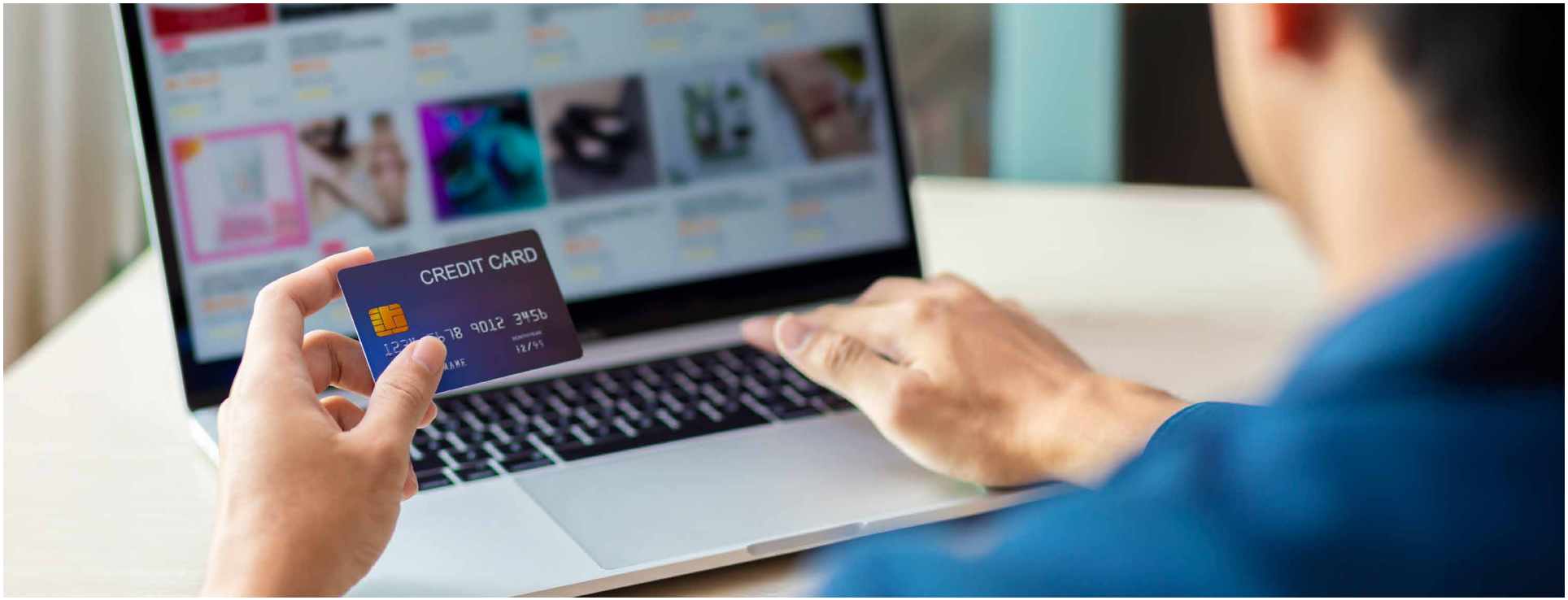


LOOKBOOK

Retail media is booming for audiences near and far

The rise of retail media networks (RMNs) has reshaped how both retailers and advertisers find, develop, and retain customers. Both widespread ecommerce and the expansion of delivery have given RMNs new ways of connecting with once-elusive consumers. Meanwhile, retail media advertisers have begun to tap under-utilized levers like in-store strategies and influencer marketing to maximize the impact of those networks. This Lookbook showcases how the growth of retail media investments, along with evolving marketing channels, have greatly expanded omnichannel opportunities and addressable audiences.

Retail media increasingly connects hard-to-reach buyers

RMNs are becoming essential for marketers seeking to connect with elusive consumer segments, leveraging retailers' unique customer relationships and geographic footprints to reach audiences that traditional advertising channels often miss.

Dive deeper

Retail media is growing at a rapid rate

US omnichannel retail media ad spend will reach $58.79 billion this year, up 19.4%, according to our forecast. Meanwhile, off-site ad spend will thrive, growing 35.0% to $12.18 billion in 2025, per our forecast.

This year, we forecast omnichannel retail media ad spend will make up 14.0%) of total media ad spend.

Retailers are tapping into niche audiences

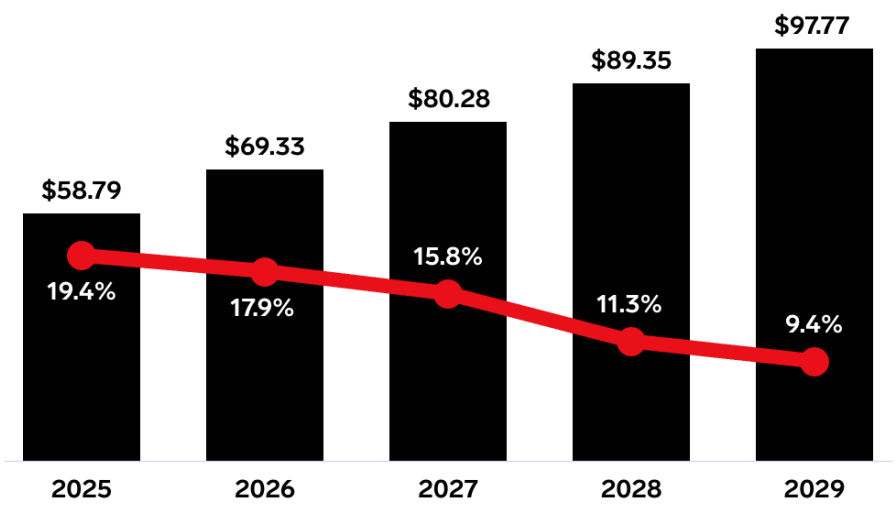
RMNs allow exposure to audiences living outside urban zones. Some 20.0% of the US population, 66.30 million people, live within rural areas, according to the US Census Bureau.

Over half (55%) of retail media ad buyers are increasing their spend to reach incremental audiences, according to the Interactive Advertising Bureau. Additionally, half of US retail media buyers from brands and agencies use RMNs to improve their customer targeting, according to Koddi.

Retail media is a key top-of-funnel tool. Some 60% of advertisers said RMNs help build brand awareness, according to LiveIntent.

Retail Media Ad Spending

US, 2025-2029



Note: digital advertising that appears on websites or apps that are primarily engaged in retail commerce or is bought through a retailer's media network or demand-side platform (DSP); examples of websites or apps primarily engaged in retail commerce include Amazon, Walmart, and eBay; examples of retail media networks include Amazon's DSP and Etsy's Offsite Ads; includes ads purchased through retail media networks that may not appear on ecommerce sites or apps. Source: EMARKETER Forecast, September 2025.

What the experts say

Sarah Marzano
PRINCIPAL ANALYST, EMARKETER

"Retail media's evolution from a performance channel to a full-funnel engine has made it indispensable for reaching audiences that were once beyond digital's grasp. As networks expand off-site and into stores, the potential addressable audience continues to grow, powered by deterministic data that allows marketers to connect with consumers across environments with greater precision."

Austin Leonard
VICE PRESIDENT & GENERAL MANAGER, DGMN

"The two core drivers of retail media's growth are closed-loop measurement and the power of reaching consumers when they are in a shopping mindset. People are more open to learning about new products and services while shopping, which creates opportunities to drive brand equity while also driving immediate trial and sales. Combine that with a unique audience like we have at Dollar General and you have a powerful media proposition."

Ecommerce's dominance has led to a swift rise in delivery

What started as a convenience play has become a data goldmine, with delivery platforms now sitting at the intersection of consumer intent and purchase decisions, creating lucrative new advertising opportunities for brands.

Dive deeper

Consumers are devoted to delivery

The growth of ecommerce and delivery are intertwined. Most (91.0%) US ecommerce sales will be delivered this year, according to our forecast. We forecast US delivery sales will grow by 4.8% in 2025, to reach nearly $1.5 trillion by 2029 ($1.44 trillion).

Almost 6 in 10 (58%) US adults will purchase apparel/footwear for delivery this year, according to AlixPartners.

Intermediaries deliver data

Commerce media intermediaries give access to ad inventory and cross-merchant data. Ad spend on US intermediaries, like DoorDash and Instacart, will grow 20.2%, according to our forecast, and that spend will rise by more than $1 billion in the next two years.

Instacart's ad revenues are expected to reach $1 billion in 2025, per EMARKETER's forecast.

Grocery delivery continues to grow

Almost half (45.0%) of the US population will use grocery delivery this year, per our forecast. And the trend will continue to surge. We forecast grocery delivery ecommerce sales will grow 9.9% this year to reach $133.83 billion.

Product Categories US Adults Have Purchased for Delivery

% of respondents, 2016, 2021, 2025

	2016	2021	2025
Food (groceries, frozen food)	30%	59%	62%
Apparel/footwear	63%	54%	58%
Cleaning supplies	24%	51%	49%
Pet supplies	26%	45%	46%
Delivery restaurant food	-	56%	43%
Health/medical supplies	32%	45%	42%
Books/media	47%	41%	34%
Cosmetics	31%	39%	34%
Small appliances	26%	33%	28%
Small electronics & accessories	35%	35%	28%
Home-improvement items/hardware	26%	34%	25%
Gift cards/certificates	38%	34%	24%
Office/home-office supplies	33%	37%	24%
Mobile phones	22%	30%	21%
Jewelry/watches	22%	29%	20%
Auto parts	22%	28%	18%
Furniture	22%	27%	18%
Home furnishing	25%	30%	18%
Sporting goods	20%	28%	18%
Large appliances	15%	22%	15%
Large electronics	20%	26%	15%
Photos	22%	28%	13%

Note: ages 18+; in the past 12 months
Source: AlixPartners, "The Longest Mile: 2025 Home Delivery Report," July 1, 2025

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What the experts say

Sarah Marzano
PRINCIPAL ANALYST, EMARKETER

"Intermediaries like DoorDash and Instacart have evolved from convenience services into data-driven ad ecosystems. Their command of high-frequency purchase data and cross-merchant visibility positions them as the connective tissue of commerce media. For retailers, these partnerships open access to in-market consumers they might not have reached otherwise, while leveraging intermediaries' fulfillment networks to enable faster delivery and capture demand closer to the moment of purchase."

Austin Leonard
VICE PRESIDENT & GENERAL MANAGER, DGMN

"We're building the 'Last Mile of Ecommerce for the Last Mile of America' by bringing our customers more opportunities to save time and money. This audience has been underserved as they're typically harder to reach, but as our digital commerce ecosystem continues to grow, it also increases our ability to deliver relevant messages and experiences for the brands we sell at Dollar General and beyond."

Retail media brings its digital lessons in-store

While retail media has largely leveraged digital advertising, there is a growing push to take advantage of physical spaces and unique formats.

Dive deeper

In-store's spend will flourish

Most retail still occurs in stores, and marketers are taking advantage of that dominance. US in-store retail media spend will grow 24.7% this year, according to EMARKETER. We forecast it will eclipse $1 billion in 2029.

Over half (54%) of US sell-side retail media decision-makers said in-store access was one of the most important services/solutions that RMNs offer. And 93% of consumer packaged goods (CPG) brands want to combine digital and store engagement for a full view of the shopper's journey, according to Grocery Doppio.

Despite in-store retail media growth, it will only make up 1.1% of omnichannel retail media ad spend by 2029, per our forecast.

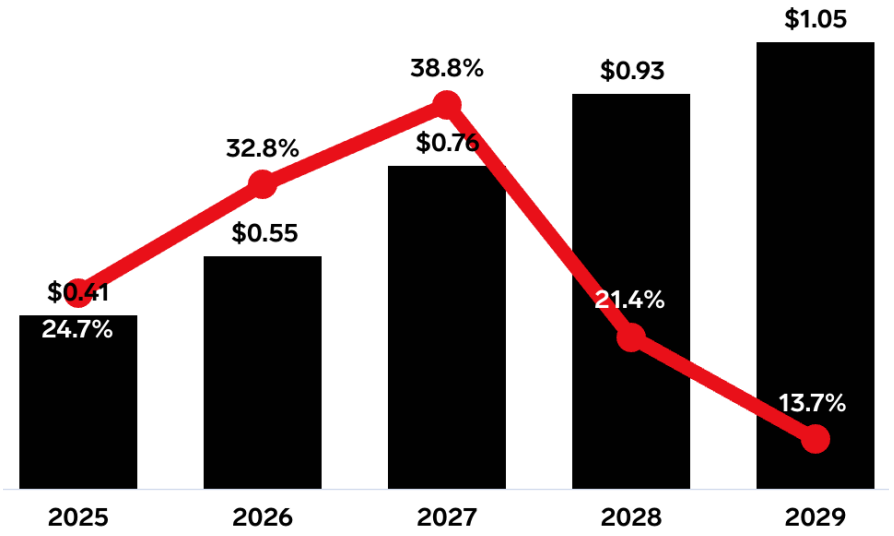
In-store hurdles remain

Some 38.8% of US agency and brand marketers say infrastructure/capital investment is the largest blocker to wider adoption of in-store ads, according to Placer.ai and EMARKETER.

Other hurdles in the survey include too many disparate networks (19.6%) and challenges delivering ads at scale (14.7%).

In-Store Retail Media Ad Spending

US, 2025-2029



Note: digital advertising that appears on a retailer's on-premise signage, either in-store or in the immediately adjacent exterior (e.g., parking lot); includes place-based advertising at grocery stores, gas stations, restaurants, etc.; excludes common area signage not directly affiliated with a retailer (e.g., inside of malls). Source: EMARKETER Forecast, September 2025.

What the experts say

Max Willens
SENIOR ANALYST, EMARKETER

"The path to in-store retail media success is going to be long and slow for most retailers. But the ones who start traveling it now, by tying in-store together with their digital offerings, will be off to a good start."

Sean Tinnelly
HEAD OF AD SALES, DGMN

"At DGMN (DG Media Network), we are already activating in-store with digital, leveraging our 20,000+ stores and a highly engaged digital shopper base. Our customers seamlessly move between physical and digital touchpoints, creating a real omni-impact today. As our ecommerce footprint grows, our integrated approach is built to deliver even greater value for brands"

Influencer marketing is retail media's newest booster

As RMNs compete for advertiser attention and budgets, they're discovering that creator partnerships offer a powerful way to differentiate their offerings and drive performance.

Dive deeper

Creator partnerships will increasingly involve RMNs

Influencer marketing has already begun to help RMNs find greater reach. Over 9 in 10 (96%) US marketers who have recently invested in creator marketing plan to promote their creator partnerships via RMNs this year, according to LTK.

Only 1% of marketers are currently not promoting, nor plan to promote, their creator partnerships via RMNs this year, per LTK.

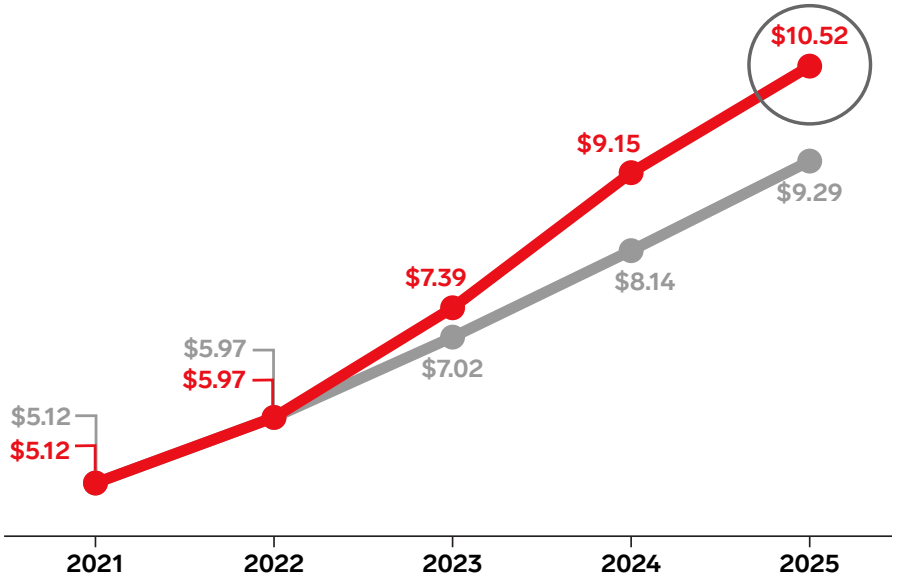
Influencer marketing has matured

RMN partnerships in creator campaigns is the latest sign of how mature influencer marketing has become overall. US-sponsored content spend will pass $10 billion this year, growing 15.0%, according to EMARKETER's forecast.

Almost half (49.2%) of marketers worldwide expected their influencer marketing budgets to increase in 2025, per Influencer Marketing Hub.

US Sponsored Content Spend Will Top $10 Billion in 2025, Earlier Than We Previously Predicted

billions in US sponsored content spending, current vs. previous forecast, 2021-2025



Note: revenues generated by US-based creators via payments received from brands to promote products and services on social media and video platforms that primarily host user-generated content (e.g., Twitch, YouTube); excludes noncash payments such as free products or trips; excludes creator content amplified as paid media. Source: EMARKETER Forecast, March 2025.

What the experts say

Max Willens
SENIOR ANALYST, EMARKETER

"Using retailer data to steer creator activations toward the right audiences is an unusually potent opportunity for advertisers. Retailers who can figure out how to facilitate those kinds of relationships could have a huge opportunity to assume integral roles in their advertisers' media strategies."

Sean Tinnelly
HEAD OF AD SALES, DGMN

"DGMN connects creator activations with rich first-party data to reach the right audiences. With our brick-and-mortar footprint and deep local insights, we help brands drive impact where it matters."

The experts

Sarah Marzano

Principal Analyst, EMARKETER

Sarah Marzano is a principal analyst covering retail and ecommerce at EMARKETER. Her coverage areas include retail media, seasonal and holiday shopping, and the impact of consumer-facing technology on the retail landscape. Previously, Sarah worked at L2 and Gartner as a retail analyst. She's been quoted by major news organizations like Wall Street Journal, as well as prominent trade outlets including Adweek, Supermarket News, Ad Age, and Modern Retail.

Max Willens

Senior Analyst, EMARKETER

Max Willens is a senior analyst on the digital advertising and media desk at EMARKETER, where he focuses on topics including how publishers monetize their sites and how social platforms monetize themselves. Previously, he served as the senior editor of research and features at Digiday.

Austin Leonard

Vice President & General Manager, DGMN

Austin Leonard is vice president and general manager of DG Media Network (DGMN) at Dollar General. With over 20 years of experience in advertising, media, and retail technology, he leads strategy, operations, and growth for the company's retail media business. Austin has held senior roles at Publicis/Epsilon, Walmart, Sam's Club, Rakuten, and eBay. He earned his bachelor of science in business administration from the University of Florida and his master of business administration in marketing from Georgia State University.

Sean Tinnelly

Head of Ad Sales, DGMN

Sean Tinnelly is head of ad sales for DG Media Network at Dollar General, where he leads the sales organization with a focus on strategic growth, client partnerships, and team development. Sean brings extensive experience across retail, advertising, and digital media. Prior to joining Dollar General, he held leadership roles at Walmart Connect, Smaato, Rakuten Marketing, and eBay. He earned a bachelor of science in broadcast journalism from West Virginia University.

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