

# Unveiling the 2024 Sponsored Products Benchmarks

## A Roadmap to Retail Media Success



## Presenters for Today

### Andreas Reiffen

Founder & CEO  
Crealytics



### Mark Burton

Head of Product - Retail Media  
Crealytics



# Uncovering Sponsored Products insights from 9 leading US Retail Media Networks

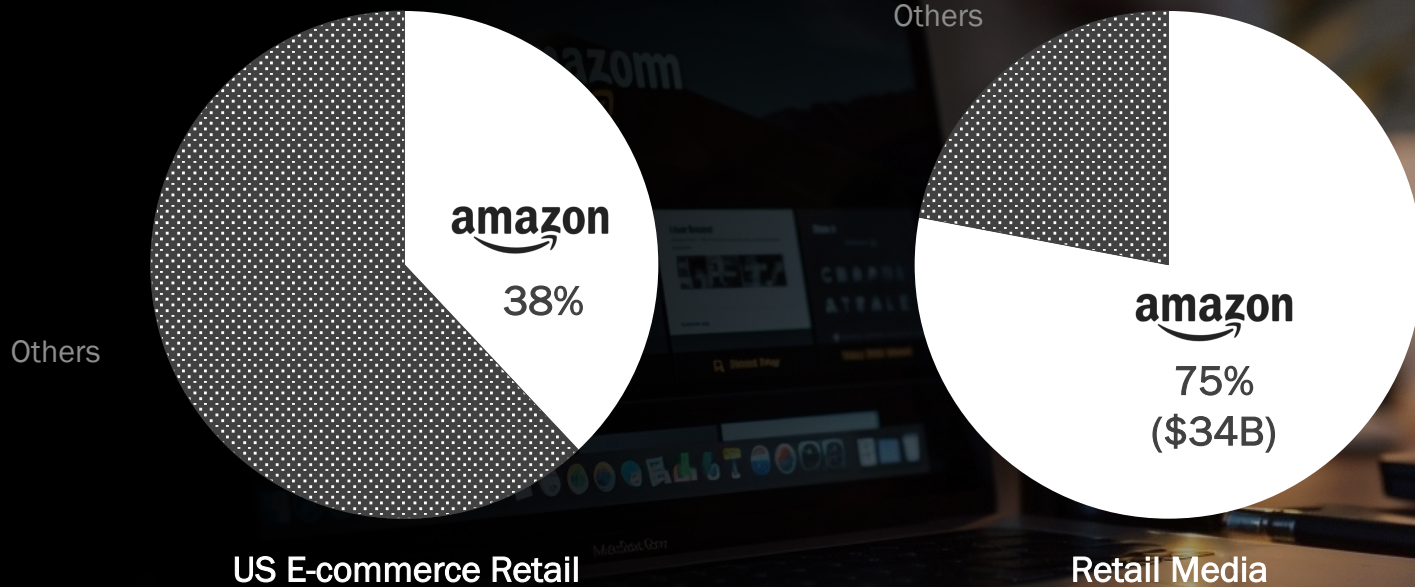
- Learn how Amazon successfully copied Google's playbook

- Reveal how 9 RMNs leverage Sponsored Products

- Discover which brands are leading the game

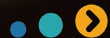


# Amazon's US Market Share




Source: eMarketer, Statista

#RetailMediaBenchmarks





A photograph of a stack of US dollar bills on a wooden table. The stack is tall and consists of several thick bundles of bills. Some bills are scattered around the base of the stack. The lighting is dramatic, with the stack of money being the brightest element against a dark, blurred background. The text is overlaid on the left side of the image.

Amazon's US rivals are leaving  
**\$43B** ad revenue on the table

Source: eMarketer, Statista, Crealytics data

#RetailMediaBenchmarks

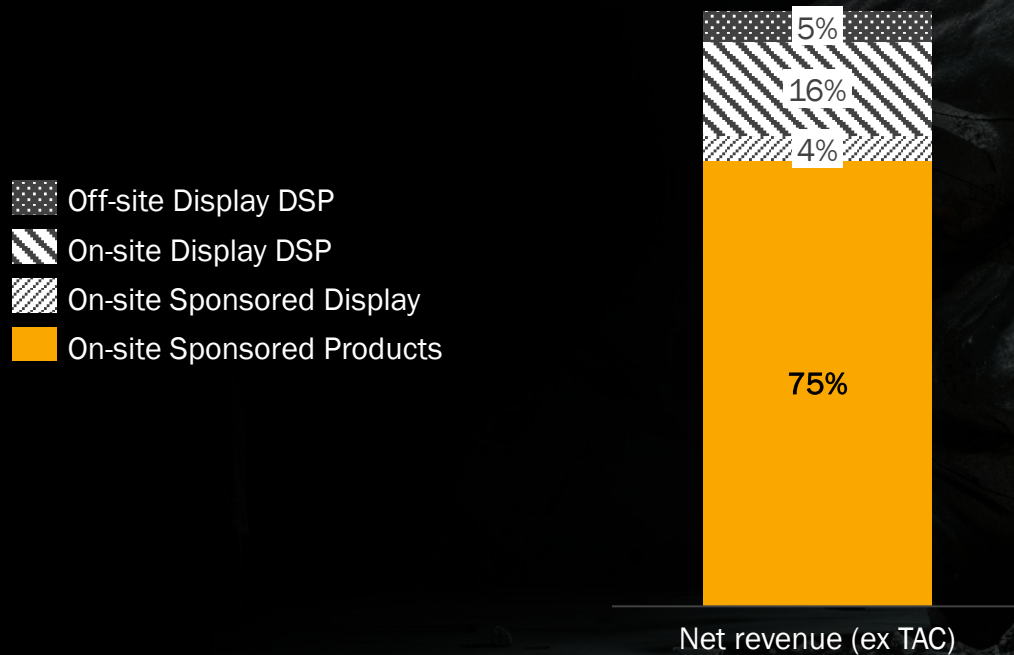


How can **Amazon** be so dominant?






# Sponsored Products account for 75% of Amazon's ad revenues







How can Amazon make  
**\$26B** with Sponsored  
Products in the US only?

A young boy and girl are sitting at desks in a classroom, looking thoughtful. The boy is on the left, resting his chin on his hand. The girl is on the right, looking down at a book or paper. The scene is dimly lit, with a strong light source from the right, creating a dramatic, focused atmosphere. The text "Amazon copied Google's playbook" is overlaid in the center of the image.

Amazon copied  
Google's playbook

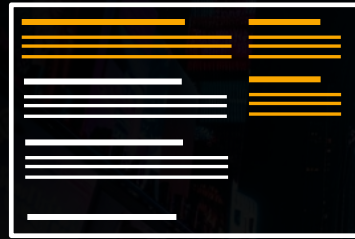


# Google

Organic vs. Paid Ads

2003

2024

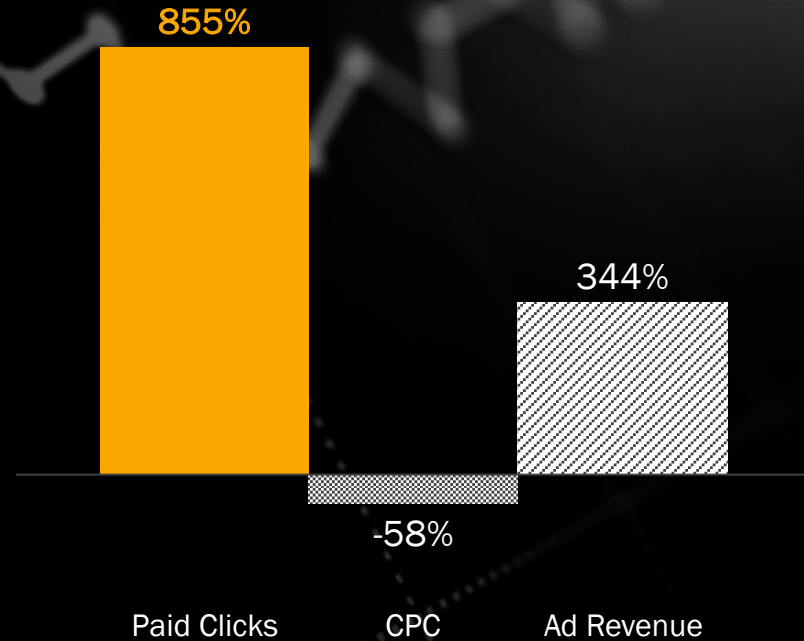




# Google

Google's last 10 years in numbers.

- Almost 10x more paid clicks
- Led to a deflation of CPCs
- Drove exponential growth



Relevancy and ad inventory  
determine the success of  
Sponsored Products.



# Sponsored Products Benchmarks Review

## 1. Explain methodology and terminology

## 2. Explore trends

- How prevalent are in-grid sponsored products with leading retail media networks (RMNs)?
- How do RMNs fill their ad inventory?
- How do RMNs use technology to drive performance?
- Which categories are most competitive?
- With whom are brands investing?





# Our research covers Sponsored Products for 9 leading US Retail Media Networks (RMNs).

## US Retail Media Networks



## Stats

2500 Keywords

- Grocery
- Beauty
- Fashion
- Electronics
- Office
- Furniture

+3500 Brands

Desktop search analysis Q3/2023 – Q1/2024, covering the following ad units:

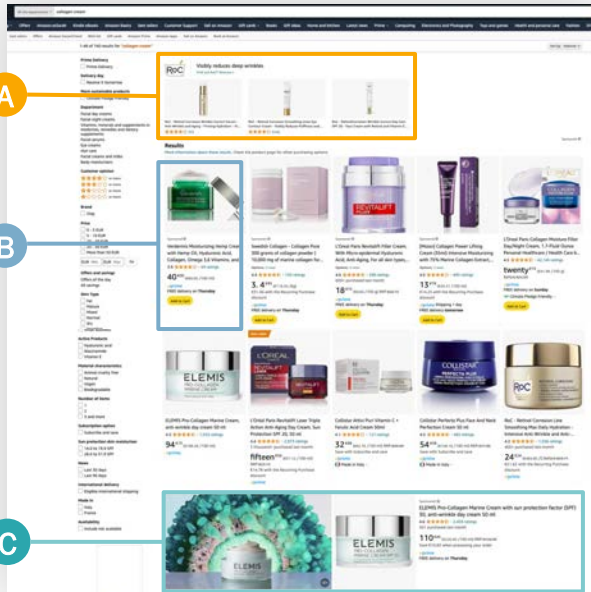
- In-grid sponsored products
- Sponsored carousels
- Sponsored brand carousel
- Sponsored video ads



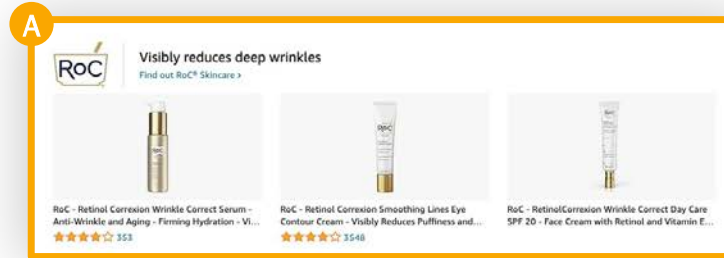
# We cover all major Sponsored Product ad units.



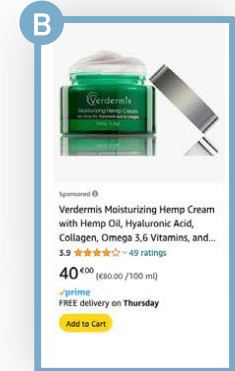
## Ad Units



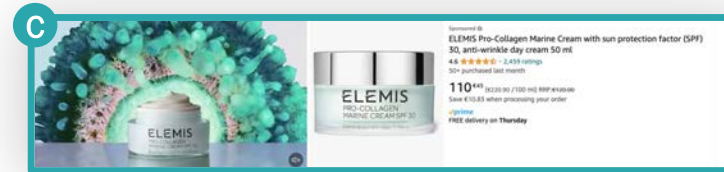
### Brand Carousel or Product Carousel



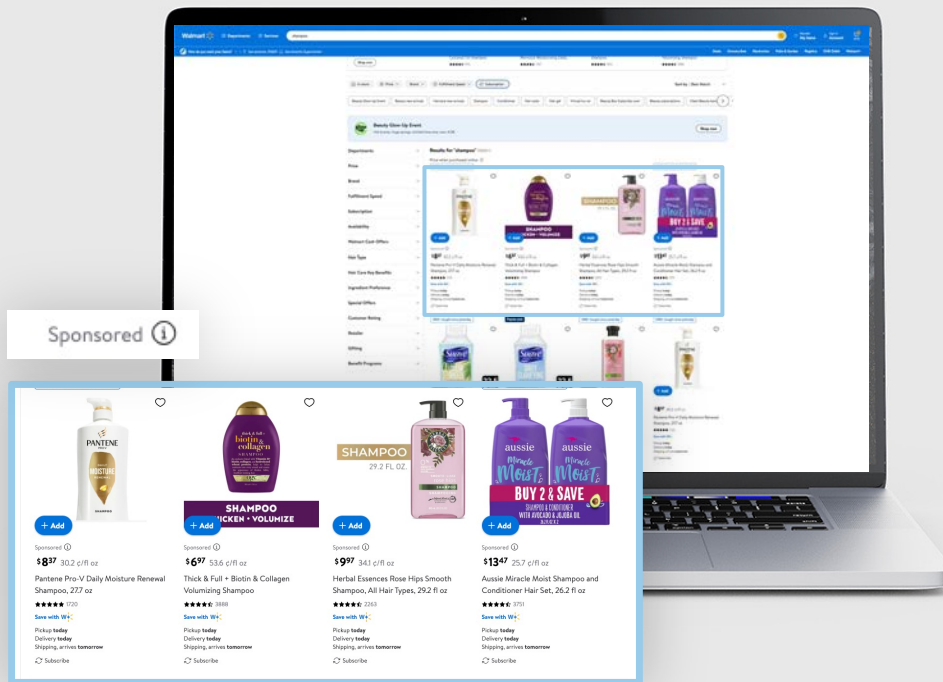
### In-Grid



### Video



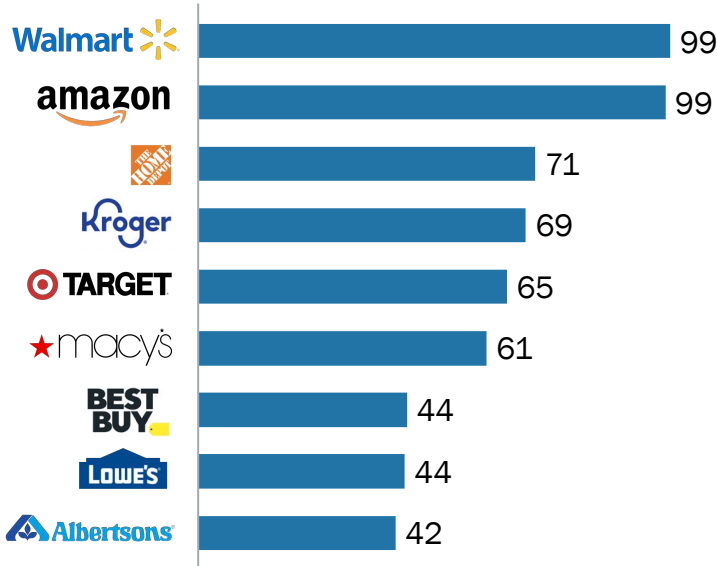
How prevalent are sponsored products with leading RMNs?



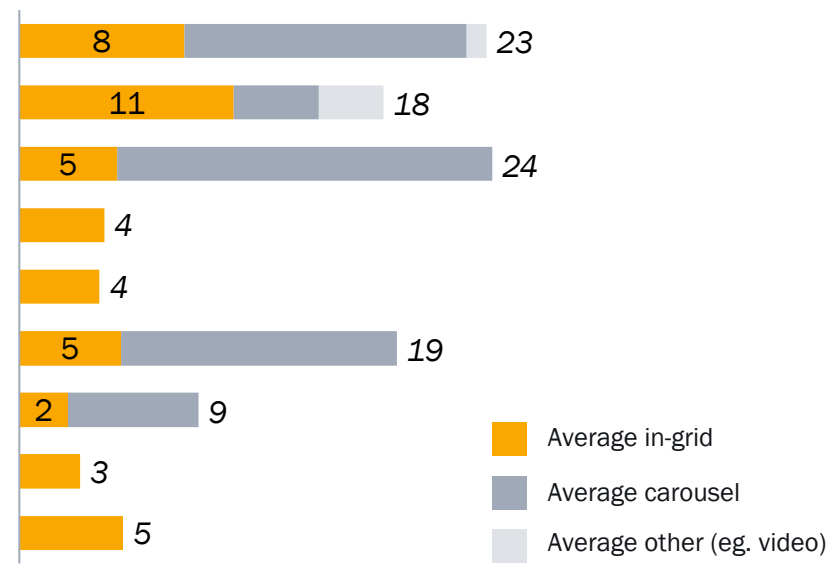


# Amazon and Walmart show sponsored ads on almost every page, while others aren't yet maximizing coverage.

## Searches with sponsored ads %












## Average ad fill count



Source: Crealytics Q1 2024 Sponsored Products Benchmarks Report (data collected Q4 2023-Q1 2024)



In-grid search ads are universal; carousels are also popular. Amazon and Walmart have the most advanced inventory.

	In-Grid	Product Carousel	Brand Carousel	Video
	✓	✓	✓	✓
	✓	✓	✓	✓
	✓	✓		
	✓	✓		
	✓	✓		
	✓			
	✓			
	✓			
	✓			

Source: Crealytics Q1 2024 Sponsored Products Benchmarks Report (data collected Q4 2023-Q1 2024)



## Amazon and Walmart prioritize sponsored products and it's paying off.

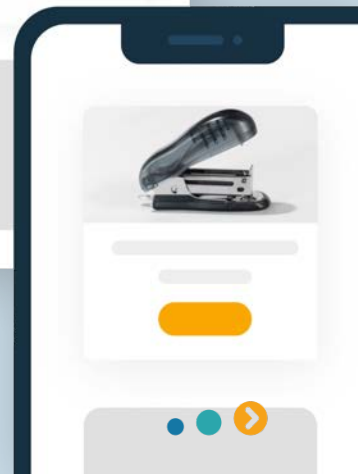
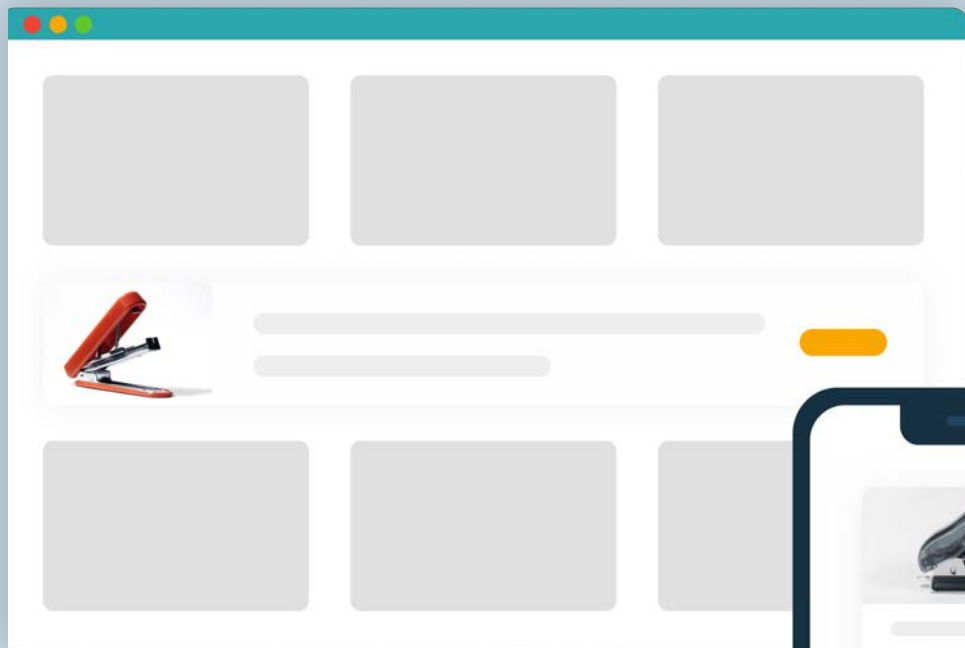




Location,  
Location,  
Location:

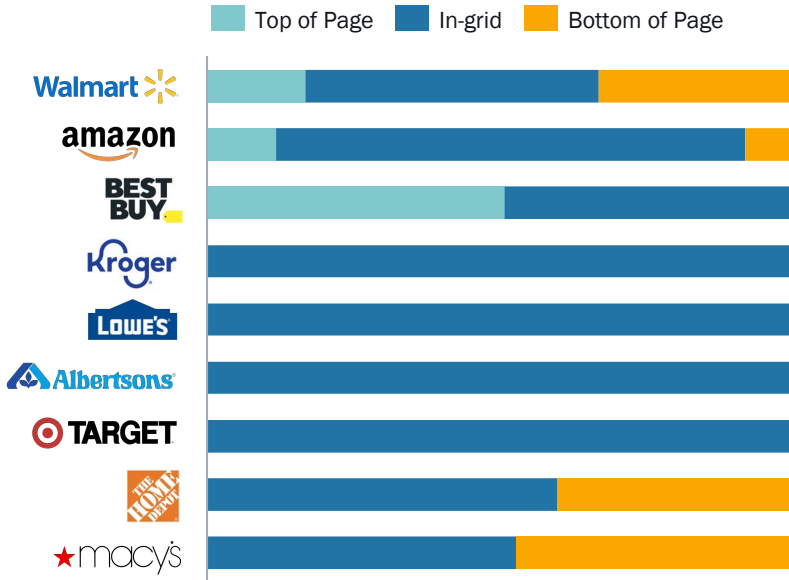
How do RMNs fill  
their ad inventory?

What does this tell us  
about ad relevancy?



# Visibility over relevancy? Ad placement strategies vary by retailer – but bottom-of-page tends to be less relevant.

Location of sponsored ads (% of ads seen)



Ad coverage with vs. without bottom-of-page carousels

Retailer	With bottom-of-page ads	Without bottom-of-page ads
Walmart	99%	96%
amazon	99%	99%
THE HOME DEPOT	71%	64%
macy's	62%	42%

Source: Crealytics Q1 2024 Sponsored Products Benchmarks Report (data collected Q4 2023-Q1 2024)



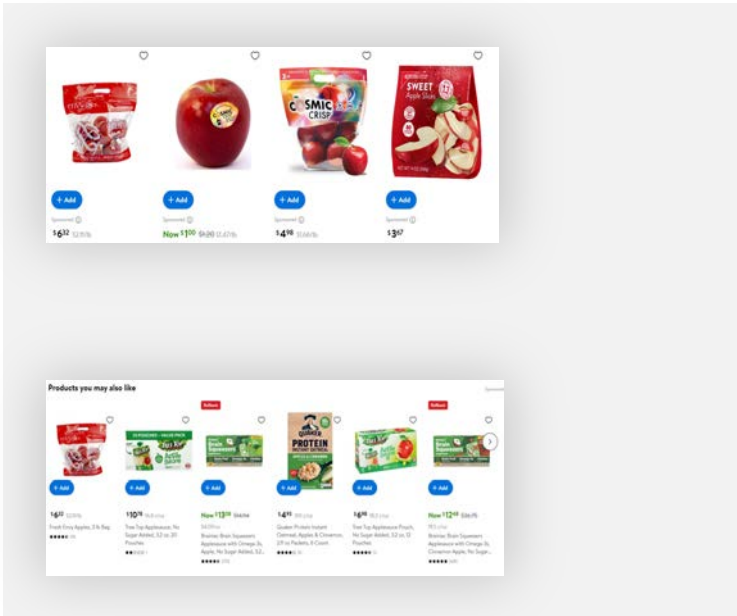
# An 'apples' search on Walmart shows more relevant ads in-grid, and less relevant bottom-of-page.

99%



Sponsored Product **Grocery** coverage with bottom-of-page ads

apples



Source: Crealytics Q1 2024 Sponsored Products Benchmarks Report (data collected Q4 2023-Q1 2024)



# An 'apples' search on Walmart shows more relevant ads in-grid, and less relevant bottom-of-page.

99%

Walmart 

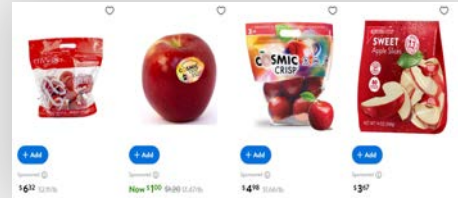
Sponsored Product **Grocery** coverage with bottom-of-page ads

83%

Walmart 

Sponsored Product **Grocery** coverage without bottom-of-page ads

apples

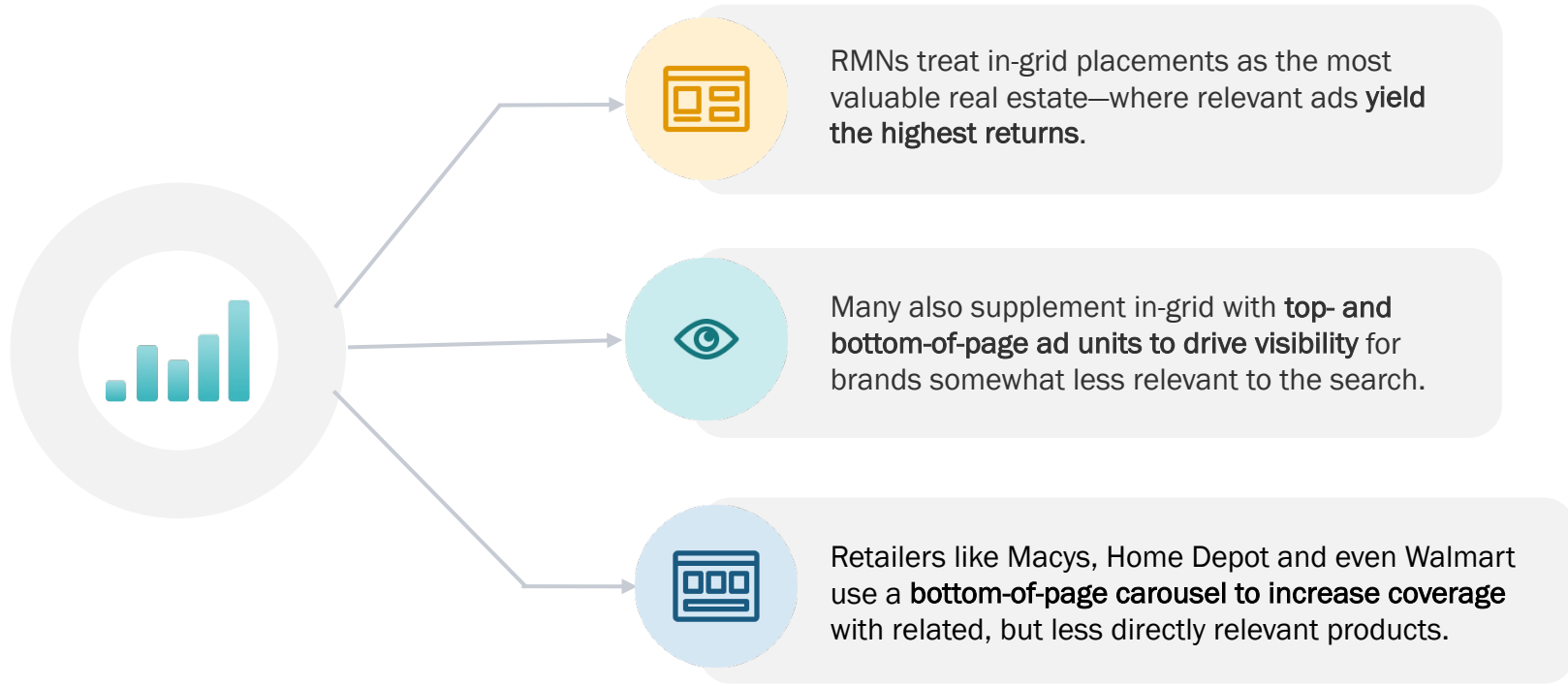


Source: Crealytics Q1 2024 Sponsored Products Benchmarks Report (data collected Q4 2023-Q1 2024)





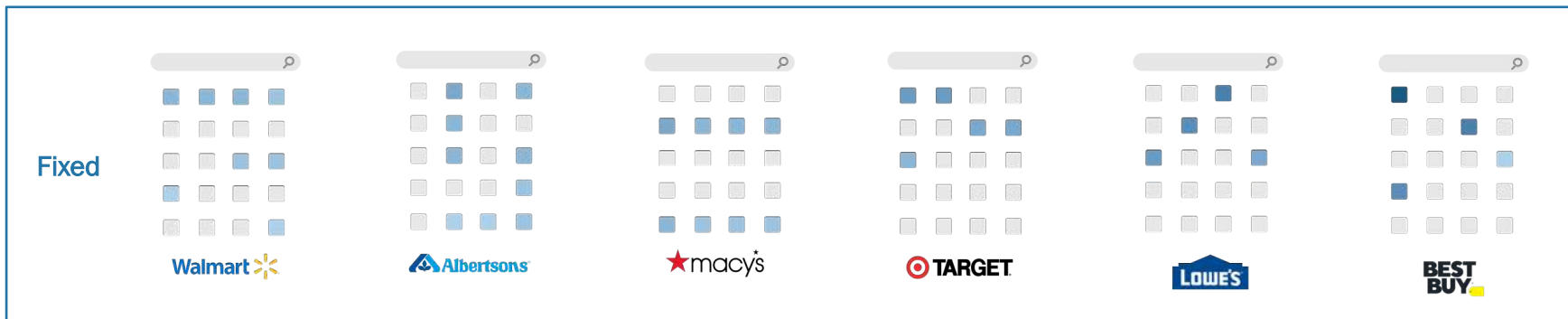
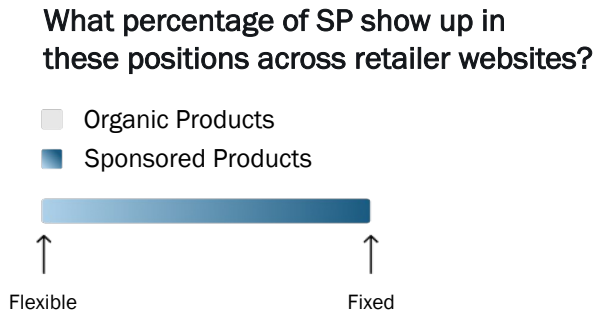
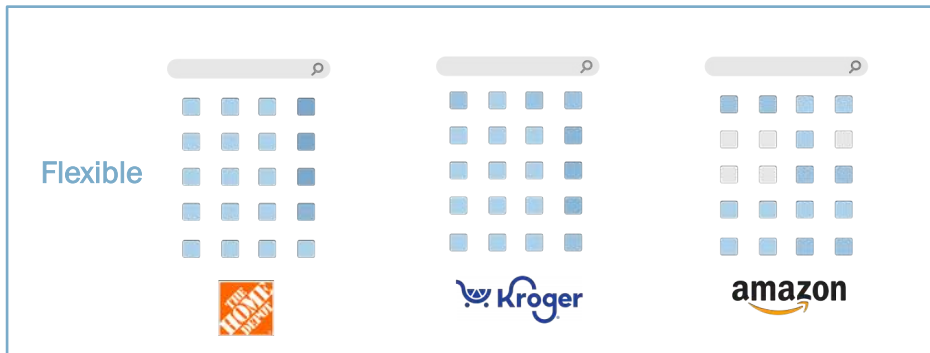
## In-grid is where high relevancy counts the most.



How are RMNs  
using technology  
to drive ad  
performance?



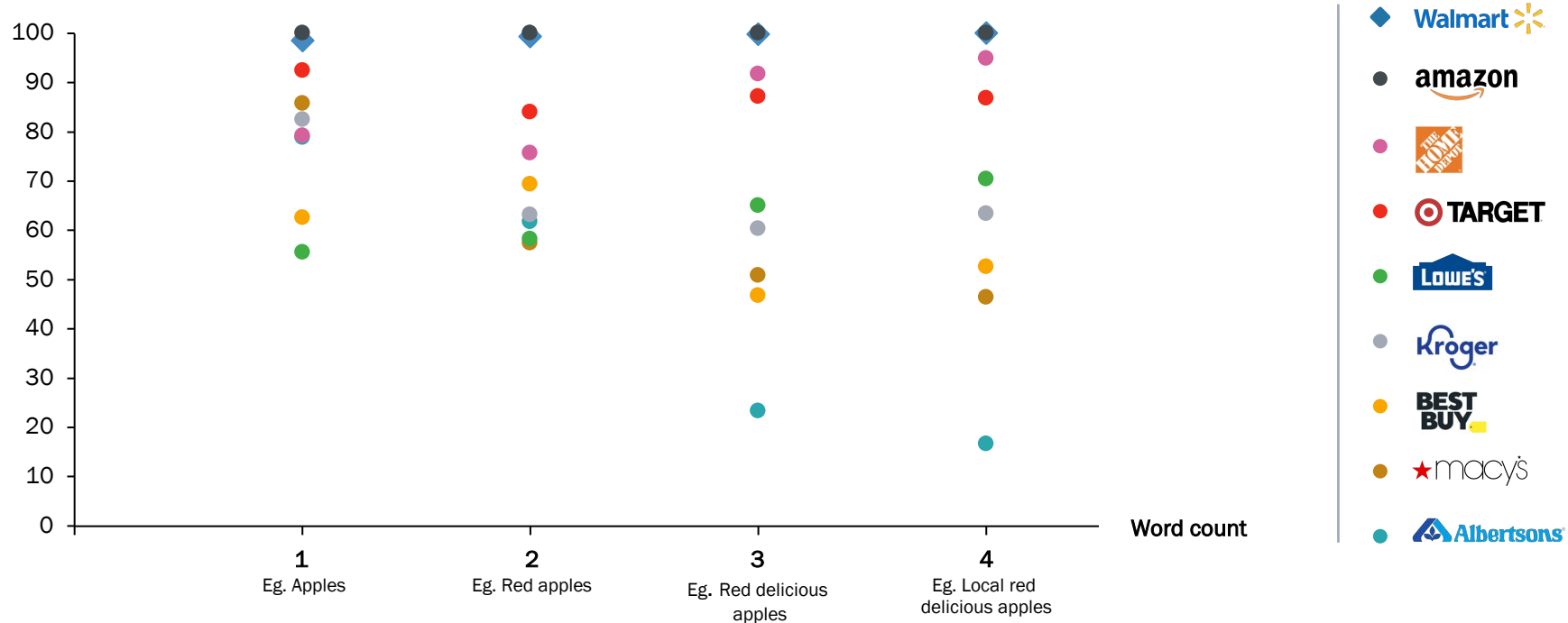
# Retailer strategies vary in-grid, between classic fixed placements and dynamic placement decisioning.



# How effectively do RMNs cover long-tail searches?

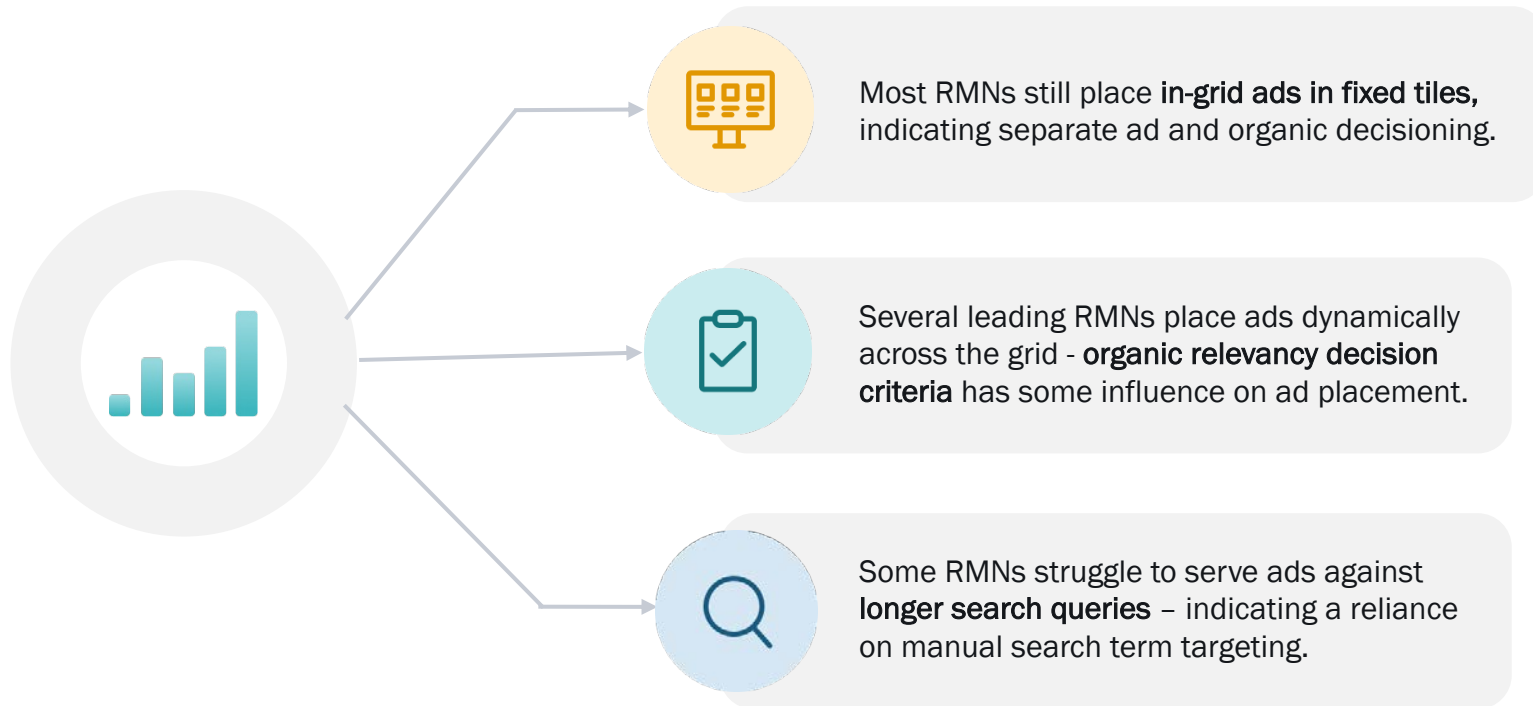
## How well does the technology perform and where are the opportunities?

% Searches covered

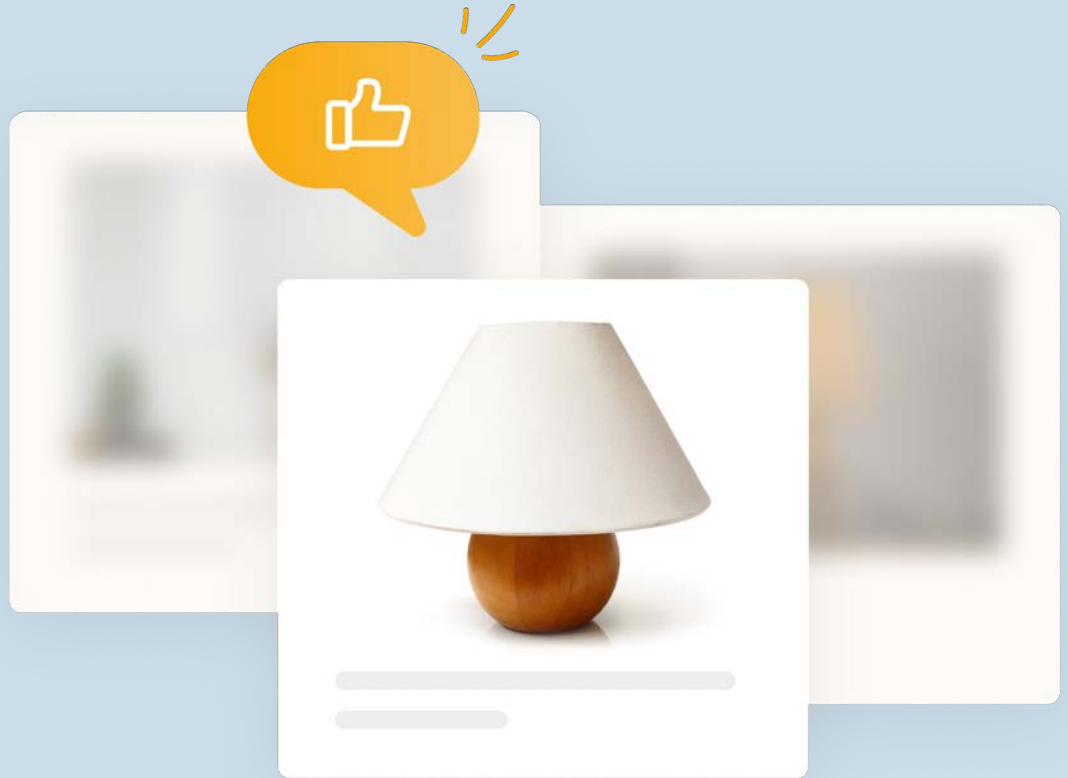




## Leaders handle search complexity and ad placement with a more sophisticated approach.



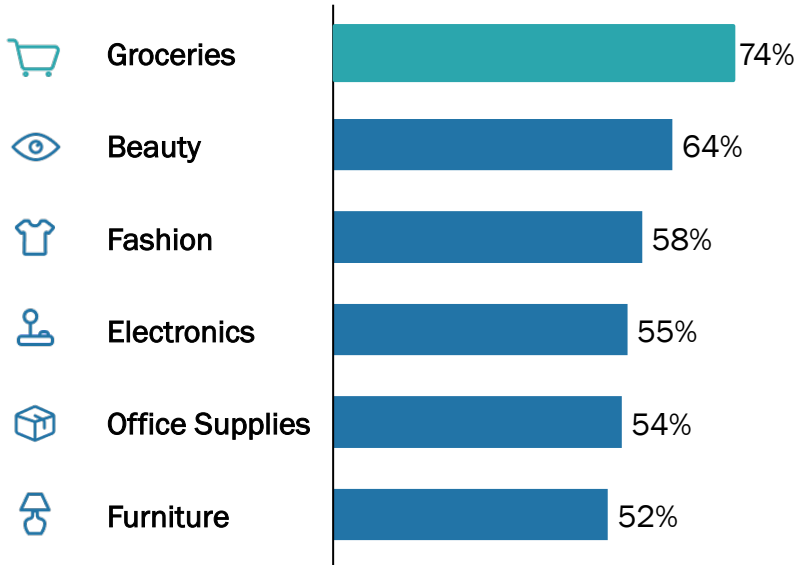
Which categories  
are the most  
competitive?



# Grocery is the most competitive category with highest coverage, while others aren't yet as developed.

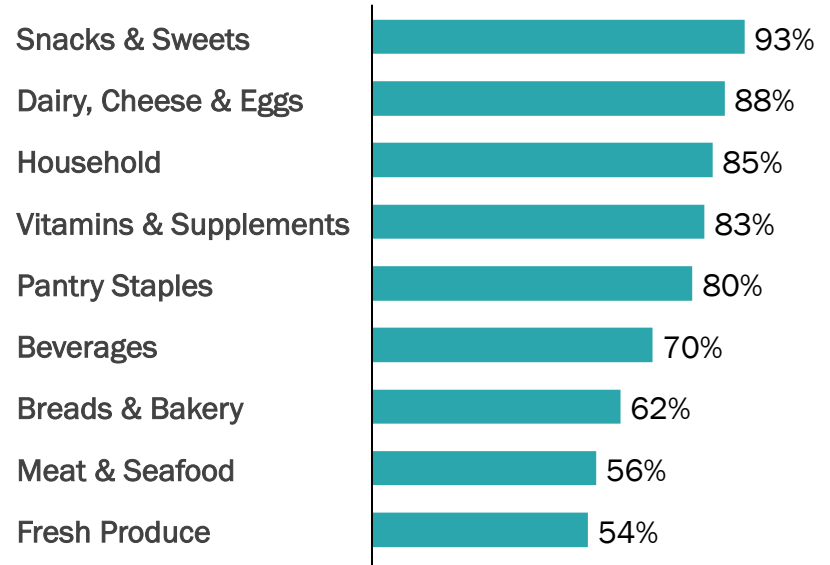
## % of user searches have SPA

% Searches covered



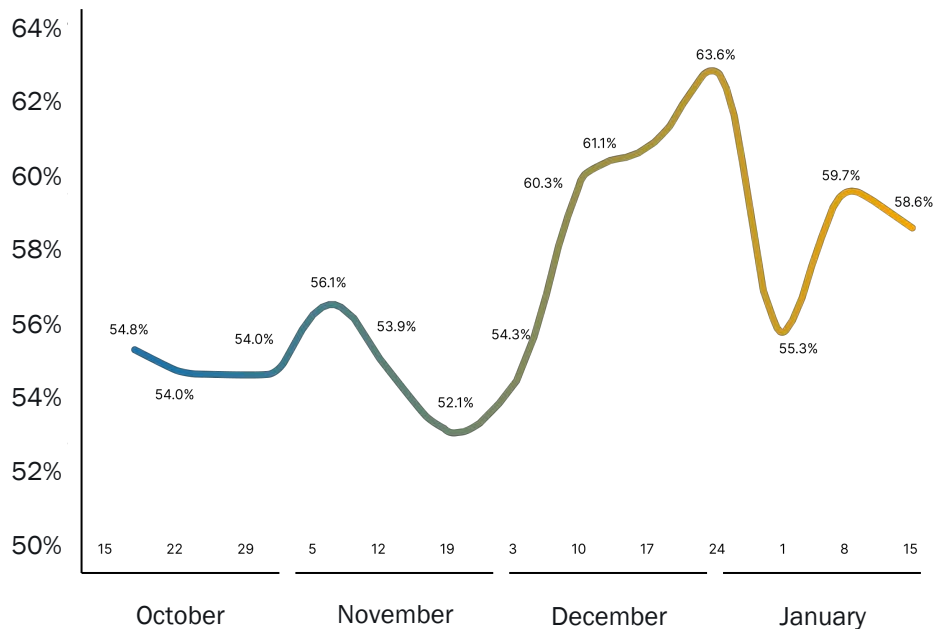
## Sub-categories in grocery

% Searches covered

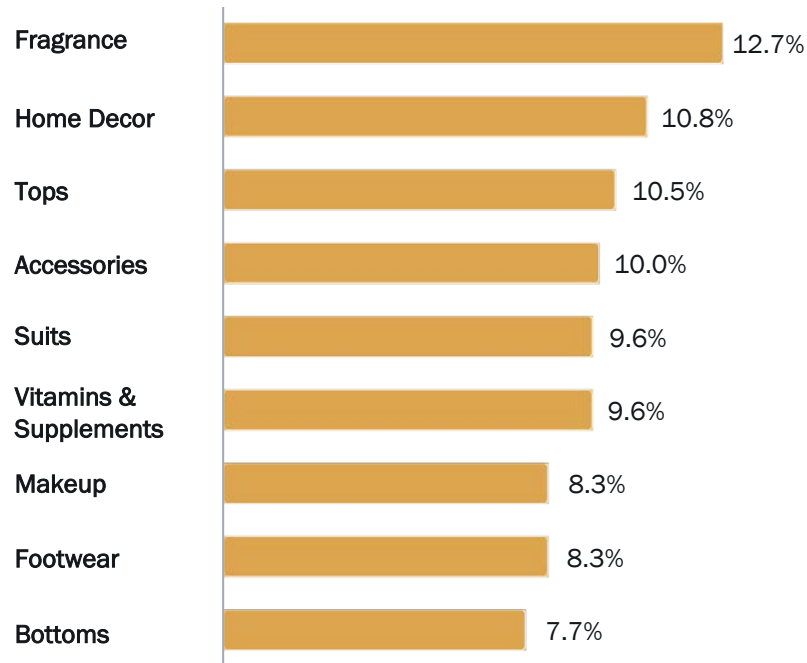


# Category competition amps up from Black Friday until Christmas.

## Sponsored Search Coverage



## % Increase in Ad Coverage (Nov - Dec)-

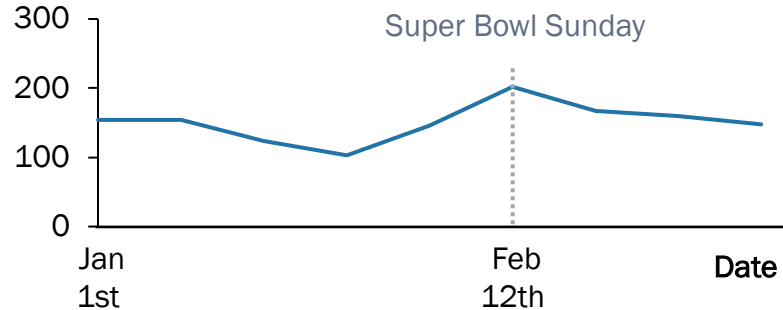




# Brand Activation: CeraVe became the biggest skincare advertiser right after their Super Bowl ad.

## CeraVe: number of searches showing SPA

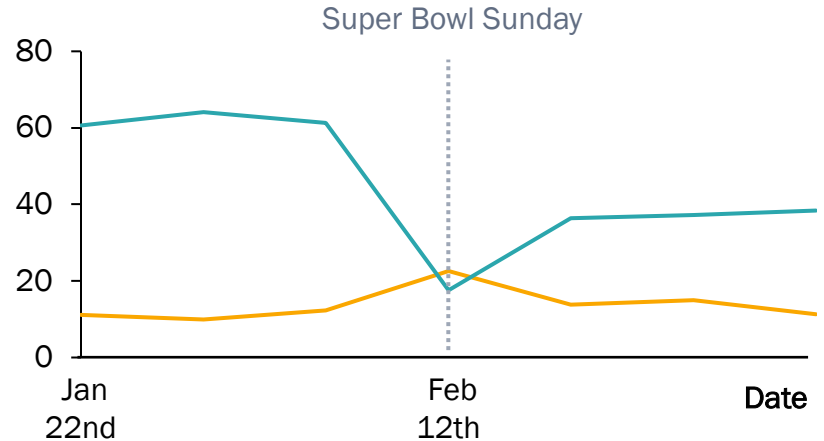
Searches



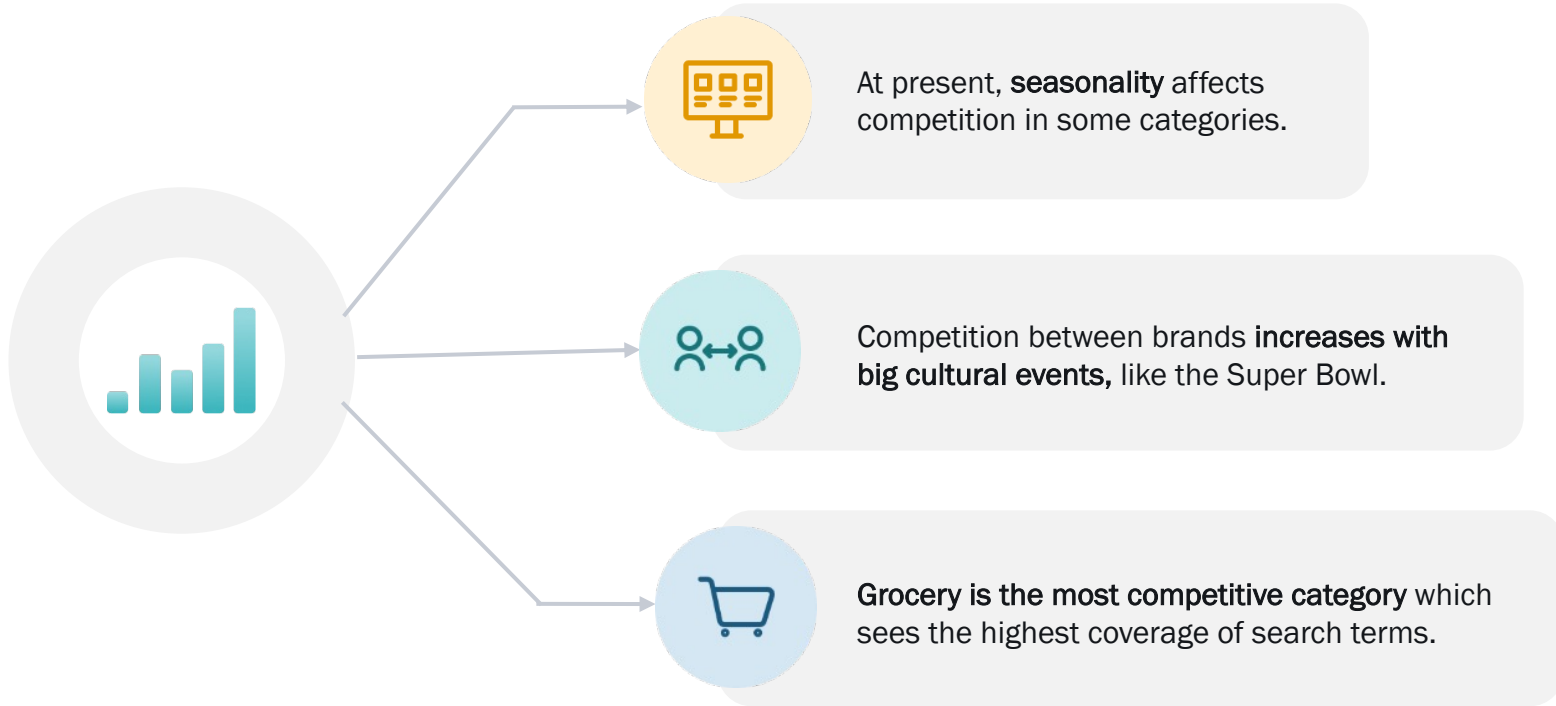
## CeraVe gains market share vs Clinique

Share of SPA ad results

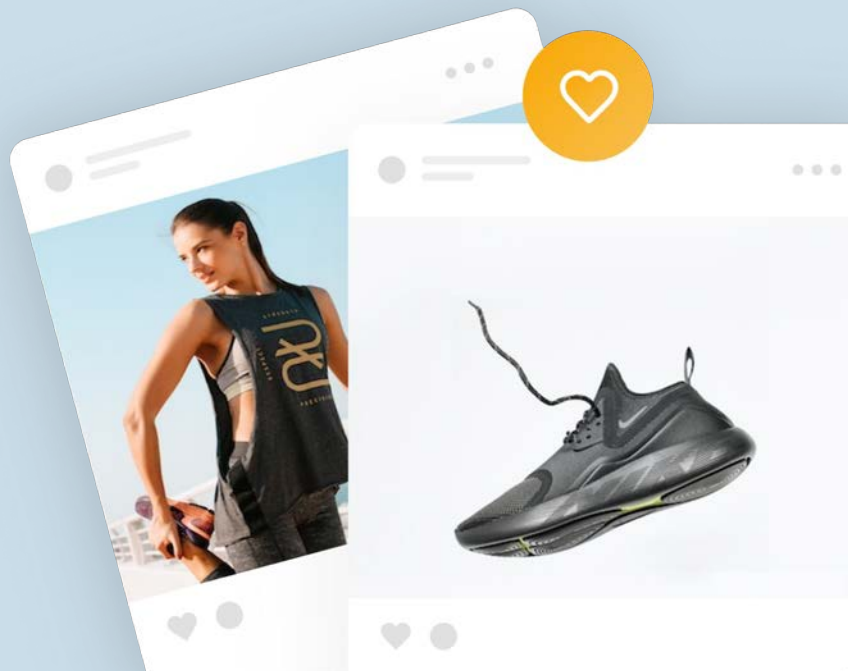
— CERAVE  
— CLINIQUE



## Some categories see consistent competition, others get spicier seasonally.

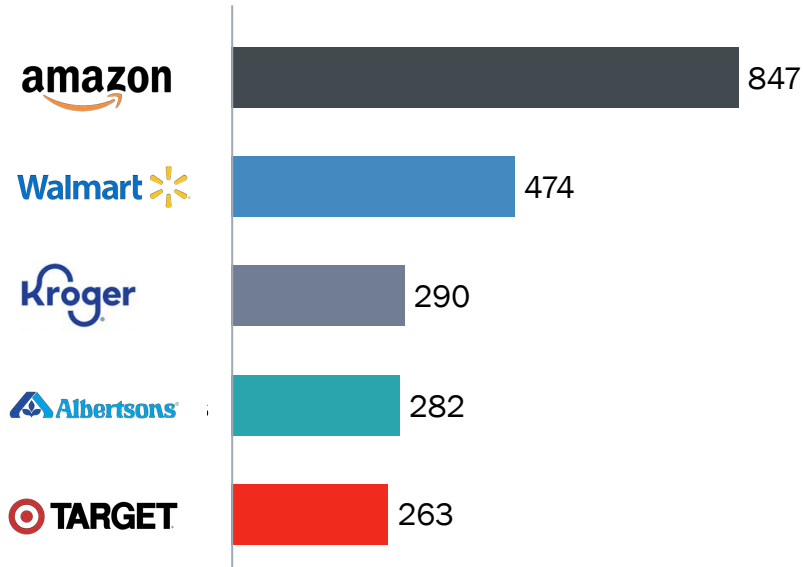


With whom are brands investing?

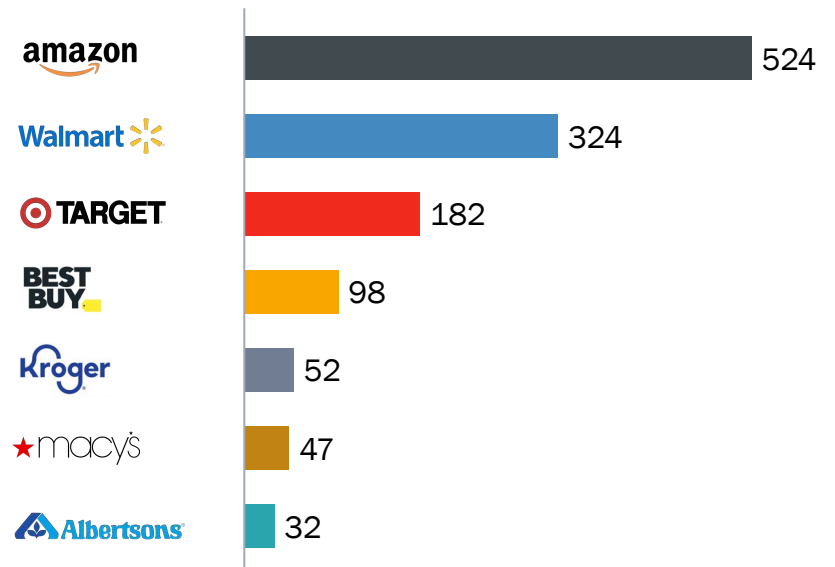


# Amazon and Walmart continue to dominate, attracting budgets from the long-tail of brands.

## Grocery Brands



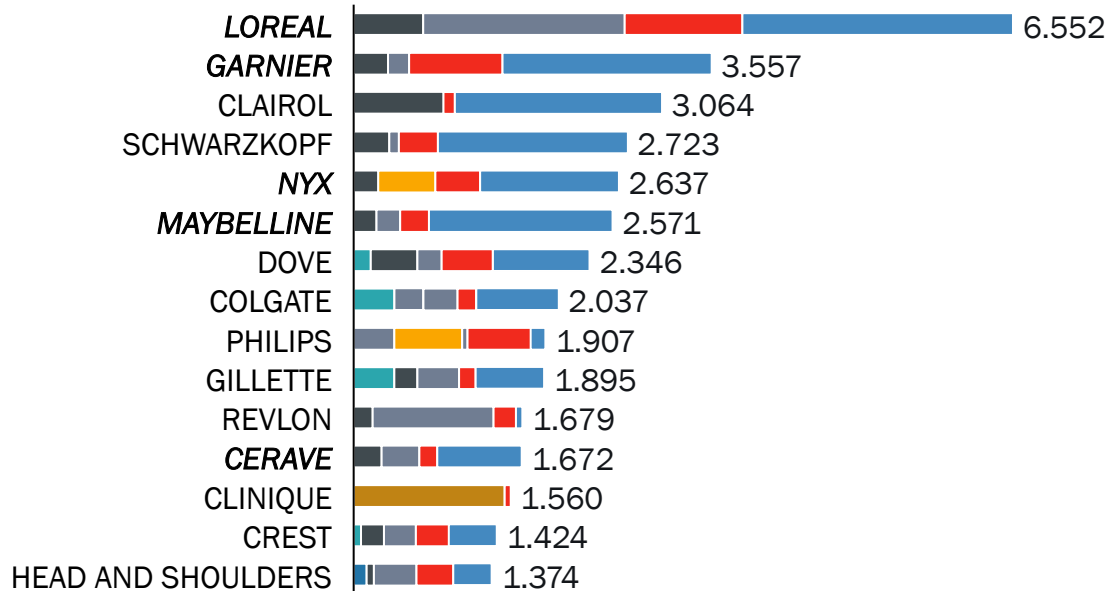
## Beauty Brands



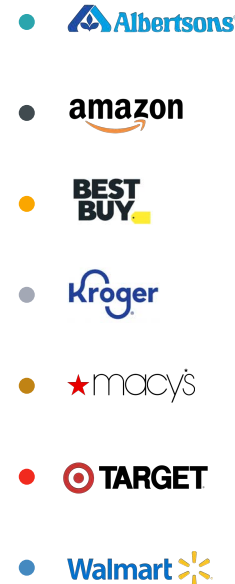


# L'Oreal brands dominate in Beauty – with many consumer brands favoring Walmart.

## Active ads in Beauty

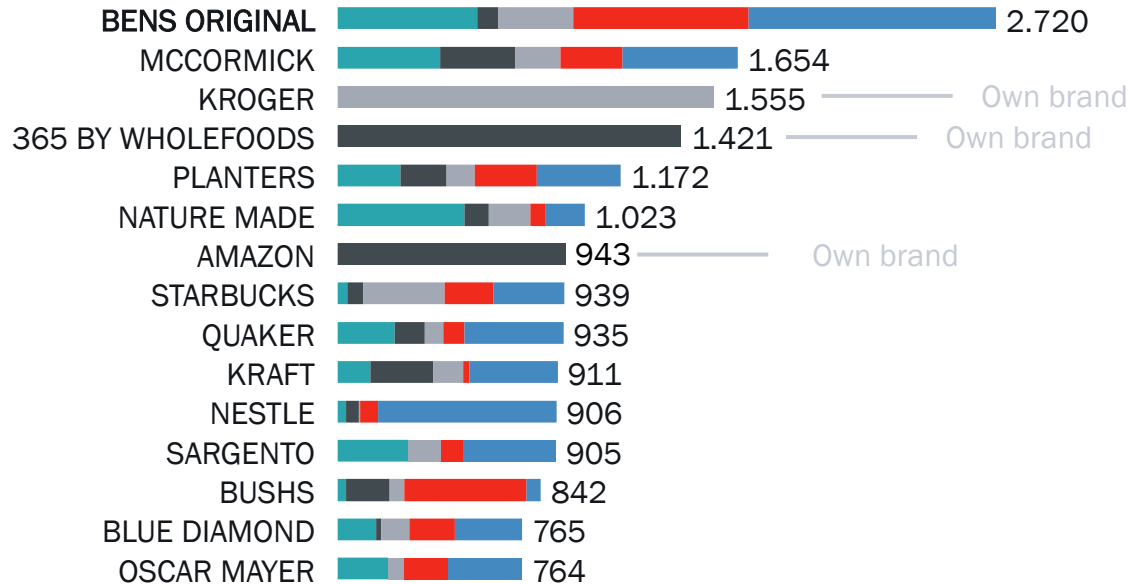


## By Retailer



# Grocery highlights an unusual trend for retailers to use sponsored slots to feature their own private-label brands.

Active ads in Grocery



By Retailer



# Amazon and Kroger both use Sponsored Products for their private-labels.

Amazon often replace top sponsored positions with a featured product from Amazon brands.

The screenshot shows the Amazon.es search results for "almonds". The top navigation bar includes the Amazon logo, delivery location (Madrid 28009), and search filters. The main search results are categorized into "Entitled to free shipping", "Fresh products", "More sustainable products", "Department", "Customer opinion", and "Brand". The "Brand" filter is set to "DORIMED". The "Results" section displays several sponsored products, including "Helios" jam, "nut&me" almonds, and "California Almonds". A yellow box highlights the "Amazon Brand Featured" product, "Sliced almonds", which is priced at 16.443 EUR (€16.43 /kg) and features a 30% discount in the first subscription order. An orange arrow points from the text on the left to this highlighted product.

amazon.es Delivery in Madrid 28009 Update location All the departments almonds

1-48 of over 1,000 results for "almonds"

Entitled to free shipping  
 Free shipping by Amazon  
FREE Shipping with Amazon to eligible destinations

Fresh products  
 Amazon Fresh

More sustainable products  
 Climate Pledge Friendly

Department  
Alimentation and drinks  
Almonds

Books  
Home, crafts and lifestyles  
fruit kitchen  
literary fiction  
Fiction about contemporary women  
Rural and small town fiction  
Italian cuisine

Customer opinion  
★★★★☆ or more  
★★★★☆ or more  
★★★★☆ or more  
★★★★☆ or more

Brand  
 DORIMED

Price  
 0 - 5 EUR  
 5 - 10 EUR  
 10 - 20 EUR  
 20 - 50 EUR  
 More than 50 EUR

EUR Min. EUR Max. Go

Offers and savings  
All savings

Helios The taste of origin  
Buy from the HELIOS Store on Amazon

Extra Jam Jam 0% Natural Jam

Results

Amazon Brand Featured  
Sliced almonds  
★★★★☆ - 576  
16.443 (€16.43 /kg)  
€15.61 with the Recurring Purchase discount  
30% discount in the first subscription order

Raw almonds with skin 1kg nut&me | natural almonds | Protein source | High fiber content | Gluten free | Almond  
★★★★☆ - 14  
14.999 (€14.99 /kg)  
-prime FREE delivery Tue, Apr 2

Natural roasted almonds without salt 1kg nut&me | Gluten Free - no additives | Keto | Healthy nuts | ...  
Toasted almond  
★★★★☆ - 17  
18.999 (€18.99 /kg)  
-prime FREE delivery Tue, Apr 2

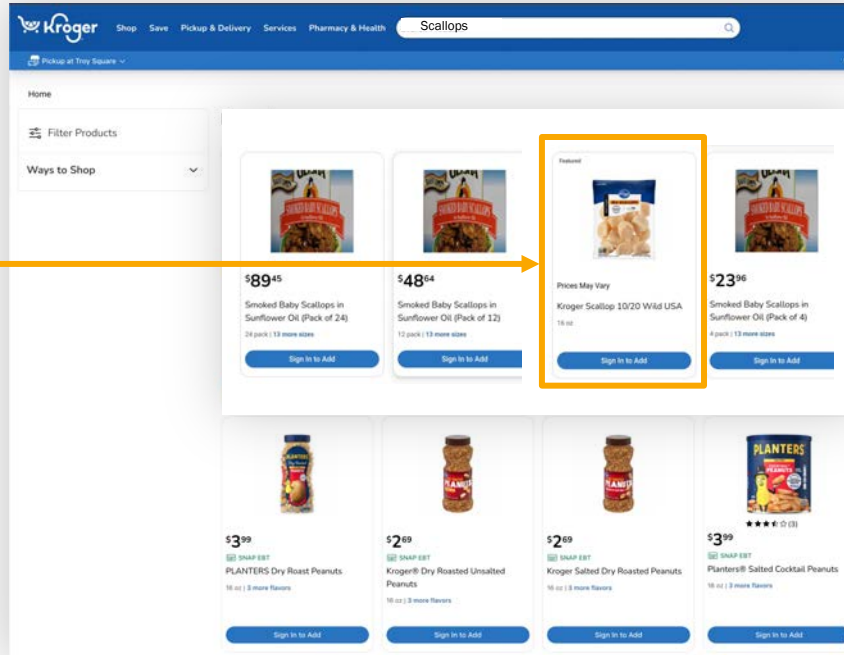
NULTHY - Natural Almond with Skin - Natural Nuts - Origin Spain - Gluten Free - Vegan (TKG)  
Almond  
★★★★☆ - 1  
13.999 (€13.99 /unit)  
Buy 2 and get 5% discount  
FREE delivery on Wed, Apr 3

By Amazon - California Almonds, Unsalted, 500 g  
Without salt  
★★★★☆ - 303  
100+ purchased last month  
6.41 (€12.82 /kg)  
€6.09 with the Recurring Purchase discount  
30% discount in the first subscription order

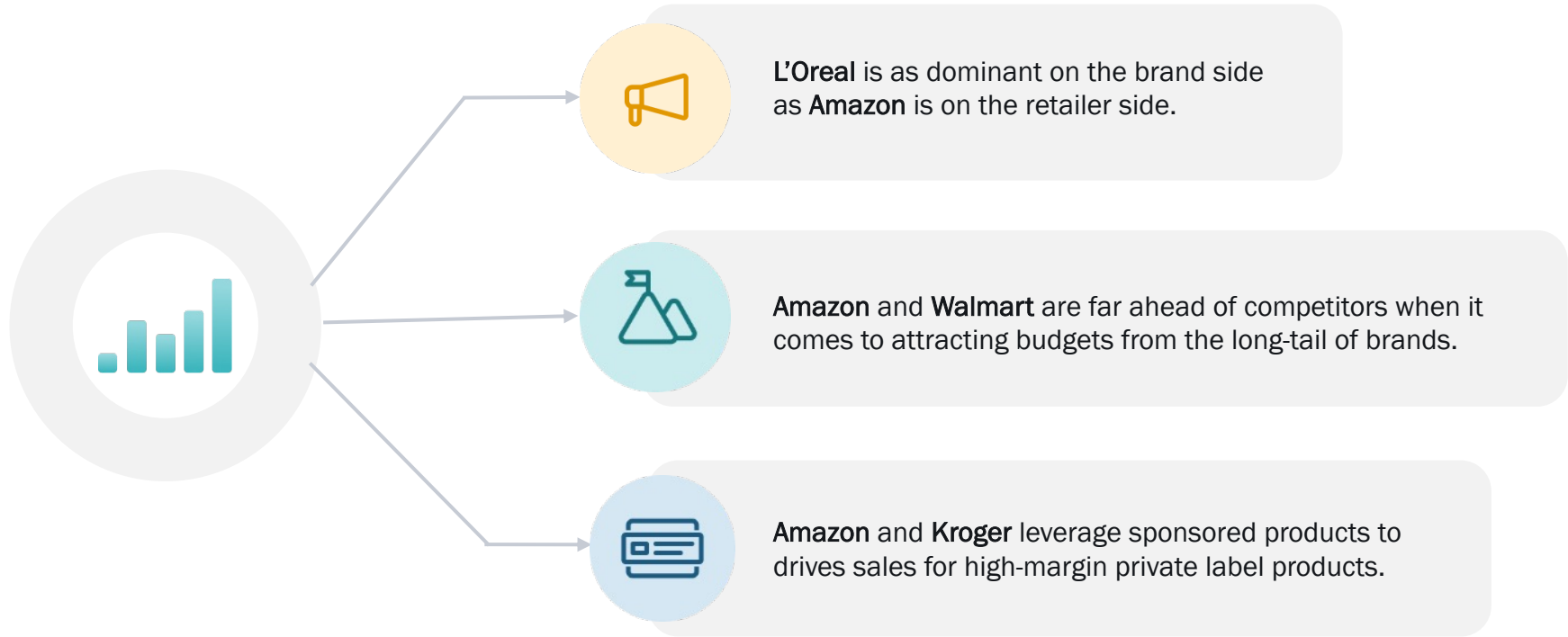


# Amazon and Kroger both use Sponsored Products for their private-label brands.

Kroger also sponsors its own products top-of-page.



## Big and small brands are attracted to work with leading RMNs.



Low ad relevance and limited inventory are holding many RMNs back from maximizing their sponsored product revenue opportunity.

How much money are you leaving on the table?

Let's talk.



Low ad relevance and limited inventory are holding many RMNs back from maximizing their sponsored product revenue opportunity.

Learn more  
about our Retail  
Media SSP at  
[crealytics.com](https://crealytics.com)

Any questions? Reach out at  
[marketing@crealytics.com](mailto:marketing@crealytics.com)

**RETAIL MEDIA**

Catch up to Amazon with the industry's **first retail media SSP**

40% of Amazon's EBITDA comes from selling ads. Sponsored products are the #1 profit driver. Let's explore why they are leading the game and how you can supercharge your sponsored products with Crealytics.

[Get Started](#)

**SPONSORED**

**BEST SELLER**

★★★★★



Q&A

