



Powering Commerce

2025 *Recap*



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Day 1 Keynotes

The Path to Purchase Institute's Retail Media Summit Keynote began with presentations from three high-level executives on May 7 in Rosemont, Illinois.

Sean Barrett, chief marketing officer at Albertsons Cos., first discussed the transformational shifts in shopper behavior that have occurred the last few years as well as the retailer's strategy to attract and retain customers.

"Coming out of the COVID-19 pandemic, there were two dynamics: value-seeking consumers and time-starved consumers," Barrett said during a discussion with Cyndi Loza, P2PI senior editor.

To reach them, Albertsons' strategy has been threefold:

- Lower prices, and then leverage the scale of that.
- Deliver personalized, relevant offers that are right for the customer.
- Leverage its loyalty program by simplifying things, making it easy to realize value, and innovating with new as well as third-party partners.

Shoppers are value-conscious. "The role of retail media is very important in this," Barrett said. "We want them to shop at our stores and feel that it's not a bad decision."

Convenience has been a strength of Albertsons. "Convenience-seeking shoppers over-index with us," he said.

Barrett added that digital capabilities and personalization are important with meal planning.

Charisse Hughes, Kellanova SVP & chief growth officer, was next on stage. During a conversation with Lisa Johnston, P2PI editorial director, Hughes described how the consumer or shopper is at the heart of everything they do.

She said her organization has leaned into innovation by creating an "ideation factory," which standardizes the way it brings products to market. (Health & wellness and sustainability are also pillars.)



"It's important to connect with customers anywhere they are thinking about planning."

The challenge, he said, is: "How do we engage? How do we do it in a personalized way?"

"It's about being helpful," Barrett continued. "Know the customer. Only put in front of them something that is helpful to that moment."

Furthermore, in-store marketing opportunities are incredibly valuable, he said. The closer to the point of purchase it is, the more valuable it is.

Personalization and the use of data is the core of that. "We have so much data on our customers. What we know about them is incredible. ... We now use data to predict their next action."

Bringing retail media (i.e., Albertsons Media Collective) in-house has impacted brand partnerships, Barrett said. "There's an opportunity for brands to reflect and operate differently with retail media."

"Creatively, we're starting with data," Hughes said. "We acknowledge that and make a commitment to data as an asset." The focus is on creating value for consumers and aligning with brand values.

Moving on to the customer journey, Hughes said Kellanova goes well beyond the traditional, and beyond transactions. "How do we lean into culture?" she offered as an important point.

Hughes presented multiple examples of how Kellanova keeps its brands top of mind.

Among them was the activation surrounding the Pop-Tarts Bowl, a Pringles/Crocs collaboration, and leveraging a TikTok video that paired Pringles with caviar.

“We’re really leaning into culture in a variety of ways,” Hughes said.

She added that Kellanova focuses on understanding where the consumer is shopping. “We have to be where they are with the right message.”

She described how they are identifying high-value audiences with clean room technology, providing an example of how they executed creative separately for brand lovers and price sensitive shoppers.

“We have to have the right data, understand the data and talk to consumers,” Hughes said.

Ten years ago, Kellanova committed to first-party data with its Kellogg Family Rewards. “Since then, we have put the brands at the center of our conversation,” she said.

Hughes discussed how Kellanova leverages AI to make sure its creative is effective. Additionally, the



AI is focused on the digital shelf for consistency and high quality. And, the company serves the customers with predictive AI.

As it strives to make retail media part of its broader strategy, Kellanova has reorganized its teams into “full-funnel” teams, Hughes said. “All these folks are at the table.”

In closing, Hughes offered advice on leadership.

Among her points:

- Poise and professionalism under pressure is important.
- It’s critically important to balance hard truths with optimism.
- Control the controllables.

“Our North Star is to be a snacks-led powerhouse,” she said.

Craig Dubitsky, founder of both Hello Products and Happy Products, brought the audience through his journey with Happy coffee.

“I love people. I’m obsessed with giving people better stuff,” he said.

He says he’s not a disruptor, as he’s been labeled. “The only people who call me a disrupter are the people being disrupted.”

Dubitsky said it’s important to “delight” people. “Keep bringing delight to more and more people.”

Emotional innovation is also key. “The challenge is, how to make something endearing and enduring.”

While coffee is a commodity, coffee makes people happy, he said. “The people buying it are happy.”

Discussing sustainable packaging for Happy ground coffee, the package (or “vessel” as Dubitsky calls it) is “beautiful.” “It’s recyclable, refillable, reusable and remarkable.”

Continuing on his journey, he discussed the launch of Happy ready-to-drink products as well as the brand’s partnership with Tate’s Bake Shop cookies, which has resulted in cookie-flavored coffee and coffee-flavored cookies.

Going back to the “happy” theme, Dubitsky also talked about how not everyone is happy, and how mental illness is prevalent.

As a result, Happy has partnered with NAMI, the National Alliance on Mental Illness. NAMI messaging is now highlighted on every package of Happy coffee.



From Fragmented Channels to Seamless Campaigns: How Brand Commerce Unlocks the Full Power of Retail Media

By Mary Kate Huffman, Blue Chip



At this year's Retail Media Summit, it became clear that retail media is at a critical inflection point: growing fast but facing rising pressure to standardize, scale and deliver brand impact.

Once focused on lower-funnel performance, retail media networks (RMNs) now influence the entire consumer journey, from digital ad exposure to in-aisle engagement. But with that evolution comes complexity.

Not all RMNs are created equal, and they shouldn't be treated as such. Capabilities vary widely, from data transparency and measurement access to in-store innovation. Brands must now navigate a landscape rich with opportunity yet riddled with fragmentation.

That's where Brand Commerce comes in.

At Blue Chip, Brand Commerce is more than a media strategy — it's how we approach marketing. We believe brand building and sales driving aren't competing objectives; they work better when planned together. With this mindset, retail media becomes a more powerful tool, capable of building brands over time while driving sales overnight. When guided by a Brand Commerce mindset, today's most pressing retail media challenges become opportunities — in how RMNs expand beyond silos, how in-store activation is reimaged, and how brands demand more control through hybrid investment models.

Let's explore each of these opportunities:

RMNs can now do more than drive sales. Top RMNs are beginning to offer media and shopper data beyond their ecosystems, enabling truly omnichannel campaigns. But presence alone isn't a strategy. Brands must be intentional when choosing RMN partners, aligning with campaign goals and leveraging media not just for performance but also for storytelling and long-term brand value.

In-store retail media is gaining ground. With more than 80% of grocery purchases still happening in physical stores, in-store digital activation is

quickly becoming the next major frontier. From smart displays to shelf-level targeting, retailers are reinventing the shopper experience. But the best in-store media enhances (not disrupts) the path to purchase. A Brand Commerce approach ensures these activations not only drive transactions but also deepen engagement.

Hybrid models bridge the accountability gap.

As RMNs grow in scale, demanding more, many marketers are grappling with opaque "black box" models. A hybrid model, one combining RMN first-party data with third-party measurement, self-serve DSPs and external attribution, is emerging as the smarter path forward. This approach keeps marketers agile, transparent and aligned with both performance metrics and brand objectives.

Retail media isn't just evolving — it's converging with broader marketing imperatives. And while RMNs offer powerful tools, it's a Brand Commerce approach that unlocks their full potential. Because in today's fast-moving marketplace, the brands that lead won't just adapt — they'll use retail media to bridge brand and commerce like never before.

The convergence of brand and commerce is no longer optional.

Retail media's momentum shows no signs of slowing, but brands now have the opportunity to lead, not just follow. By approaching this evolving landscape through the lens of Brand Commerce, marketers can unlock smarter strategies, deeper engagement and more meaningful results. It's not about choosing between brand and performance — it's about bringing them together. And as this transformation accelerates, having the right partner by your side can make all the difference.

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Accelerating Brand Growth: How Retail Data Fuels the Brand-Retail Partnership



Speakers: Michael Bell, Director, Kroger Precision Marketing; and Jason Kogut, SVP Strategy & Planning, Spark Foundry

Brands and retailers are leaning into data to rehaul their planning and drive growth.

There are many ways to utilize retailer data. For example, a retailer media network could help a brand identify the demographic of lapsed households and determine the best way to personalize messaging to convert those households.

Bell said the perception of retail media is changing.

“Retail media networks are partners of both brand and omnishopper marketing teams, for both retail and national programs,” Bell said. “We’re not just a profit driver for the team.”

While working with 12 top grocery suppliers, Bell said that many of them have restructured their teams for better alignment and planning. A bigger shift he’s seen is CPGs bringing their shopper and brand teams together.

One of things Kogut discussed was identifying the “rock” or things that cannot be moved, and which areas can be more adaptive.

“If there’s an overarching business objective ... how are we moving that over to what the marketing objective is going to be?” Kogut said.

The common denominator Spark Foundry has found is: Who is the main decision-maker? How can the team be structured in such a way so that everyone is “singing from the same sheet of music,” so to speak? The speakers said marketers should embrace AI as merely a starting point. An answer given by ChatGPT can’t just be copy and pasted into someone’s work.

The speakers said going forward, the industry will continue to see new advances in technology and aggregation in data.



In-Store Retail Media Acceleration: Driving Incrementality for Retailers and Brands

Speakers: Cyndi Loza, Senior Editor, P2Pi; Ameet Srivastava, VP of Sales, In-Store Connect by Quad; Ankita Chhabra, Senior Key Account Manager, Michelob Ultra, Anheuser-Busch; Joceyln Grant, Director Retail Media, UNFI; and Daniel Cropsey, President and Founder, Harmony Marketing Technology Advisors

Retailers are increasingly viewing their stores as a media channel, providing an opportunity to monetize their shopper touchpoints and deliver a more personalized shopping experience.

In this session, the panel of experts highlighted how in-store retail media is a critical component of the retail media ecosystem as it can help brands drive awareness, product discovery and incremental sales, especially for smaller or emerging brands.

Session highlights include:

- Retailers such as Cub Foods and UNFI are investing in in-store digital screens to enhance the shopper experience and enable more targeted advertising.
- Successful in-store retail media campaigns involve close collaboration between brands, retailers, and media providers to deliver a seamless and engaging shopper experience.

- Key challenges include managing the hardware and content delivery, as well as measuring the impact of in-store campaigns.

"The beauty of the in-store environment is we're seeing more solution providers, meaning measurement providers come in and help us quantify the impact of in-store digital advertising," Srivastava said.

Srivastava also believes in-store media is moving to that next stage of maturity, particularly given advancements in definitions from the IAB, moves to standardize KPIs and more.

"Retail media has become a disruptive force in marketing, in advertising, and it's already become a foundational component, what I would characterize as a historic reset in our industry," Cropsey said.

From Fragmented to Formidable: Uniting Regional and Independent Grocers for National Scale

Speaker: Adam Zimmerman, Co-Founder, Ideal
by Design House



In some ways, the circular ad has come, well, full circle. The perennially popular marketing tool, which can trace its history to a circa-1887 Coca-Cola coupon and has long been a way for brands and retailers grocers to entice shoppers, can be transformed from static print ads to dynamic data-driven experiences.

Zimmerman explored how a national digital circular ecosystem can help CPGs and independent and regional retailers unlock reach and revenue. As the use of traditional print circulars declines with the dwindling number of newspapers, there are more and better options to connect with consumers, he asserted.

“This print system that we are running is heading towards a cliff and needs to be replaced,” he declared. “The first problem we have to overcome with the digital ad is changing the user experience — it can’t be a PDF. The future of retail media is revolving around the dynamic digital weekly ad. It has the potential to really change the game for independent and regional retailers.”

Zimmerman contended that a digital circular ecosystem with features like animation and video allow retailers to move to a centralized platform in tandem with their CPG and wholesaler partners, facilitated with synchronized trade funds.



Who Owns Retail Media? Breaking Down Silos to Achieve a 16.4x Increase in Media Efficiency

Speakers: Carli Feinstein, Managing Director, Partner, Craft & Commerce; Bradley Keefer, Chief Revenue Officer, Keen Decision Systems; and Christen Spencer, Director of Shopper Marketing, Chobani

Brands can more effectively leverage retail media by adopting a holistic, data-driven approach. Those that figure out how to work comprehensively across their internal organization to bring together siloed reports and develop a unified measurement model are driving better efficiency across their media investments overall. Budgets may still come from different sources, but the focus should be on shared responsibility around business planning and a unified media strategy supported by recurring cross-functional briefings.

Key takeaways:

- Update your media plan every quarter, aligning your tactics with your objective. Break the habitual search habit and consider incorporating upper funnel tactics including display/video as appropriate. Diminishing returns on search help make the case for investments that may not be as directly and immediately measurable.
- Understand that brand building takes time. Media is a tool that can drive both short term sales objectives and build brand equity over the long term. Consider reserving more expensive channels such as CTV for new item launches and pairing efforts with a shopper program to boost on-site and off-site tactics.
- Push back on retailer expectations with data. If a retailer's request doesn't make sense, internal performance modeling and future projections can help look across trade, slotting and data investments holistically to make the case that spend across the retailer relationship should be growing at the same rate as projected sales.

In-Store Media – Raising the Bar in 2025



Speaker: Chris Riegel, CEO, Stratacache

Retail media is now a material business for many retailers, with Amazon and Walmart Connect representing large and fast-growing segments. Riegel said retailers should view their competition as digital platforms like Google and TikTok, not just other retailers, and focus on bringing new ad dollars into the store

Some highlights include:

- There are two main paths for retail media networks: digital trade networks (lower CPMs, converting existing trade dollars) and commerce media networks (higher CPMs, targeting new digital ad dollars).
- Retailers have seen 34% growth in net in-store retail media spend by offering “no-lose” value propositions to brands.
- Retailers can leverage in-store data and customer insights to better target and personalize their media offerings.

- Retailers can track in-store customer behavior like dwell time, path to purchase, and category selection to better target and personalize their media offerings.
- Scaling retail media networks can be achieved through external financing, rather than requiring the retailer to fund the infrastructure themselves.

Riegel said in-store retail media networks are entering the “winner takes most” phase. It’s time to act or risk missing the opportunity. Three key lessons from his session:

- Make it no-loss scenarios for your advertisers.
- Leverage in-store data and loyalty programs as the new advertising cookie to convert adjacency.
- Scale your network with other people’s money to drive faster approvals, better results and less risk to your company.



Unlocking the Power of Unified Data: The Next Era of Retail Media Partnerships

Speakers: Heather Campain, VP, CPG Strategy, Epsilon; Maggie Gilliam Hoy, Senior Director Omni COE Lead, Kellanova; Todd Hassenfelt, Global Digital Commerce Senior Director, Strategy & Execution, Colgate-Palmolive; and Chris Perry, Chief Learning Officer, firstmovr

The panelists shared best practices for partnering and utilizing data among various stakeholders, including retailers, brands and solution providers.

It's important for brands to audit their own retail media briefs. What kind of growth are you trying to achieve? What types of content would you use, and what media tactics would aid in that effort? What KPIs would achieve that goal?

Brands need to define and align. Approach personalization from the consumer's perspective: Engage them, but don't be creepy.

Some brands struggle to leverage retailer-specific data. They aren't sure how to best utilize the information. Once the objectives are better defined, then getting the data can be perceived as a strategic investment and not simply a significant cost.

The more specific data a brand can obtain and share internally, the more buy-in and acceptance marketers can get from other departments, such as sales.

Another key strategy is to tell a story with data so the stakeholders can mobilize with clear objectives. The panelists cited examples of Hill's Pet Nutrition working with Petco, and Mondelez International partnering with Albertsons Cos.

Looking forward, the panelists said collaboration is important. The work needs to be about progress over perfection.

Sometimes having the right KPI for the team literally changes everything.

The Key to Maximizing Impact in the Retail Media Landscape



Speakers: Stacie Barra, Senior Manager Omnichannel Activation, Del Monte Foods; and Meghan Howard, Chief Revenue Officer, Chicory

Barra shared how Del Monte successfully approaches retail media with outside partners such as Chicory.

Off-site retail media ad spend continues to grow, and Del Monte is among the brands leaning into those ads. Del Monte was able to easily swap messaging on its ad creative for different occasions, such as back to school and Halloween.

As part of a broader push, Del Monte engaged with Chicory to run a very specific program for its Kitchen Basics cooking stock brand during a critical meal time at fall holidays.

It resulted in \$615,539 in incremental sales, 5.2% sales lift at Target, 8.1% sales lift at Instacart and 18.5x total iROAS.

"The learning for us is that we want to include Instacart in as many activations as possible," Barra said.

In a separate co-brand campaign, Del Monte's Contadina tomato sauce had an opportunity to partner with Stella Rosa wines. Through Chicory, they were able to create a strong solution for shopper baskets and inspire consumers while they were looking for Italian recipes.

The co-branded effort resulted in \$1,148,631 in incremental sales, 1.8% total sales lift and 9.6x total iROAS.

When partnering with retail media networks, brands should detail their goals beyond general growth. The more specific you can be with your asks and your business situation, the better.



Leaving the Comfort Zone: From Siloed Solutions to Integrated Strategies

Speakers: Keith Peiffer, Regional Business Manager, Sales & Commercial Development, Henkel North America; Adam Stave, Founder & CEO, Swish Brand Experiences; Steve Triplett, SVP of Advertising Sales, Vibenomics, a Mood Media company; and Bernadette Van Osdal, VP of Sales, AD Retail Media, Ahold Delhaize USA

Retail media may help solve puzzles when it comes to determining what consumers want, but putting together the pieces for the final big picture requires scrutiny and strategy, according to the panelists.

“Retail media is incredibly complex — we have offsite and in-store retail media touchpoints. Brands no longer have this option to think linear,” observed Stave.

Integration stems from understanding when, where and how best to use each component. “Sometimes it feels like you’re in a maze if you try to tackle all of them at once,” said Peiffer. “For us it’s really about the right places and the right strategies. We want to be nimble and we want to learn fast.”

Busting through silos for a connected experience can be enabled through the creative deployment of in-store retail media that aligns with offsite efforts.

“What I love seeing with the digital channels and the transformation that’s happening right now is we’re coming back into the store,” declared Van Osdal, citing the effectiveness of strategically placed digital screens in store and compelling in-store audio.

Added Triplett: “The digitization of the inside of the store is one of the few remaining monetized audiences that retailers have.”

Day 2 Keynotes

The morning keynote presentations that started day two of the Path to Purchase Institute's Retail Media Summit focused on digital commerce trends and 7-Eleven's evolution as a convenience retailer.

First on the stage in Rosemont, Illinois, **Andrea Leigh, founder and CEO of e-commerce consultancy Allume Group**, identified AI-assisted shopping as one shift that's impacting digital commerce.

"AI is the most transformational thing since e-commerce," Leigh said. "We're in a really big shopper transformation. ... AI will transform every one of our jobs."

She said that retail media will look very different going forward. "Marketers are freaking out about AI search. ... Walmart is not looking at Amazon as its biggest competitor anymore. [Generative AI] search is its biggest competitor."

Leigh said that, for brands, agility is key. Legacy brands are struggling.

For retailers, AI has to be a priority to keep the shopper in their ecosystem.

And for everyone in the industry, "retail media is about to get weird" due to AI.

A second trend/shift, according to Leigh, is the discerning shopper. It's not all about price. It's about both value and values. It's both private label and second-hand products. It's about differentiation.

"Brands and retailers need to emphasize value, emphasize values and differentiate," Leigh said.



"If you need to charge more [for your product], differentiation is key."

Furthermore, Leigh identified content as the new commerce for brands and retailers. "Shoppers are gravitating to platforms and experiences that are more fun," she said.

Brands are now content factories. Retailers are media platforms. And, authenticity inspires authenticity in others.

In closing, Leigh re-emphasized that these trends/shifts are the new normal, and agility is key. "We're on a wave right now," she said. "These are not roadblocks. They are springboards."



In the second keynote of the day, two 7-Eleven executives described how the convenience retailer is evolving to stay ahead of the shifting landscape.

Patrycja Malinowska, director of retail at the Path to Purchase Institute, sat down with **7-Eleven's Marissa Jarratt, EVP, chief marketing & sustainability officer;** and **Mario Mijares, VP, marketing, loyalty, and monetization platforms.**

The executives described how 7-Eleven is more than a retailer. It's a portfolio of brands that operates/sells proprietary brands — brands that are in the fabric of American culture, Jarratt said.

Since adjusting to meet the needs of consumers during the COVID-19 pandemic, 7-Eleven has continued to shift its business. Delivery and food have become important parts of the convenience channel.

Jarratt said that a lot of manufacturers paused their innovation work as a result of COVID-19, but now they must realize that the convenience channel and 7-Eleven are a "hot spot for innovation."

"We've been building a set of tools to help brands innovate," Mijares said.

The retailer has built what it calls an "Immediate Consumption Ecosystem" that comprises:

- Inspiration, amplification and customer engagement (including shopper marketing and the Gulp Media Network).

- Awareness, trial and conversion (i.e., loyalty programs such as 7Rewards).
- Data, insights and measurement — namely the convenience store shoppers, The Brainfreeze Collective (a proprietary consumer research tool) and lab stores.

7-Eleven is also working to provide consumers with experiences, which is difficult considering the quick nature of convenience shopping trips.

The retailer also leverages in-store audio, which is also challenging due to quick trips.

Jarratt spent a few minutes discussing how brands can best work with 7-Eleven. "We work with brands very closely, trying to understand what they're trying to deliver," she said. "At the end of the day, we're all trying to sell more units.

"A lot of the brands come to us saying, 'I do this in mass merchandise. I do this in grocery. I do this with online retailers. I want to do the same thing [with 7-Eleven].' And you can't, because it's a different format, right? A lot of it is education; a lot of it is trial and error. We know what works for us.

"One thing that distinguishes 7-Eleven in the marketplace from other retailer brands, and it's important in terms of how we think about collaboration, is that the 7-Eleven brand does carry a different cultural relevance weight, particularly around Gen Z, young Millennials [etc.]. ... Part of it also is the actual history of the brand and the legacy of different types of cultural engagements that the brand's been a part of over the decades."



Fueling CPG Marketing Effectiveness With Real-Time Measurement & Attribution

Speaker: Stan Turek, General Manager, Measurement Business, InMarket

Given the economic uncertainty, brand marketers cannot rely on outdated methods.

Today's CPG landscape demands more than just tracking activity. It calls for clarity of what truly drives business results.

Marketers need a bird's eye view to understand the holistic impact of campaigns and the ability to dig deep with granular insights.

Previous reporting methods focused on correlation, such as "who saw and bought?" A better way is to focus on causation, like "how many additional sales happened because of marketing?"

Brands must avoid chasing ghosts and focus on metrics that demonstrate direct impact, such as incremental sales and incremental return on ad spend, or iROAS.

With impact driven-KPIs, brands can:

- Gain clarity on marketing effectiveness.

- Confidently allocate budgets to what works.
- Move from ambiguity to decision, growth-focused actions.

The new standard for marketing leaders is integrated, causal, granular and real-time. It's important to lead by championing incremental growth over limited conversion optimization KPIs.

There are four steps for a competitive edge:

1. Prioritize incrementality for clear performance reads.
2. Optimize with iROAS using real-time causal insights.
3. Enhance MMM with causal truth for smarter strategic planning.
4. Foster data-driven collaboration for aligned and winning execution.



Unlocking the Potential of In-Store Media in a Connected World

Speakers: Shock Torem, SVP of Media Solutions, Vestcom; and Andrew Bracht, Senior Manager, Omni Customer Marketing — Value, Drug, Grocery Lead, Colgate-Palmolive

Torem discussed the rapidly evolving media landscape and the increasing importance of in-store media within a connected retail environment. Bracht joined the conversation to share current challenges and the company's evolving approach to integrating in-store media into a broader omnichannel marketing strategy.

Bracht delivered a clear message: in-store media should no longer be viewed merely as a promotional tactic but as an essential component of a full-funnel brand-building effort — engaging shoppers at the critical point of purchase.

Colgate-Palmolive is actively investing in digital tools and retail media networks to unify online and offline experiences. Bracht highlighted the company's use of QR codes on in-store tags to drive shoppers to digital content, enhancing brand engagement through interactive and personalized experiences.

A significant challenge remains the complexity of stretched budgets and internal silos between brand

and customer marketing teams. Bracht emphasized the need to break down these barriers and foster collaboration across partners and channels, citing Dollar General's annual planning model as an example of unifying strategy across touchpoints.

Key takeaways include:

- In-store audiences represent **double the annual Super Bowl viewership every week** and are on average 3.5 times larger than digital audiences.
- In-store media remains highly relevant, **with 86% of purchase decisions made in-store.**
- In-store media can deliver a **5%-20% sales lift and 2-4 times ROI**, making it a measurable and impactful tactic.
- **Connectivity is critical**, such as linking merchandising and retail media strategies and aligning brand and shopper teams.
- Despite challenges, there's opportunity **in closer collaboration with retailer partners.**



How Loblaw's Is Rethinking Loyalty and Engagement

Speakers: Rohit Dua, VP - Loyalty Portfolio Management, Loblaw Cos.; and Mike Grimes, President, Ecrebo Inc.

Canadian retail conglomerate Loblaw Cos. Ltd. is making strides in digital media through an unlikely source: in-store print receipts. Dua and Grimes shared how the company is making it happen.

In recent years, Dua explained, Loblaw has put a focus on growing its digital database and driving membership in an effort to gather more loyalty and first-party data, which essentially drives retail media. "With digitally engaged members and more members engaged in the program as a whole, you drive more retail media inventory that you can sell to customers," he said.

Gaining a better understanding of their customers through that data also allows companies to optimize their campaigns and drive an increased return on ad spend with those customers. Through a partnership

with Ecrebo that transforms paper receipts into a personalized marketing channel, Loblaw has begun doing just that.

"The receipt is essentially a mini billboard in the palm of your customer's hand," Dua explained. "It's not just utilized to look at the totals and the itemized products that you bought on that day. It's actually a vehicle to communicate with your customers."

While Loblaw knew it had a massive opportunity with receipt marketing, especially considering 50% of its loyalty members track their points on paper receipts and 33% of its shoppers read those receipts top to bottom, the tactic can be difficult to execute. According to Grimes, however, Ecrebo's software-only solution doesn't require hardware or any integration with point-of-sale systems.

"We use the existing printers to make everything work with whatever the retailer has," Grimes explained. "There is no pain at all for it. It's designed to be owned and operated by business users. So, the operational pain for it goes away as well."



How to Leverage Customer Insights for Effective Media Planning, Targeting and Activation

Speakers: Steve Baxter, EVP, Retail Media, Ovative Group; Erin Houg, VP, Head of UB Media, Ulta Beauty; Matt O'Grady, President of the Americas, Dunnhumby; and Claire Wyatt, GM, Client Service - Retail, The Trade Desk

The panel discussed with gusto how retail media networks and brands can unlock the power of shopper data across the full marketing funnel. As part of this, they explored the importance of using data to inform campaigns that drive both brand building and sales activation, as well as the deep need for collaboration and interoperability between enterprise marketing teams and retail media networks.

Loyalty data can serve as valuable fuel for understanding shoppers. For example, Houg noted that Ulta Beauty's loyalty program has 45 million members, and 95% of the company's sales come from those members.

Among the takeaways:

- There is a need to look beyond just last-touch metrics and consider the full-funnel impact of

campaigns, including brand building and new customer acquisition.

- Collaboration and interoperability between enterprise marketing teams and retail media networks is crucial to coordinate messaging and maximize the impact across the customer journey.
- Retail media networks need to provide easy access to first-party data and enable seamless integration with platforms to facilitate cross-channel measurement and insights.
- Challenges include ensuring data security and stability, as well as breaking down silos between enterprise and retail media teams.
- Despite being problematic, ROAS still exists as a performance metric; however, organizations are adjusting it based on channel.

The In-Store Retail Media Performance Era: Delivering Full-Funnel Results



Speakers: Andrew Lipsman, Independent Analyst & Consultant, Media, Ads + Commerce; Kathryn Mazza, SVP, Chief Marketing Officer; President of RedMedia, Hy-Vee; Marlow Nickell, CEO and Co-Founder, Grocery TV; and Lee Dunbar, SVP, Head of Retail Media, Starcom

As in-store retail media becomes another frontier in reaching shoppers where they are — at the all-important point of sale — measuring the effectiveness of such efforts is also a work in progress, the panelists agreed.

“Some brands have not quite bought into in-store yet and we know we have our work cut out for us to provide them with real measurement to lean more into consistency across digital tactics,” said Mazza, adding that Hy-Vee has seen strong results with compelling case studies for brands.

The good news is that tech is advancing at a pace where such proof of performance is improving. “We’re on a path to where in-store is going to have all the same closed-loop capabilities that you have for offsite,” reported Nickell.

When it comes to assessing results of well-placed, eye-catching retail media tools in the store, measurement is more than data on incremental sales lifts. “There are powerful stories that could be made there, but I don’t want to fall down the trap as we often do with retail media overall — that if you have perfect measurement, then it will unlock dollars,” said Dunbar, adding that there is a certain level of give and take on key performance indicators.



Bridging the Gap: Integrating Digital Shelf Insights into Proactive Commerce Media Planning

Speakers: Jack Lindberg, Head of Product, Commerce Media Intelligence, Shalion; and Jamie Williams, Retail Media Lead, Glanbia Performance Nutrition

In this session, Lindberg and Williams mapped out a commerce media plan for a non-existent product launch at Costco to demonstrate the benefits of leveraging digital shelf insights. The two examined keyword trends, promo tactics, competitor pricing tactics, sentiment analysis and more to create their holistic plan.

Research projects U.S. commerce media spend to exceed \$100 billion by 2028 (per eMarketer), but often in a vacuum devoid of on-shelf realities, Lindberg said. This can result in competitor moves, consumer search shifts and out-of-stock risks going unseen. Media that anticipates competitor tactics captures unmet demand and avoids wasted spend.

One important takeaway is the importance of bridging digital and physical, such as integrating digital shelf insights into in-store promotional calendars and shopper marketing activations.

Together, the two showcased a framework for intelligence-driven media planning:

- **Define objectives (the mission):** Set share targets and ROI thresholds.
- **Gather shelf intelligence:** Monitor content, stock levels, reviews, search insights.
- **Analyze landscape:** Identify messaging, bid opportunities, promotional alignments.
- **Deploy media strategically:** Tailored bid, dynamic creatives, geo-targeted allocation.
- **Measure impact & adapt:** Monitor performance versus shelf shifts; iterate daily/weekly.



Growing Retail Media: Embracing Programmatic to Drive Results

Speakers: Eric Brackmann, VP of Commerce Media, Koddi; Nick Hamilton, SVP of Kroger Precision Marketing and Commercial Technology, 84.51°; and Andrew Hotz, Director, Programmatic Media, Google

In this session, leaders from Koddi, Google and 84.51° discussed how programmatic buying is driving growth and efficiency in retail media, while improving brand-retailer collaboration and customer experiences.

Brackmann shared that more than 80% of retail media buyers prefer DSPs for managing fragmented budgets and improving scale, automation and measurement.

Hotz emphasized that platforms like DV360 help unify buys across the full funnel, leading to a 120% increase in ROAS when shifting from publisher-direct to programmatic. "That's valuable for both brands and retailers," he said.

Hotz also noted that consolidated media buying often leads to faster brand growth and better allocation across the marketing funnel. He predicted that brand and shopper marketing will continue to merge, creating a more holistic consumer journey approach.

Hamilton stressed the need to reduce friction for advertisers by integrating Kroger's retail media capabilities into tools brands already use. He and Hotz also highlighted AI's growing role in reshaping the shopping journey and advertising strategies.

Ultimately, the panelists agreed that connected, programmatic strategies not only improve performance, but also enable more relevant and seamless customer experiences.

"We have the tools," Hotz said. "It's about bringing together brand expertise, shopper insights, and programmatic scale to create a truly connected experience."



Transforming Measurement: The Future of Retail Media Networks

Speakers: Shafique Niazi, VP/Group Director, Commerce Media, Digitas NA;
and Liz Roche, VP, Measurement and Media, Albertsons Media Collective

Roche took the stage alongside Niazi to discuss the continued retail media evolution.

The two media pros shared strategies for transforming retail media measurement practices, as well as ways to integrate data sources, optimize attribution models, and leverage advanced analytics to create a unified view of campaign performance and increase incrementality, among other timely issues related to measurement.

Niazi shared his philosophy and practices when it comes to measurement, stressing the fact that the core job of a retail media practitioner is to think about success being measured through the lens of hitting certain KPIs.

“The most important thing that we can do as we’re hitting our ad KPIs, thinking about our ad KPIs, is recognize that they’re proxies for a business result,” Niazi explained. “They’re the seasoning to the soup, but the meat and potato says, are we growing? Are we growing faster? Are we growing profitably?”

Continued Niazi: “So we have to always be addressing everything we do within the context of the business, and our ad KPIs are just there to assist us in our narrative and to ensure that we’re doing the right things, we’re taking advantage of what’s out there for us to optimize it.”

Additionally, Niazi explained the dynamic between brand marketers and performance marketers, along with his belief that the most successful companies will begin tearing down the walls between those two functions in order to be able to look for unified measurement solutions beyond ROI.

“We look to understand how what we do is actually impacting the bottom line,” he shared. “We can see that, just in our ad data, we should be looking at our holistic sales data. We should be looking at the customer negotiations that we have and understanding how we make sure we go past those and tie advertising, marketing, sales and loyalty together to make sure that we’re really thinking about foundations and fundamental marketing.”



Turn Up the Volume in Retail Media With Streaming Audio

Speakers: Charlotte Mock, Director, Offsite Strategy & Activation, 84.51°; and Adam Ross, Director of Commerce and Retail Media Partnerships, SiriusXM Media

This session focused on how Kroger has added streaming audio to its retail media network activations as part of a full-funnel omnichannel strategy.

Kroger's media portfolio includes the onsite media you expect from retailers, as well as offsite partnerships with other publishers like Meta, Pinterest, Roku, etc.

Kroger offers flexible partnership models to support businesses in the way that's right for them, including managed service, self-serve on-site and self-serve off-site.

One retail media success story came with SiriusXM, drove strong performance across 43 campaigns and four categories for Kroger Precision Marketing. The solutions featured:

- **Product Mix:** Leverage a mix of streaming select mobile audio and web placements across Pandora and SoundCloud on the SiriusXM streaming network.
- **Audience Strategy:** Apply advanced Kroger first-party audiences informed by purchase behaviors and geo-targeting to connect with audio streamers.
- **High-Impact Creatives:** Leverage creatives with contextually relevant themes, sound effects and subject matter that resonate with listeners.

The results: \$10.30 average ROAS; +25% sales & household penetration uplift; +26% visits uplift, and +46% new household trial uplift.

KPM recommends pairing broad-reaching off-site media with conversion-focused self-serve on-site to optimize sales uplift.

Best-in-Class In-Store Retail Media Strategies for Today and Tomorrow



Speakers: Matt Eichorn, CEO, Co-Founder, Freeosk; Gretchen Reisner, Lead Director, Client Insights & Strategy, CVS Media Exchange (CMX); Chris Ryan, VP, Sales, Stingray; and Charlie Menchaca, Managing Editor, Path to Purchase Institute

In-store media, especially in the current marketplace, should be part of every media mix, if you ask Ryan.

"Reaching shoppers in the last stop before they check out, before they add to basket, is the most important part of any marketing plan," Ryan said. "Especially now with the way the economy is going with tariffs, inflation, supply chains, shoppers looking for deals — being at the store promoting the product, the utility of the product, the price of the product is more important than ever, and in-store retail media is the best place to do that."

Underscoring Ryan's comments, Reisner said in-store is the "that last mile to be able to actually influence

that brand preference. ... It's not last click anymore. It's not last view. This is your last opportunity to really influence what that shopper is going to buy."

Recognizing there will soon be lots of screens in store, Eichorn added Freeosk hopes to provide a differentiated experience through experiential retail media that's "multi-sensory, multichannel and multimedia all rolled into one. ... And to be able to measure it all and drive performance will not only prove that experiences matter, but also retail media in-store matters."



Full-Funnel Strategies for Omnichannel Retail Media

Speakers: Rae Marie Guimond, Director, Strategy & Business Development, PriceSpider; Oscar A. Ibara, VP of Sales, Kevel; Davis Kalsbeek, Director of Retail Media Partnerships, NC Solutions; Lindsay Pullins, Director, Ads Revenue Partnerships, Roku; and Patrycja Malinowska, Director of Retail, Path to Purchase Institute

Chock full of diverse perspectives, this panel broke down some of the trends, challenges and the measurement techniques that will matter more in the future for the full funnel.

Shopper behavior is incredibly fluid, noted Guimond, and brands want to draw the link between having a shopper on their dot-coms and connecting them to a cart. “Shoppability is a big thing,” she stressed.

As the market has shifted to not only focus on onsite and offsite, Pullins pointed to growth in adoption of CTV, which is being driven by brands’ desire to reach consumers in more effective and efficient ways, she said.

Other takeaways included:

- Retail media’s evolution is being driven by changes in consumer behavior, the rise of second-screen experiences and the impact of third-party cookie deprecation.
- Brands are facing challenges in integrating offsite and onsite media into a cohesive strategy, including setting appropriate expectations, leveraging first-party data effectively, and measuring the true incremental impact of their investments.
- Successful retail media strategies require a full-funnel approach, balancing brand-building objectives with conversion-driven tactics, and leveraging data and personalization to reach and engage consumers across the customer journey.
- Metrics like brand lift, consideration, and new buyer acquisition are increasingly important as brands seek to understand the holistic impact of their retail media investments.
- Data accessibility is key to a successful future. While brands and retailers may wish to hold tight to their own data, more collaboration will power more informed decision-making.



Speaker: Ben Weisel, Director of Dick's Media Strategy & Development, Dick's Sporting Goods

Owning the Space: What Retail Media Networks Must Do to Stand Out

More TED talk than sales pitch, Weisel treated the audience to a speedy overview of how the retailer is leaning into authenticity to differentiate its RMN. He outlined the three key principles that Dick's Media Network is pursuing to differentiate itself:

1. Play your position
2. Win the moment
3. Own your turf

The Dick's Sporting Goods mission is to be "the best sports company in the world" by inspiring, supporting and equipping athletes to achieve their dreams. The company seeks to create meaningful moments for shoppers by understanding their emotional journeys and delivering relevant, impactful messages during those moments.

Unless an RMN is one of those larger media networks, it's not going to win the battle of scale; being able to stand out is critical, he stressed. Dick's is leveraging its in-store experiences — such as its "House of Sport" concept — to do just that by engaging customers and delivering immersive, story-rich advertising placements.

"I think the question that retail media networks and commerce media networks should be asking themselves is no longer, 'How big is our audience?' or 'How fast is it reporting? Where are we getting more efficient with AI?'

"All of that is important. We're asking ourselves those same questions, but you should be asking yourself: 'What is the unique space that we can occupy in a customer's life and how can we lean into that? What do they expect from us? What do they need from us?'"

Transforming Retailer Relationships Through Retail Media & Merchant Alignment

Speaker: Michele Roney, EVP of Retailer CX, Mars United Commerce

Roney opened her session with a clear message: Successful retail media strategies hinge on strong relationships — not only between brands and retailers, but also within brand organizations themselves. “You really need to understand both sides of the coin ... in order to understand how they can come together,” she said.

Roney outlined three retail media tiers — media-first, balanced and retail-first — and emphasized that networks must differentiate to secure investment: “You have to know why I’m investing — what can I bring to the table that I can’t get anywhere else?”

She debunked the notion that retail media threatens brand marketing: “I saw a LinkedIn post yesterday that made me nuts. It said, ‘Retail media has killed brand marketing.’ No. That’s not the case.” Instead, she said, it’s driving internal collaboration across brand, shopper and media functions.

Examples of winning retailer-brand collaboration:

- **Sam’s Club** rebranded its retailer media network with a focus on experience rather than just media, using in-store engagement as a unique value proposition.



- **7-Eleven's** ICE ecosystem — integrating insights, content and engagement tools — helped Celsius leverage shopper data, loyalty programs, and even in-store radio to generate an 11% lift in sales and 274% ROAS.

Roney closed by stressing the importance of early collaboration: “It wasn’t just about how well they were going to perform. They were trying to build a relationship.”



Cracking the Clean Room Code: How Retailers and CPGs Can Finally Put It to Work

Speakers: Scott Blessman, VP of Analytics and Data Insights, and Daniel Cinquegrano, Director of Analytics and Data Insights, Goodway Group

“Clean rooms are necessary to understand what we’re doing with our investment,” Blessman said.

A data clean room is a secure environment where companies (data providers) can share data with partners and analysts (data consumers) without openly sharing it, preserving the privacy and security of their valuable data.

The two outlined four areas shaping the state of data clean rooms.:

- Increased consumer focus on data privacy, moving systems to “privacy by design.”
- Tightening data privacy regulations including CCPA, VCPA and CPA.
- Rising demand for data-driven insights due to marketing’s “scientific transformation.”

- Increased data governance and data security as cybersecurity threats increase.

Clean rooms help fill gaps in attribution and prove sales impact, a top need for advertisers, per P2PI research. But adoption still lags, with AI and omnichannel ranked as higher priorities — despite clean rooms being foundational for both.

Case examples:

- A fitness franchise used Meta’s clean room to link ad exposure with in-gym membership signups, achieving an 89% match rate and identifying 10 times higher conversion for users exposed to multiple tactics.
- CPG brand SpoonfulOne merged Amazon ad data with its DTC site data in Amazon Marketing Cloud, enabling detailed customer journey insights.