

Experts: Measurement, non-endemic advertising shape commerce media in 2025

Article

Commerce media is becoming more competitive as [retailers](#) and non-retailers continue to build out their networks and [advertisers](#) prioritize [measurement](#) for proven results. Looking

ahead to 2025, cross-industry partnerships will grow and in-store media will enable retailers to merge online behaviors with in-person shopping.

Here are four insights into the future of commerce media in 2025.

1. Retailers will be pressured to master measurement

The [retail media](#) frenzy has continued through 2024, with retailers like Costco, Wawa, and Saks launching networks, while others, like The Home Depot, Instacart, and [Walmart](#), bolstered their networks to grow their share of ad dollars.

- With more options, advertisers are becoming more cautious about the networks they work with, focusing on those that can prove campaign success.
- “Measurement is table stakes for us,” said Cely Moreno-Mosier, senior director, retail media partnerships and shopper marketing at PepsiCo during the [EMARKETER virtual summit](#) last week. “Incremental growth is particularly important as we justify our investments, not just this year, but in the future.”

The Interactive Advertising Bureau’s (IAB) Retail Media Measurement Guidelines, released earlier this year, aim to help [retail media networks](#) (RMNs) standardize the measurement process.

- In 2025, the IAB will build on those guidelines with an evaluation kit to help brands assess different networks based on their current capabilities, said Jeffrey Bustos, vice president, measurement, addressability, and data center at the IAB.
- Adoption of measurement standards will grow over the next few years, said Bustos, because “retailers will need to prove performance, prove their value to brands.”

2. Non-retail media will take off

Retail media isn’t the only growing sector—financial and travel media networks are also emerging as they seek ways to monetize their first-party data.

- Travel media network ad spend in the US will reach \$2.53 billion next year, an 18.9% increase, according to our forecast.

- Though US financial media network ad spend is a smaller figure (\$710 million), it will grow much faster at 103.1%.

“The emergence of these new media networks will create much more competition, especially as retailers go after non-endemic dollars,” said Bustos. “But it’s also a great way to connect with consumers and understand their behavior a bit more.

- Each vertical has its strengths, said EMARKETER principal analyst Sarah Marzano.
- “For example, financial services being able to bring purchase data that is cross-merchant and therefore more expansive, versus retailers who have really granular or SKU-level data,” she said.

3. Non-endemic partnerships will increase

As the lines between retail, financial, and travel media blur into one big commerce media landscape, there will be ample opportunities for brands to advertise on platforms they don’t necessarily sell on.

- “Considering the goals that different advertisers will have, it’s important for any network to incorporate non-endemic advertising,” said Marzano.
- This will open doors for more data collaboration, said Bustos.
- “Let’s say you’re in a car ride share app, and you ride to the [grocery](#) store,” he said. “And on the way, you saw an ad in the car share, and then when you get to the store, you buy the product. The data collaboration between both networks can provide that attribution.”

However, brands and networks must avoid annoying customers with irrelevant ads or deals.

“Right now, especially from a retail or financial services perspective, non-endemic advertising should come across as more of a rewards-based cross-promotion,” said PJ Triboletti, vice president, business development at Fluent. “It could be offering a discount or a free trial for a streaming service - something that’s like a thank you to the customer making the purchase.”

4. In-store media will start to take shape

While less than 1% of total retail media spend in the US, in-store retail media is growing fast, increasing 46.5% YoY in 2025, per our forecast.

“But if we consider that more than 80% of retail sales still happen in person, physical stores represent a massive and largely untapped opportunity,” said Marzano.

Retailers have been slow to adopt in-store retail media, possibly because of how difficult it is to update or implement in-store [technology](#).

- “It’s a big cumbersome project for retailers,” said Moreno-Mosier. “Does the right infrastructure exist? Who are the right networks to partner with? And then there’s being able to integrate with some of the antiquated systems that are already out there.”
- However, retailers don’t have to go super digital to start experimenting with in-store retail media, said Bustos.
- “Retail media in-store should not be Times Square,” he said. “Work closely with your merchant team to create plans to bring online consumer purchasing behavior in-store and then optimize that.”

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