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**MARS** UNITED.  
COMMERCE

  
SPECIAL — REPORT

# RETAIL MEDIA REPORT CARD: CANADA

A universal tool for effective cross-network evaluation

# INTRODUCTION

Retail media ad spending in Canada is projected to grow 26% in 2024 to surpass C\$3 billion mark – nearly double the total of three years ago, according to Insider Intelligence.

And while that level of growth will slow a bit over the next few years, total spending is expected to reach nearly C\$5.1 billion in 2027.

Retail media is fast becoming a cornerstone of digital advertising in Canada — and already accounts for 20% of all digital ad spending, eMarketer estimates.

As the influence of ecommerce on the retail marketplace grows, many retailers are establishing their own retail media networks to connect brands directly with consumers at crucial points in their evolving shopping journey. Canadian giants including Loblaw Companies Ltd., Walmart, and Canadian Tire are at the forefront of this trend, offering brands the opportunity to advertise through their owned & operated digital channels such as websites, apps, and in-store media.

The appeal of retail media lies in its ability to deliver personalized, data-driven advertising that is deeply integrated with the shopping experience. Through access to first-party data, these networks allow brands to target shoppers more effectively by creating advertising campaigns that speak directly to specific shopper behavior and influence purchase. Retailers, in turn, gain an entirely new revenue stream while offering advertisers high-impact opportunities to reach engaged shoppers that will likely also drive incremental sales.

## The Importance of Measurement

As retail media grows, the need for standardized measurement has become increasingly clear. Brands want to ensure that their investment delivers measurable results, whether through increased sales, stronger brand awareness, or higher return on ad spend (ROAS). Currently, the retail media landscape in Canada lacks consistent measurement frameworks, which poses challenges for brands looking to compare performance across the different networks.

IAB Canada has taken a proactive stance on the issue, pushing for clearer, more universal metrics to measure effectiveness. In particular, the organization emphasizes the importance of transparency and accountability, encouraging retailers to provide comprehensive reporting on metrics such as impressions, clicks, conversions, and sales lift. Standardized measurement not only helps brands better assess their media performance, it also builds trust between advertisers and retailers, fostering stronger partnerships.

## Mars United's Role

Mars United Commerce is deeply involved in helping our clients navigate this evolving retail media landscape. We leverage our global expertise and strong Canadian market presence to ensure that clients will capitalize on these new opportunities.

Following our recent acquisition by Publicis Groupe, our capabilities in data, analytics, and media buying have expanded significantly, allowing us to deliver even more integrated solutions that can drive meaningful results.

In line with IAB Canada's focus on measurement, we prioritize transparency and data-driven insights in our approach. We work closely with both clients and our retail media partners to establish clear KPIs, optimize investments, and continually assess performance through robust reporting. By doing so, we ensure that every dollar spent on retail media contributes to a brand's broader business objectives, from sales growth to brand loyalty.

As retail media continues to develop, the partnership between brands, agencies, and retailers will be key to unlocking its full potential. With the right measurement tools in place and a focus on collaboration, retail media can become an even more powerful engine for growth in Canada. At Mars United, we are committed to being at the forefront of this transformation, helping brands harness the power of retail media to drive success now and in the future.

## New Features This Quarter

Each Report Card is updated to reflect the ongoing enhancements made by these platforms, to evaluate additional platforms, and to modify our analysis as needed to continue reflecting best practices across the industry.

In this report we initiate coverage of two additional platforms: The Home Depot Canada's Orange Apron Media, and Canadian Tire's Triangle Retail Media. We've also added 24 more capabilities to our evaluation criteria, most notably by expanding our coverage of Media Opportunities to include more offerings and distinguish between onsite, offsite, and on-location options.

These updates reflect the speed with which the Canadian retail media marketplace is growing in both size and sophistication as networks strive to meet the needs (and sometimes demands) of their brand partners.

We hope you enjoy the second edition of Mars United Commerce's Retail Media Report Card Canada.



# USING THE SCORECARD

Mars United Commerce has established 90 criteria for evaluation that can be grouped into 5 Key Performance Areas.

The specific criteria for each Key Performance Area reflect tangible capabilities, services, and offerings, such as the network's ability to customize the audience, provide access to sales data and other metrics, or advertise through social media channels and in physical stores. Each of the criteria is explained in greater detail in the Glossary at the end of this report. Additional information about each network's capabilities can be found on the Platform Profiles (see page 13).

USING THE  
SCORECARD

# 5 KEY PERFORMANCE AREAS

## 01\_TARGETING

How robust is the network's overall audience? How sophisticated is its ability to engage with specific shopper segments? Can it target beyond its own site? We evaluate each network's Targeting capabilities based on 16 criteria ranging from audience scale to conquering opportunities.

## 02\_MEASUREMENT & REPORTING

What is the level of data transparency and reporting sophistication for the network's results? Does it provide access to customer and sales data? Can it distinguish between online and offline sales? We evaluate each network's Measurement & Reporting capabilities based on 17 criteria ranging from programmatic sales measurement to custom analysis opportunities.

## 03\_MEDIA OPPORTUNITIES

How well does the network connect with shoppers along the entire path to purchase, both onsite and across the digital landscape? Is it offering in-store opportunities along with digital media? We evaluate each network's Media Opportunities across 32 potential touchpoints ranging from onsite search to in-store radio.

## 04\_INNOVATION

Does the network consistently develop next-level media opportunities incorporating new tools and technologies? Is it keeping pace with evolving shopper demands? We evaluate each network's Innovation strengths based on 12 criteria ranging from testing opportunities to AR/VR implementation.

## 05\_PARTNERSHIP

Does investment unlock other opportunities with the retailer? Does the investment satisfy broader vendor commitments? Does the network provide creative flexibility? We evaluate each network's Partnership strengths based on 13 criteria ranging from training programs to JBP opportunities.

# USING THE SCORECARD

The goal of this public Retail Media Report Card is to offer brand advertisers a simple, “step one” method of cross-network evaluation. For clients, we prepare a more extensive assessment that assesses and compares each network’s strengths and weaknesses in the context of their unique business needs and relationships.

We often also share this deeper level of analysis with the retail media networks themselves — who, in many cases, appreciate the competitive comparison and the potential guidelines for improved collaboration with brand partners that our evaluation provides. In fact, all the evaluated networks helped Mars United compile this report.

The scorecard presents a clear view into the relative strength and sophistication of each retailer. In this way, brands can easily identify the industry leaders, versus the developing platforms, versus the networks that are trailing the marketplace in key performance areas. As the marketplace has matured and advertisers have refined their expectations, some criteria that initially may have been optional capabilities should now be considered standard requirements for any competitive retail media network.

These designations are meant to be used as a method of evaluating the relative investments that should be considered across the landscape of networks, as well as a tool for bringing practical, more mutually beneficial plans to the negotiating table. They are not, however, intended to be used for making straightforward “yes or no” determinations on investments because there are many other factors that should impact those decisions.

That, in fact, is the next exercise we take with our clients: creating a framework for investment that sets parameters on how much to spend at each retailer, as well as which internal function should provide the funding — a decision that, at some level, we believe should be determined by the capabilities and sophistication of the retail media partner. (For more of our perspective on investment best practices, read [“Making Sense of Retail Media.”](#))

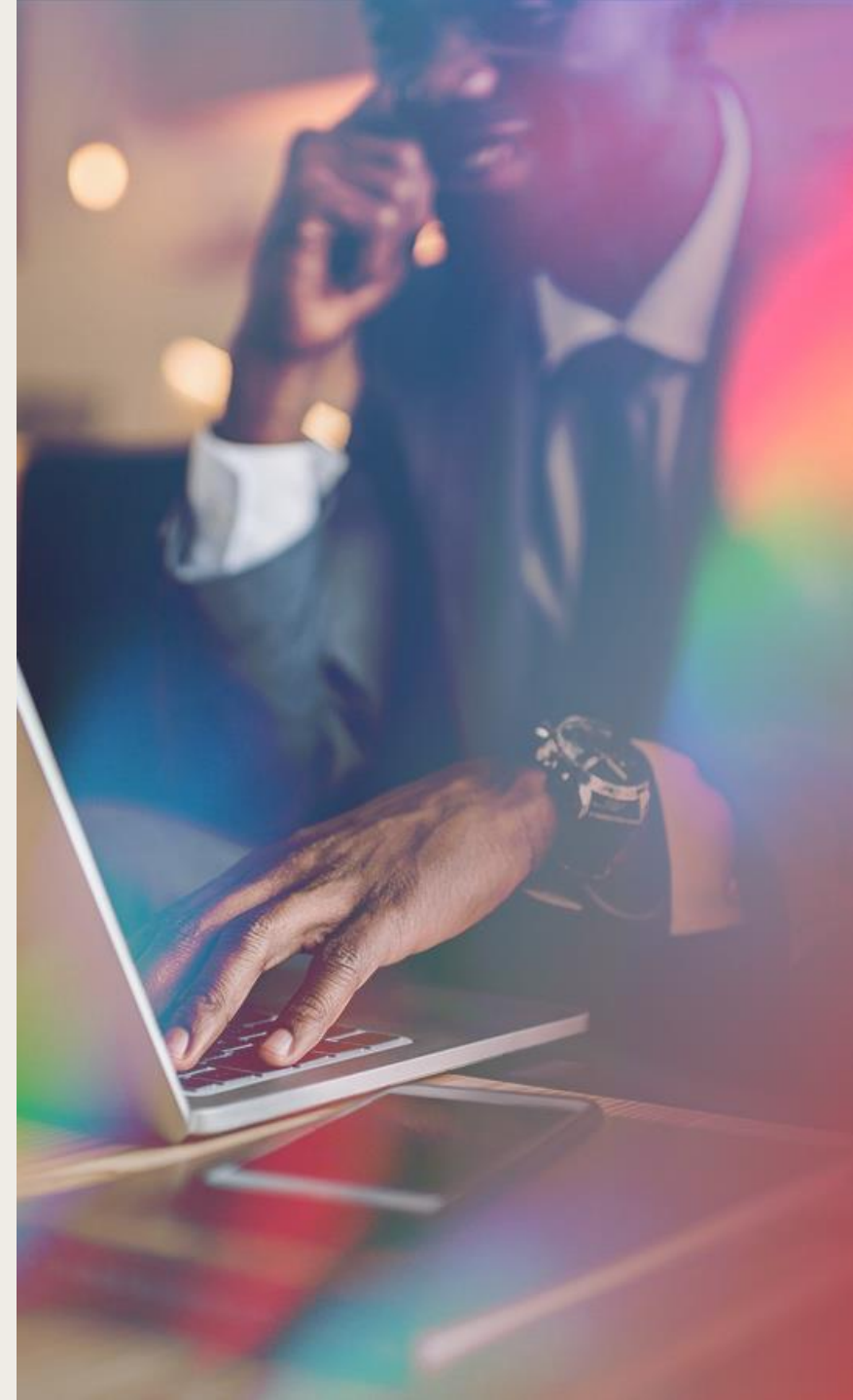
This framework also provides guidance on tactic selection, which again should be based on each retailer’s capabilities and sophistication level. It is here, at the tactic level, where brands can — and should — more comfortably make “yes or no” funding decisions based on the Report Card. (As always, the brand’s specific goals and KPIs, along with its broader strategic relationship with the retailer, must be considered, too.)

While this specific process isn’t necessarily the “be all, end all” solution, we have found it extremely effective at helping Mars United’s clients evaluate retail media network capabilities to inform their investment decisions.

It has also helped our clients conduct more open, informed discussions with their retail media network partners by clearly identifying where they fall within the competitive landscape in terms of meeting the commerce marketing needs of brand partners.

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**Note:** The information in this report has been collected from various industry sources by Mars United<sup>SM</sup> Commerce and, in most cases, verified by the retail media networks themselves. Factual information represents the best available data at the time of publication. Mars United has made every effort to be as accurate and up to date as possible with this information. In certain cases, platform assessments reflect objective evaluations determined by considering industry best practices and Mars United’s own experience and expertise.



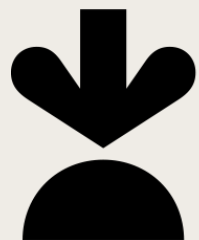
# EVALUATED RETAIL — MEDIA NETWORKS



Walmart



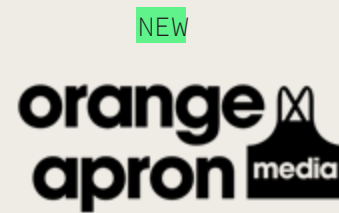
Amazon



Instacart



Loblaw Companies Ltd.



The Home Depot Canada





Canadian Tire Corp.











Targeting Criteria	Starburst	Amazon	Hand	F	Media	Play
<b>Audience Scale</b> (10 million+ shoppers)	●	●		●	●	●
<b>Audience Growth</b> (+10% YOY)	●	●	●	●	●	●
<b>Purchase-Based Targeting</b> (IP data)	●	●	●	●	●	●
<b>Keyword Targeting</b> (Search)	●	●	●	●	●	●
<b>Geo-Targeting</b> (Postal code or store-level)		●		●	●	●
<b>Behavioral Targeting</b> (e.g., Browsing behavior)	●	●	●	●	●	●
<b>Contextual Targeting</b> (e.g., Site placement/location)	●	●	●	●	●	●
<b>Demographic Targeting</b>	●	●		●	●	●
<b>Competitive Conquesting</b>		●	●	●	●	
<b>Templated Audience Segments</b> (e.g., Holiday)	●	●		●	●	●
<b>Custom IP Audiences</b> (Unique "from scratch" segmentation)	●	●	●	●	●	●
<b>Custom IP Audiences Self-Service</b> (Audience is landed into client account)		●	●	●	●	
<b>Predictive Audiences</b> (Likelihood to buy)	●	●		●		
<b>Clean Room/Brand Audience Ingestion</b>		●				
<b>Retargeting/ Site Pixeling</b>		●				●
<b>Retailer-Level Targeting</b> (on cross-retailer platforms or at multi-banner retailers)				●		

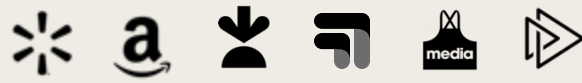
						
Standard Media Metrics <small>(e.g., Impressions, CTR, CPC)</small>	●	●	●	●	●	●
Closed-Loop Attributed Sales & ROAS <small>(1P data)</small>	●	●	●	●	●	●
100% Deterministic Sales Data	●	●	●	●	●	
Total Omni-Sales Data	●	●		●		●
% New Buyers	●	●	●	●	●	●
Sales Lift & iROAS <small>(via A-B/exposed vs. unexposed test)</small>	●	●	●	●	●	
Sales Lift & iROAS <small>(True incrementality)</small>	●	●	●	●	●	
Viewability/Fraud Transparency <small>(Direct or via 3P tags)</small>		●				●
Viewability/Fraud Transparency <small>(DSP)</small>		●			●	●
Self-Serve/Real-Time Reporting	●	●	●	●	●	
Self-Serve Insights		●	●	●	●	
Media Mix Modeling		●		●		
Custom/Ad Hoc Analysis	●	●	●	●	●	
Targeted Audience-Level Reporting	●	●	●	●	●	●
Creative Versioning-Level Reporting		●	●	●	●	●
Basket Analysis	●	●	●	●	●	
Rest of Market Analysis	●	●				

						
Onsite Search <small>(In-grid managed service)</small>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Onsite Display <small>(Managed service)</small>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Onsite Search <small>(Banners-managed service)</small>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Onsite Search <small>(In-grid self-serve)</small>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Onsite Display <small>(Self-serve)</small>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Onsite Search <small>(Banners-self-serve)</small>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email <small>(Brand-sponsored spot or stand-alone)</small>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Circular <small>(Print or digital)</small>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
Mobile App Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Digital Sampling	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		

						
Offsite Search <small>(e.g. Google)</small>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Offsite Display <small>(Managed service)</small>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
YouTube	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Facebook	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Instagram	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pinterest		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TikTok					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Snapchat				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Social Influencers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Connected TV <small>(CTV)</small>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Streaming Audio		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	



	Starburst	Amazon	Hand	F	Media	Play
Digital Out of Homes	●			●	●	
Foyer/Welcome Digital Screens				●		
Ceiling/High-Visibility Digital Screens				●		
End Cap/Gondola End Digital						
In-Aisle/Shelf-Edge Digital						
In-Store Digital Signage	●			●		
Checkout/Cashier Screens				●		
In-Store Scan As You Shop						
In-Store POS <small>(non-digital media)</small>	●			●		
In-Store Radio	●			●		
Sampling In-Store	●					



	Starburst	Amazon	Hand	F	Media	Play
Self-Serve Programmatic		●		●		
Self-Serve Custom 1P Audiences		●	●		●	
Self-Serve Predictive Audiences		●				
Self-Serve Measurement/Reporting		●	●	●	●	
Self-Serve Media Insights		●	●		●	
Shoppable Content	●	●	●	●		●
AR/VR		●				
Livestream Shopping						
1P Data Sharing	●	●				
Dynamic Creative Optimization (DCO)		●			●	
Generative AI Search		●	●			
Electric Vehicle Charging						



	Starburst	Amazon	Hand	F	Media	Play
JBP Process for Retail Media	●	●	●	●	●	●
Retailer-Level JBP Integration	●	●		●		
Annual Planning/Top-to-Tops	●	●	●	●	●	●
In-Store Opportunity Leverage <small>(e.g., Distribution/incremental display)</small>						
Partner Training Programs/ Certifications		●	●			
Dedicated Account Reps	●	●	●	●	●	●
Dedicated Data Analytics/ Other Resources	●	●	●	●	●	●
Loyalty Program Alignment		●		●	●	●
First-to-Market Test & Learns	●	●	●	●	●	●
Agency Partnerships	●	●	●	●		●
Roadmap Visibility/Collaboration	●	●	●	●	●	●
Transparency Into Media Rates	●	●	●	●		●
Non-Endemic Opportunities	●	●				●

# PLATFORM PROFILES

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KEY PARTNERS

Cardinal	Flipp	Magnite
Path	Google	Optable
Corus	Index Exchange	Pinterest
Dandelion	Meta	The Trade Desk
Enviroics		



RECENT DEVELOPMENTS

Loblaw Advance™ has expanded its offsite reach with premium video and connected TV inventory across 30 publishers through a partnership with Magnite.

It also has enhanced its onsite media offerings to include more placements for sponsored products on the PC Express™ delivery/pickup service platform and launched: sponsored search and enhanced brand hubs on Shoppers Drug Mart®; new display ad formats on the PC Optimum™ app; and shoppable display ads on PC Express™ and Shoppers Drug Mart®.

The sponsored search offering is employing greater intelligence with automatic targeting, presenting products based on direct and complementary searches. Audience data now leverages signals from Esso®, providing an understanding of shopper behaviour and automative-related purchases that is shaping 12 new audience segments.

The Loblaw Advance™ in-store network has grown significantly, with in-store audio expanding to No Frills® and MaxiMD stores. Digital screens in Shoppers Drug Mart® continue to scale.

Elsewhere, reports on the Loblaw Data Insights & Analytics™ platform now include shopper and cart analytics. And a new in-store opportunity will place personalized loyalty offers at the bottom of printed customer receipts good for future purchases.



YEAR LAUNCHED  
2019

AUDIENCE SIZE  
11 million unique online visitors, 18 million unique in-store shoppers monthly



ON THE HORIZON

The soon-to-launch LOOP (Loblaw Omnichannel Optimization Platform) self-serve platform will provide single-door access to all in-store, onsite and offsite inventory and deliver objective-based campaign planning, optimized budget allocation, and omnichannel measurement across Loblaw's media network. The platform was ideal for helping brands maximize sales, grow new to brand buyers, and launch new products.

Trials on audience subscriptions will make Loblaw's high-quality audiences and measurement solutions available directly in digital media platform seats for brands and agencies. The Shoppers Drug Mart® in-store screen network will continue growing to achieve national reach. Loblaw will also roll out strategically placed panoramic screens in Real Canadian Superstore™ locations.

The PC Express™ sampling program is improving through post-sample measurement and more-seamless participation. Audience targeting is also available, with invite-only trial opportunities for sample-size and full-size products. Gamification will continue to expand on the PC Optimum™ app, allowing brands to offer deals and products for customers to win.



ANALYSIS

Loblaw is leading the way in Canadian retail media with a robust and growing menu of online and in-store offerings.



OVERVIEW

As Canada's leading grocery and pharmacy retailer with millions of daily visitors, Loblaw knows Canadian shoppers. The combined power of its PC Optimum™ program, strong retail insights and analytics, and omnichannel media experiences makes it a key strategic partner for driving shopper loyalty and sales growth.



KEY PARTNERS

Adobe	Lytics
DoubleVerify	Nielsen
IAS	Oracle
Kantar	Tealium
Lucid	



RECENT DEVELOPMENTS

As the exclusive home of NHL Monday Night Hockey, Prime Video lets advertisers in Canada reach sports fans at scale. All Monday night games nationally will stream in English throughout the 2024-2025 season, joining a slate of hockey programming that also includes a live, weekly studio show and an NHL docuseries.

Now available in the Amazon advertising console, the AI image generator page is a free, self-service tool that produces enhanced creative images and is available for use in sponsored brands, sponsored display, Posts, and Stores campaigns.

Sponsored TV is now available in Canada as a retail-aware, shoppable ad format, allowing marketers to buy streaming TV directly through the Amazon ad.

Amazon Marketing Cloud is in beta with a new audience solution that lets advertisers create high-value segments, visualize their impact, and turn them into reachable lists. Users can generate insights and activate without writing code, thereby streamlining the process for campaign managers, media traders, and brand managers.

Ads Planner is now available as a unified planning tool that combines features from Cross-Channel Planner and Channel Planner while also introducing new capabilities such as goal-based planning, de-duplicated reach estimates, budget allocation recommendations, and audience insights.



YEAR LAUNCHED  
2015

AUDIENCE SIZE  
28 million+



ON THE HORIZON

A landmark 11-year media rights agreement with the NBA begins in 2025. The live-game rights package extends worldwide, with rights in Canada beginning in the 2026-27 season.

A new feature in the ad console will help sponsored product advertisers identify and refine high-performing targets across campaigns.



ANALYSIS

Recent ad tech upgrades have enhanced cross-channel insights and audience targeting precision within the Amazon DSP, elevating campaign planning and measurement efficacy. The new sponsored TV self-serve solution broadens reach across streaming platforms and democratizes access by requiring no minimum spend.

Generative AI integration for image creation and the global launch of Amazon Marketing Stream signal a shift toward real-time, visually compelling ad optimization. Amazon Publisher Cloud's collaborative environment delivers data-driven programmatic deal activation by leveraging first-party and Amazon Ads insights.



OVERVIEW

Amazon remains the undisputed leader in the retail media marketplace. Beyond the unrivaled volume and sophistication of its first-party data, the depth and reach of its audience opportunities go above and beyond what any other network currently offers.



KEY PARTNERS

Flywheel	Perpetua
Google	Skai
Meta	Stackline
Pacvue	Tinuiti

Retailer Targeted Demand (Carrot Ads): Costco Same Day, Rexall



RECENT DEVELOPMENTS

Instacart announced a significant expansion of its offerings in Canada with the launch of display ad formats. The move enhances the company's already robust advertising toolkit, empowering CPG brands in Canada to engage more deeply with consumers directly at the point of purchase.

The expansion introduces four key capabilities: Display Ads are creative banners that appear at the top of pages on the Instacart marketplace to introduce brands and products. Shoppable Display and Shoppable Video Ads are rich media units that combine branded storytelling through imagery or video with in-line shoppable products that consumers can immediately add to the cart. Pages are customizable, shoppable pages that let consumers explore a brand's product portfolio. All these display ad formats drive to a page; brands can also send traffic to their pages from offsite campaigns.

Finally, new objective-based buying functionality in Ads Manager lets brands choose "reach," "engage," or "maximize sales" when setting up their campaigns to receive tailored recommendations for ad formats and targeting options.



YEAR LAUNCHED  
2021

AUDIENCE SIZE  
Not provided



ON THE HORIZON

Instacart does not publicly disclose forward-looking plans.



ANALYSIS

The leader in on-demand delivery, Instacart offers in-depth analytics through its self-serve ad platform. Its targeting capabilities for both display and search are unique and extensive. Offsite, Instacart is growing its programmatic offerings via Google and Meta.



OVERVIEW

A decade ago, Instacart introduced a new model for online grocery shopping and convenient home delivery. Today, the company provides retail enablement solutions for more than 1,500 retail banners across 85,000+ stores.



KEY PARTNERS

EngageFront  
Google

Meta  
Pinterest



RECENT DEVELOPMENTS

Orange Apron Media (OAM) launched Orange Access, its unified media platform, in the back half of 2024. The platform lets advertisers develop creative, set up campaigns, and obtain real-time reporting across onsite and offsite advertising channels. Orange Access is designed for both managed and self-service clients.



ON THE HORIZON

Orange Apron has a long list of program improvements planned for 2025 to ensure that it is offering the best retail media experience for brand partners. Three notable areas of focus are onsite search keyword bidding, the development of predictive audiences (for both managed and self-serve), and enhanced media sales attribution.



RETAILER

The Home Depot Canada

YEAR LAUNCHED

2022

AUDIENCE SIZE

Not provided



ANALYSIS

As the retail media network for Canada's largest home improvement retailer, OAM has a deep audience that includes high-value PRO (professional home improvement) shoppers along with a growing base of DIY (do it yourself) customers. With a continually expanding menu of offsite and onsite capabilities, OAM gives brands a differentiated opportunity to communicate with unique shopper segments throughout their path to purchase, along with the ability to close the loop on performance reporting.



OVERVIEW

As a network in the home specialty channel, Orange Apron Media is dedicated to helping brands find and talk to unique segments of shoppers. First established in the U.S. in 2018, OAM now provides advertising opportunities there and in Canada, with the potential for future expansion as The Home Depot continues growing. The network offers media touchpoints throughout owned and off-platform properties and is continuously working to expand and deepen its capabilities to benefit advertisers.



KEY PARTNERS

Criteo  
 Google (DV360, Google Ads,  
 Google Ads Manager)

Meta  
 Pinterest



RECENT DEVELOPMENTS

Recent upgrades include expanded inventory volume and placement opportunities for onsite sponsored product ads in search results, product pages, and category pages. Placement quality and viewability of onsite display formats have been improved.

Triangle also launched email and in-app advertising, along with premium brand shop microsites for highlighting multi-category products and brands. It also is beta testing incrementality (lift) measurement via audience hold-out and synthetic control approaches.



ON THE HORIZON

Triangle's plans to enable greater access for collaboration include pilot testing access to audience data and inventory via self-serve solutions, private deals, and clean room technology. Expanded omnichannel measurement capabilities will include linking onsite ad exposure to in-store purchases and deduplicated attribution (ROAS) across channels. It also will continue testing incrementality solutions, including clean room partnerships. The roadmap also features expanded onsite media inventory through app, email and native website, along with new placements like rich media and video. A review of digital out of home solutions is also underway.

Triangle Retail  
**media**

**RETAILER**  
 Canadian Tire

**YEAR LAUNCHED**  
 2022

**AUDIENCE SIZE**  
 11.5 million



ANALYSIS

Triangle Retail Media is a robust network that leverages the vast first-party data of Canadian Tire's Triangle Rewards program. Its strength is derived from precise targeting capabilities that enable brands to deliver personalized messages to a highly engaged audience across multiple Canadian Tire banners, including Sport Chek and Mark's.

One key advantage is Triangle's omnichannel approach, which offers both onsite and offsite advertising opportunities that let brands engage consumers both within the retailer's digital ecosystem and across external platforms. The integration of loyalty data enhances targeting and campaign personalization, which can lead to higher conversion rates.



OVERVIEW

Triangle Retail Media is Canadian Tire Corporation's retail media network, which helps brands connect with consumers through a variety of advertising solutions across the retailer's owned platforms and elsewhere. The network leverages the Triangle Rewards loyalty program's extensive first-party data to offer precise targeting based on shopper behavior and preferences.

The platform offers onsite advertising (banner ads, sponsored products, search placements) across Canadian Tire's family of retail brands, including Sport Chek, Mark's, and Party City. Additionally, offsite advertising extends reach to external digital channels while using Canadian Tire's data for targeting.

Triangle Retail Media provides detailed insights and analytics, helping brands measure campaign effectiveness through metrics such as ROI, conversion rate, and in-store foot traffic. The network's omnichannel approach, which spans digital and physical stores, enables brands to drive engagement and boost sales while reaching a highly engaged, loyalty-driven customer base.



KEY PARTNERS

Adobe	Flipp
Criteo	Google
Envionics	Meta
Flipcart	Stingray



RECENT DEVELOPMENTS

Recent in-store product launches include sampling, digital signage placements on pharmacy health kiosks, and premium sign placement on partitions bookending the cosmetics aisle. New digital enhancements include search buy box and carousel ads onsite, digital onsite display products, and offsite solutions including ads on Google's Shopping, Performance Max, and video network leveraging Walmart's new in-market audiences.



ON THE HORIZON

The roadmap is highlighted by a redesigned home page and new onsite ad product placements including inspiration boxes, display buy boxes, and tile takeovers; in-store enhancements will include the introduction of retailtainment opportunities.



YEAR LAUNCHED  
2017

AUDIENCE SIZE  
17 million unique visitors;  
1.5 million daily shoppers



ANALYSIS

The additions and enhancements Walmart Connect made to its measurement tools and media products over the last year have resulted in more strategic, KPI-driven campaigns and improved performance for advertisers. However, there is still room for improvement with media opportunities.



OVERVIEW

Walmart Connect has a robust ad product offering that features closed-loop measurement and tools allowing advertisers to execute media through either self-serve platforms or a white-glove managed service.



# GLOSSARY

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Details and definitions for the evaluation criteria across four Key Performance Areas

# GLOSSARY

## TARGETING

<b>Audience Scale</b>	The retail media network has an audience of at least 10 million shoppers.	<b>Behavioral Targeting</b>	The ability to target campaigns based on specific shopping activity on the retailer's website such as browsing or search.
<b>Audience Growth</b>	The retail media network's audience has grown by at least 10% year over year.	<b>Contextual Targeting</b>	The ability to place ads in specific locations on the retailer's website or within relevant content off-platform.
<b>Purchase-Based Targeting</b>	The availability of a proprietary first-party database of shopper sales data.	<b>Demographic Targeting</b>	The ability to target campaigns to specific personal characteristics.
<b>Keyword Targeting</b>	The ability to buy top-of-page placement in the search results of keywords or target ads based on keyword searches.	<b>Competitive Conquesting</b>	The ability to target campaigns to your competitors' shoppers.
<b>Geo-Targeting</b>	The ability to target campaigns to specific locations such as ZIP codes or store footprints.	<b>Templated Audience Segments</b>	The ability to leverage pre-built audience segments (such as holiday entertaining or Millennial shoppers) that are available to all advertisers.

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## TARGETING

Custom 1P Audiences	The ability for the advertiser to create unique “from scratch” audience segments from the retailer’s first-party data that are not available to other advertisers.
Custom 1P Audiences Self-Serve	The ability for advertisers to create unique “from scratch” audience segments from the retailer’s 1st party data that are not available to other advertisers through a self-serve platform.
Predictive Audiences	The ability to build audiences based on their likelihood to take a specific action based on predictive metrics or characteristics shared with the brand’s known buyers.
Clean Room/ Brand Audience Ingestion	The ability to share anonymized brand data for targeting and measurement.
Retargeting/ Site Pixeling	The ability to leverage tracked behavior on the retailer’s platform to conduct retargeting campaigns.
Retailer-Level Targeting	On cross-retailer platforms (like Instacart), the ability to target campaigns at the retailer level. On retailer platforms, the ability to target campaigns at the banner level (e.g., Shoppers Drug Mart at Advance).

# GLOSSARY

## MEASUREMENT & REPORTING

<b>Standard Media Metrics</b>	Commonly accepted methods of digital media measurement such as impressions, click-through rate, and cost per click.	<b>Viewability/ Fraud Transparency</b>	The retail media network provides access to, or the ability to utilize, outside ad quality measurement tools (like MOAT, DoubleVerify, or IAS).
<b>Closed-Loop Attributed Sales &amp; ROAS</b>	The use of the retail media network's own 1P data to measure sales and resulting ROAS (return on ad spend).	<b>Self-Serve Real-Time Reporting</b>	The ability for advertisers to access reports directly, in as close to real time as possible.
<b>100% Deterministic Sales Data</b>	The retail media network exclusively leverages 1P data for reporting rather than modeled or extrapolated data.	<b>Self-Serve Insights</b>	The ability to access campaign insights through a self-serve platform.
<b>Total Omni-Sales Data</b>	The retail media network reports both online and brick & mortar sales impact.	<b>Media Mix Modeling</b>	The ability to gauge the unique impact of each specific tactic within a campaign through multi-touch attribution, mixed modeling, or predictive analysis, either in-flight or post-event.
<b>% New Buyers</b>	The retail media network reports the number or percentage of buyers who are new to your brand.	<b>Custom/Ad Hoc Analysis</b>	The ability for advertisers to create or request their own custom analysis/reports. These can include analysis at the targeted audience and creative versioning levels.
<b>Sales Lift &amp; iROAS</b> <small>(via A-B/exposed vs. unexposed test)</small>	The ability to measure a campaign's sales impact by conducting A/B (Exposed vs. Unexposed) testing on the retail media network's audience.	<b>Rest of Market Analysis</b>	The ability to measure a campaign's impact on incremental sales at other retailers.
<b>Sales Lift &amp; iROAS</b> <small>(True incrementality)</small>	The ability to measure a campaign's true incremental sales impact by analyzing granular data points among actual buyers such as new-to-brand, purchase frequency, or basket ring.	<b>IAB Measurement Compliance</b>	The network is actively working to adhere to the retail media measurement standards presented by the IAB (Internet Advertising Bureau).

# GLOSSARY

## INNOVATION

<b>Self-Serve Program Management</b>	The network allows advertisers to directly manage various aspects of their campaign planning, bidding, activating and reporting via self-serve ad platforms, either through the retailer's own platform or 3P services (Criteo, CitrusAd, Pacvue, etc.)	<b>Dynamic Creative Optimization (DCO)</b>	Advertisers are able to use 3P creative tools (such as AdForm or Flashtalking) to mass-personalize ad experiences to drive shopper engagement.
<b>Shoppable Content</b>	The network offers opportunities for advertisers to create shoppable content (such as recipe pages or click-through videos).	<b>Generative AI Search</b>	The network has an advanced AI tool that allows shoppers to conduct product searches by asking questions or using contextual phrases to receive recommendations rather than simple results.
<b>AR/VR</b>	The retail media network is creating shopper engagement opportunities around the emerging technologies of augmented and virtual reality.	<b>EV Charging</b>	The network offers advertising opportunities at the electronic vehicle charging stations in store parking lots
<b>Livestream Shopping</b>	The network hosts live sponsored shopping events on digital platforms or has partnerships available to stage them.	<b>AI Content Generator</b>	The network has AI tools that help advertisers create images and other content (like turning plain-background product shots into vibrant lifestyle images) to help improve shopper engagement.
<b>1P Data Sharing</b>	The platform lets advertisers use its 1P data for campaigns handled by 3P service providers/publishers outside of its own partner network.		

# GLOSSARY

## PARTNERSHIP

<b>JBP Process for Retail Media</b>	The retail media network offers joint business planning and/or preferred partnerships for brands and agencies.	<b>Creative Flexibility/Self-Serve Certification</b>	The advertiser has control over campaign creative/messages and/or can earn creative certification to develop ad units directly within the platform.
<b>Retailer-Level JBP Integration</b>	Retail media network activity is integrated into the broader JBP process between the retailer and advertiser.	<b>First-to-Market Test &amp; Learns</b>	The network offers opportunities to conduct first-to-market test & learns on new offerings before activating them at scale.
<b>Annual Planning/ Top-to-Tops</b>	The relationship includes standard business opportunities such as annual planning and top-to-top meetings.	<b>Agency Partnerships</b>	The network establishes formal partnerships with marketing agencies that strengthen collaboration and facilitate cross-client benefits.
<b>In-Store Opportunity Leverage</b>	The retail media investment earns value-added activation in stores (such as increased product distribution or incremental display).	<b>Roadmap Visibility/ Collaboration</b>	The network openly shares its future plans with advertisers, actively seeking their input and participation in developing mutually beneficial improvements and innovation.
<b>Partner Training Programs/ Certifications</b>	The network offers formal training and education opportunities to help brands and agencies understand and optimize the platform.	<b>Transparency Into Media Rates</b>	The network openly shares the rates it is charging for media opportunities.
<b>Dedicated Account Reps</b>	The retail media network provides advertisers with a direct point of contact.	<b>Loyalty Program Alignment</b>	The retailer has a loyalty program that can be leveraged for retail media network activity.
<b>Dedicated Data Analytics/Other Resources</b>	The retail media network has dedicated internal resources for data analytics and other key business needs.		

... OUR TEAM



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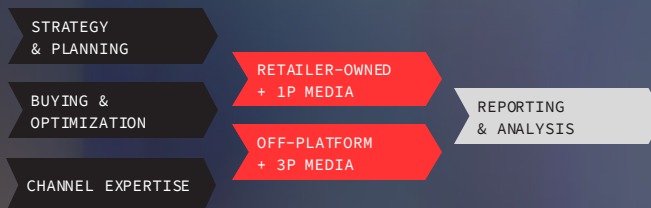
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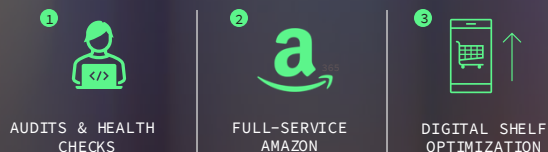
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