



**PUBLICIS  
COMMERCE**

**2025 Trends and  
Predictions**



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In this report, the team at Publicis Commerce provides an in-depth analysis of the key trends that shaped 2024, a review of our past predictions and their impact, and a forward-looking perspective on anticipated trends for 2025 through a consumer-focused lens. Explore insights and predictions from our leading executives across Publicis Commerce to discover what the coming year holds.

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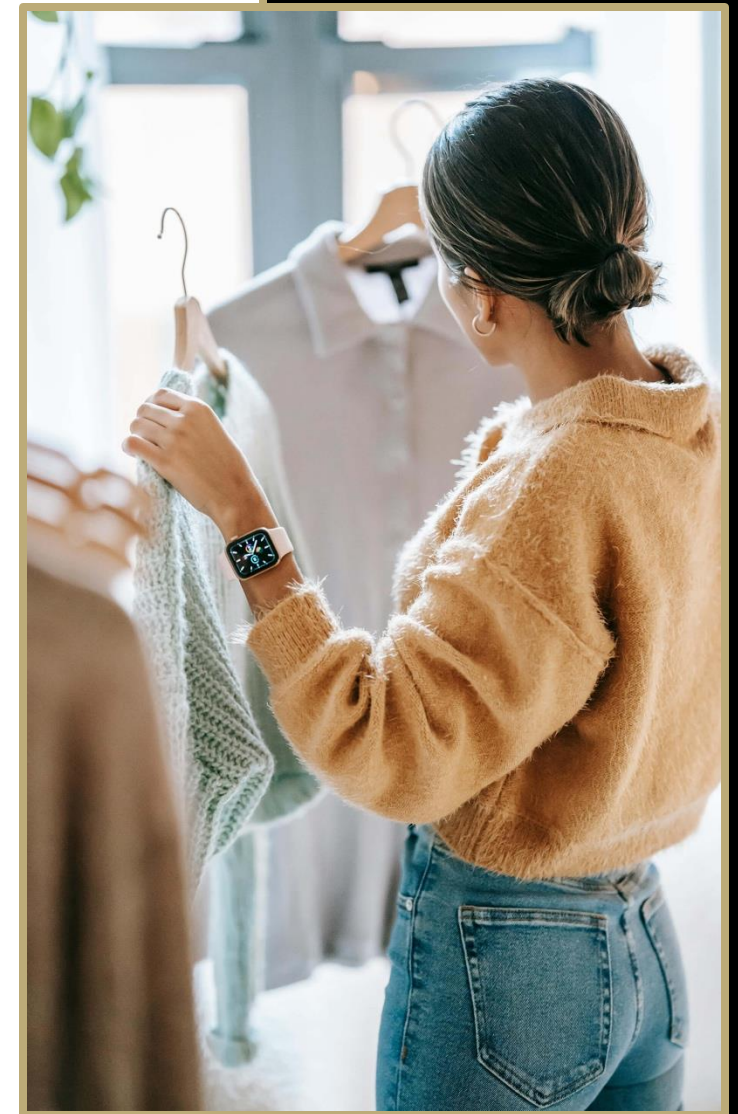
# 2024: The Year of The Consumer

Last year, we predicted 2024 would be focused on consumer’s favored path to purchase verses forging new ones. Here’s what was forecasted and how it turned out in 2024....

## Predicted



## Actual



# 2024 Trend Recap

Here's a highlight on predicted trends from 2024

**50%**  
faster growth in Amazon's everyday essentials business largely due to same-or next day delivery.

### Same Day Delivery

62% of DoorDash users are now choosing to order groceries and personal health items, signaling a shift toward quick and convenient grocery shopping. This trend also highlights the growing demand for affordable luxuries, such as last-minute delivery options.

**40%**  
Of GenZ have made at least one purchase on TikTok Shop

### Social Commerce

New platform features such as TikTok Shop and Amazon ads integrated into Pinterest helped social commerce continue to soar in 2024. This growth is driven primarily by the rising influence of Gen Z, and even the youngest generation, Gen Alpha, as they begin to discover brands through social content.

**41%**  
of US consumers have expressed interest in AI-powered search engines for online shopping

### Generative AI

The hottest topic for 2024 was Generative AI. Brands embraced AI as a friend not foe. Used it to automate and make marketing more efficient. As performance and capabilities improved, we saw an increased adoption as well as a greater emphasis on industry regulations and guidelines.

# 2024 Trend Recap

Here's a highlight on predicted trends from 2024

**20.4%**  
growth for Retail Media in 2024 making it the fastest-growing ad channel in the US for the year.

**\$35.57 billion**  
US CTV ad spend which has nearly doubled since 2021

**12.7%**  
growth for retail marketplace ecommerce sales in 2024

## Retail Media

Retail media ad spend was forecasted to grow 22.5% in 2024. With additional measurement standards and upper-funnel offerings, RMN's did see expansive growth and 58% of US marketers worked with at least 5 RMNs in 2024.

## Video

Fueled by TikTok, video content, particularly CTV, video has become the preferred way to consume content. Businesses have embraced video throughout the consumer journey, spanning from their websites to Amazon and across various social platforms, and beyond.

## Marketplaces

It was another great year for retail giants Amazon and Walmart. Coupled with challenges such as rising theft incidents in brick-and-mortar stores, marketplaces consistently maintain their position as the preferred destination for consumer shopping carts

A top-down view of a group of people sitting on a patterned rug. They are gathered around a laptop and a tablet. One person's hand is pointing at the laptop keyboard, while another's hand is pointing at the tablet screen. The scene is dimly lit, with a warm, blue-toned light source. The text "2025 Trend Predictions" is overlaid in the center in a bold, white font.

# 2025 Trend Predictions

## 2025: The Year of Possibility

Following an election year marked by high-profile events like the Olympics, the outlook for next year is full of possibilities and opportunities. Many people are optimistic about economic improvement, with 43% expecting the economy to perform better compared to 34% last year. However, 40% of all income groups are showing signs of adopting more frugal behaviors. Consumers appear cautiously optimistic, holding back slightly as they await more clarity.

Regardless of economic conditions, we don't anticipate a slowdown in e-commerce and online shopping. While consumers may shift between retailers or opt for more budget-friendly alternatives, their preference for online shopping is here to stay.

**\$1.291 trillion**

forecasted eRetail  
sales in 2025

**8.3% YoY growth**

predicted  
in 2025 for eRetail

**225.8 million**

digital buyers  
forecasted for 2025

In the following section, we'll take a deeper look at some of the forecasted trends looking to define 2025.

Source: eMarketer, US Digital Buyers 2024  
Deloitte 2024 Holiday retail survey



## Top 2025 Total Commerce Trends

Trends effecting consumers path to purchase for next year

### **Social Streaming**

CTV will see an ever-blurring line between platforms like Netflix, YouTube, and social platforms. Both streaming and social platforms will tap into longer-form, high-production-value creator content alongside interactive social features such as follows, likes, comments, and livestreaming, creating a more immersive and connected viewing experience.

### **Evolution of Search**

As consumers increasingly turn to social platforms and retail search for discovery, coupled with the growing use of AI to enhance search optimization, traditional search is taking a backseat. Over the next year, we anticipate significant advancements in search behaviors and results across platforms, reshaping how consumers find and engage with content.

### **Partnerships Blur the Lines**

The distinction between retail media and core media is increasingly fading. Legacy media brands are forming strategic partnerships with retailers to leverage first-party data, enabling more precise ad targeting and expanding reach to new audiences beyond traditional shopping environments – i.e. Instacart and YouTube.

### **Data Coming Together**

A key trend for 2025 will be the convergence of in-store and online shopping data, allowing for more precise targeting and attribution. Technologies like RFID, IoT sensors, and mobile apps are helping retailers merge these data streams, providing real-time insights into customer behavior. This data integration enables better personalization, inventory management, and ad targeting across both physical and digital channels.



## 2025 Retail Media Trends

Retail Media Trends that impact the industry at large globally

### **Consolidation**

Next year, while Retail Media Networks (RMNs) are expected to continue growing, we may see some consolidation. Smaller retailers may seek partnerships or acquisitions to compete with the Amazon's and Walmart's of the world to keep up or to stand out.

### **Measurement**

Harder questions around incrementality and the true impact of retail media are becoming increasingly important as its share of investment steadily increases. No longer can retailers launch an RMN and watch the insertion orders flow in – advertisers are asking the tough measurement, capability, and attribution questions, being more choiceful, and pushing back on retail media offerings that do not meet their standards around impact and measurement.

### **Standards**

We expect the commerce and retail media landscape to be significantly shaped by regulation, ie GDPR, CCPA, and additional privacy laws, However, the retail media industry could benefit from a shake-up beyond just regulation. Retail Media needs a better system to hold it accountable for the lack of standards. The IAB has made some progress on this in the last year, both in the US and EU, but we are still worlds away to make these standards uniformly accepted. As these standards become more universal, we anticipate retailers changing their approach significantly to comply while also trying to protect their data and competitive advantage.

A woman with long dark hair is sitting at a wooden table in a library or bookstore, reading an open book. She is wearing a striped shirt and a dark vest. A denim jacket is draped over the table next to her. The background features tall wooden bookshelves filled with books, and three modern, cube-shaped pendant lights hang from the ceiling, casting a warm glow. The scene is dimly lit, emphasizing the bookshelves and the woman's activity.

# Thought Leader's Predicted 2025 Trends

Forecasted trends from top subject matter experts at Publicis

## Retail Media



### **Multi-Retailer Media Network Clean Rooms Will Become a Fundamental Practice:**

As advertisers look to measure retail media's true return on investment, incrementality, and life-time customer value, clean room portals will become standard practice and an upskill every media manager will be trained on in 2025. Data silos across different departments or channels can hinder a unified view of operations, making it difficult to ensure consistency. In 2025, it will be common practice for retail media reporting to be combined in one single multi-retail instance to give marketers a true understanding of the impact of their total retail media investment on brands vs. single walled gardens.

– Matt Korotko, **GVP, New Business Strategy and Consulting, Publicis Commerce**



**Retail Media's Next Era: Proving Impact in a Mature Market:** As retail media captures an increasingly substantial share of investment, the initial "gold rush" phase may be fading. The focus is shifting to harder questions around incrementality and the true impact of retail media networks (RMNs). Retailers can no longer simply launch an RMN and expect automatic success. Advertisers are becoming more selective, demanding robust measurement and clear evidence of impact. Those networks that fail to meet these higher standards risk losing advertiser support as the market matures.

– Jason Goldberg, **Chief Commerce Strategy Officer, Publicis Groupe**



**The Rise of Audio and Podcasting in Commerce Media:** Audio and podcasting are poised for a comeback as innovative channels for retail and commerce media. Early iterations of audio ads in retail struggled with tracking and demonstrating direct sales impact. However, advancements in measurement and targeting, particularly through owned-and-operated platforms like Wondery and Amazon Music, have reinvigorated the potential of these channels. Podcasting, in particular, is carving a niche by reaching audiences in unique ways, enabling hyper-relevant targeting and messaging that aligns with audience interests.

– Margaux Logan, **SVP Head of Online Marketplaces, Publicis Commerce**



# AI and Commerce



**Agentic AI and the Era of Implicit Commerce:** The rise of AI-powered shopping assistants is ushering in an era of implicit commerce, where purchases are automated based on consumer preferences and needs. From restocking household essentials to planning meals, AI agents will fundamentally change how consumers shop, shifting decision-making from individuals to algorithms.

– Robert Rivenburgh, CEO, **Mars United Commerce**



**AI Will Drive Hyper-Personalized Shopper Experiences:** Research shows personalization drives customer loyalty. A study by Google found that 72% of consumers are more likely to be loyal to a brand if they offer a personalized customer experience. Grocers and Mass Retailers especially will have the ability to curate digital shelves that are more meaningful to the individual. For example, product feed technology will harness individual data and/or look-a-like data to optimize product listings, recipes, and other bundles across social and marketplaces to the individual. From there, advertisers can build on unique experiences with product recommendations, ad-retargeting, push notification, custom content, and even dynamic pricing. Retailers and CPGs that will be first to market in 2025 will gain sizable loyalty with consumers in 2025 and beyond.

– Matt Korotko, GVP, New Business Strategy and Consulting, **Publicis Commerce**



**Generative AI: Transforming Marketing in 2025:** Generative AI surged in 2024, with adoption rising to 75% from 55% in 2023, and global AI spending projected to hit \$632 billion by 2028. As AI transforms work, learning, and shopping, marketers face a growing content supply chain challenge: keeping up with personalized consumer demand. By 2025, many GenAI pilots will mature into robust systems, with Gartner predicting 30% of outbound marketing messages will be synthetically generated. While GenAI boosts efficiency, creativity, and scale, maintaining authenticity and consumer trust through transparency will be key to its continued success.

– Debra Hughes, SVP, Commerce Strategy, **Publicis Commerce**



# Omnichannel



## **Omnichannel Evolution: Bridging In-Store and Digital for Seamless Engagement:**

Omnichannel and integrated shopping experiences are becoming the norm as consumers demand unified journeys across online, social commerce, in-store, and mobile app touchpoints. Retailers are responding with strategies that connect these interactions to boost engagement and loyalty.

Looking ahead to 2025, the convergence of in-store and online shopping data will define the next phase of omnichannel evolution. Technologies like RFID, IoT sensors, and mobile apps are enabling retailers to merge data streams, offering real-time insights into customer behavior. This integration supports enhanced personalization, efficient inventory management, and more effective ad targeting across physical and digital channels.

– Alex Vinci, VP Global Commerce Media Strategy, **Publicis Media**



**The Limits of DTC Growth: A Shift Toward Omnichannel and Wholesale:** The growth potential of direct-to-consumer (DTC) brands is proving to be more constrained than anticipated. As a result, many DTC brands are pivoting to omnichannel strategies and embracing wholesale distribution to sustain growth. This evolution underscores the challenges of scaling exclusively through direct channels and highlights the importance of blending digital and physical retail to reach broader audiences and drive revenue.

– Jason Goldberg, Chief Commerce Strategy Officer, **Publicis Groupe**



# Digital and Social Commerce



**Digital as the Core of Every Purchase Journey:** The modern consumer journey is defined by digital touchpoints that span the full spectrum of commerce. Whether it's researching products on Amazon, reading reviews on a retailer's website, or finding the nearest store via Google Maps, digital influences nearly every transaction. According to Forrester, 70% of all retail sales will be digitally influenced by 2025. Social media and micro-influencer content further amplify these touchpoints, shaping consumer preferences and driving action.

– Robert Rivenburgh, CEO, **Mars United Commerce**



**Social Media as the New Front Door to Commerce:** Social media is emerging as a dominant platform for product discovery, surpassing in-store experiences. Consumers increasingly discover new products through their TikTok feeds rather than traditional retail environments. This shift is driving a move away from broad, one-to-many branding campaigns and mega-influencers toward more targeted, personalized campaigns leveraging micro-influencers. Notably, TikTok has become the first Western social platform to generate significant sales directly through its platform with TikTok Shop, signaling a transformative shift in how consumers shop and engage with brands.

– Jason Goldberg, Chief Commerce Strategy Officer, **Publicis Groupe**



**Social Shopping Loses Its Impulse:** Social shopping purchases are often described as impulse buys due to their typical association with low-priced consumer goods. However, younger generations, particularly Gen Z, are taking a more thoughtful approach to these purchases—just at a much faster pace. Gen Z can quickly move through the buying funnel by watching a TikTok video to see how a product works, looks, and feels, getting a recommendation from an influencer or friend, and scrolling through comments that serve as reviews. Despite having limited disposable income and facing financial concerns, Gen Z turns to social platforms as a space to discover products and make confident purchasing decisions, all while matching the speed of their fast-moving attention spans. To succeed in social shopping, brands must engage across every aspect of the social journey—comments, videos, searches, and beyond.

– Emily Staples, Manager, Commerce Strategy, **Publicis Commerce**



## Search and Discovery



**Visual Search Takes Off And Reinforces Showrooming:** The newest and hottest search feature of 2025 will be visual search. Mobile Cameras and AI are enabling consumers to snap a photo of a product and get a result of all the similar choices available online. Many times, consumers are able to find the same exact product they are taking a picture of. Amazon, Google, and Perplexity are making leaps in this space and are helping shoppers with findability within their consumer journey for products they do not know the name of, how to describe, or don't have the time to search. These functions will only accelerate showrooming and price-comparisons as shoppers in-store can snap a photo of what they picked up and instantly get hundreds of similar results that can get delivered to their front door.

– Matt Korotko, GVP, New Business Strategy and Consulting, **Publicis Commerce**



**Google's Grip on Digital Attention Weakens:** The shift away from Google's traditional dominance in digital discovery accelerates as users increasingly rely on social platforms and large language models (LLMs) for search and information retrieval. The next generation of consumers, in particular, favor social networks and AI-based interfaces over search engines, potentially disrupting Google's advertising revenue model.

– Jason Goldberg, Chief Commerce Strategy Officer, **Publicis Groupe**



# Identity



**Strengthening Identity:** Identity will remain a critical focus for retailers next year. As brands seek more robust audience data strategies, retailers will prioritize robust identity solutions to deliver seamless shopping experiences across platforms. The emphasis on leveraging first-party data (1PD) through retail media networks or owned assets will grow, providing richer customer insights, improved personalization, and more precise measurement and attribution. Consequently, customer identity solutions will play an increasingly vital role in audience measurement. Developing a robust strategy for leveraging identity across first- and second-party data sets will be absolutely critical for success

– Mudit Jaju, Global Commerce Media Lead, **Publicis Groupe**



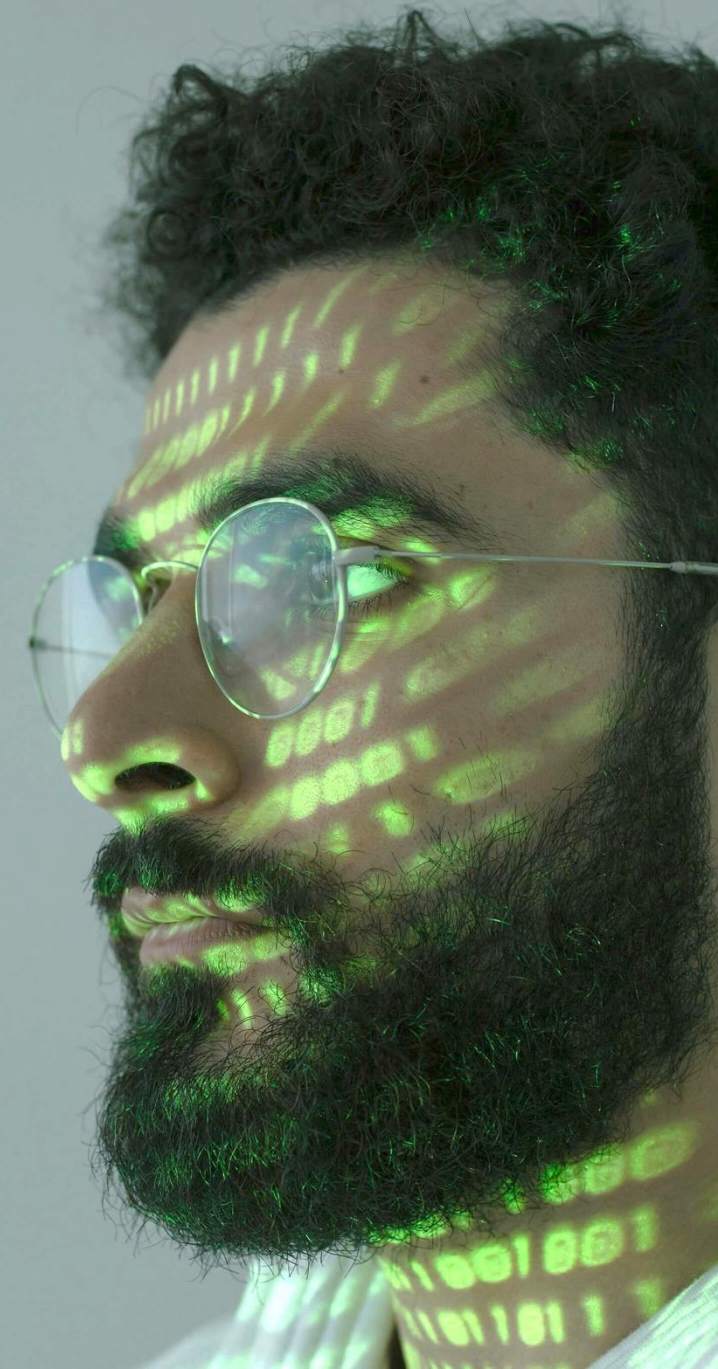
**Identity as the Key to Unlocking Sustainable Growth for Retail Media Networks:** As Retail Media Networks (RMNs) mature and face plateauing revenue growth, focus will shift to addressing revenue leakage in offsite activations—much like optimizing yield for owned inventory. Without strong identity strategies, 1P data drop-off across the onboarder-to-DSP/Ad Server journey will worsen with 3P cookie deprecation, leading to under-delivery against audience segments and greater reliance on extrapolated reporting. Simultaneously, brands will demand more transparency as they align National and Shopper strategies. RMNs and brands that leverage robust identity frameworks to maximize 1P data will better attract national investments and thrive in a crowded market, with customer lifetime value emerging as a key KPI.

– Austin Leonard, SVP, Business Development, **Epsilon Retail Media**



**Unified Understanding of Identity:** In the coming year, the adtech industry will shift its focus from a picking a singular standard identifier to standardizing the concept of identity itself. As privacy laws evolve and consumer behaviors change, the industry will prioritize a unified understanding of identity. Rather than relying on traditional identifiers like cookies, the emphasis will be placed on verification and accuracy in ID solutions. Integrating transaction data with digital touchpoints will help optimize marketing spend by accurately linking consumer actions to ID, reducing inefficiencies from misidentified inventory and aiding marketers in navigating privacy regulations while maintaining trust in a rapidly changing landscape.

– Rachel Cascisa, VP, Platform Adoption, **Epsilon**





# Brand Disruption



**Rise of the “Unbranded” Consumer:** The trend of “unbranding” gains momentum as consumers increasingly favor high-quality store brands over traditional national brands. Retailers offering unbranded goods, like Amazon, Temu, and Shein, capture a greater share of the market. Even regulatory adjustments, such as tweaks to de minimis thresholds, won’t slow the adoption of quality private-label options over branded alternatives.

– Jason Goldberg, Chief Commerce Strategy Officer, **Publicis Groupe**



## **The Rise of Direct-to-Consumer from China**

Platforms like Shein, Temu, and TikTok Shops are revolutionizing U.S. retail by prioritizing speed, value, and consumer demand. By leveraging real-time data and bypassing traditional supply chains, these platforms offer high-quality, unbranded products at unprecedented prices. With over \$100 billion in demand captured in 2024 alone, these players are reshaping consumer expectations and redefining global retail.

– Robert Rivenburgh, CEO, **Mars United Commerce**



**“Vibe-cession” Fuels Shift to Value and Essentials:** In 2025, the “vibe-cession” continues to prioritize value-priced goods and everyday essentials over premium-branded, discretionary products. Consumers gravitate toward high-value options, fueling a shift in Amazon’s product mix towards first-party (1P) essentials while boosting the appeal of high-efficiency discount retailers like Walmart over niche or specialty stores.

– Jason Goldberg, Chief Commerce Strategy Officer, **Publicis Groupe**



# Sustainability



**Sustainability via Circular Commerce:** Consumers' demands for environmentally responsible practices haven't ebbed, and they continually put modest efforts in demanding such practices from brands, pushing for ethical sourcing, carbon neutrality, and eco-friendly packaging. They also continue to invest their dollars into circular business models (e.g., resale platforms, rental services, repair/recycle programs) by way of increased usage with brands like REI, Patagonia, and IKEA, all of which are leading the way in promoting recycle/repair traits for sustainable consumerism.

– Paul Williams, **SVP, Solutions & Growth Strategy, Publicis Commerce**

**“Product as a Service” Models Will Continue to Grow:** Subscription models for durable goods—such as electronics, clothing, furniture, and other high-value items—are set to expand as brands refine their production cycles to retain ownership while offering consumers compelling incentives to "rent" rather than purchase. This approach allows brands to maintain control over product life cycles, reduce waste, and provide ongoing value through flexible, usage-based offerings that appeal to cost-conscious and sustainability-focused consumers.

– Paul Williams, **SVP, Solutions & Growth Strategy, Publicis Commerce**



# How Publicis Commerce Can Help You in 2025

As these trends shape the future of commerce, Publicis Commerce is uniquely positioned to empower brands and retailers to not just adapt but thrive.

Together, let's unlock the potential of these transformative shifts and shape the future of commerce.



- PUBLICIS GROUPE** 2024 LEADER FORRESTER COMMERCE SERVICES WAVE
- Epsilon** #1 IDENTITY SOLUTION (TOP RANKED IDENTITY SOLUTION) - FORRESTER
- Profitero** #1 DIGITAL SHELF PROVIDER RANKED BY DCG
- PUBLICIS MEDIA** #1 NORTH AMERICA MEDIA NETWORK #2 GLOBAL MEDIA NETWORK
- PUBLICIS MEDIA** #1 RETAIL MEDIA NETWORK SPEND
- PUBLICIS GROUPE** FOUNDING PARTNER TIK TOK COMMERCE
- Publicis CONSEIL** CREATIVE COMMERCE CANNES LIONS GRAND PRIX WINNER

 Ready to innovate and drive growth?

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