



# Recap Report

November 2025

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## **Introduction: Strategic Signals**

## **Commerce Leaders Can't Ignore**

While neither the largest nor flashiest event on the commerce conference circuit, the intimacy (and longevity) of Path to Purchase Institute's P2PI Live give the event a unique vantage point for tracking the evolution of commerce marketing.

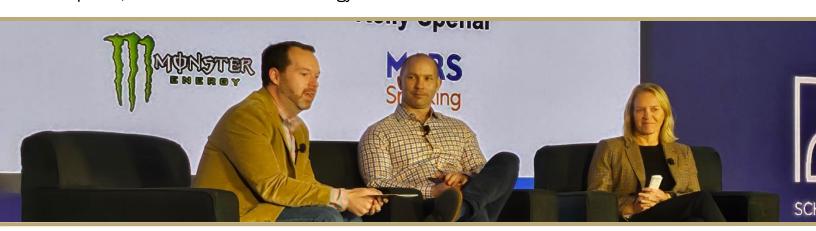
Held Nov. 12-13 in Schaumburg, IL, this year's event reached back into its roots in point-of-purchase activation, which helped to ground a wide range of emerging industry touchpoints and trends with one common anchor: a renewed commitment to shopper-first strategy.

The on-stage conversations across the two-day conference covered a variety of topics, from retail media, contextual commerce, and omnichannel strategies to loyalty marketing, agentic shopping, and the unique complexities of the bevalc category (alcoholic beverages for the uninitiated). In conjunction with the re-emphasized shopper focus, four key themes emerged.

#### Data & Insights: The Foundation for Everything

If one topic dominated the event, it was data — not as a buzzword, but as the connective tissue for all modern commerce. Speakers explored data's role in personalization, segmentation, measurement, and real-time optimization — while acknowledging the unresolved gaps in measurement reporting and standardization.

Brands highlighted practical use cases, such as identifying shopping occasions through retailer data. Mars Snacking is "using the first-party data from Uber Eats or Instacart [for example] to speak to consumers who are potentially planning for family movie night" and get them to "add on our products to build the basket," said Kelly Spehar, Global Retail Media Strategy Director.





## **Commerce Leaders Can't Ignore cont.**

Retailers, too, are pushing data deeper into activation. Chief Marketing Officer Brian Messerschmitt described how Dollar Tree is combining internal insights with shopper profiles from **Epsilon** to develop a performance marketing tool that builds new audience segments and delivers targeted ads to drive incremental engagement.

#### In-Store Retail Media: Putting the Store Back into Omnichannel

There were no dissenters on the topic of in-store retail media. Not only is it poised for growth, but its acceleration is an industry imperative. Brick-and-mortar retail remains critical in every stage of the purchase funnel, and in-store discovery still converts more shoppers than digital activity. Speakers stressed the importance of failing forward and investing in test-and-learns to develop viable in-store retail media tactics — while on the other hand underscoring the need to quickly get beyond the beta phase and build scalable, operational models.

Data plays a critical role here as well, working hand in hand with cohesive and integrated omnichannel strategies. "The consumer, more than ever, now has an expectation that you know them — you know what they're looking for and you're talking to them," said Kimberly Garner, Director of Shopper Marketing at The Coca-Cola Co. "[But] don't think of in-store POS or in-store media on an island. Think about how [to connect it] to your digital, your social, your out-of-home [so] you're creating a cohesive, 360-degree program that delivers on the expectations of today's consumer."

Yet internal alignment, along with the need for more innovative placement and advanced measuring capabilities (see below), is a persistent roadblock for retail media as a whole. Tensions between digital and in-store teams and competing priorities across merchandising and media continue to slow progress.





## **Commerce Leaders Can't Ignore cont.**

The best way to advance on the path toward truly connected commerce, speakers agreed, is to gain stakeholder alignment on specific, business-driving KPIs upfront — ahead of annual planning and budgeting. As Ben Galvin, Monster Energy's Senior Director of Ecommerce & Omnichannel Retail Sales, quipped, "Sometimes it's not about how effectively you use your own dollars, but other [internal teams'] dollars."

#### Value Creation: Winning Wallets by Winning Feelings

Economic pressures continued to shape conversations. With prolonged inflation, tariffs, and shifting household budgets, shoppers are buying fewer discretionary items. According to Kearney Senior Partner Katherine Black, 60% of consumers now purchase less overall on their grocery trips.

Value today isn't just about savings; it's about emotion. Speakers asserted that convenience, community, and aspiration increasingly influence shopper behavior. Ryan Draude, Director of Loyalty, CSM & Digital at Ahold Delhaize's Giant Food, offered the grocer's revamped loyalty program as a differentiated value proposition. The Giant Choice Rewards program delivers free product on every shopping trip but also incorporates a health angle: nutritional advice, recipes, and rewards for making healthier choices like getting a flu shot. This shifts shopping beyond a habitual action to create an emotional connection. As several speakers noted, appealing to the aspirations of shoppers can be as powerful as appealing to their wallets.

"We can't let shopper marketing become a programmatic exercise through retail media networks," warned Soche Picard, CEO for North America at **Arc Worldwide**. Picard underscored that point with groundbreaking research identifying how emotional dynamics at the point of purchase can drive both immediate sales and brand loyalty by turning forgettable transactions into meaningful brand moments. \*\bigsig





## **Commerce Leaders Can't Ignore cont.**

Arc's research identified four shopping-trip profiles based on the emotional complexities that influence decisions across both retailers and product categories: complex and unrewarding ("Burden"), complex but exciting ("Engaging"), easy but joyless ("Routine"), and both easy and enjoyable ("Pleasant"). The profiles illustrate how emotion underpins retailer preference, loyalty, and spending—and why brands must consider not only what shoppers buy, but how the shopping experience makes them feel.

#### Al in the Cart: The Agentic Commerce Watershed

Among the multiple AI themes threading their way through the event (including dynamic creative and predictive optimization), agentic search and shopping clearly captured the most attention.

At a time when consumers have been wired for convenience but are rarely willing to pay for it, agentic commerce holds the promise of enabling shoppers to find the right product, get the best price, and save time doing it. More than 60% of consumers plan to use AI for shopping in the next year, Black at Kearney noted. Adoption is accelerating due to economic constraints, which lead consumers to prioritize convenience that won't add costs, she said.

Routine household and beauty product categories will likely be first to feel an impact from agentic search and shopping, with mass/big-box, dollar, and drug channels following closely behind. "We expect consumer behavior to shift rapidly," Black said. "Actively testing now is critical."

For brands, this means ensuring their value proposition and product data are agentready. GEO (generative engine optimization) is only the starting point; full "agentic commerce optimization" will require far deeper data hygiene and a more extensive strategy. For retailers, falling behind risks margin erosion, commoditization, smaller baskets, and a shift in both transactions and ad dollars to other commerce options.

Yet in a potentially not-so-surprising twist, multiple speakers identified in-store retail media as the channel least threatened by an agentic future, a relatively safe harbor for retailer revenue and an opportune reset moment for brand-retailer collaboration.



## **Commerce Leaders Can't Ignore cont.**

As commerce enters a new era, one message was unmistakable throughout P2PI Live: The future of commerce will not be defined solely by channels, formats, or technologies. Instead, it will be shaped by the integration of data, emotion, physical environments, and Al-powered decision-making. The organizations that navigate this complex intersection successfully will pair operational excellence with a renewed commitment to understanding — and serving — the evolving shopper.

P2PI Live also featured multiple awards programs. Saatchi X Executive Chairman Andy Murray (page 8) emceed the annual Hall of Fame ceremony, which this year inducted longtime Mars United client and partner Stephen Chriss, VP of Enterprise Omni-Commerce at The Campbell's Company, along with Dollar General's Messerschmitt and Sarah Nellson, Sales Director for Target at Ferrero. In his acceptance speech, Chriss stressed the importance of industry recognition in fostering future generations of marketing talent.

That sentiment carried into the next morning, when a panel of past Hall of Fame inductees led by **Spark Foundry** EVP-Commerce April Carlisle reflected on their own exemplary career paths and shared seasoned insights into the evolving commerce media landscape and cross-ecosystem collaboration (see page 16).

Also celebrated during the event were P2PI's 2025 class of "40 Under 40" rising executives, which included Willy Blesener and Tessa Allen of **Mars United** and Elisia Bielawski of **Arc**; as well as the Institute's Women of Excellence honorees, which featured Mars United's Victoria Van Dusen and Jill Rourke.

What follows are additional event takeaways by thought leaders from across the Publicis Commerce ecosystem. •





## The Human Side of Technology Change and Shopping





Andy Murray
Executive Chairman
Saatchi X

As a veteran of the commerce industry, I left P2PI Live with two interesting takeaways on topics that have long nagged the industry.

The first came during a presentation on retail media network adoption by Sarah Marzano, eMarketer's Principal Analyst for Retail & Commerce Media. Marzano outlined how a lack of internal alignment, friction across functional silos (digital and in-store, media and merchandising), and differing priorities on KPIs are among the current challenges facing retailers as they roll out networks.

While we've all felt that instinctively for quite a while, this is the first time that survey data shows how much of a barrier it has become.

The point being: advances and promises of new technology that pace ahead of an organization's internal alignment, as in the case with RMNs, will eventually face off against the human side of change.

I predict we may see the same thing in agentic commerce deployment, as capabilities and speed outpace the organizational readiness to adapt and thrive. This re-emphasizes — but this time with data — that we must move from silos to symphonies! ▶ □





### The Human Sides of



## **Technology Change and Shopping cont.**

Another interesting takeaway came from my Publicis Commerce colleague Soche Picard, North America CEO at Arc Worldwide, who explored the impact of emotion on in-store shopping behavior.

Arc has done a beautiful job putting together a real framework for breaking down the emotional drivers of shopping — by category and retailer — and the key factors requiring our attention. While 85% of shopping decisions are still based on emotion vs. logic, almost 100% of industry discussion is focused on data and precision targeting. The importance of understanding the role emotion plays in the physical space has been under-estimated and under-addressed, and this presentation brought it rightfully back to the center of the discussion. •

Editor's note: Andy Murray was on hand at P2PI Live to introduce the 2025 inductees into the Path to Purchase Institute Hall of Fame. Murray himself was inducted in 2014.





## Sip & Click:

#### **Alcohol on Demand**





Maeve Casey
Senior Manager, Client Leadership
TWINOAKS

Speaking at the BevAlc Commerce Initiative share group meeting during P2PI Live, DoorDash presenters Katie Quinn, Senior Industry Manager for BevAlc, and Susan Cylenica, Enterprise Account Executive for CPG, highlighted the current strong growth in alcohol delivery. This trend is being driven by younger, wealthier, multicultural customers and heavy engagement with the DashPass paid subscription service — which accounts for over half of all alcohol orders on the DoorDash platform.

DoorDash's stated goal is to become the top choice for at-home alcohol occasions by offering a broader selection, affordability, quality, and improved shopping experiences. Seasonal spikes, new promotions from marketing partner lbotta, and tools like sponsored ads support growth; DoorDash is now also sharing retailer data to help brands optimize ad performance. Here are some of the other key topics that were covered:

#### High-Value, High-Frequency Customers

DoorDash baskets containing alcohol often exceed \$40 and include add-ons like snacks and non-alcoholic drinks. For marketers, this audience represents a premium, high-intent shopper base that is actively building baskets and open to discovery, making DoorDash a strong channel for influencing immediate and repeat purchase behavior.

#### **Event-Driven Demand Spikes**

Alcohol sales on DoorDash each quarter peak around key cultural moments: March Madness, Father's Day, July 4th, and Christmas. Because some 85% of orders are for ASAP or priority delivery, these surges reflect real-time, occasion-based needs. Marketers can maximize impact by aligning their campaigns, promotions, and creative with these moments, capturing consumers when they're most primed to buy and willing to build larger baskets. \*



## Sip & Click:

#### Alcohol on Demand cont.



#### Winning Requires Coverage & On-Platform Marketing

DoorDash emphasized the four strategic pillars it's using to become the go-to option for at-home alcohol. This requires brand marketers to ensure strong retailer distribution, competitive pricing, and smart substitutions. Supplementing those core efforts with sponsored ads, offsite media, banners, and promotions (including lbotta offers), brands can increase visibility in a category where shoppers browse first by category, making discoverability essential for share growth.

#### Better Data and New Partnerships

DoorDash is now sharing retailer-level data and expanding partnerships with the likes of Ibotta and Chase (which offers credit cardholders benefits such as free DashPass membership), which helps give brands clearer insights into performance and promotional effectiveness. This transparency lets marketers identify opportunity gaps, refine targeting, and optimize both distribution and media. Considering the industry's historically limited visibility into alcohol delivery behavior, this new data access provides a meaningful edge for planning and measurement. •





## **Turning Retail Media Intelligence**

#### into Measurable Growth





Alexandra Goidel
VP, Commerce Investment Lead
Publicis Media

Retail media is a growing channel in modern marketing. However, as investment has surged, so has the need for reporting transparency and proof of performance.

P2PI research finds that 40% of CPG brand marketers believe they've figured out how to make retail media more effective than other digital media, which means 60% are still working to understand retail media performance and value. At P2PI Live, I participated in a panel discussing how the industry is working to close that accountability gap, and how better connection across data, planning, and activation can accelerate data confidence.

#### The Accountability & Measurement Gap

Many professionals agree that there is a lack of standardized measurement and accountability across retail media networks. Marketers face inconsistent metrics (e.g., different sales attribution windows), retailer-specific data silos, and difficulty understanding the true incrementality gained from media efforts. This environment has led to an over-reliance on imperfect retailer-specific models and a lot of skepticism.

For marketers, this creates challenges in proving direct ROI, forming cross-retailer comparisons, and confidently allocating investment. As retail media budgets grow, solving these gaps is critical to justify investments and optimize campaigns based on true performance drivers. \*



## **Turning Retail Media Intelligence**

#### into Measurable Growth cont.



#### The Move Toward Unified Measurement

The future of retail media measurement lies in unified data environments — i.e., clean rooms — and seamless integration across retailer, brand, and agency teams.

Advancement can be propelled by more seamless API integrations, cross-channel measurement, and cross-retailer attribution.

Cross-channel attribution will enable full-funnel campaign analysis, whereas cross-retailer attribution (enabled by third-party measurement partners) allows for more consistent reporting metrics across organizations. As data silos break down, marketers will gain holistic views of customer journeys and campaign impact.

This transparency is essential: it enables smarter planning, creative, and activation, and fosters trust among stakeholders. For marketers, the promise is clearer proof of performance, more efficient optimization, and the ability to orchestrate omnichannel commerce at scale. •





## **Rethinking Brand Value and**

## **Shopper Engagement**





Brooke Roller
VP, Retail Consultancy
Mars United Commerce

The retail landscape is undergoing a structural shift, driven by the key themes examined at P2PI Live: the economic pressures affecting shopper behavior, the in-store marketing resurgence, Al-enabled automation, and an increasingly measurable media ecosystem. In short, shoppers have become more value-driven and retailers more data-driven, which is requiring brands to be more outcome-driven.

Consumers are more price-sensitive and less loyal than ever. To be successful in this environment, retailers and brands must evolve their loyalty strategies around frequent value. Price/value perception is now the primary driver of loyalty; it's not brand equity or convenience alone anymore.

The store is re-emerging as a high-value media channel. More than 80% of retail sales still occur in physical stores, according to various sources. As the fragmentation of digital commerce grows, brands need to double down on their in-store presence. In-store media must be a strategic, integrated asset — not a separate afterthought.

Winning brands and retailers will connect digital media to the physical shelf with consistency, measurement, and real-time visibility. One speaker referred to in-store as the "last media mile" where loyalty, media, and merchandising converge — and where most conversion still happens. This thought really hit home, since as an industry we've always talked about the last mile being the figurative steps shoppers take before literally walking into the store — but that is far from the truth.



## **Rethinking Brand Value and**

## **Shopper Engagement cont.**



Brand choice will increasingly be made by agents, not shoppers. All shopping agents will become a new "decision layer" for consumers. In response, retailers and brands must make themselves "agent-friendly" through structured data, clear pricing, strong reviews, and consistent availability.

**Retail media is transforming the way retailers operate.** This is pushing organizations to rethink how they reach consumers. Retail media in general, and in-store media in particular, must be designed to lift both conversion and brand love — not to drive one at the expense of the other due to outdated functional silos that don't align with "how shoppers shop."

Most marketers have mastered the basics of the retail media landscape, but there is also a huge opportunity in social commerce to deliver relevant buying moments. This, too, requires less fragmentation and stronger connections across organizational silos.

The convergence of value, intelligence, and convenience across the commerce ecosystem can build a retail experience that wins every trip, every basket, and every shopper — whether human or Al agent. This is our moment to lead; to design loyalty that truly rewards, to elevate the store's role, to embrace Al, and to redefine what it means to deliver value across all touchpoints. •





## **Session Closeup:**



## Fresh Perspectives from Industry 'OGs'

In a wholly unique session at the event, Spark Foundry Commerce EVP April Carlisle led a panel of P2PI Hall of Fame members in a lively discussion that tapped into decades of industry experience to assess some of the industry's newest trends.

Steve McGowan, Senior Director of Consumer Experience at Mondelez International (Class of 2020), and Julie Eddleman, Chief Commercial Officer at DoubleVerify (2014), joined Carlisle (2019) for a mainstage session featuring career "origin stories," engaging anecdotes, and personal advice for fellow professionals. Along with their long-term perspectives, the panelists offered fresh insights on the rise of retail media, the evolution of measurement, cross-functional alignment, omnichannel planning, and the evolving needs of commerce marketers.

#### The Alignment of Roles Across the Commerce Ecosystem

One key aspect of the conversation was a look into the ways in which retailers, brands, agencies, and technology providers are partnering across what, at first glance, can seem like a fragmented ecosystem:

- **Brands** create products and set strategy. "Our job is to make products that people love, sell those to retailers, work with agency partners to create the right messaging, target the right audiences, [and] make sure we're delivering that message in a brand-safe environment," McGowan said.
- Agencies optimize brand investments and performance. "A media agency's role is to help clients get the best performance out of their investments across both national media and retail media in a holistic manner," Carlisle said.
- Retailers and their media networks provide targeted reach and conversion, with a
  focus on traffic to their stores and websites to drive brand sales.
- Ad-tech partners provide critical support through various solutions, such as verification and measurement to safeguard spending. "DoubleVerify's mission is to make digital advertising stronger, safer, and more secure, to ensure ads are seen by a real person, fraud-free, in the right geography, and in brand-safe and brand-suitable environments," said Eddleman.



## **Fresh Perspectives from**





#### The Shift Toward Holistic Media Planning

Panelists emphasized the need to integrate national and retail media by breaking down organizational silos — a major industry pain point that few brands have yet solved. This will enable such important practices as shared frequency caps on ad views and sequential messaging across channels.

"Brand awareness messaging reaches a lot of people, and pure conversion-focused retail media is critical," said McGowan. "But the integration of the two is where the magic is."

#### An Integrated Retail Media Success Story

To illustrate best-practice integration, Carlisle shared an example from Spark Foundry's recent work with a large CPG brand.

"The client had been sponsoring the NFL for over 10 years but needed new consumers. [And] Amazon was underdeveloped for the brand," Carlisle explained. The solution was a campaign running throughout the 2023-24 NFL season that harnessed cultural signals for a program featuring several NFL players and influencers. ••





## **Fresh Perspectives from**





The CPG and Spark used Amazon Marketing Cloud to identify ideal target audiences of younger consumers unfamiliar with the brand to receive educational messaging: Amazon Prime Thursday Night Football streamers, viewers of a related Amazon Prime documentary, and relevant Amazon Music listeners. Brand media that ran during *Thursday Night Football* on Amazon Prime used a QR code to directly drive conversion on Amazon.com, ultimately delivering a 43% new-to-brand lift.

"To me, that is the embodiment of how we integrate national and retail media," Carlisle said. "But what's really critical to all of that is the measurement."

#### The Evolution of Measurement

Eddleman offered a look into retail's historical resistance to, and eventual adoption of, third-party measurement — and why verification has become non-negotiable as retailers themselves have become not only media sellers but advertisers for their own platforms.

"Twelve years ago, Google didn't want anyone to measure anything they did. They just wanted [advertisers] to spend [money] and take their word for it," Eddleman said. "We knew someday that was going to end, so I worked with companies across the ecosystem to start third-party measurement."

#### Advice to the Industry

Framed as personal career advice, the panelists concluded the session with guidance for marketing organizations as they navigate the need for increasingly hybrid roles. Key themes included cross-functional curiosity and cross-discipline learning, humility and openness, consistent performance over occasional brilliance, and the importance of cultivating both internal and external mentors.

"Always take the opportunity to [work on] special projects," said McGowan. "It's extra work, but you learn a ton and also see other parts of the business."

"Be a model for those around you," Carlisle recommended.

"Never take yourself too seriously and have a great time," suggested Eddleman. •























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