PUBLICIS COMMERCE

Recap Report

October 2025

Groceryshop 2025: Too Fast to Forecast

Few of the 170-plus executives who took the stage at Groceryshop 2025 in Las Vegas from Sept. 28 to Oct. 1 were willing to predict what the commerce industry will look like in 10 or even five years. The furthest most speakers were prepared to look ahead was two to three years, and even *that* shorter time frame made some hesitate.

It's not that industry leaders are suddenly afraid to make predictions. It's that technology advances have so profoundly accelerated the pace of change across the commerce ecosystem that it's a risky proposition to assume any current trend will still be relevant in more than a few years. Was anyone predicting the rise of generative AI search five or 10 years ago — did anyone back then even know what generative AI was?

Everyone knows now, of course, which is why artificial intelligence (generative or otherwise) dominated the discussion at this year's Groceryshop, whose other key themes reflected the ongoing evolution of retail media, the physical store, marketing measurement — and a little pill with a surprisingly big story to tell.

The following are a few additional thoughts on those four themes, which will be covered in greater detail — along with many other key takeaways — throughout this report by 12 leading thought leaders from across the Publicis Commerce ecosystem.

1. ChatGPT is now buying groceries (and may soon be eating your lunch).

According to Adobe Analytics, 39% of U.S. consumers aged 18-64 had used generative AI by the end of 2024. More astoundingly, AI-powered data provider SimilarWeb found that 20% of Walmart.com's referral traffic in August came from ChatGPT.

Such rapidly rising usage levels are forcing a fundamental shift not just in search strategy but in marketing overall because gen AI search engines are synthesizing information from a variety of digital touchpoints and making product recommendations "without the consumer ever interacting with your brand," notes Digitas SVP Elena MacGurn (see page 14).

That's great news for brands that can crack the gen AI code: consumers using these tools are 23 times more likely to convert because they already trust the recommendations, says AI marketing platform Ahrefs. But it's troubling news for brands that can't quickly revamp their strategies to address the now-urgent need to shift from SEO to "GEO" ("generative ...") or "SAO" ("... answer ..."). Discussions about the topic even intensified *during* Groceryshop after ChatGPT coincidentally unveiled an "Instant Checkout" capability that will connect users directly with sellers.

Of course, AI tools are impacting and improving an ever-increasing number of commerce activities beyond search. That made AI at least a sidenote in nearly every Groceryshop session — if it wasn't the primary topic (pages 8, 10, 15).

2. Retail media is a full-funnel marketing vehicle.

The concept of retail media providing an unrivaled opportunity to collapse the funnel by driving brand awareness, consideration, intent, and conversion — potentially through a single touchpoint — isn't new for anyone who's been working in the space. It has, in fact, become a critical selling point for retailers looking to move beyond shopper/trade funding and tap into brand media budgets — by *generating* intent rather than just harvesting it, in the words of Liz Roche, VP-Media & Measurement for Albertsons Media Collective.

While the full-funnel discussion typically centers on the need to activate through retail media partnerships with social platforms, streaming services, and other channels typically associated with the upper funnel, Groceryshop speakers placed more emphasis on the move into physical stores to ensure coverage of all shopping moments.

But while in-store advertising can certainly drive awareness, it shouldn't distract from the act of shopping (see page 12). "It's not just about mounting screens on a wall," said Christine Foster, SVP-Commercial Strategy & Operations for Kroger Precision Marketing. "Those screens should be enhancing the product experience and the shopper experience."

Meanwhile, the definition of retail media remains fluid (see page 7) as competition continues to expand beyond retail: some analysts were suggesting that two-year-old TikTok Shop could soon be the third largest network behind Amazon and Walmart — if it isn't already.

3. ROAS is the "stupidest thing ever."

Delivered by Benoit Vatere, Chief Media Officer at Liquid Death, this comment earned a good laugh from the audience and a little social media attention. But it wasn't the only assessment of ROAS as a poor metric for retail media measurement heard at the show. After several years of debate, the marketplace now seems to be in *almost* complete agreement that what's needed are metrics that move beyond standard media KPIs to prove real business impact (see page 22). In the case of Liquid Death, those KPIs are household penetration and new-to-brand sales.

"The single-channel, campaign-level mindset needs to go away," said Roche at Albertsons, which is moving toward marketing mix modeling and working with brand partners on "longitudinal metrics" like lifetime value — because even incrementality can be insufficient depending on the product's purchase cycle, or may simply represent a purchase shift from another retailer, she suggested. "Our businesses growing together is the ideal scenario."

The Coca-Cola Company has built its own analysis model "to bring some equalization to the way that we're investing" across retail media networks, explained Katie Neil, Head of Connected Commerce. The model provides an actionable six- to eight-week look-back window that lets the company "surgically say this investment in retail media drove this percentage of impact to sales in an incremental way."

4. "It's still the store, stupid!"

If there is one area of commerce that's likely safe for the next 10 years, it's the physical store (see page 16). Despite the best efforts of an ever-growing ecommerce ecosystem that now includes social media and generative AI search engines, the traditional store continues to account for 80-90% of consumer packaged goods sales (depending on the category). And it remains the foundation for all other retail activity, according to Ben Miller, Groceryshop's VP of Original Content, who made the declaration quoted above in the event's final recap session.

And while the rapid influx of retail media opportunities that's taking place is just one aspect of a brick-and-mortar evolution aimed at creating a more seamless (as in digitally connected) and relevant (as in personalized) environment, the in-store grocery shopping experience in 10 years "may not be massively different than it is today," supposed Ocado founder and CEO Tim Steiner, one of the few speakers who did look that far into the future.

One aspect of the physical store that will change is the amount of space and other resources dedicated to ecommerce order fulfillment. Retail insights firm Brick Meets Click finds that 43% of online grocery orders currently involve store pickup, and retailers will have to adopt the technology needed to handle the service as that figure increases, said Steiner.

5. GLP-1 Is slimming down baskets, too.

One out of every 8 U.S. consumers has taken a GLP-1 medication to help manage Type 2 diabetes or lose weight, according to healthcare researcher KFF. That widespread adoption is having a significant impact on the grocery market as a whole: households with at least one GLP-1 user reduce their grocery spending by 6% within six months, per Cornell University/Numerator. And what's going in those baskets is also changing as users seek out healthier eating options (see page 17).

Helping GLP-1 users adjust their lifestyles, therefore, has become fertile ground for shopper engagement. Haleon recently teamed with Walgreens to stage an information-centric campaign that helps shoppers understand how to manage the necessary dietary changes and potential side effects related to use of the medication, explained Joe Sta-Romana, the CPG's Chief Customer Officer-U.S. Boasting dedicated multi-brand product displays and pharmacy-area signage in 2,000 stores, the effort has driven category-level growth, he said.

Health & wellness in general remains an important trend, as evidenced by keynote-stage conversations with Thrive Market and Sprouts Farmers Market. Sprouts hopes to nearly triple its current footprint to 1,400 "sea to shining sea" stores, said CEO Jack Sinclair. But the retailer considers itself more a "complementary shop" than a competitor to traditional grocery, since it typically earns 13% of a shopper's total spend, he said. "We're not trying to steal trips from anyone."

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Retail Media Perspectives from Both Sides of the Table

Amy Andrews
President
Mars United Commerce

One of the most beneficial aspects of industry events like Groceryshop is the opportunity to hear the perspectives of experts and executives from all facets of the commerce industry. For the work we do at Mars United, it's always especially interesting to hear points of view from both sides of the brand-retailer relationship and better understand the similarities and differences between them.

I had that opportunity in back-to-back sessions about retail media networks on Groceryshop's first full day. Our own Michele Roney first led an informative panel of retail media network partners from Ahold Delhaize USA, Kroger, and Walgreens, which was followed by an equally insightful panel of executives from Coca-Cola, Bayer, and Ferraro discussing their retail media strategies.

One common topic across the two sessions was the fluid definition of retail media that exists from one organization to the next. Although that might sound counterproductive at first, it's actually understandable—and manageable — as this space continues to evolve significantly.

The Coca-Cola Company, for one, is less concerned about defining retail media and more focused on harnessing its power. "Retail media is becoming more about influence, about omnichannel integration, so it really has to move into places where consumers are going," explained Katie Neil, the company's Head of Connected Commerce. "How do we leverage that first-party data in a way that delivers a seamless, fluid experience to build brands but also drive [conversion]?"

Having a more flexible definition also facilitates greater collaboration, which was another topic discussed in both sessions. As Kroger Precision Marketing continues to evolve its platform, the key question being asked is, "How can we meet brands where they are in a better way? That allowed us to … think about the definition of retail media and what we need to do differently" to foster stronger collaboration, explained Christine Foster, SVP-Commercial Strategy & Operations.

Strong brand-retailer collaboration is becoming increasingly important due to another key topic explored at these two sessions and almost everywhere else at Groceryshop: AI. As they begin to examine how shoppers are using agentic AI, brands will need to work closely with their retail media partners to understand the rules and regulations that must be addressed and identify the best ways to show up together on the new AI-driven search platforms that are emerging.

Speaking of collaboration, a potential new partner that brands and agencies should consider from a retail media perspective is TikTok. While there was plenty of conversation at Groceryshop about the dominance of Amazon and Walmart in the retail media marketplace (more than 84% of U.S. ad spending, according to eMarketer), I heard one provocative discussion suggesting that TikTok Shop may be the third largest network—if not already, then sometime soon.

Winning Brand Discovery in the Age of AI

Profitero

Mike Black
Chief Growth Officer
Profitero+

Agentic shopping, GEO, and "AEO" ("answer engine optimization) were hot topics at Groceryshop. While each term has a slightly different technical meaning, they all circle the same core question: How will brands remain discoverable in the age of AI?

The consensus is clear: brands must fundamentally rethink how they operate. Success will depend on ensuring that content and brand assets provide large language models (LLMs)— like ChatGPT, Perplexity, Rufus, and Spark — with the data they need to answer two critical questions:

1. Which products best solve a shopper's problem or need?
2. Which products can be trusted— based on authentic user experiences, not brand claims?

KEY TAKEAWAYS

Product data hygiene is essential: As the foundation of AI-era discoverability, retailer product pages and owned brand sites must be coded, structured, and enriched with accurate, comprehensive product attributes. Good product information management systems (PIMs) are no longer optional— they are mission-critical. Every attribute, claim, and image contributes to how LLMs interpret and surface your products to shoppers.

SEO is not dead—but it has evolved: Traditional keyword stuffing won't win in an AI-driven world. Product titles and descriptions must be written with clarity, context, and semantic richness, reflecting how real people express needs in natural language. Modern SEO means optimizing for meaning, not just metadata— to help both search engines and AI assistants understand when your product is the right answer.

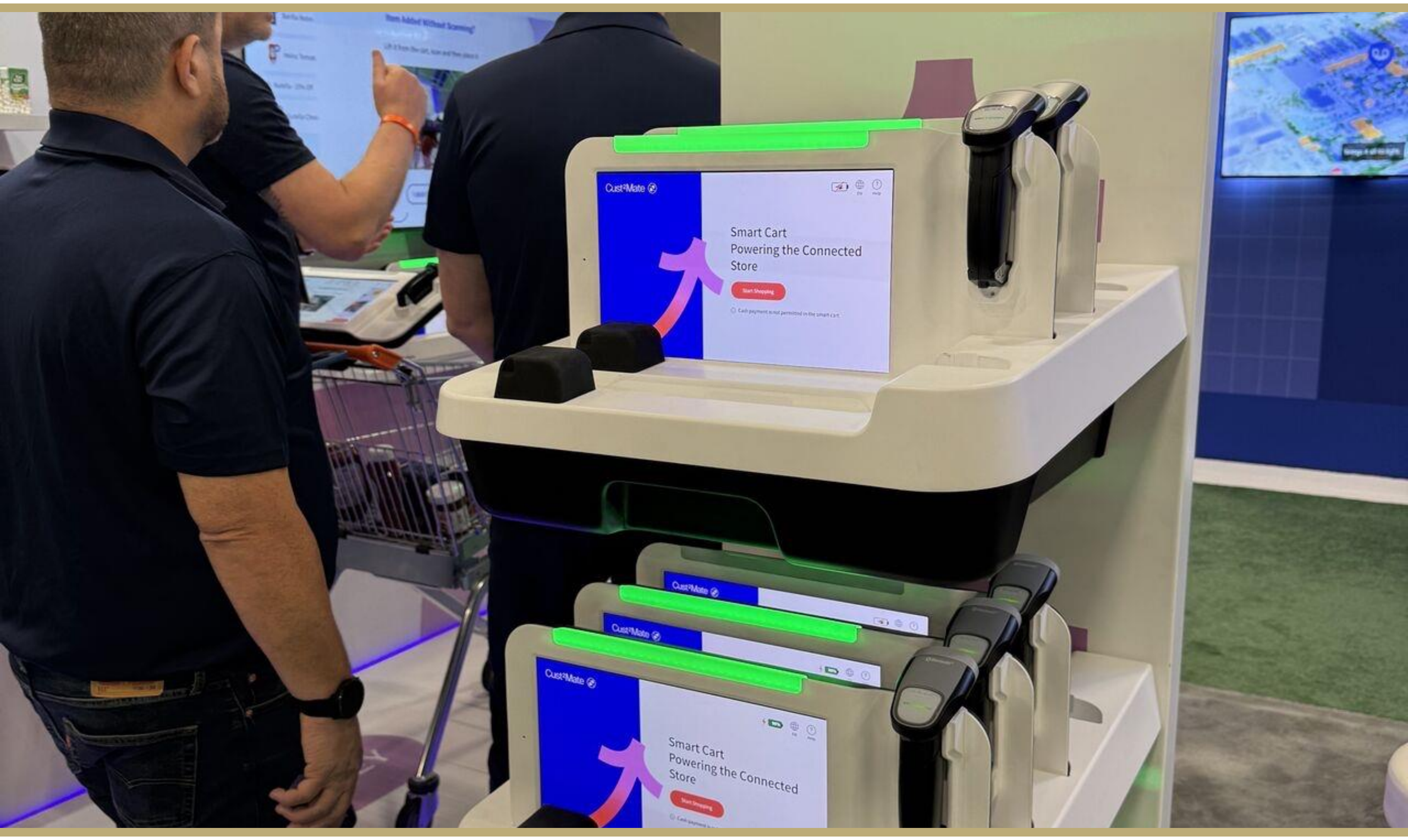
Prompt science is the new consumer research: Brands must understand the specific problems consumers are trying to solve in their buying journey. Instead of broad queries like "pre-natal vitamins," consumers now ask, "best pre-natal vitamins for the first trimester." Knowing and mapping these nuanced prompts enables brands to create content that directly matches real, conversational search intent in the lower funnel.

Winning Brand Discovery in the Age of AI

KEY TAKEAWAYS - Continued

There's no single strategy to win: Success requires balance across multiple touchpoints. Product pages must feature problem-rich, informative copy while brands also invest in generating authentic reviews on retailer sites. Simultaneously, participation in trusted communities like Reddit— from which LLMs often source insights — can boost credibility and visibility. The most effective brands connect these ecosystems with consistency and authenticity.

Measure what really matters: Traditional "share of search" metrics are no longer enough. Brands must evolve toward tracking their share of AI recommendations: how often their products appear in generative search results and assistant responses. Sophisticated analytics should also connect these signals to real business impact, measuring changes in traffic, conversion, and sales to validate AI-era optimization strategies. ◆



Unlocking the Game-Changing Power of Agentic AI

Heather Campain
VP-Growth Strategy
Epsilon

A session entitled "AI Unlocked: Leveraging Agentic Tools for Game-Changing Efficiencies, Commerce & Innovation" explored how agentic AI tools capable of autonomous decision-making are transforming the industry.

Featured speakers Diana Schildhouse, Chief Data & Analytics Officer at Colgate-Palmolive, and Desiree Gosby, SVP-Tech Strategy & Emerging Tech at Walmart, emphasized the critical role of strong data foundations, organizational mindset shifts, and human-AI collaboration in leveraging the full power of agentic AI. Both leaders shared how their companies are removing friction for consumers and employees alike by unlocking new efficiencies and personalization at scale.

KEY TAKEAWAYS

Data quality Is the differentiator: Schildhouse emphasized that data is no longer just important but essential and needs to be considered an asset. The quality of an organization's data products and partnerships will determine its competitive edge. For marketers, this means investing in clean, connected, and purpose-driven data strategies that enable personalization, measurement, and innovation across the ecosystem.

Agentic AI requires a solid foundation: Gosby warned that agentic tools can only deliver value when they're built on a robust data infrastructure. Without foundational integrity, AI outputs risk being inaccurate or irrelevant. Marketers must ensure their data architecture supports real-time decisioning, consent management, and cross-channel orchestration.

Mindset matters: learn, experiment, improve: Both speakers stressed the importance of cultivating a culture of experimentation. AI success isn't just about the tools, it's about teams willing to test, learn and iterate— and organizations that support this thinking! Marketers should foster environments where curiosity and continuous improvement are rewarded, enabling faster adaptation and smarter strategies.

Human + AI synergy is the future: The session underscored a major shift: AI isn't replacing humans, it's augmenting them. From personalized experiences to internal workflows, the combination of human insight and AI efficiency is unlocking new possibilities. Marketers should design systems that empower employees and enhance customer journeys through intelligent collaboration.

Trust and frictionless experiences drive adoption: Consumers are increasingly trusting AI, but expectations are rising as well. As AI answers more complex questions, brands must be ready to deliver seamless, trustworthy experiences. Removing friction, whether in shopping, service or internal processes, is key to driving adoption and loyalty.

Data's Role in Bringing Retail Media Creative to Life

John Elliott
SVP-Commerce
Saatchi X

At this year's Groceryshop, the buzz was palpable — but the big, headline-worthy takeaways felt elusive. Yet one offhand comment made during a panel discussion stuck with me: **"Retail media is where creative goes to die."**

It was a provocative statement. And it got me thinking — if that's true, why?

Retail media networks (RMNs) have evolved rapidly, expanding into mid- and upper-funnel ad solutions. But despite this growth, they're still largely viewed as conversion engines, not brand-building platforms. The creative that populates these channels often leans heavily on "buy now" calls to action, rational benefits, and rigid formats. Guidelines and restrictions can feel more like creative handcuffs than helpful guardrails.

And the spotlight? It's been on retailer first-party data — valuable for targeting and measurement but rarely seen as a source of creative inspiration.

So yes, maybe data has been the killer of creativity. But here's the twist: data can also be its savior.

To unlock this potential, we must break down the silos between media and creative. Data shouldn't just fuel targeting — it should inspire storytelling. RMNs offer granular targeting capabilities that allow us to move beyond mass messaging. If we realign our creative development with media planning, we can craft segmented, resonant creative that mirrors the nuance of our audience strategies.

New ad formats — across social, video, and high-impact display — offer richer canvases for storytelling than static banners ever could. But unlocking their full potential requires true collaboration between media strategists and creative teams.

And with the rise of self-service and AI-enabled optimization tools, we can now test and iterate creative at scale. The question isn't whether we have the tools, it's whether we're using them to their fullest.

Retail media isn't where creative goes to die. It's where creative can go to thrive — if we let it.

Blending Engagement & Commerce for a Seamless Shopper Experience

Jason Goldberg
Chief Commerce Strategy Officer
Publicis Groupe

The conversation around omnichannel we've been having as an industry has matured into a focus on delivering shopper experiences that seamlessly blend engagement with commerce. And that statement does a nice job of aligning the two panel discussions I had the pleasure of leading at Groceryshop.

The first session looked at crafting seamless shopping experiences—what we would have called "omnichannel" even a few years ago— with a perfectly paired duo of The Marzetti Company, a multidisciplinary food manufacturer (retail and foodservice), and retailer Sam's Club.

Marzetti doesn't have any direct-to-consumer channels or control over the point of sale, so its efforts to deliver seamless experiences involve aligning its owned content on social media and brand websites with the retail media investments, in-store merchandising materials, packaging, and promotions it provides to retail partners, explained Michael Reda, VP-Omnichannel Marketing & Insights. Marzetti plans all these touchpoints through an omnichannel lens to make sure they will work seamlessly.

Sam's Club does own the shopping journey of its customers, and the retailer has made significant strides in breaking down internal silos and merging its disparate services to connect the experience, said VP-Digital Merchandising Rina Hurst. For one, its use of AI computer vision at checkout to streamline receipt verification has been a big success: more than half of Sam's Club shoppers now use this "Scan and Go" technology, letting their mobile phones guide them through the in-store experience.

Shoppers can now also order a temperature-sensitive prescription medication (like GLP-1 maybe), a hot rotisserie chicken, and a kayak and have all three delivered to their home in two hours. What would have been separate services in the "old days" is now one seamless transaction.

But what's especially noteworthy is the collaboration now possible between brands and retailers. Marzetti can secure ad placement in the Scan and Go app (through the Sam's Club Member Access Platform) to reach shoppers in the store with an offer for a complementary sauce right after they add a protein to the cart— before checkout, exactly when the message is most relevant. That's a perfect example of how omnichannel strategies can deliver truly seamless engagement.

Tools That Remove the Seams

My second session tackled even more overt ways to blend shopper engagement and commerce— and with another ideal panel. The conversation was fortuitously preceded by ChatGPT's announcement of "Instant Checkout" functionality that will enable product purchases directly through its agentic AI-fueled chat interface.

Blending Engagement & Commerce for a Seamless Shopper Experience

Continued

In a similar way, TikTok has transformed itself from a pure entertainment platform, to a brand engagement channel, and now into a commerce powerhouse that's considered to be the fastest-growing "retailer" in history. Amanda Parker, Head of Food for TikTok Shop, detailed how DTC brands are thriving on the platform, which also is enabling traditional retail brands to sell directly to consumers.

The transformation at DoorDash has involved moving solely from restaurant deliveries to a retail model that now includes grocery — an expanded partnership with Kroger was unveiled during the show. And its DoubleDash service lets you order both a hot restaurant meal and snacks from 7-Eleven to your hotel (bypassing room service entirely). Partnering brands can also now incorporate DoorDash-fulfilled commerce calls to action into their ads on social media platforms, noted VP-Ads & Growth Services Toby Espinosa, commercializing what traditionally have been upper-funnel awareness vehicles.

Finally, e.l.f. Beauty Chief Digital Officer Ekta Chopra brought both conversations home in a way by outlining how the company's successful digital journey has naturally evolved to TikTok Shop and even gaming platforms like Roblox. The shift has required internal teams to reorganize around the new experiences and identify new criteria for success, she said.

New Search Strategies for a Generative AI World

Elena MacGurn

SVP-Head of Organic Search

Digitas

Generative AI is rewriting the rules of product discovery and digital commerce. Today, products win or lose before the consumer even reaches the store. As more of us embrace AI-powered assistants across chat and browsing experiences, the battleground for visibility has shifted: it is now earned in the moments before the click. Adapting organic search strategies for a “zero-click” world now demands a full-funnel strategy. The session I led at Groceryshop explored how to leverage integrated brand storytelling, social proof, and syndicated product data to win visibility in AI assistants, search engines, and commerce ecosystems, ensuring brands remain discoverable and competitive in an AI-driven marketplace.

KEY TAKEAWAYS

AI is reshaping the consumer's path to purchase: Shoppers now move fluidly across commerce, social, search, and AI assistants, and AI platforms are pulling signals from all those touchpoints to decide which brands get recommended. Large language models (LLMs) such as ChatGPT compare prices, filter reviews, and summarize product data at machine speed. If your brand isn’t included in the AI’s responses, it’s invisible to the consumer.

Zero-click is the new normal: Consumers increasingly get their answers inside AI platforms, where comparisons and recommendations appear without a single site visit. The click no longer defines success; visibility does. To stay competitive, brands must expand measurement beyond web traffic and capture how often they’re seen, cited, and chosen within AI-driven conversations and results.

Assume a full-funnel SEO strategy (from product discovery to purchase): Winning in AI-driven search requires visibility at every stage of the journey. Build awareness through thought leadership and social proof, fuel product research with credible comparisons and reviews, and drive conversion with structured product data and LLM feeds. The brands that connect these layers end to end will earn both product visibility and purchase in our new AI-driven world.

Agentic AI Is Reshaping Retail Media

Katie McBrien
SVP-Commerce
Spark Foundry

It's not surprising to say that one of the key themes at Groceryshop 2025 was the emergence of agentic AI in retail media. AI is the buzzword in many conversations — helping craft emails, plan honeymoons, and most importantly for us as commerce marketers, shaping the way we shop.

This next-generation AI technology is designed to autonomously execute tasks with minimal human input, and it's already being piloted by major grocers to streamline media planning and activation. One session I attended highlighted how agentic AI is transforming the way retailers and brands unify insights, drive efficiency, and deliver seamless customer experiences.

KEY TAKEAWAYS

Agentic AI enables one-click media activation: Ahold Delhaize USA is layering agentic AI over its retail media platform to let advertisers plan and activate campaigns with a single click. This reduces friction and accelerates time to market for media strategies, making retail media more accessible and scalable for brands.

AI unifies digital operations for seamless activation: Kroger Precision Marketing shared how agentic AI is helping unify its digital operations. By connecting insights directly to activation, brands can move from data to action faster, improving campaign relevance and customer engagement.

AI is a bridge between insight and loyalty: The ultimate goal of agentic AI is to create a seamless loop from insight, to activation, to loyalty. By automating this process, retailers can deliver more personalized experiences that resonate with intentional shoppers and health-conscious consumers.

Retail Media 3.0: Full-Funnel or Bust

Kris McDermott
SVP-Commerce
Spark Foundry

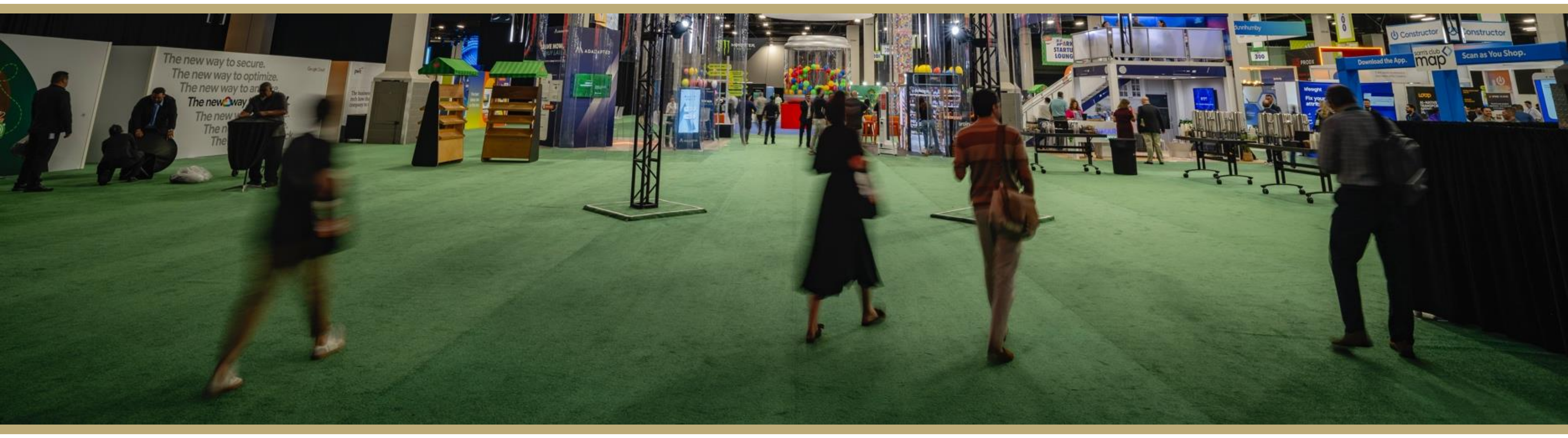
One consistent theme across the programming at Groceryshop was that retail media is undergoing a strategic transformation, moving beyond performance marketing into full-funnel brand building — including in-store activations, digital screen networks, and omnichannel measurement. As brands demand more accountability and integration, retail media networks must evolve to deliver scalable, measurable, and creative solutions that drive both awareness and conversion.

KEY TAKEAWAYS

Full-funnel strategy is non-negotiable: Retail media must now support brand building at the top of the funnel, not just bottom-funnel conversion. Marketers should push for integrated campaigns that combine awareness-driving formats (e.g., video, display) with performance tactics. This shift enables better storytelling and long-term brand equity, especially in categories where loyalty and differentiation matter.

Creative quality matters more than ever: As retail media expands into upper-funnel formats, creative excellence becomes a key differentiator. Marketers should prioritize high-impact storytelling, personalized messaging, and dynamic creative optimization. Strong creative drives engagement and ensures that retail media builds brand affinity and loyalty — not just impressions.

In-store media is the next frontier: Retailers are investing in digital screens, shelf-edge displays, and smart carts to bring media into the physical store. Marketers should explore how to extend digital campaigns into the store environment to influence purchase decisions closer to the point of sale. This shift also opens up new creative formats and shopper engagement opportunities.



GLP-1's Impact:
How Brands & Retailers Must Evolve

Chelsea Monaco
SVP-Commerce
Digitas

In the next decade, as many as 20% of eligible Americans are projected to use GLP-1 medications to help with their diabetes or obesity issues, fundamentally shifting attitudes and behaviors around food, health, and retail. Where sleep once dominated the wellness conversation, food and beverages have become the new frontlines of health management — especially with consumers eating 40% fewer calories and tightening their spending.

This disruption brings both challenges and opportunities for marketers, manufacturers, and retailers to reimagine product offerings, partnerships, and in-store experiences to address a rapidly changing landscape. Brands, retailers, and agency partners need to collaborate to incorporate these evolving consumer and shopping behaviors into the forefront of their strategy to stay ahead of competition and win in this shift at retail.

KEY TAKEAWAYS

Rethink product innovation around consumer needs: With GLP-1 users prioritizing small portions, high protein, gut health, and low sugar, brands must innovate beyond legacy products. Snackable sizes, protein-forward options, and digestive-friendly solutions will win share among health-conscious shoppers. Marketers should help consumers create new routines aligned with these needs — positioning products as part of their evolving lifestyles. Product innovation and online/in-store experiences should be a key consideration for brand and retailer collaboration.

Leverage retail media & partnerships beyond sales: As retail media becomes central to strategy, marketers must look beyond traditional sales metrics and think of RMNs not only as a sales driver, but rather a growth partner. Collaborating with retailers can unlock insights into shopper behavior, enable personalized messaging at scale, and build brand equity by meeting consumers where they are on their health journey. The right partnerships can turn media touchpoints as well as retailer-owned and -operated properties (digital and physical) into hubs for education and discovery.

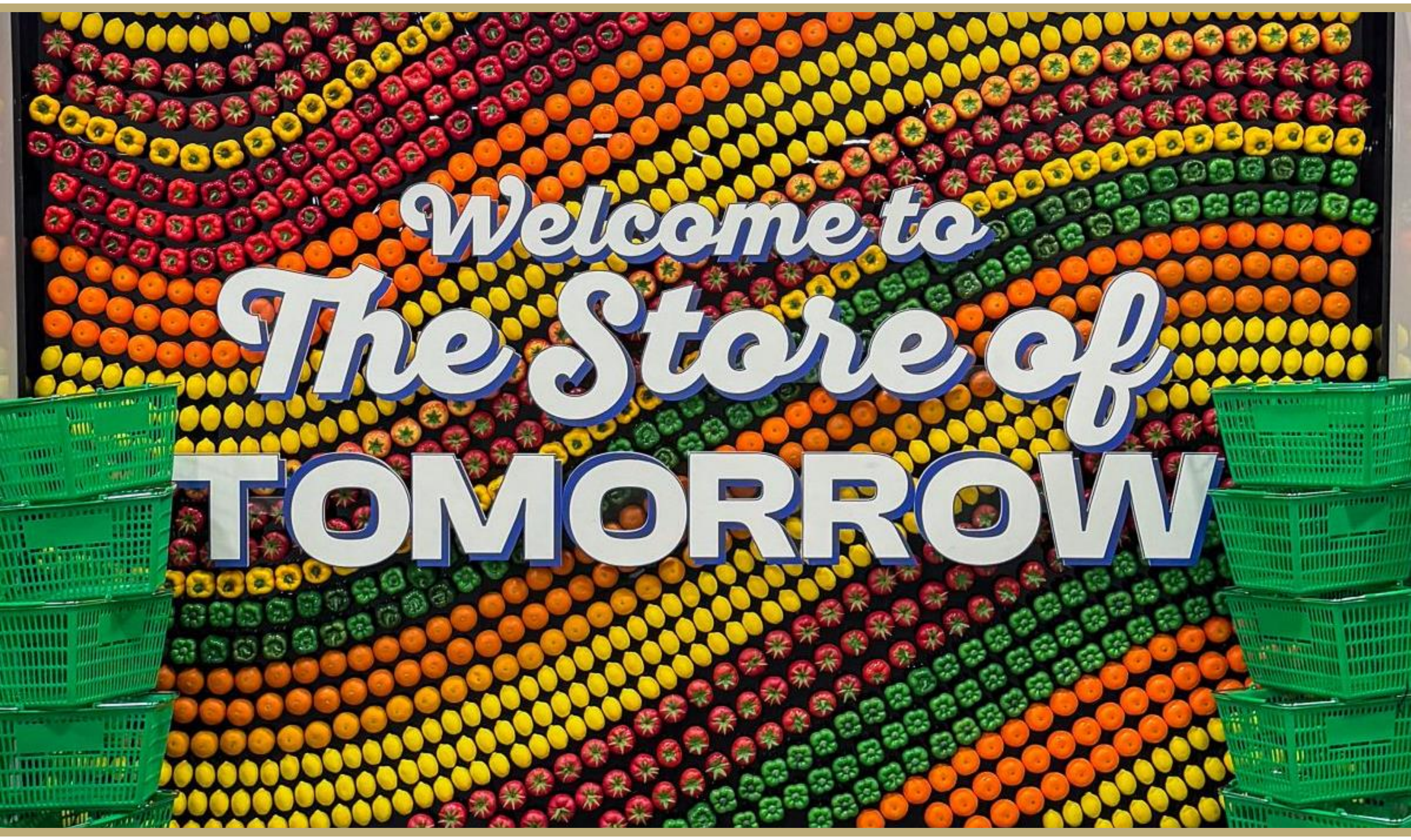
Reinvent in-store merchandising for the new shopper: Merchandising needs a bold reset — to highlight functional claims (fiber, hydration), curate sections by nutritional goals (high-protein or low-sugar zones), and prioritize convenience without sacrificing health. Visual cues matter more than ever to help consumers navigate quickly and confidently.

GLP-1's Impact:
How Brands & Retailers Must Evolve

KEY TAKEAWAYS - Continued

Understand your brand's role in the changing landscape: Shopper habits are shifting fast: baskets are down 6% (equating to ~173 million users), driven by calorie reduction and budget constraints. It's important to understand the impact this could have on your brand if sales are affected by the decrease. If you are a tailwind brand, you need to: be seen, innovate, and communicate the relevant benefits of your brand. If you are a headwind brand, you need to: amplify desirable claims, understand where you can add joy to a more health-conscious shopper, and lean into health and diversity.

Address side effects & support holistic wellness: GLP-1 users face unique risks like malnutrition and digestive discomfort. Brands that address side effects and support holistic wellness by proactively offering nutrient-dense but easy-to-digest products — and communicate these benefits clearly — can build trust and loyalty. Supporting holistic wellness means not just selling products but helping consumers avoid pitfalls along the way. Content around education and support will be key pillars of an effective strategy— as will a strategic approach to influencer marketing. ◆



New Approaches to Old Problems

Rob Rivenburgh
CEO
Publicis Commerce

When you've attended as many commerce industry events as I have, discovering an entirely new concept doesn't happen very often. You usually need to dig a little deeper into the discussions to consider how existing concepts are evolving.

Naturally, artificial intelligence was the hottest subject at this year's Groceryshop, as the primary topic of numerous sessions and at least a sidenote in nearly all others. And there was plenty of new information shared from the stage about the effect that AI is having on both internal operations and external shopper engagement, especially around the rapidly growing impact of agentic AI on product discovery. (I'll let some of the other Publicis Commerce thought leaders featured in this report get into those details.)

Beyond AI, I noticed four recurring themes that, while certainly not new, appear to be evolving in the right ways, based on the discussions I heard from the stage and the conversations I had with clients and colleagues throughout the event.

The first is the commerce industry's attitude toward the economic uncertainty we've been dealing with this year, which has changed significantly since we gathered at CES back in January. I think people now better understand the situation, have accepted that uncertainty is the new normal, and are moving forward with that mindset.

The second is what appears to be a stronger focus on the need for organizational redesign. It feels like we've been talking forever at industry events about the lack of internal integration, the need to break down functional silos and streamline organizations and go-to-market strategies. Based on what I heard at Groceryshop, it might finally be happening in earnest, as companies work to build the new capabilities needed to keep pace with marketplace change. We've realized how important it is to synchronize the business internally so you can effectively deliver the seamless experiences that customers and shoppers now require.

The third is what's clearly a growing passion for agility and speed to market, a greater emphasis on test & learns and iteration, adapting and adjusting as needed. There was a lot of energy around this topic, and plenty of examples about how it's being applied to gain insights, guide strategy, and improve results. Perfect can be the enemy of good, and as an industry we're becoming more willing to "fail fast" in the short term so we can achieve even greater success — or avoid failing even worse — down the road.

And finally, I see many organizations becoming more methodical with their shopper planning. They're getting more structured about setting guidelines, establishing clear KPIs, coordinating various tactics within the plan and assigning specific objectives for each, and fully understanding the business results they want to achieve. And if the plan isn't proving out, they're applying some of that passion for agility and pivoting quickly.

So, while I may not have experienced anything entirely new at Groceryshop, I did leave the show with renewed confidence in the future of commerce.

Designing Best-in-Class
Retail Media Networks

Michele Roney
EVP-Retailer CX
Mars United Commerce

Retail media ad spending in the U.S. continues to grow at a strong pace, but the rising tide isn't lifting all network boats: according to eMarketer, 76.2% of all spending currently goes to Amazon and 8% to Walmart. That leaves 15.8% of the pie for the other 200-plus networks competing for their fair share.

As competition increases, it's becoming harder for brands to navigate through all these networks, which are operating at various stages of maturity. A handful of top networks have basically become publishers, selling their media based on access to a large, national audience. Their scale gives them relevance, elevating their offering from retailer engagement to media engagement.

A slightly larger group of networks at the next level are operating retail media as it was originally intended, as an extension of their collaborative partnership with manufacturers. But these networks also have enough scale to deliver meaningful impressions and make the investment worthwhile for brands.

However, the other 190-plus networks out there generally lack the scale needed to deliver on media performance alone, which often leaves brands investing in the media simply because they need to work with that retailer — even though it doesn't have the audience, capabilities, or business model needed to drive real growth.

Designing Best-in-Class
Retail Media Networks

Continued

For these networks, competitive advantages are becoming harder to find, since unique capabilities quickly become table stakes in such a crowded field. (Even emerging frontiers like in-store media are maturing rapidly.) Based on our experience helping launch successful retail media businesses, these networks need to apply the following seven “mandatories” to their practices:

1. **Data, data, and more data** that delivers an addressable audience with breadth, scale, and unique characteristics valued by brands. With apologies to run-of-the-mill networks, “Women 55+” is not a unique, valued audience. But “health-conscious Gen X’ers” might be.

2. **Organizational readiness** to invest the necessary time and resources required to build a viable business. Many retailers get in their own way by launching a network before all the necessary teams are prepared to support retail media as a strategic pillar.

3. **A robust offering** of owned and paid media opportunities that will enhance the customer experience rather than detract from it. You should not introduce ad products just so you can sell them. They have to be aligned with the customer experience to ensure relevance and effectiveness.

4. **Activation tools** that make it easy for brands to buy and manage campaigns — and seamlessly integrate with their own third-party partners. Third-party integration has fast become some of those table stakes mentioned earlier; self-service platforms are also essential if your advertisers have the resources to leverage them (but ask before you build).

5. **Strong measurement capabilities** that demonstrate tangible business impact (not just media results) for *your particular channel and operating model*. This is critical. KPIs are different in a c-store than they are in a supercenter. It’s the network’s job to educate brands on what success looks like.

6. **Achievable expectations** identified through realistic goals that will keep the organization aligned. Not every network is capable of generating $100 million in year one (although that’s the target we often hear). You have to understand the limitations of your vendor community and the inventory you'reselling.

7. **Ongoing demand generation** through a dedicated marketing plan. Retailers often don’t realize they’re now a business-to-business company and must act accordingly, consistently communicating what they have to offer to potential advertisers.

Will following these seven guidelines guarantee success? Not in a market as competitive as retail media. But ignoring them will almost certainly assure failure. ◆

Applying Data & AI to Consumer Exploration

Dan Westendorf
SVP-Retail Consultancy
Mars United Commerce

A few topics stood out across almost every conversation and session I attended at Groceryshop : data, AI, and consumer exploration.

For years, we've all been asking for more data. Now that we have it, many organizations are realizing the real challenge isn't access, it's application. As Chaz Flexman, CEO & Co-Founder of Starday Foods, put it: "What's measurable is not always meaningful."

We're swimming in information, but few know how to distill it into insights that actually drive decisions. Those that can hold a clear competitive edge.

That's where AI comes in. I heard story after story about companies using AI to unify fragmented data, surface new opportunities, and accelerate innovation. The most successful examples weren't just about having the right tools, they were about asking the right questions — because ultimately, AI is only as good as your prompts.

Another shift that caught my attention: the rise of "GEO" ("generative engine optimization"), the practice of optimizing search for AI-generated answers alongside traditional SEO. As agentic search grows, brands will need to find new ways of showing up in AI-driven discovery moments — not just on search results pages.

And while retail media networks continue to expand and compete for brand investments beyond the trade spend, segmentation needs to evolve too. Consumers don't shop the way retailers categorize — our frameworks and strategies shouldn't either.

KEY TAKEAWAYS

A few other points stood out over the course of Groceryshop:

- 46% of consumers using GLP-1 medication long-term have switched their primary grocery store to address the resulting changes to their diet, according to Kantar.
- Data centers are being built across communities to store the massive amount of information that is fueling AI models.
- Recommendations from friends and family still carry more weight than answers from AI — but AI is helping consumers validate those choices.
- The use of wearable technology is accelerating, connecting data and behavior in new, meaningful ways.

Applying Data & AI to Consumer Exploration

KEY TAKEAWAYS - Continued

These all point to a few key shifts:

1. Retail media is being redefined. Search may become less dominant as digital commerce evolves into a true brand-building channel.
2. Creators are evolving. Anyone can be a creator now — not just influencers with large followings.
3. Agentic shopping is coming. AI may soon shop on our behalf, with AI-to-AI interaction shaping new paths to purchase and order fulfillment.

The next era of commerce won't be about having more data. It'll be about using it — intelligently, creatively, and meaningfully. ◆

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