

# SHOPTALK

## SPRING



**PUBLICIS  
COMMERCE**

# Recap Report

**April 2026**

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## Shoptalk Spring: Talking a Good Game

*The AI conversation is getting a lot more pragmatic through tangible case studies and more reasonable thinking about agentic commerce.*

It would be an exaggeration to say that all of the major themes emanating from Shoptalk Spring 2026 involved AI. But just a slight one.

Shoptalk's content planners dedicated an entire stage of panel discussions and presentations to the topic, although they did also astutely name the event's full agenda "Retail in the Age of AI" since every session on every stage discussed AI to some degree — and that statement is not an exaggeration.

Agentic platforms will "eventually replace the traditional search and ecommerce experience," predicted Sky Canaves, Principal Analyst for Retail & Ecommerce for EMARKETER, while presenting findings from a just-published research report fielded in partnership with Publicis Commerce. But a number of forecasters are more publicly skeptical about the direct impact they will have on sales.

There have been many changes to the agentic commerce marketplace since Shoptalk Fall was held last September, including the coincidental fact that (as Canaves noted), OpenAI's ChatGPT "came full circle" — unveiling an in-platform "Instant Checkout" initiative during the earlier show and disclosing plans to shutter the program right before Shoptalk Spring began.

EMARKETER conservatively estimates that search agents will generate \$20 billion in U.S. product sales this year and \$144 billion in 2029 — when agentic commerce will account for roughly 9% of all ecommerce sales. A more aggressive forecast puts the 2029 number at \$225 billion and 14% of ecommerce sales if you add in purchases made either within third-party agentic platforms or on a retailer website immediately after an agent's recommendation.

The future, therefore, "is still highly speculative," Canaves acknowledged, especially since most retailers either don't yet have an agent or aren't prominently featuring the ones they have. Yet she projects that agentic commerce will ultimately usher in a new era for commerce defined by three types of "shoppers": humans, AI-assisted human shoppers, and AI agents.

Meanwhile, a number of Shoptalk attendees appreciatively noted that discussions around the impact of AI on the business of commerce marketing have progressed "from ethereal to real practice," in the words of Saatchi X's Amy Vollet (see page 21), with speakers now presenting case studies detailing effective implementation — often involving improvements to retail media activation and nearly as often featuring mutually beneficial partnerships.

And despite the overwhelming focus on AI, there was still plenty of attention paid to that first and still-most-important of EMARKETER's three shoppers: the humans who continue to visit physical stores and still have their own ideas about brand loyalty — no matter what their agents might be telling them.

Here are five key themes from Shoptalk Spring 2026. <sup>1</sup>

## 1. Agentic Commerce Is Not Taking Over Retail

Industry consensus remains overwhelmingly bullish on agentic commerce having a substantial impact on future shopping behavior and, subsequently, brand marketing and retail operations. It's just not quite as certain that AI-enabled shopping assistants will ultimately handle the entire purchase journey all by themselves.

Search agents “are absolutely changing the way we search,” said industry consultant Andrew Lipsman, principal at Media, Ads + Commerce. But will they buy products with minimal or no human interaction? “I don't think it's ever going to happen,” he said. Shopping is “not a chore to be outsourced,” concurred Sarah Marzano, Principal Analyst for Commerce Media at EMARKETER, while noting that Amazon's longstanding Subscribe & Save program — created to relieve humans of repetitive shopping activity — recently lost share in nine out of 10 product categories. “We're not seeing any consumer appetite for doing that at scale,” she said.

Lipsman and Marzano presented their views during a lively debate with two commerce practitioners who do believe “bot to bot” shopping will have a massive impact on the marketplace. One of them, ReFiBuy CEO Scot Wingo, cited Morgan Stanley research (among other forecasts) predicting that 10% of ecommerce sales will come through autonomous agent shopping by 2030.

Regardless of adoption levels, the greater issue “is about brand visibility in those search engines. If you're not there as a brand, you're going to lose the game,” said Ekta Chopra, Chief Digital Officer at e.l.f. Beauty (the other “pro-agent” in the debate). “It is a mindset shift that needs to happen in the organization ... a broader discussion about how this world is changing.”

“How do you think about enriching your product information? We started doing that almost a year ago,” explained Chopra. Now, e.l.f. is investigating the questions that consumers are asking agents “so we can enrich our product content around that.”

And there already is evidence that doing exactly as Chopra suggests can enhance a brand's visibility within agentic search engines by increasing the number of times its products are recommended. In fact, Ethan Goodman, president of Profitero+, presented studies from a unique analysis of recommendations on Amazon's Rufus search agent that identified the potential impact of optimizing content on product detail pages based on the questions shoppers are asking (see page 24 for more information).

“Retailers and brands should absolutely be testing and learning within these environments,” said Marzano. “But crucially, they should not be convoluting the difference between preparation and a massive reallocation of budget.” At least not yet. ▶



## 2. AI Is Taking Over Marketing Processes

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As usual, search agents and other shopper-facing activations got the most attention at Shoptalk but case studies involving back-office implementations that improve workflow processes, operational efficiency, speed to market, and ultimately marketplace activation were more plentiful – and typically came with more proven results.

Retailers are using AI to implement efficiencies throughout the supply chain, up to and including more effective merchandising in stores. Brands are improving operations in a variety of areas, with creative versioning and personalization a particular sweet spot.

Speed to market has become a standard benefit for both retailers and brands. A junior staff member at Crocs demonstrated the power of rapid prototyping by leaving a meeting and returning one hour later with an AI tool that is helping the footwear brand better track social trends.

At Macy's, AI is compiling and summarizing all reports emanating from store leadership to improve efficiency and free up those employees “so they can be on the floor with the customers [because] it all boils down to the way you make the customers feel,” said Max Mangi, Chief Customer & Digital Officer.

Haleon so far has focused on media activation and operational efficiencies, but the company is also exploring how AI can improve product innovation by giving the CPG a deeper, more strategic lens into evolving consumer behavior, explained Reagan Freyer, Director-Performance + Commerce Media, during an interview with Publicis Commerce.

The use of AI tools to improve retail media planning, activation, management, and measurement has also become commonplace – and perhaps even table stakes in a market where the competitive landscape continues to grow.

And when it comes to shopper-facing agents, retailers and brands can focus on simplifying the purchase journey as they wait to see if the bots will take over buying. Behr Paint Co.'s “ChatHUE” color selection tool uses Google's Gemini agentic search platform to help customers get personalized recommendations for their projects; the brand's exclusive retailer partner, The Home Depot, similarly has a “Magic Apron” shopping assistant running on Gemini that helps shoppers plan out their DIY projects.

## 3. Retail Media Is Maturing (but still has some growing up to do)

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As competition intensifies and advertisers become more assertively selective about their investments, holistic activation and other methods of strategic collaboration are becoming more commonplace at retail media networks looking for a marketplace advantage. That trend was most clearly examined during a panel discussion featuring The Home Depot and Behr.

“[Behr has] never really just looked at us as a channel investment focused on the final conversion, which many of our suppliers do – and we're happy to serve that role,” said Taryn Dominie, Senior Director-Head of Industry for the retailer's Orange Apron Media. “We really are a larger part of their omnichannel marketing strategy.” ▶

On the other side of the table, Behr is “leveraging our Orange Apron team as a strategic marketing partner that, yes, has a lot of capabilities in targeting first-person audience data ... but also helps us get innovative in the experiences that we can build together for our customer,” said Andy Lopez, Behr’s SVP-Head of Global Marketing.

What still needs work: measurement. “How do we understand what's working and what's not working? How can we make sure that every dollar we're spending is being as effective as possible? [And] how do we get data faster in real time,” asked Lopez. Orange Apron is addressing these questions through its proprietary ROMO (“Return on Marketing Objective”) framework, which employs advanced multi-touch attribution methodologies and other tools to measure performance against a campaign’s specific goals.

Google is working with brands to identify the “recipe of ad products that uniquely suit a marketing challenge and a marketing objective. So [they’re] not just buying into a retail media network, [they’re] actually crafting the right ad products to drive the right outcomes,” said Andrew Hotz, Director of Consumer Brands at Google.

“There isn't a lot of connectivity” within brand organizations, noted Christine Foster, SVP Commercial Strategy & Operations at Kroger Precision Marketing. “Performance challenges maybe aren't actual performance challenges. It might be organizational design challenges that keep brands from connecting the dots in terms of actual outcomes that go all the way through the historical funnel,” she warned.

KPM’s new deal with Google made it the first retailer to fully integrate its first-party data and closed-looped measurement capabilities into Google’s tech stack to activate media through YouTube and “anywhere on the web,” said Hotz. Historical shopper data “tells us a lot more about the consumer than a cookie ever could, right?” said Foster. “Now there's this opportunity to really blend that time with consumers into [full-funnel] media planning that is going to supercharge the ecosystem.”

A corollary to the debate over agentic commerce is how this potential behavior shift will impact the relevance of retail media. If product discovery is taking place within agents that then direct shoppers to buy a specific product on the retailer’s website, will onsite media lose its purchase-decision relevance? Will agent adoption significantly reduce traffic to retailer sites?

“There are new use cases for discovery and search [with agentic search], but you're still going to end up at the [retailer] site, and you're still going to make your decisions within the context of the site,” contended Lipsman during the “great debate.” For now, at least, data from the Publicis Commerce-EMARKETER study supports this theory, with 60% of agent adopters saying they still conduct their own research after receiving the agent’s recommendation. ▶



## 4. The Physical Store May Yet Be Eternal

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When even “the future of shopping malls” is discussed in positive terms, it should be safe to assume that physical stores will remain the indomitable core of retail for quite some time. Data supports this assumption: store traffic was higher in December 2025 than it was in April 2019 — before the COVID-19 pandemic put what many believed would be the final nail in brick-and-mortar retail’s coffin, according to foot-traffic tracker Placer.ai.

Furniture/home décor retailer Wayfair has 2,500 employees on its tech team, which is why it has had the internal resources to build AI-infused tools for its shoppers, merchants, customer service reps, and suppliers. Yet after more than 20 years as a digital-only business, the company has plans for three additional large-format locations thanks to the success of the Chicago store it opened in 2024 — where 50% of visitors have been first-time customers, noted CEO Niraj Shah.

Drive-thru-only coffee chain Dutch Bros offers an additional, slightly offbeat example of the perpetual need for in-person experiences as it works to nearly double store count to 2,000-plus by 2029. “We’re in the relationship business. And love is the product,” professes CEO Christine Barone. And to drive brand awareness in regions where it doesn’t have stores, the company partnered with Trilliant Food & Nutrition last year to begin selling packaged coffee and other products that now are available at Amazon, Walmart, Albertsons, and other retailers.

Heck, even Meta now has five “Meta Lab” physical environments, which are designed to entertain consumers while collecting behavior data for retailers.

**Speaking of Meta: Nicola Mendelsohn, Head of Global Business Group, earned a legitimate round of applause from her keynote audience by announcing that product tags are being embedded into Instagram reels. “The era of ‘Link in Bio’ is over,” she proclaimed. “Discovery and commerce are happening almost seamlessly together.”**

Retailers that deliver a sense of excitement like H Mart, Sprouts Farmers Market, and Trader Joe’s are attracting shoppers from a wide footprint; grocers that effectively match their merchandising assortment and in-store experience to the core needs of customers — like H-E-B, Publix, and Woodman’s — continue to thrive, according to R.J. Hottovy, Placer.ai’s Head of Analytical Research.

With even malls being reimagined as multi-purpose engagement centers, physical stores do need to undergo the experiential upgrades that have been discussed for quite some time. Hottovy expects store performance to ultimately be measured by “total revenue” rather than product sales alone.

## 5. Loyalty Building is More Important Than Ever

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In the study from Publicis Commerce and EMARKETER, 49% of agentic search users said they would consider switching to a different brand based on the agent’s recommendation. But an equal 49% say they’re more likely to trust the agent’s suggestion if they’re already familiar with the product. So the equity that a brand has previously built, and the relationships it has established with shoppers, will still be a factor in many of these purchase decisions. ▶

Brands will need to win over both parties, of course, which requires them to understand what “motivates” each of them, explained Tomer Tagrin, Co-Founder & CEO of ecommerce platform operator Yotpo. AI agents favor structured data and the context of a loyalty program (point values, redemption options, tier benefits) and typically optimize their choices based on the lowest cost. Humans are looking for shared value and purpose, memorable experiences, exclusive opportunities, and a sense of belonging. They’re less price-sensitive and more willing to upsell/cross-buy.

The trick for marketers will be finding ways to get the agents to recommend their brand — but more importantly establishing relationships with shoppers that will keep them loyal regardless of the recommendations they receive. Retailers and brands must build programs that address shopper motivations, provide consistent experiences, reward engagement beyond purchases, give members input on products and services, and deliver uniquely human experiences, Tagrin suggested.

The “always on” loyalty program that footwear chain Snipes launched before the 2025 holiday season is designed to drive shopper stickiness by providing early access to new products and tickets to sporting and music events, as well as cash-back rewards, said VP-Digital Joe Shoemaker.

PetSmart’s Treats Rewards program launched with a focus on commercial incentives but soon shifted to drive stronger emotional connections, explained SVP-Marketing Bradley Breuer. One key aspect of the shift has been the ability for members to donate their rewards points to PetSmart Charities and automatically earn top-tier VIPP (“Very Important Pet Parent”) status by adopting a pet at an in-store event. Customers who donate their rewards spend more and return to the store faster, Breuer noted.

For Generation Z, “the emotional connection is what ties them to a brand,” said Carly Gomez, Chief Marketing Officer at Crocs, whose current “Let Your Human Out” ad campaign seeks to reposition its connection from “belonging to becoming.” Gen Z is “also shopping where they’re getting entertainment,” said Gomez, while advising marketers to understand the problems consumers are trying to solve rather than “chasing trends on a hamster wheel. Virality isn’t as vital as it used to be.” ♦



# Partnering to Drive Retail Media Innovation



Aligning on audience targeting is a key step in the road to mutual success.



**Amy Andrews**  
President  
**Mars United Commerce**

I moderated a panel discussion at Shoptalk Spring that used a format I love because it united two case studies exploring unique aspects of the partnerships across brands, retailers, and media companies that are so critical to best-in-class commerce marketing these days.

I was joined first by Taryn Dominie, Head of Industry for The Home Depot's Orange Apron Media, and Andy Lopez, Head of Global Marketing for Behr Paint Company, which have enjoyed an exclusive category partnership for more than 45 years.

Effective retail media activation for Behr and Orange Apron Media is based on targeting the right audiences, which also reflects the heart of what we're doing at Publicis Commerce right now around identity and personalization — and really what we've been trying to do with our marketing at Mars United forever: getting the right message, to the right person, at the right time.

Behr and Home Depot are innovating in targeting by going way beyond segmenting the retailer's audience into do-it-yourselfers and professionals to identify niche, customized segments within each group — like “residential repainters” in the case of professionals — to deliver relevant messaging that specifically addresses how they shop.

The second case study featured a new partnership announced just one day before the panel discussion, a collaborative agreement between Kroger and Google to make all the grocer's wonderful shopper data available for ad campaigns across the Google ecosystem — including YouTube, where users are watching 90 million hours of shopping-related videos per day. Brands can connect that behavior to shopper data from Kroger (and soon, other retailers) to make those purchases more relevant and optimize them in real time.

Both of these conversations presented some enlightening points of view on how traditional brand-retailer relationships are evolving and improving through enhanced technology. From my perspective, there were three key takeaways from the session:

## KEY TAKEAWAYS

- 1. Audiences are the edge.** Refining audiences and developing a deep understanding of individual shoppers is the best way to gain the edge in marketing by delivering truly custom solutions. The more precisely we can identify and activate unique audiences, the stronger our results will be. ▶

# Partnering to Drive Retail Media Innovation

## KEY TAKEAWAYS - Continued

2. **Measurement is (still) the unlock.** Retail media wins when it can prove the real business outcomes that are taking place. There is still work to do around measurement, and everyone acknowledges that we're improving as an industry in this regard. But there's still huge opportunity to better measure the business impact, so we really know where to spend the next dollar.
3. **Connection is the future.** We talked a lot about connections, of course, which logically leads to discussing connected commerce. It was great to hear these partners speak in unison about breaking down those traditional funnel divisions and treating media more holistically to determine where we can best convert, whether that's national media or shopper media. That's a very exciting direction for our industry to take for the future.

And speaking of the future, we definitely heard a lot about AI at Shoptalk. In my panel, Andy Lopez explained how Behr is using AI agents to give people greater confidence in their journey, helping them find the best paint solutions for their specific needs. It makes a lot of sense to think about leveraging AI in ways like these that are beneficial to shoppers, particularly in categories like home improvement where they have a lot of questions to ask. Our goal as marketers is to make sure we're in the right place to answer them. ♦



# AI Rewards Builders Over Procrastinators



Retailers that haven't started moving forward are already falling behind.



**Stacey Georgoulis**  
VP-Platform Partnerships  
& GTM Strategy Development  
**CJ**

At Shoptalk Spring, Executives from Gap, Sephora, Wayfair, Dutch Bros, and other retailers described the same compounding logic when it comes to planning and executing AI transformation: Know what you're solving for, move before you have all the answers, and build each initiative so it makes the next one easier. The distance between brands that operate this way and those still deliberating is already widening.

## KEY TAKEAWAYS

- 1. Start with a specific problem, not broad ambition.** Chief Technology Officer Sven Gerjets outlined three steps in Gap's AI transformation: enabling employees, optimizing existing processes, and only then reinventing what's possible. Skipping to reinvention without that underlying foundation produces tech for tech's sake. His practical marker for preparedness: structured, AI-ready data that can travel across platforms while keeping the customer relationship intact.
- 2. Act now, improve as you go.** Sephora's Global Chief Digital Officer, Anca Marola, set the timeline plainly: ship something today, because it may already be old news by tomorrow. Shoptalk's own future predictions add urgency to that: Fast movers in agentic commerce could reshape the balance of power at retail the way pure-play ecommerce did in the early 2000s, with AI lowering barriers enough to fuel a generational boom in new brands that compete on speed and discoverability rather than scale.
- 3. Solve for friction.** Gap's partnership with virtual technology provider Bold Metrics targets fit and sizing, a genuine pain point for shoppers with direct impact on returns and conversion. The retail floor already has too many AI "solutions" that generate good demos but little or no measurable business impact, Gerjets said. For performance marketers, the question is the same regardless of the tool: Where does this reduce friction in the customer journey, and how will we know? Merchants must set concrete goals and metrics and use them to guide and measure every aspect of an initiative.
- 4. Trust compounds the way data does.** Shoptalk's head of content, Joe Laszlo, named trust as the thread running through the entire conference. Dutch Bros CEO Christine Barone reframed her brand around it on the main stage, describing emotion as the drive-thru QSR's product and coffee as the delivery mechanism. Reddit's Steve Huffman added a data point: almost half of his platform's conversations involve purchase decisions, because people seek human perspectives before they buy. AI scales reach. Sustained trust is what turns that reach into revenue.
- 5. Build infrastructure, not just initiatives.** Successful AI programs run on data foundations that compound advantage over time. Wayfair offered a vivid example: its AI Stylist tool, 20 million-plus SKU catalog, and recent push into physical retail all run on infrastructure built long before any of those projects existed. Every interaction improves the foundation over time. First-party data strategy is the work that makes everything else possible. ♦

# Connecting Media Strategies for a Coordinated Shopper Journey

The goal is to deliver identity-driven outcomes rather than impressions.



Tom Giovingo  
VP-Client Lead (Media & Entertainment)  
**Epsilon**

Shoptalk Spring made one thing clear: Retail media is entering a new phase that will be defined by coordinated journeys rather than individual channels. As shopper journeys stretch across national media, social platforms, onsite activity, and in store, retailers are rethinking how these touchpoints work together. The opportunity ahead lies in identity driven sequencing that delivers outcomes rather than isolated impressions.

## KEY TAKEAWAYS

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- 1. Coordinated journeys are replacing channel by channel execution.** Throughout the event, retailers and brands emphasized this shift from siloed campaigns to connected shopper experiences. AI driven personalization, dynamic recommendations, and real time decision-making only work when signals flow across national media and retail media network environments. Treating these channels as one coordinated journey helps retailers reduce waste, avoid oversaturation, and guide shoppers with greater relevance.
- 2. Unified planning grows retail media audiences and strengthens retailer-brand partnerships.** Several sessions highlighted how upper funnel media can fuel retailer ecosystems by bringing new, high value shoppers into retail media environments. When national and retail media are planned together, retailers can expand their addressable audiences and create more meaningful collaboration with brand partners. This alignment helps both sides push beyond transactional campaigns toward shared growth.
- 3. Identity is becoming the foundation for smarter sequencing.** A recurring theme was the need to close the gap between modeled audiences and real people. Retailers are investing in stronger identity strategies to power AI, improve personalization, and connect onsite, offsite, and in store signals. With connected identity at the core, marketers can make more confident decisions about where to engage, how often, and with what message.
- 4. Measurement challenges are accelerating the move toward connected planning.** Sessions on retail media measurement underscored the industry's frustration with fragmented KPIs and inconsistent definitions. Brands want clearer accountability and more actionable insights across onsite, offsite, and in store activation. Unifying national and retail media network strategies creates a more coherent signal chain, making it easier to understand what's working and tie media impressions to real business outcomes. ♦

# The Fundamental Things Apply

The basics of commerce marketing remain essential to future success.



Ethan Goodman  
President  
Profitero+

Agentic commerce was probably the biggest theme of all at Shoptalk Spring, and I was proud to contribute to the discussion by sharing some of the key findings from Decoding Rufus, the hot-off-the-presses research we co-published with Mars United Commerce.

We undertook the research after watching shopper behavior begin shifting toward AI agents: ChatGPT, Perplexity, Claude, as well as retailer-operated agents like Amazon’s Rufus and Walmart’s Sparky. We were helping clients start thinking about how they show up on this new “agentic shelf,” alongside their efforts on the digital shelf and traditional physical shelf. And we wanted to identify some effective methods for “AEO,” or “agentic engine optimization.” And the size and status of Amazon within commerce made Rufus a logical agent to investigate.

Our research produced two topline takeaways. The first is that optimizing product detail page content on Amazon.com — shopper-facing descriptions, backend keywords, etc. — to address the questions being asked on Rufus can help brands increase their “Share of Agent Recommendations,” which can then lead to quantifiable conversion and sales growth. However, this content optimization will really only impact brands that already have established themselves as highly rated, frequently reviewed “Best Sellers” on Amazon — because those are the baseline thresholds of “eligibility” brands must meet to be considered for recommendation by Rufus at the moment. (Download the [full report here](#).)

The other key takeaway goes hand in hand with the first. And it confirms a theory we had before the research: that the key factors influencing agentic search are the same ones brands use to drive traditional SEO and maintain a strong presence on the digital shelf. Successful brands don’t really need to make wholesale changes to the approach they’ve been taking, because improving their recommendation share on Rufus really just involves sticking to the basics and doing them exceptionally well (see page 23).

Elsewhere at Shoptalk, retail media remained a leading theme, and in discussing what’s new and next for the practice, we heard from a lot of the “usual suspects” in terms of the key issues: building more credible measurement, expanding channel options, and improving audience capabilities. ▶



## The Fundamental Things Apply

But let me throw a curveball at you: I met with one industry analyst during the show who believes we'll be seeing a return to traditional methods of analog marketing, as evidenced by a direct mail company that's now effectively working with digitally native brands. And to be honest, based on what I heard at various sessions and meetings, I can't say that analyst was crazy.

Whether or not direct mail ever experiences a resurgence, the very idea that it was being discussed at a Shoptalk event in 2026 underscores a far more important point: Yes, it's critical to stay ahead of emerging digital trends in general and especially agentic commerce. But we can never leave behind the fundamentals, the basics of commerce marketing – at least not as long as more than 80% of product transactions are still occurring at physical stores (which was another key theme during the event). ♦





# Retail's New Playbook:

## AI, Partnerships & Organizational Design

AI will only work if marketers rethink their strategies and restructure their organizations.



**Chelsea Monaco**  
SVP-Commerce Media  
Digitas

Shoptalk Spring provided a wake-up call: Winning in retail media demands more than just embracing emerging technology or forming collaborative partnerships; it requires a fundamental rethink of how organizations are structured for speed, agility, and measurable business outcomes.

As brands and retailers pursue bold AI innovation, internal silos and legacy mindsets remain the main barriers to progress. In this increasingly complex ecosystem, it's easy to lose sight of the most important objective: putting the consumer at the heart of the brand-retailer experience. Here's what marketers must prioritize to adapt, lead at scale, and future-proof their businesses.

### KEY TAKEAWAYS

- 1. Strategic partnerships unlock differentiation.** Partnerships are the new power source. Strategic collaboration and data sharing that enable alignment on key consumer moments are table stakes for meeting today's evolving paths to product discovery. True growth will come from treating partners as extensions of your own team rather than simply vendors or media networks. Long-term alliances like The Home Depot and Behr's 45-year partnership (see page 9) prove that value lies beyond transactional media buys. Too often, partnership conversations focus on revenue or media-spend commitments rather than the real opportunity: co-creating high-impact experiences that matter to consumers.
- 2. AI that works — if the organization is ready.** AI is moving from buzzword to backbone, powering everything from advanced measurement platforms for brands to personalized recommendations for consumers (think Google Gemini for color choices — from paint, to produce, to makeup palettes). Yet many brands struggle to unlock full value because their organizations are not designed for it. Data scientists, marketers, media managers, brand teams, and technologists often work in silos, slowing decisions and stifling adaptation. True transformation begins when organizations break down these walls and empower cross-functional teams. While the debate continues over AI's ultimate impact on retail, one thing is clear: marketers must leverage AI not only to drive product discovery but also to deepen consumer understanding.
- 3. Measurement without action is meaningless.** Retail media measurement is evolving rapidly through solutions like Kroger and Google's closed-loop system to utilize retail data across the media company's inventory. However, unless insights lead to organizational action, their potential is wasted. Many teams lack unified goals or incentives tied to business outcomes. Media investments must work harder across both efficiency and effectiveness — for both brand building and sales alike. The future is measurement models based on real business impact (think ROMO: Return on Marketing Objective), supported by agile teams who can quickly connect insight to action. ▶

# Retail's New Playbook: AI, Partnerships & Organizational Design

## KEY TAKEAWAYS - Continued

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- 4. Organizational design is the bottleneck (and opportunity).** For both brands and retailers, outdated org structures represent a barrier to innovation — but one too often unacknowledged as the core challenge. Siloed shopper and brand teams, unclear ownership as national and retail media roles collapse, slow tech adoption all undermine strategic initiatives. Leaders who break down these silos, leverage clean room data for incremental insights, and deliver audience-first personalization through frictionless shopping journeys will outpace competitors while future-proofing their business in the rise of AI.
- 5. Bold leadership sparks change (and conversation).** The industry needs more candid dialogue about what is and isn't working. Progress depends on leaders willing to embrace change, challenge norms, and invite new thinking at every level, whether debating AI's future or sharing lessons from enterprise pilots. The organizations brave enough to evolve their structure — financially and operationally — and forge deeper partnerships around shopper insights will be the leading voices in conversations (pun intended) as we enter the era of agentic retail.

Bolder design — and thinking — will turn vision into real outcomes across the modernized media landscape. ♦



# AI, Retail Media, & Creators Are Rebuilding Discovery

And it's now up to brands to connect all three.



Juan Olea  
VP-Commerce  
**Influential**

Shoptalk Spring made one thing clear: Discovery is no longer just about search. It is being simultaneously reshaped by AI, retail media, and creators.

AI dominated this year's event, but the bigger signal offers more practical guidelines about what is real now, what is still early, and what brands should do next. The opportunity is not to treat these as separate trends, but to connect content, media, product data, and commerce into one system.

## KEY TAKEAWAYS

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- 1. Discovery is becoming more guided as well as more searchable.** One of the clearest signals from Shoptalk is that consumers are moving from keywords to full questions, and search platforms are responding by making discovery more guided. AI is playing a bigger role in how people explore products, compare options, and narrow choices.

**So what for brands?** Make sure your product information is clear, structured, and easy to understand across platforms. Strong product data, rich attributes, reviews, and simple positioning will matter more as discovery increasingly becomes AI-led.
- 2. Brands need to separate what is now real from what is still hype.** A lot of the talk at Shoptalk centered on agentic commerce, but one of the most common viewpoints was that the market is still early. AI is already shaping discovery and consideration, but fully autonomous buying at scale is not here yet. The smarter move is to focus on AI search visibility and discovery now while staying ready for what comes next.

**So what for brands?** Do not wait for full agentic commerce. Focus immediately on how your brand and products show up in AI-driven discovery, comparison, and recommendation environments. Solve for visibility and usefulness first.
- 3. Creators are moving closer to the point of decision.** Creators are no longer just helping brands drive awareness. They're becoming part of how people evaluate products, build trust, and decide what to buy. That trend came up across the broader Shoptalk conversation — and was confirmed by Meta's announcement regarding AI-powered product discovery, creator product tagging, affiliate partnerships, and easier paths to purchase.

**So what for brands?** Use creators not just for reach, but for product explanation, proof, comparison, and confidence-building closer to purchase. Creator content should support commerce, not just content calendars. ▶📄

# AI, Retail Media, & Creators Are Rebuilding Discovery

## KEY TAKEAWAYS - Continued

- 4. The winners will balance AI efficiency with human relevance.** Another strong theme was that the human element still matters most. Brands that stand out in the future won't just automate everything, they will use AI to remove friction while still building trust, emotion, authenticity, and confidence at the right moments. **So what for brands?** Use AI where it helps simplify decisions, improve relevance, and reduce friction. But keep human judgment, strong brand storytelling, and authentic creator voices in the places that shape trust and preference.
- 5. The real advantage is operational, not theoretical.** Do not address AI, retail media, and creators separately. The real opportunity lies in connecting them into one working model. Stronger outcomes will come from better infrastructure, cleaner first-party data, better system integration, clearer ownership, and more measurable execution. **So what for brands?** Make this operational now. Connect your creator strategy, paid media, product data, and measurement into one clear workflow with shared goals and clear owners. You won't gain an advantage by talking about AI the most but by testing faster, learning faster, and scaling what works.

My biggest takeaway from Shoptalk Spring? The next edge will come from execution. AI will shape discovery, creators will shape trust, and better systems will shape conversion. The brands that pull ahead will connect those pieces early and turn them into a repeatable commerce engine. ♦



# AI Is Raising the Bar for Human Connection

Technology is great for optimization, but people still need to drive the experience.



**Elizabeth Planek**

**VP Audience Strategy**

**Publicis Groupe, ConnectedCRM**

One theme cut through the noise at Shoptalk Spring: the tension between AI dominance and the resurgence of human connection. But framing this as a tradeoff misses the point. The brands that will win aren't choosing between artificial and human intelligence — they're orchestrating both.

The rise of agentic commerce is accelerating that reality. As consumers increasingly rely on tools like ChatGPT and Claude, they're not simply completing their own tasks but training these systems. Every interaction sharpens preferences, making each recommendation more precise, more personal, and more trusted. Over time, these agents begin to feel like an extension of the individual.

This shift is redefining expectations. Consumers won't compartmentalize these experiences but instead carry them everywhere. Every brand interaction is now measured against the last best experience. Memory and relevance are no longer differentiators; they are table stakes.

For brands, this puts new pressure on the fundamentals. First-party data strategy and CRM can no longer function as passive systems of record. They must increasingly operate as systems of memory. Every signal should inform the next interaction because customers increasingly will expect brands to know them the way their agents do.

Inside organizations, this is driving a parallel shift. As AI embeds across workflows, marketing teams are evolving from execution engines into orchestration layers. New roles are emerging to connect tools, agents, and data into cohesive systems. The upside is real: operational efficiency is unlocking capacity for more strategic, decision-driven work. The risk is equally real: without clear orchestration, complexity scales just as quickly as capability.

And yet, even as AI dominated the conversation, the most grounded insight from Shoptalk was this: Human connection is not diminishing, it's becoming more valuable.

Retailers pointed to continued strength in physical stores — not in spite of AI, but because of it. As AI streamlines inventory, operations, and scheduling, it gives store associates something more valuable than efficiency: time. Time to engage, build relationships, and create moments that matter. Leaders highlighted the value of long-tenured associates, rigorous training, and frontline teams empowered with the autonomy to make “surprise and delight” decisions. Loyalty programs followed a similar arc, with retailers prioritizing experiential value such as exclusive events over purely transactional rewards. The message was consistent: AI may scale efficiency, but trust, loyalty, and brand love are still built human to human.

If AI is optimizing the system, humans are defining the experience. ♦

# Finding Clarity

## Among AI Opportunities



A session hosted by Publicis Sapient outlined two options for retailers looking to start their journey.



**Michele Roney**  
EVP-Retailer CX  
**Mars United Commerce**

If Shoptalk Spring had a drinking game based on AI mentions, the level of intoxication experience at the show would have been crazy — even by Las Vegas standards.

There now are a sea of use cases for AI optimization in the commerce marketplace, which can make it hard for retailers to prioritize the opportunities available to them and the potential impact they can have on the organization. But I attended one session hosted by our Public Sapient friends and colleagues at Publicis Sapient that did a really good job of breaking down two of the more common AI workstreams that we're seeing: speed to market and agentic commerce.

**Speed to Market.** Two retailers participated in the session, one representing the loyalty function (Amanda Bailey, VP-Customer Marketing & Loyalty at Lowe's Companies) and one from a retail media network (Evan Hovorka VP-Product and Innovation at Albertsons Media Collective).

It was interesting to hear that, from their respective sides of the organization, these executives are often dealing with similar issues — especially in the case of speed to market, where various stakeholders have to align with the process needed to automate and then optimize workflows with AI. Retailer go-to-market strategies are still siloed, so it demands constant internal negotiation to establish a single process that will make wholly effective AI execution possible.

But the best advice these retailers gave was to avoid trying to boil the ocean by taking on too much change at once. Look at the project and find a little bit of time to work with each stakeholder. Begin by automating any small part of the process so you're accelerating the plan, reducing time with each stage that you undertake.

**Agentic Commerce.** Retailers will encounter similar internal issues when implementing agentic commerce because a lot of people need to get involved to make it work. There is plenty of experimentation going on right now because scrappy teams are able to launch their own pilots, but scaling across the organization requires a huge leap that can easily lead to failure. ▶

## Finding Clarity Among AI Opportunities

It helps to start with a customer-first strategy that all stakeholders can rally around. Operational efficiency, after all, will be worthless if you end up alienating your customers by not satisfying their needs or delivering a poor experience. It's also critical to get all your customer data housed in one place — don't move forward without taking this initial step.

The best advice from the retailers here was to avoid implementing AI just for the sake of keeping up with the times; do it because you have a clear objective in mind. If your agent isn't doing anything to help your customers buy or your associates sell, don't do it. Wait until you've clearly identified ways to do one or the other — because if you haven't mapped out your process from search to sale, you won't be able to properly train your agent.

The sea of AI opportunities is getting wider every day, so it helps for retailers to have clear guidelines like these to help them chart a course and start navigating the journey ahead of them. ♦



# AI Partnerships Are Transforming Retail Strategy

The industry is making progress with case studies driving internal and external benefits.



**Amy Vollet**  
SVP-Media & Commerce  
**Saatchi X**

The AI conversation at Shoptalk Spring moved from speculative to tested applications, including consumer-facing features that reshape discovery and internal systems that speed operations. Equally prominent at the show were partnerships and ecosystem unifications, with brands, retailers, and technology providers showcasing the interoperable solutions they're building from the stage.

Through it all, human judgment, creative collaboration, and strategic vision emerged as the glue that turns capability into commercial advantage. Commerce marketers leaving the show had one clear mandate: pair AI-driven automation and personalization with intentional human-led design to craft omnichannel journeys where AI curates discovery but brand differentiation and experiences complete the sale.

## KEY TAKEAWAYS

- 1. AI powers both customer experiences and internal efficiency.** AI was presented in two complementary roles: consumer-facing tools (personalized discovery, visual search, conversational assistants, virtual try-ons) and internal systems (demand forecasting, creative automation, dynamic assortment, fraud detection).

These dual tracks multiply ROI: front-end engagement drives conversion while back-end automation reduces cost and latency. Marketers should treat AI as a platform strategy, not a single campaign tactic. They should invest in measurement that ties personalization to retention and margin, prioritize pilot projects that link customer-facing wins to operational savings, and build governance that balances speed with data privacy and brand voice.

- 2. Strategic partnerships accelerate scale and relevance.** Shoptalk spotlighted numerous partnerships: brands embedding into retailer ecosystems, tech vendors co-creating middleware, and suppliers sharing first-party data frameworks. Instead of siloed point solutions, the winners are aligning commerce, logistics, and discovery across partners.

Partnerships let marketers access new audiences, capabilities, and data faster than going it alone. Marketers should map partner ecosystems to identify gaps (fulfillment, identity, content) and negotiate shared KPIs and data contracts. Co-led pilots can reduce time to market for AI features while dispersing risk and investment. ▶

# Finding Clarity Among AI Opportunities

## KEY TAKEAWAYS - Continued

- 3. Human-centered leadership turns AI into competitive advantage.** On-stage panels and show-floor demos emphasized that the human element — creative direction, empathy, strategy, and cross-functional collaboration — remains essential. AI amplifies decisions but doesn't replace judgment; content curation, brand positioning, and ethical oversight still require people.

Marketers should prioritize recruiting and upskilling teams that can translate AI outputs into brand-aligned experiences. They should create cross-disciplinary squads (product, analytics, creative, operations) with a shared roadmap and escalation paths. And invest in scenario planning and ethical frameworks now to protect brand trust and enable bolder experimentation with faster approvals.

- 4. Omnichannel is shifting to AI-curated discovery and tactile in-store experiences.** Shoppers increasingly rely on AI to surface a curated set of options — personalized feeds, assistant-guided lists, and AI-concierge suggestions — that simplify choice but still steer some purchases toward required in-store experiences for sizing, service, or immediacy. Marketers should use AI to reduce discovery friction, then orchestrate seamless handoffs to physical touchpoints (appointments, in-store inventory holds, experiential activation). Retailers should measure the incremental value of in-store conversions driven by AI discovery and optimize staffing, training, and fulfillment to convert these high-intent visits into long-term loyalty. ♦



## Preparing for the Agentic Future

Proprietary research finds ways of using ‘old’ strategies to meet new challenges.



**The following article provides an overview of a Shoptalk Spring presentation given by Ethan Goodman, President of Profitero+**

The rise of agentic commerce is already driving a significant shift in how consumers discover and purchase products. Driven by AI-powered shopping assistants, this new model of AI curation is quickly moving beyond an emerging to become established behavior. In this environment, brands face both exciting opportunities and some clear risks.

One of the most significant challenges is the compression of the digital shelf. Whereas traditional ecommerce environments might present hundreds of product options to shoppers, agentic search platforms surface only about eight results per query. This requires an evolution beyond SEO to “AEO” to optimize for both standard search algorithms and “answer engine” recommendations.

That leads to a critical question: How can brands prepare for agentic commerce optimization, and how can they impact the levers that influence whether they surface agentic search results? To find an answer, Profitero+ partnered with Mars United Commerce to conduct three months of proprietary research to determine if content optimization on product detail pages can influence visibility through search agents — and if so, what impact that might have on traffic, conversion, and sales. And we started the investigation with Rufus, which has more than 300 million monthly active users who Amazon says are 60% are more likely to purchase than its traditional searchers.

The study confirmed that it is possible to influence AI-driven results by optimizing PDP content, but only if the brand’s products have already meet two baseline criteria:

- “Best Seller” rank on Amazon.com: Products with the greatest visibility on Rufus had an average rank that was 2.5 times greater than other products.
- Strong consumer validation: Highly recommended products typical boast more than 15,000 reviews and a 4.6 or better rating.

“Once you’ve met those eligibility requirements, content optimizations really start to become important,” noted Goodman. ▶

## Preparing for the Agentic Future

Effective content optimization for AEO goes well beyond simple keyword matching to focusing on consumer intent and the product attributes they value as reflected in their prompts. For example, instead of concentrating on keywords like “running shoe,” a sneaker brand should highlight benefits such as cushioning and comfort.

We identified the impact of this kind of AEO through a new metric we call “Share of Agentic Recommendation,” or “SOAR,” which measures the number of times a brand’s products are recommended before and after relevant content updates are made. And even in cases where the visibility gains varied, sales still increased as a result.

“This led us to what is probably our most important finding. Yes, it’s important to optimize for agentic shopping,” said Goodman. “But ultimately, what’s really critical is ensuring that we have the basics of digital shelf optimization right – the fundamentals that are impacting some of the core elements of our Amazon presence.”

In the agentic commerce future, therefore, the foundational elements of content strategy that drive organic search success become more critical than ever. To prepare, brands have a clear roadmap to follow:

1. Align on core KPIs.
2. Assess competitive positioning.
3. Identify high-value consumer intent.
4. Optimize content accordingly.
5. Continuously measure and refine performance. ♦





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