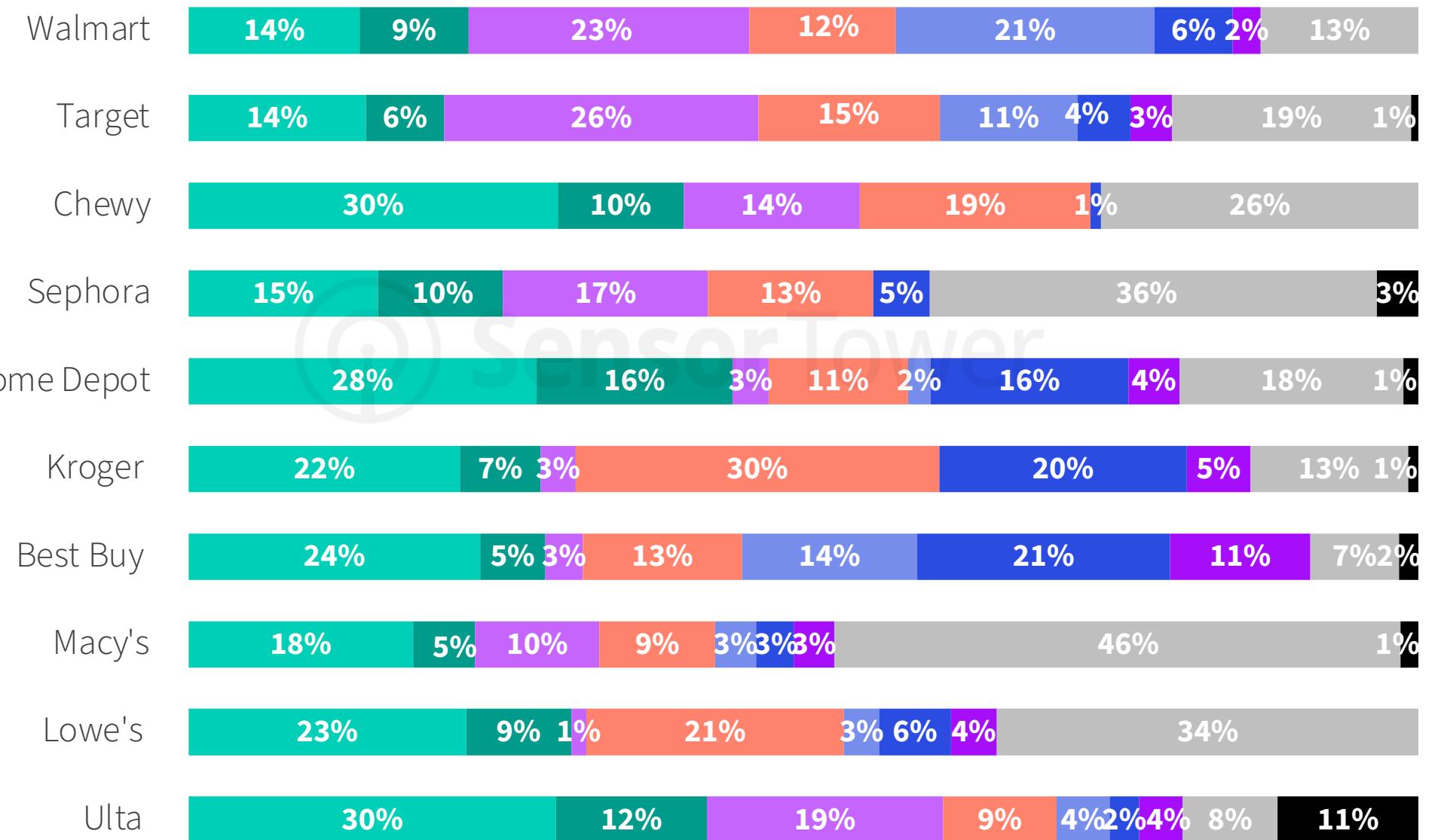
On retail media, channel mixes should be customized by retailer, playing to each retailer's strengths while also considering competitive activity.

As shown here, retailers leaned into their own preferred channels in 2024. At Walmart and Target, for example, TikTok emerged as the #1 channel. At Kroger, over a quarter of all dollars ran on YouTube, demonstrating their emphasis on video content. At Ulta, 11% of ad spend ran on Snapchat, aligning with their younger beauty-focused demographic.

Channel Mix by Retailer

2024, % of Retail Media Spend

■ Facebook ■ Instagram ■ TikTok ■ YouTube ■ OnSite Display ■ OffSite Display ■ OffSite Video ■ OTT ■ Snapchat



Source: Sensor Tower's Retail Media Insights

Channel Selection

Channel Strategy:

How are competitors investing at key retailers?

Going one level deeper, a brand can also evaluate the channel mix of their key competitors at an individual retailer. In this example, we're looking at the top Snacks advertisers at Walmart. As shown, channel strategies varied considerably by brand. While Jif ran almost exclusively on TikTok, Simple Mills relied heavily on Facebook.

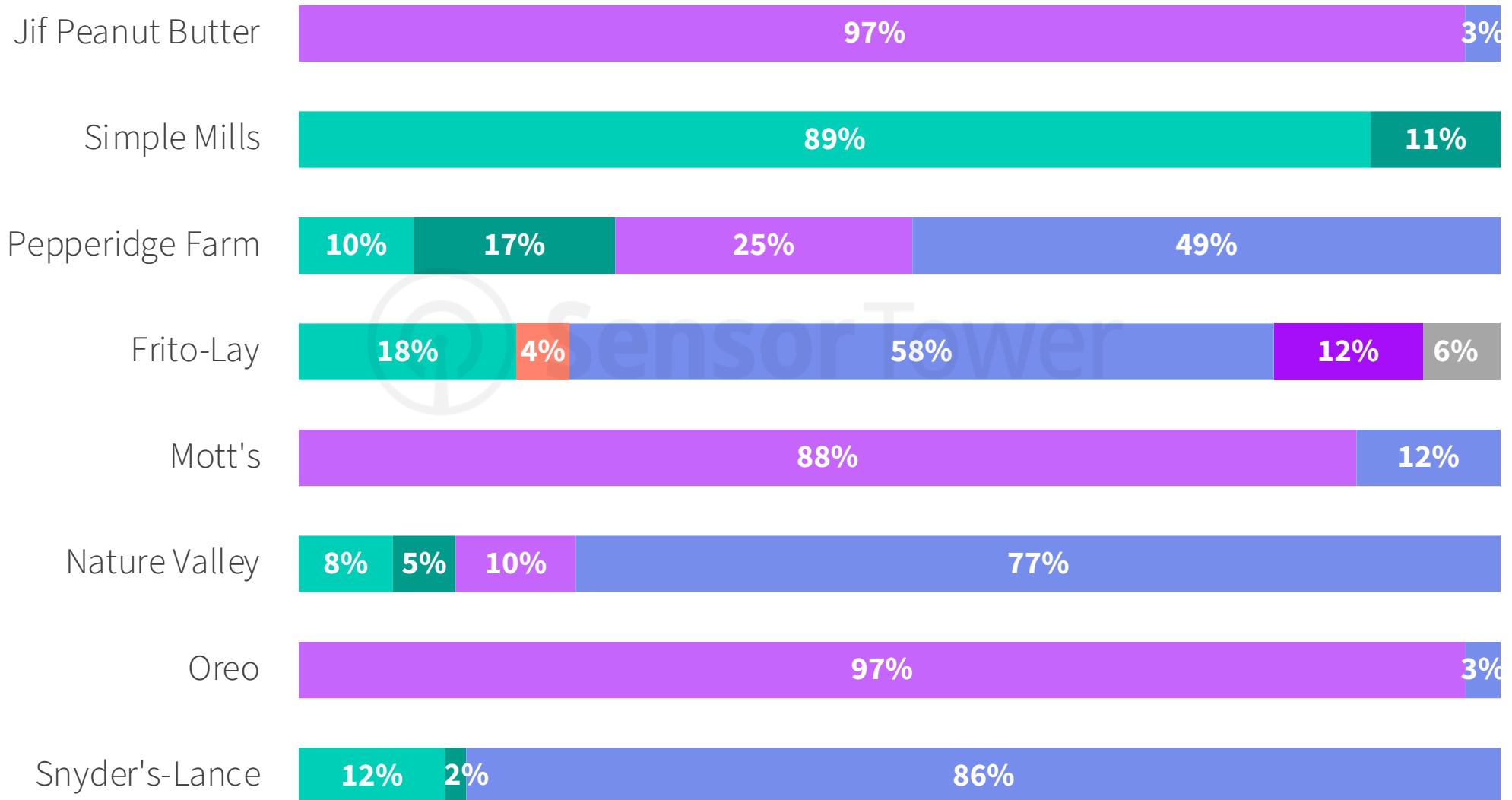
A competitive brand in this category, such as Ritz Crackers, could use this view to inform their own channel strategy at Walmart.

Snacks at Walmart: Channel Mix

% of 2024 Retail Media Spend, Top Advertisers Shown



■ Facebook ■ Instagram ■ TikTok ■ YouTube ■ OnSite Display ■ OffSite Video ■ OTT



Source: Sensor Tower's Retail Media Insights

Channel Selection

Channel Deep Dive:

Creative strategies on Instagram

Understanding creative types by platform can help brands understand shifting trends and how to differentiate from competitors. In this case, we're taking a closer look at Instagram, 2024's fastest growing channel on retail media.

On Instagram in 2024, Purina Petcare was the leading advertiser with a total investment of \$7.1M, outpacing all other brands by nearly 4x. A deep dive into creative strategies shows that top advertisers often prioritized Story Posts, Reel Posts, and Video Posts. In Purina's case, Story Posts represented 50% of their spend.

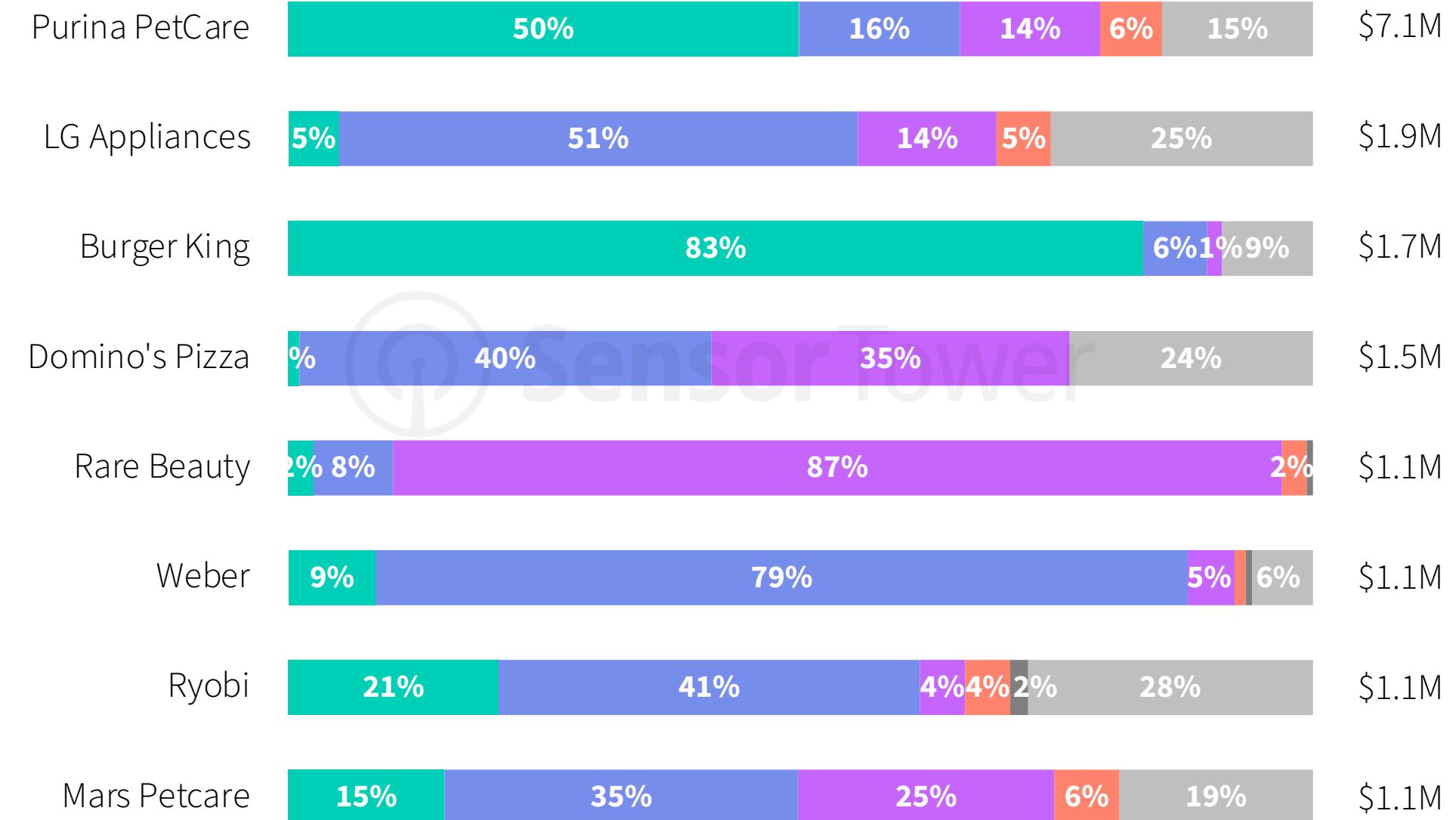
For brands that are evaluating their own Instagram strategy, Retail Media Insights can provide similar deep dives among their custom competitive set.

Instagram: Creative Types Among Top Advertisers

2024, % of Retail Media Spend



■ Story Post ■ Reel Post ■ Video Post ■ Photo Post ■ Other ■ Unknown



Source: Sensor Tower's Retail Media Insights

There are a variety of reasons for "unknown" creative types.

If a creative type cannot be applied, it's marked "unknown"

Channel Selection

Channel Deep Dive:

Who's driving the growth of TikTok?

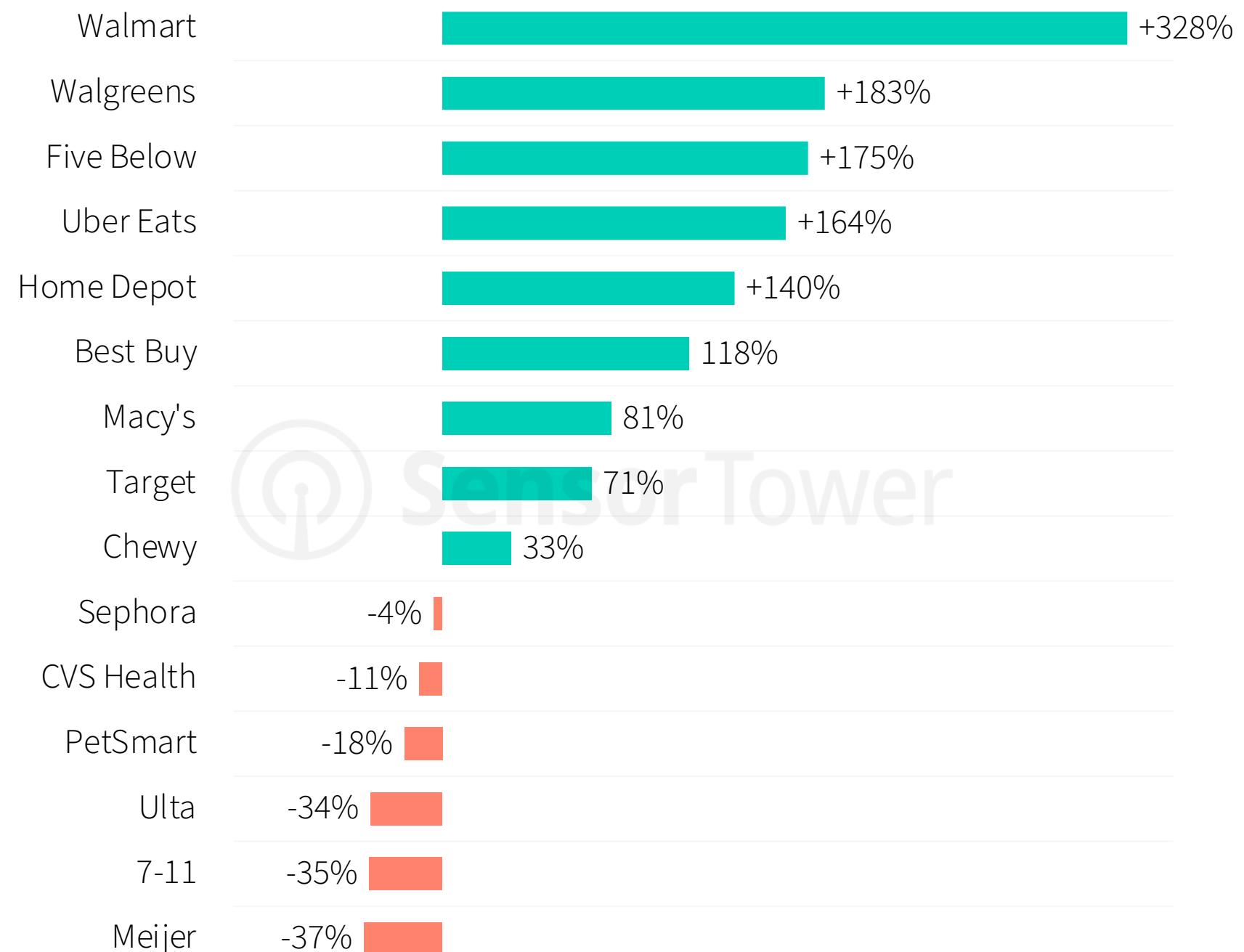
TikTok emerged as one of the breakout stars of retail media in 2024, as nine retailers dialed up their TikTok spend YoY.

The largest growth (+328% YoY) and largest total spend (\$114M) occurred at Walmart, where TikTok represented 23% of total dollars. For context, TikTok was the #1 channel at both Walmart and Target in terms of 2024 ad spend.

For advertisers, it's important to keep a pulse on the constantly evolving industry. Change in retail media is happening fast, especially when trends are supported by large players like Walmart and Target.

TikTok: YoY Spend

2H 2024 vs. 2H 2023*



Source: Sensor Tower's Retail Media Insights

*YoY growth compares 2H 2024 vs. 2H 2023, as all measured retailers have data starting from July 2023 or earlier



Full Funnel Utilization



Full Funnel

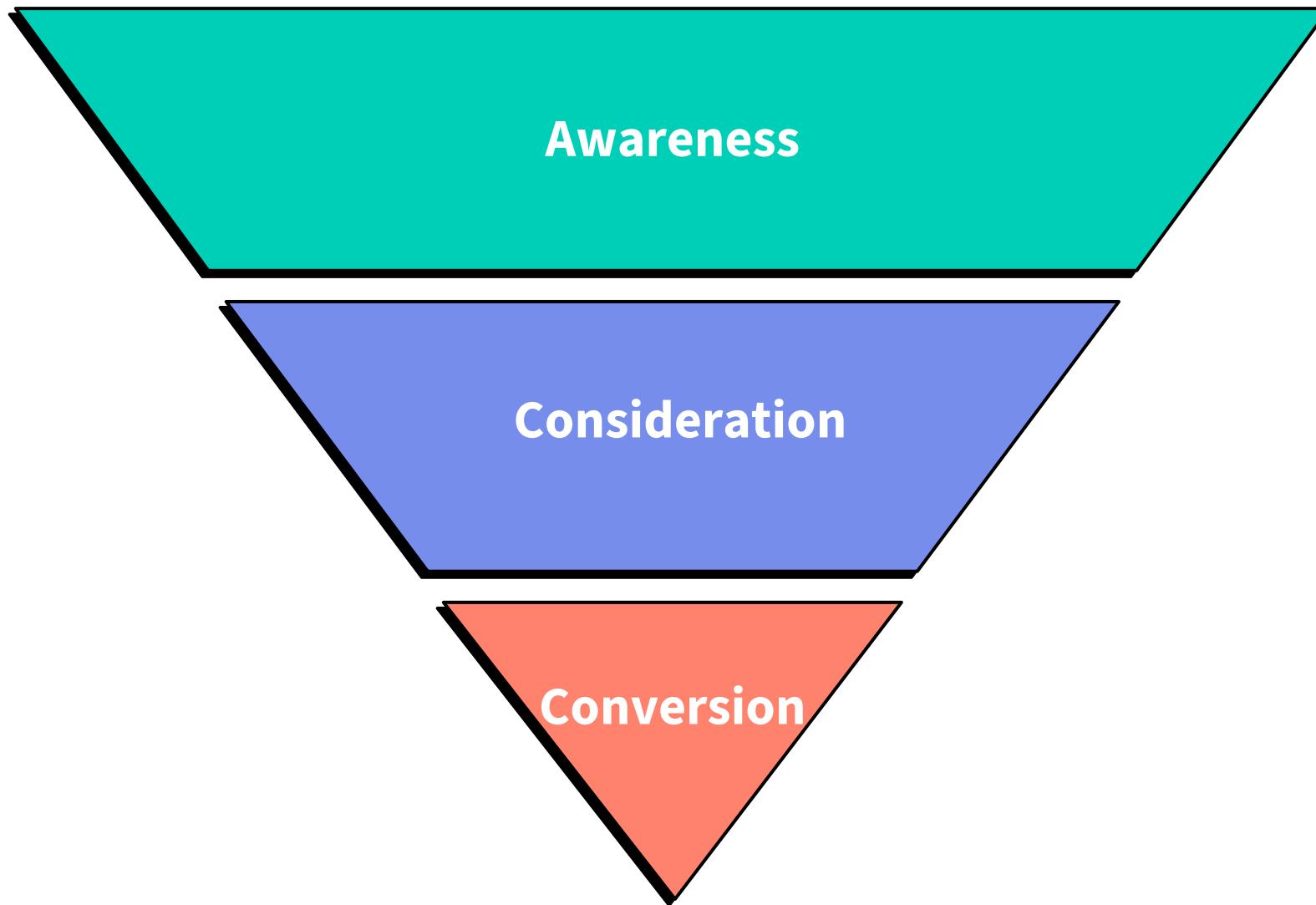
Full Funnel Approach:

How retail media spans awareness to conversion

Retail media offers a unique full-funnel advertising opportunity, enabling brands to drive awareness, consideration, and conversion—all while leveraging a retailer's first-party shopper data. Unlike other digital advertising channels, retail media connects upper-funnel awareness tactics with lower-funnel sales drivers, making it easier to measure impact within a closed-loop environment.

As an example, a brand may leverage an OffSite channel like OTT to drive discovery, while also using OnSite Display to drive conversion through retargeting. The following slides will explore two real-world case studies.

By employing a full funnel retail media strategy, brands can create seamless and holistic customer experiences across the full shopper journey.



Source: Sensor Tower's Retail Media Insights

Full Funnel

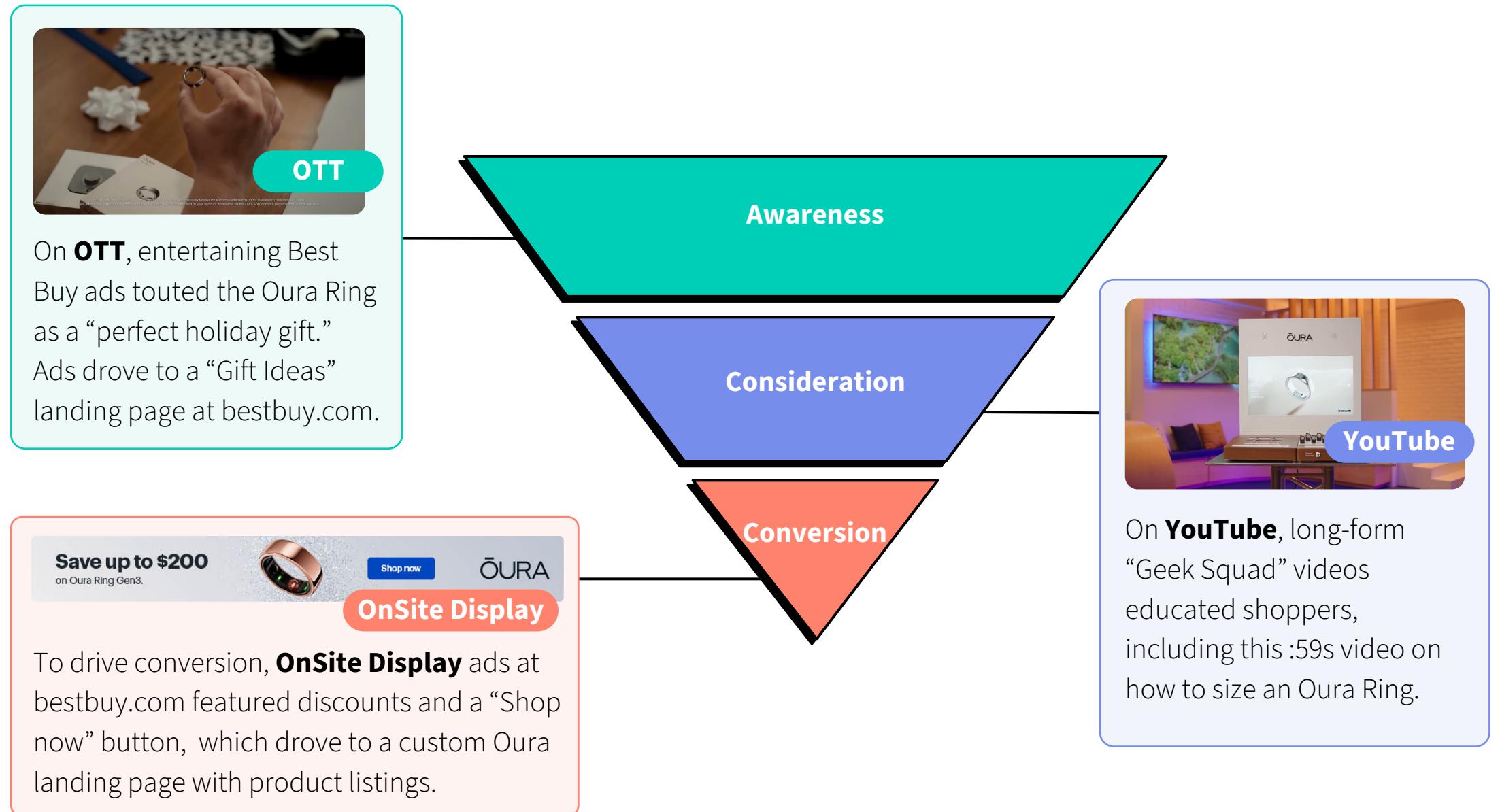
Case Study:

Oura Ring drives holiday sales at Best Buy

In this example, Oura Ring leveraged a full-funnel strategy at Best Buy to maximize holiday sales. Each channel had a distinct role within their mix, as illustrated on the right. From lean-back OTT ads to discount-driven Display ads, Oura Ring tapped Best Buy's retail media to address the full funnel during a key sales period.

Oura Ring at Best Buy

A Full Funnel Case Study



Source: Sensor Tower's Retail Media Insights

Full Funnel

Case Study:

Coke & Oreo launched a limited-time partnership at Walmart

In September, a limited-time collaboration brought together two iconic brands in an unexpected pairing of cookies and drinks. To promote the launch, Coca-Cola and Oreo executed a full funnel campaign at Walmart. A “Besties” theme formed the foundation of the launch, with creative messaging that was highly consistent across all channels.

Coke & Oreo at Walmart

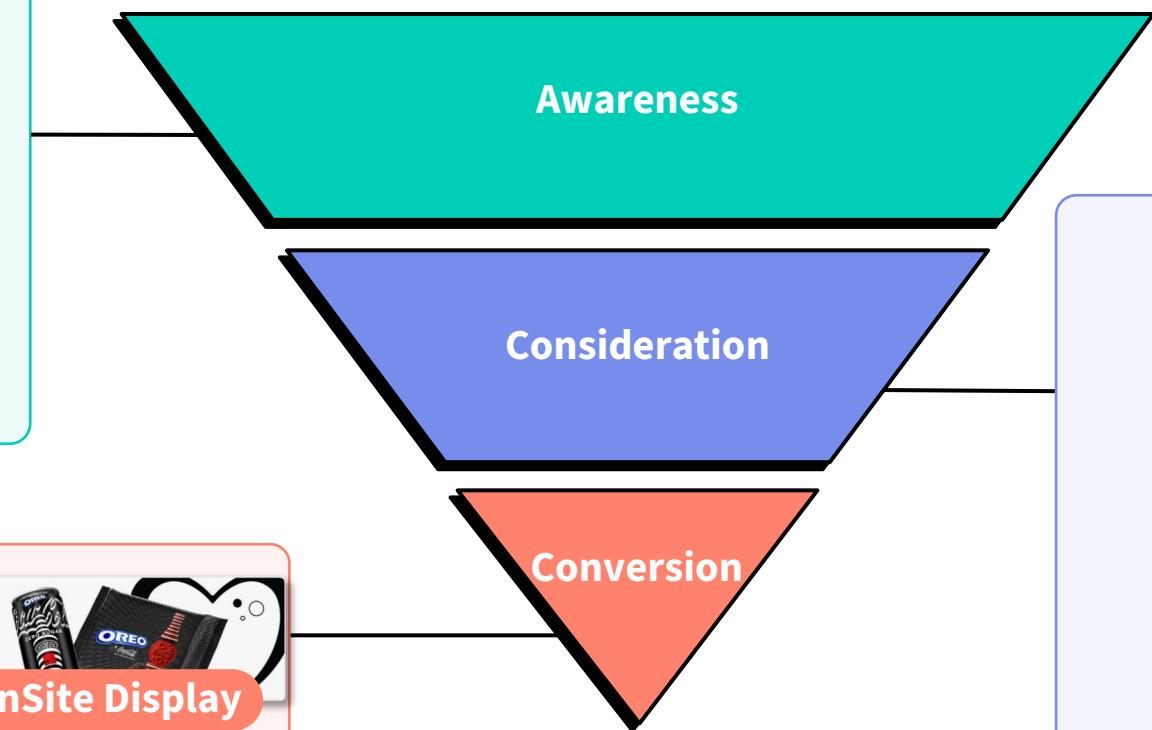
A Full Funnel Case Study



On **TikTok**, engaging videos showed their friendly mascots dancing and celebrating their “bestie” relationship.



At Walmart.com, **OnSite Display** ads created a sense of urgency with a “Don’t Miss” message and a “Pre-order” button, driving to a custom “Taste It While It Lasts” landing page.



On Walmart’s **Instagram**, the limited-time products took center stage, without a direct prompt to purchase.

Source: Sensor Tower’s Retail Media Insights



Retail Media for Mobile-Led Brands

Mobile Advertising:

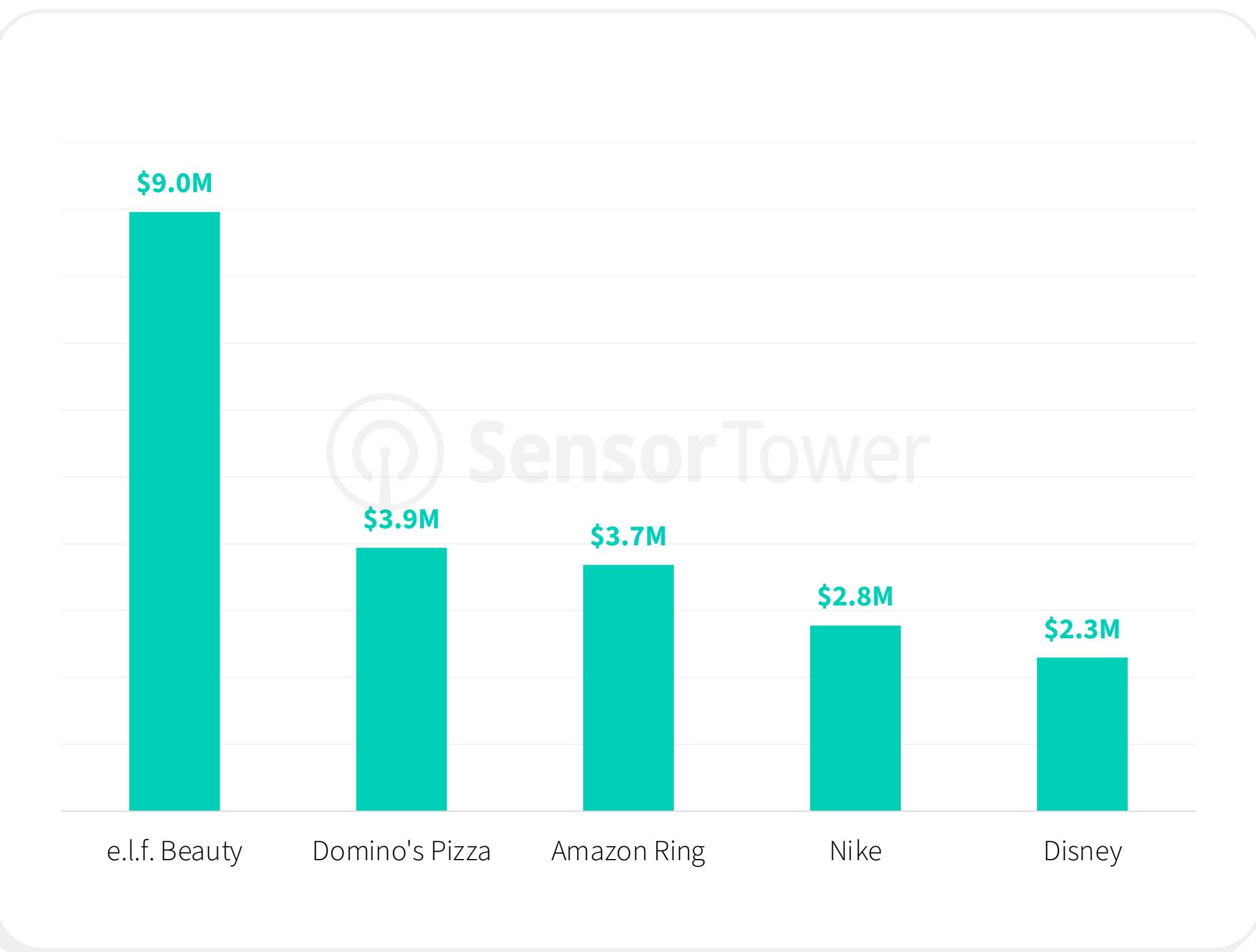
Retail media opportunities for mobile-led brands

Mobile-led brands also stand to benefit from retail media advertising. This chart highlights a selection of brands with a strong mobile presence, spanning a wide range of categories. As shown, each of these brands invested multi-million-dollar budgets into retail media in 2024, an indication that they recognize its value in driving engagement and sales.

Retail media networks offer a variety of mobile advertising opportunities, from social media apps to mobile display ads, enabling mobile-led brands to extend their reach and connect with targeted audiences within a mobile environment.

Mobile-Led Brands: Retail Media Spend

2024 Retail Media Spend, a Select Group of Brands Shown



Source: Sensor Tower's Retail Media Insights

Mobile

Case Study: e.l.f. Cosmetics' mobile-first approach at Target

e.l.f. Cosmetics, a brand who considers themselves a bold disruptor, took a mobile-led approach to retail media at Target.

By leaning into TikTok, Instagram, and Mobile Display, e.l.f. was able to meet their young audience where they are – on their phones. On TikTok, video ads leveraged a user-generated style while featuring relatable seasonal messaging, ranging from Mother's Day to summer adventures. On Mobile Display, ads touted the latest drops, while driving to a "New & Trending" landing page at target.com.

e.l.f.'s activation is just one example of how mobile-led brands can leverage retail media in a way that feels authentic to their identity and resonates with their audience, by making strategic decisions related to channel selection and messaging.

Source: Sensor Tower's Retail Media Insights

e.l.f. Cosmetics at Target

2024 Retail Media Activity



Look what just dropped in

Mobile Display

Shop what's new & now at Target.

Mobile

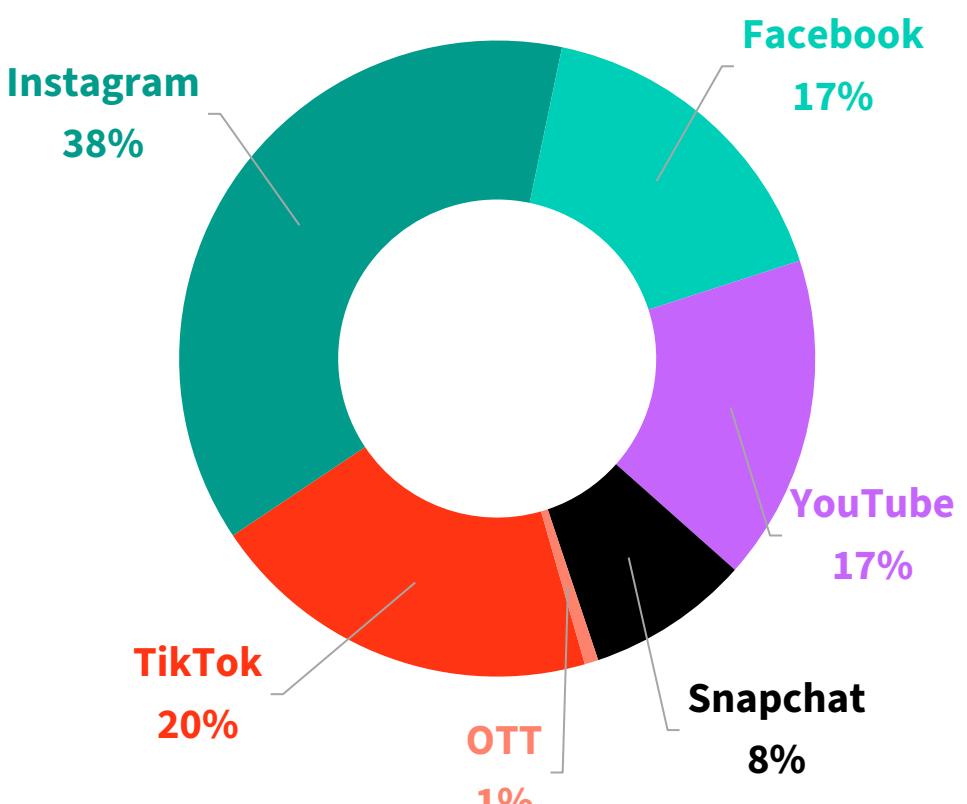
Case Study: Domino's Pizza partners with Uber Eats

To celebrate their debut on Uber Eats, Domino's Pizza generated buzz and engagement by giving away \$10 million in free pizza. To promote the giveaway, Domino's tapped into Uber Eats' retail media network, where they leveraged a mobile-led strategy, driven by advertising on Instagram and TikTok. The campaign creative starred rapper Lil Wayne.

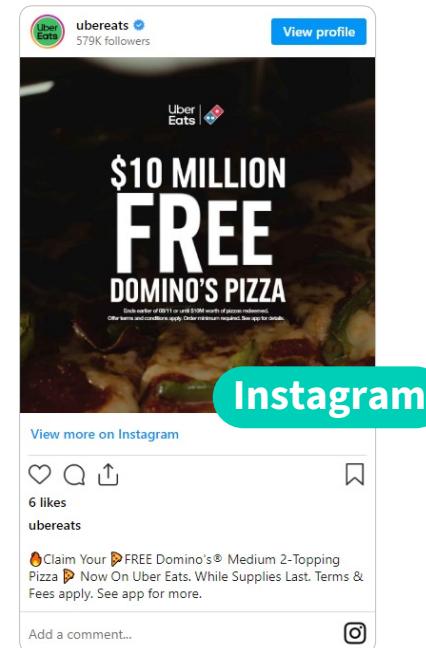
This Domino's campaign serves as a reminder that retail media can extend far beyond conversion. It can also be a powerful tool for driving upper-funnel objectives like increasing awareness and creating high-impact brand moments.

Domino's Pizza at Uber Eats

2024 Channel Mix, % of Spend



Source: Sensor Tower's Retail Media Insights





First Look: Amazon Retail Media

Amazon First Look

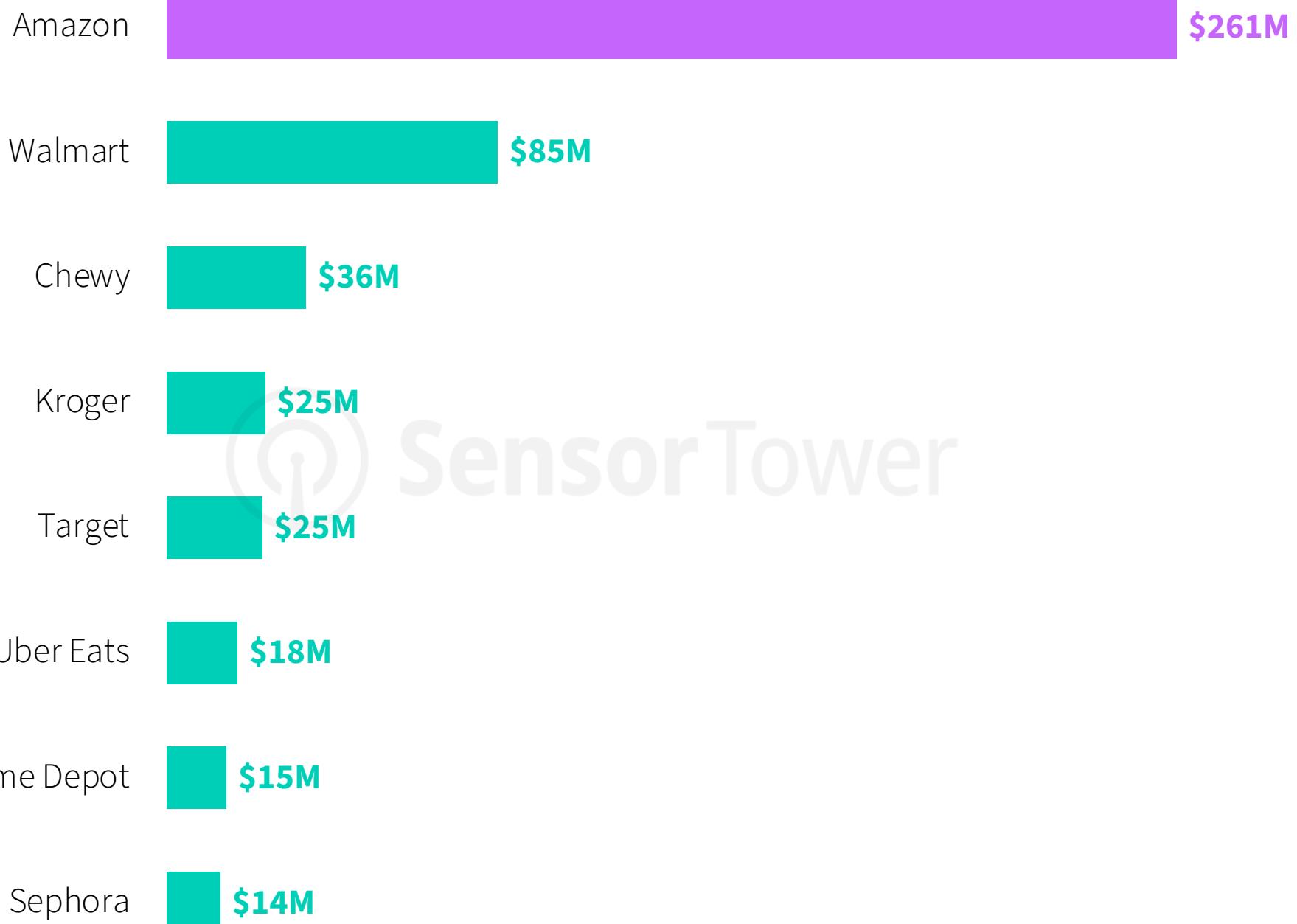
Amazon's Retail Media: A first look at the industry's biggest player

For the first time, Sensor Tower's Retail Media Insights is providing visibility into Amazon's retail media ad spend—offering a long-awaited look at the largest player in the space. Our initial data release, covering January and February 2025, reveals that Amazon is dominating in terms of retail media investment, far surpassing even Walmart. Later this year, we'll expand this dataset to include all of 2024, unlocking a full historical view of Amazon's retail media landscape.

Here's a first glimpse at the new Amazon data, setting the stage for a deeper understanding of how brands are investing at the retailer.

Top RMNS: Jan-Feb 2025

Retail Media Spend, Top 8 Shown, US Only



Source: Sensor Tower's Retail Media Insights

Amazon First Look

OnSite vs. OffSite: Brands are prioritizing OnSite spend at Amazon

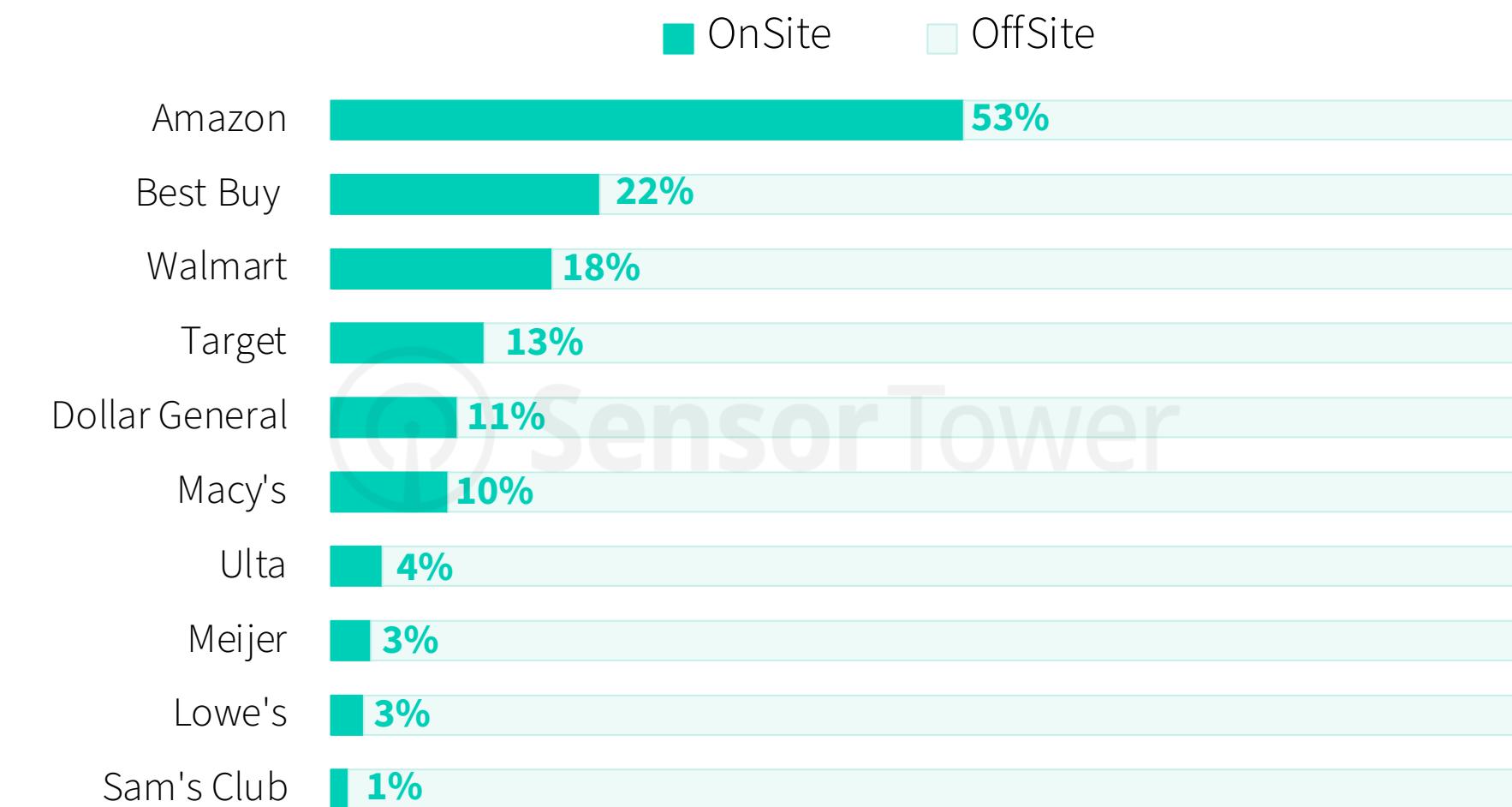
In January and February 2025, 53% of Amazon's retail media spend ran OnSite, a far larger share than any other retailer. Best Buy, the next highest, had just 22% of ad dollars run on their website.

For brands, the scale of Amazon's e-commerce platform represents a key battleground for capturing high-intent shoppers. OffSite channels, on the other hand, represent an opportunity to further extend the reach of retail media campaigns. With OffSite advertising, brands can still leverage Amazon's shopper data for targeting, while driving back to product pages at amazon.com for a streamlined and measurable conversion.

Source: Sensor Tower's Retail Media Insights

OnSite vs. OffSite Spend

% of Jan-Feb 2025 Retail Media Spend, Top 10 OnSite Retailers Shown



Definitions:

Onsite: Ads displayed on the retailer's website (for example, ads displayed on Walmart.com). Note that this includes onsite display only, not inclusive of search, sponsored results, or proprietary ad units per retailer.

Offsite: Ads displayed on other websites, social media platforms, or OTT. For example, this includes co-branded advertisements on Facebook, TikTok, and YouTube.

Amazon First Look

Top Advertisers:

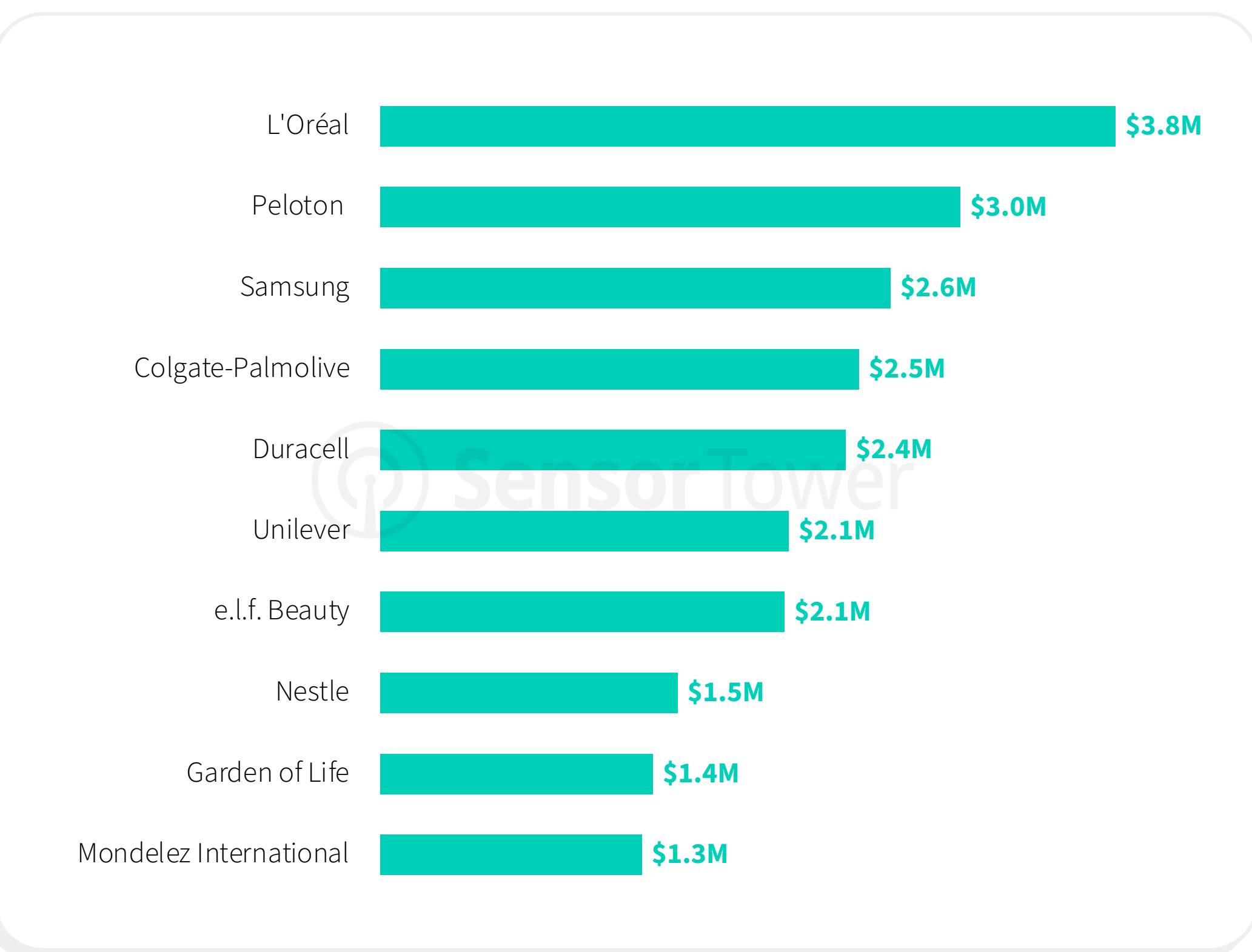
Amazon attracts leading brands from a diverse mix of categories

Amazon's retail media is attracting major advertisers across a wide range of product categories. In January and February 2025, L'Oréal led the pack with \$3.8M in ad spend, followed by Peloton (\$3M) and Samsung (\$2.6M).

This list of top 10 advertisers underscores the broad appeal of Amazon, with brands that span categories from cosmetics and electronics to batteries and food.

Amazon: Top Advertisers

Jan-Feb 2025 Retail Media Spend, Top 10 Advertisers Shown



Source: Sensor Tower's Retail Media Insights

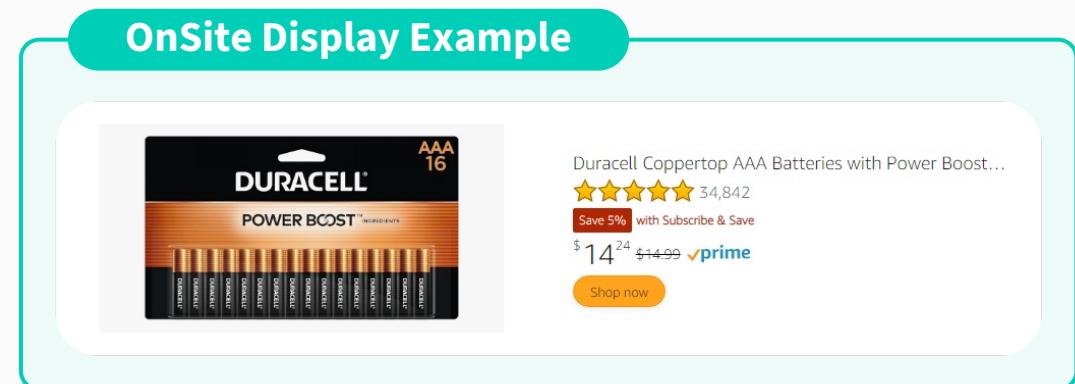
Amazon First Look

Amazon Channel Mix:

Top advertisers are turning to OnSite Display

Amazon's channel strategy stands apart from other retailers, as top advertisers overwhelmingly favored OnSite Display ads. This presents a stark contrast to the more diversified channel mixes we've seen across other retail media networks.

In fact, among the top 10 advertisers in January and February 2025, eight allocated over 90% of their ad spend to OnSite Display ads.

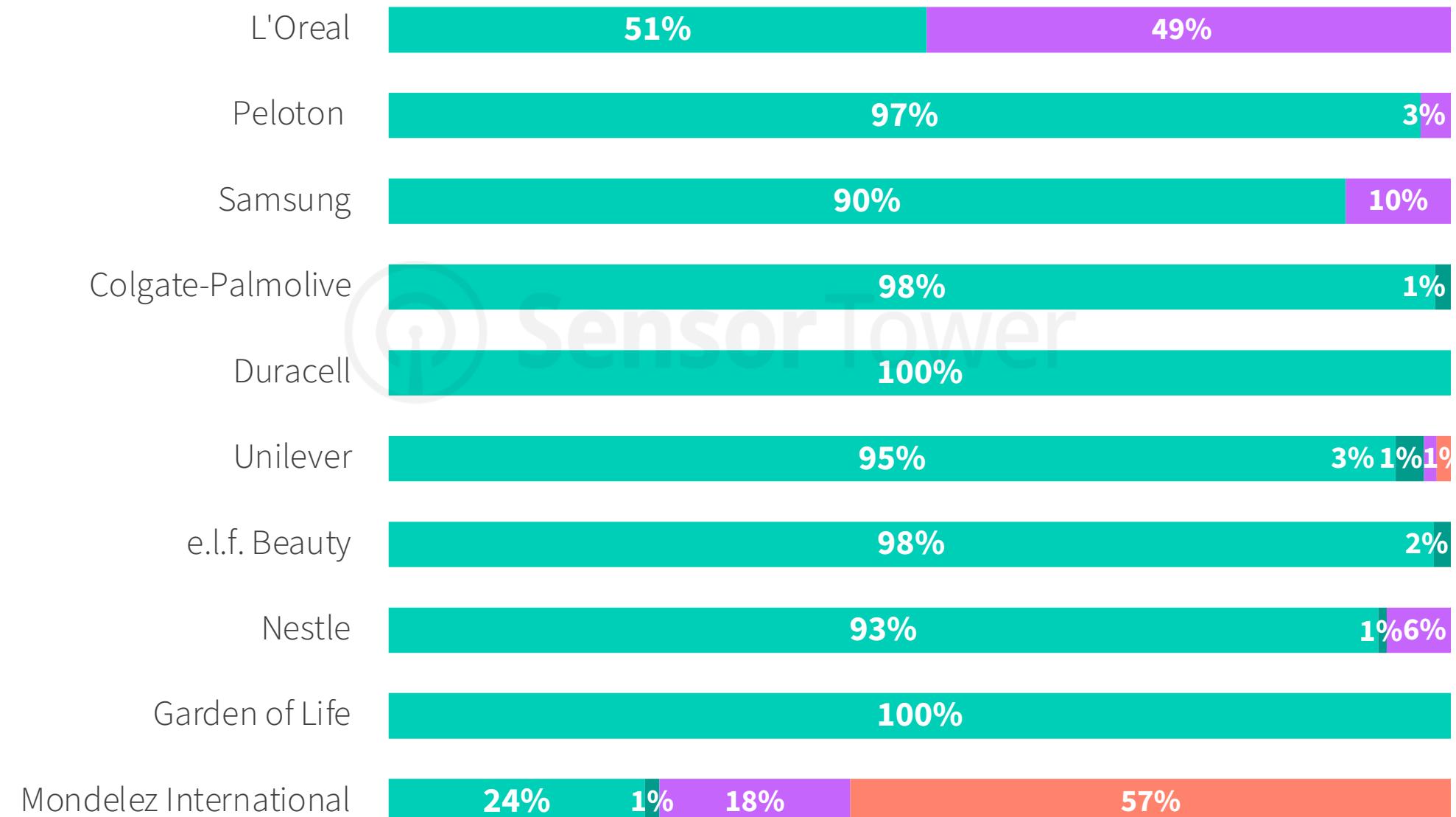


Source: Sensor Tower's Retail Media Insights

Amazon: Channel Mix by Advertiser

Jan-Feb 2025, % of Retail Media Spend, Top 10 Shown

■ OnSite Display ■ OffSite Display ■ OffSite Video ■ OTT



Amazon First Look

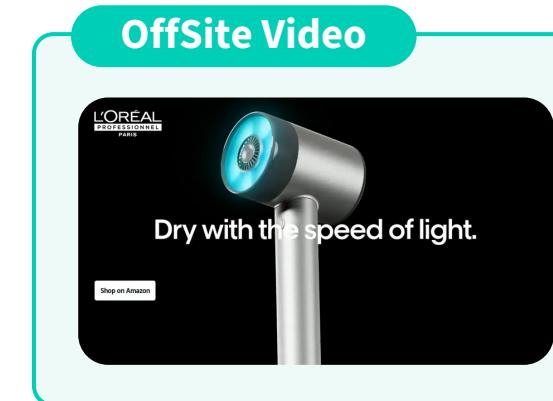
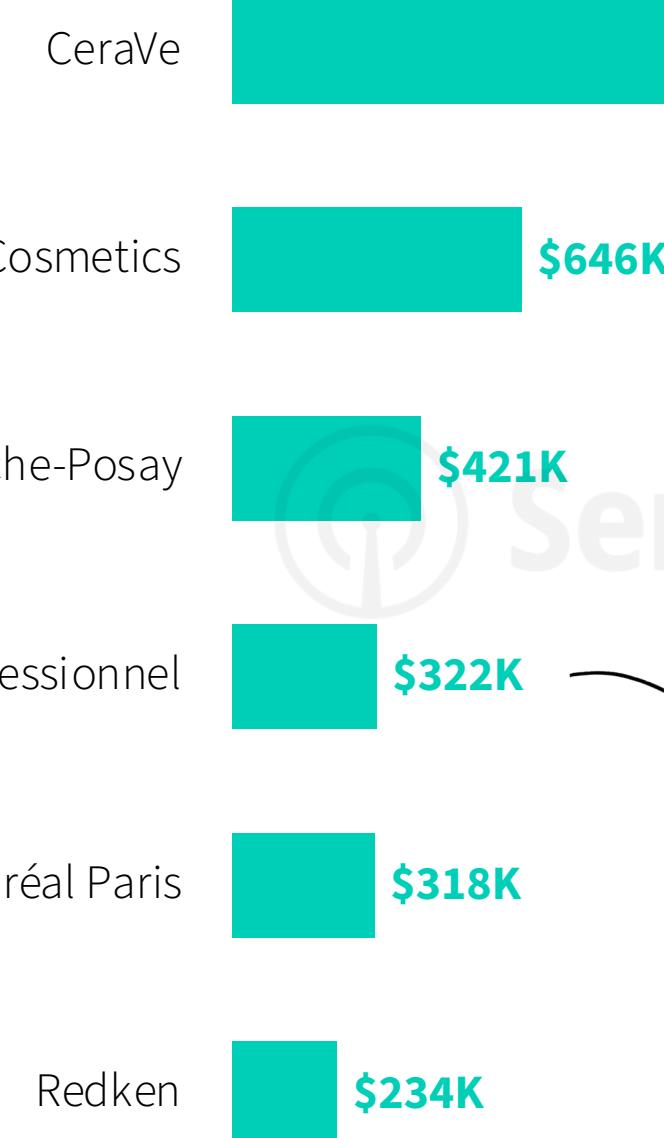
Advertiser Deep Dive: A look inside L'Oréal's Amazon Strategy

Beyond overall spend and channel mix, Retail Media Insights also allows brand to analyze how competitors are allocating budgets across their product lines, while viewing the individual creatives that are supporting them.

In this example, we're looking at L'Oréal, Amazon's top spender across January and February 2025. As shown, L'Oréal prioritized their CeraVe product line with an investment of \$1.5M. OnSite Display ads for CeraVe promoted a "Limited Time Deal" with a "Shop Now" button. To promote their L'Oréal Professional line, L'Oréal looked OffSite, running video ads with a "Shop Now" button that drove back to their product page on amazon.com

L'Oréal: Top Products at Amazon

Jan-Feb 2025, Retail Media Spend, Top 6 Shown



Source: Sensor Tower's Retail Media Insights



Snapshot: The UK and Canada

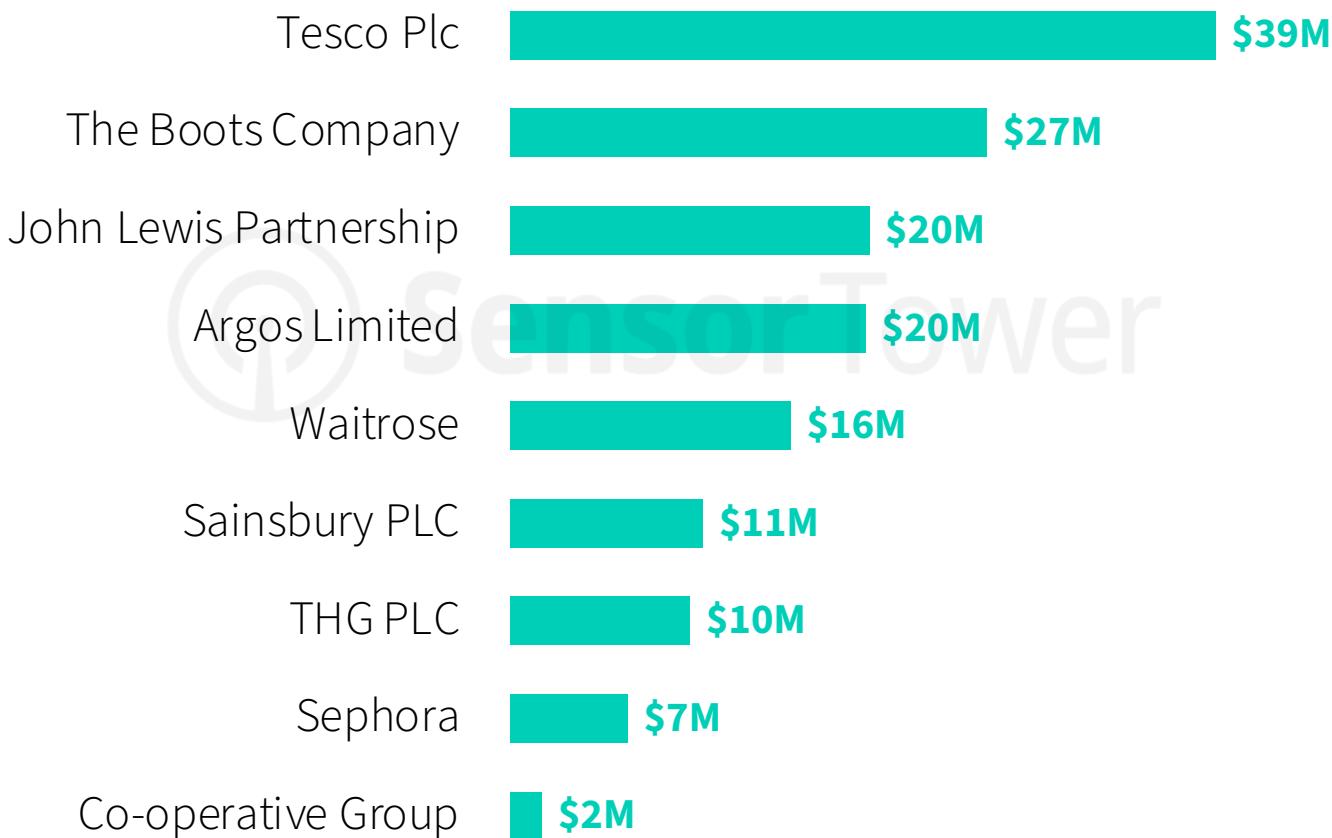
The UK & Canada: Top Retail Media Networks

While this playbook largely focuses on the U.S. market, the same guiding principles can be applied to the UK and Canada, which are both captured by Sensor Tower's Retail Media Insights. Shown below are the measured retailers in both countries, ranked based on their 2024 retail media spend.



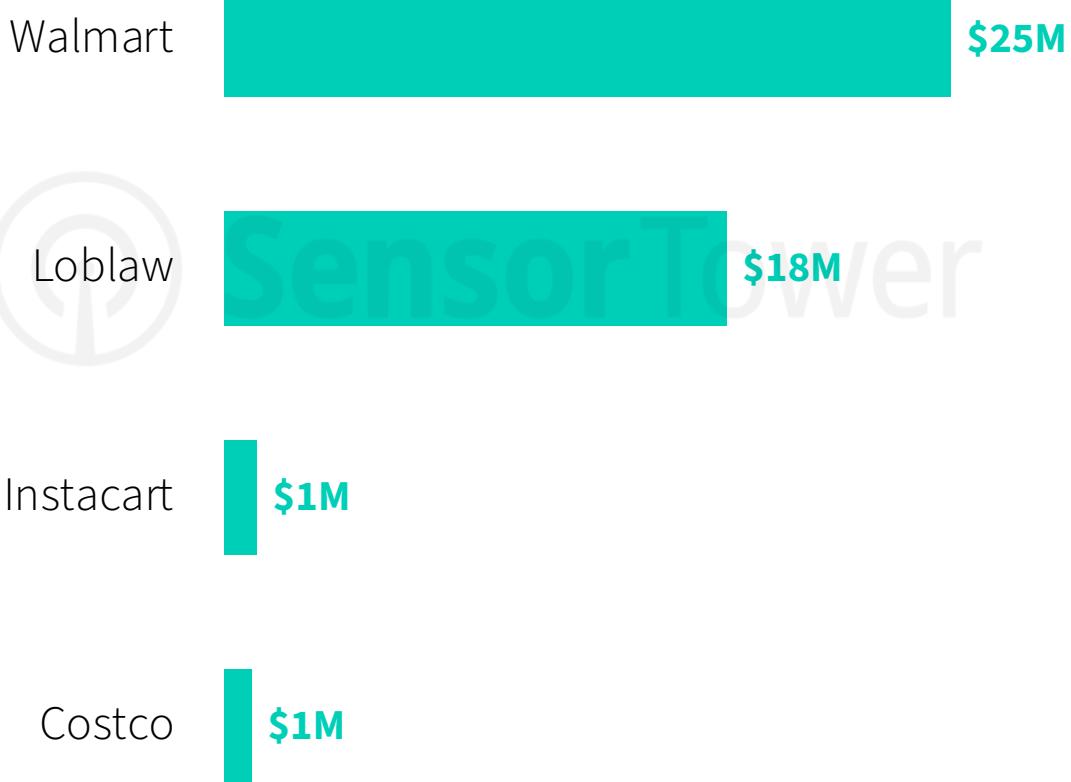
UK: Top Retail Media Networks

2024 Retail Media Spend



Canada: Top Retail Media Networks

2024 Retail Media Spend



Source: Sensor Tower's Retail Media Insights

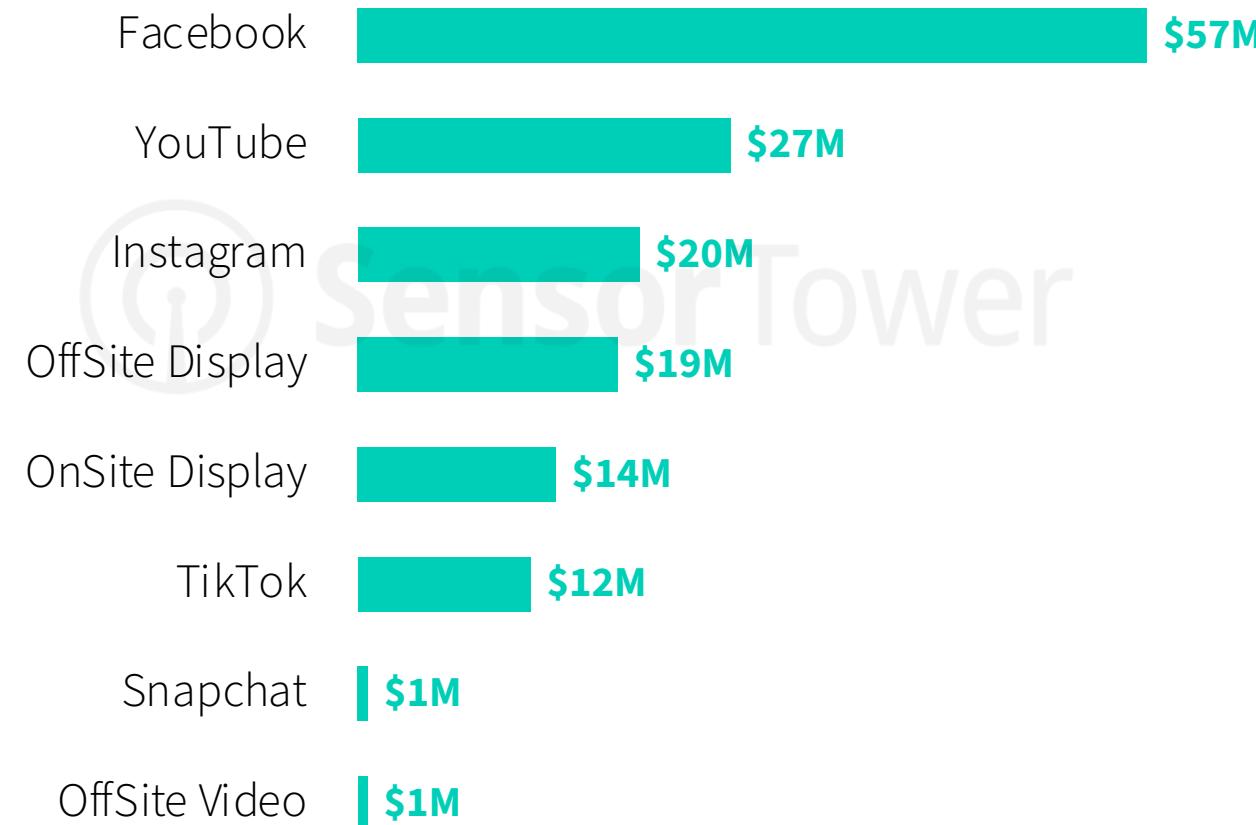
The UK & Canada: The Leading Retail Media Channels

As shown below, the retail media landscape is different by market. In the UK, Facebook secured the largest ad spend in 2024, while in Canada, YouTube was the leading channel. With Retail Media Insights, brands can evaluate these channels by retailer, category, and competitor, helping to optimize their own media mix.



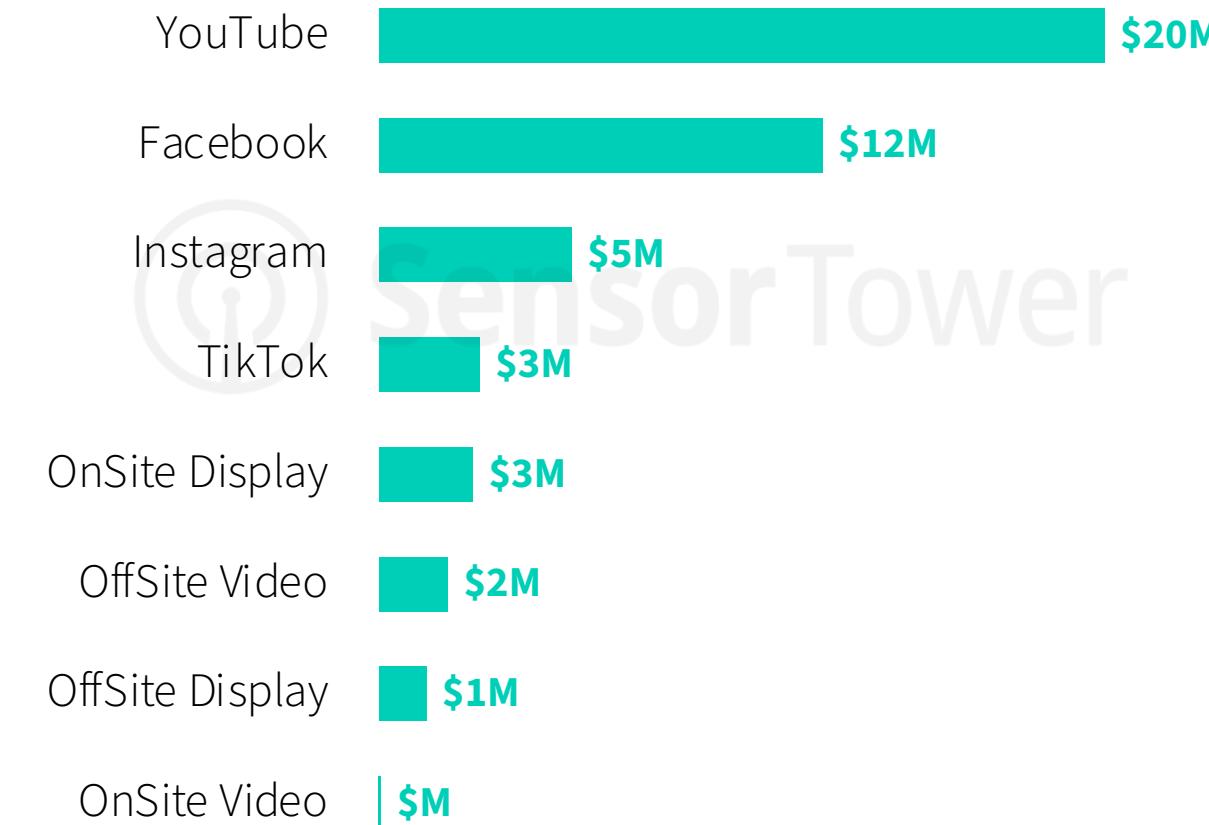
UK: Top Channels

2024 Retail Media Spend



Canada: Top Channels

2024 Retail Media Spend



Source: Sensor Tower's Retail Media Insights

Looking Ahead

Turning Insights into Action

Now that you've explored how retail media is transforming the advertising landscape, it's time to take the next step. To build a successful, data-driven retail media strategy, remember to:

Choose the Right Partners

Map the landscape and identify retail media networks that align with your category, audience, and competitive dynamics.

Set an Effective Budget

Benchmark against your category, evaluate competitive spend, and determine what it will take to breakthrough.

Fine-Tune Your Flighting

Align investment with seasonal demand and high-impact promotional periods, while considering competitive flighting strategies.

Optimize Your Channel Mix

Analyze where your competitors are investing and develop your channel mix to cut through the noise and drive impact.

Activate the Full Funnel

Combine broad-reach OffSite platforms with high-intent OnSite placements to create a seamless and measurable path to purchase.

Engage Mobile Consumers

Prioritize mobile-friendly platforms and creative formats to connect authentically with today's shoppers.

Outsmart the Competition with Retail Media Insights

Retail Media Insights by Sensor Tower is your secret weapon for making data-driven decisions, measuring success, and staying ahead in a fast-moving industry.



[Request a demo!](#)



SensorTower

About This Data:

Retail Media Insights

This playbook focuses primarily on the US market, with historical data going back to Q3 2023.

The playbook also includes an early preview of the recently released Amazon US data, along with a snapshot of Retail Media Insights in the UK and Canada.

Region:

US

Time Period:

Q3 2023 – Q4 2024

Retailers:

Ace Hardware Lowe's
Ahold Delhaize Macy's
Albertsons Companies Meijer
Best Buy Petco
Chewy PetSmart
Costco Wholesale Publix Super Markets
CVS Health Sam's Club
Dollar General Sephora
DoorDash Seven & i Holdings Co.
Family Dollar Target
Five Below Kroger
GNC Uber
Home Depot Ulta
Hy-Vee Walgreens
Instacart Walmart
Just Eat Takeaway

Channels:

OffSite:

Desktop Display
Desktop Video
Mobile Display
Facebook
Instagram
OTT
Snapchat
TikTok
X
YouTube

OnSite:

Desktop Display
Desktop Video
Mobile Display



Interested in more Retail Media Insights?

If you want to learn more about Sensor Tower, please request a demo:

[Request a demo!](#)



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