



3 Brands, 3 Retail Media Playbooks

What location intelligence reveals about consumer behavior and the retail media strategies of Kroger, Sam's Club, and CVS

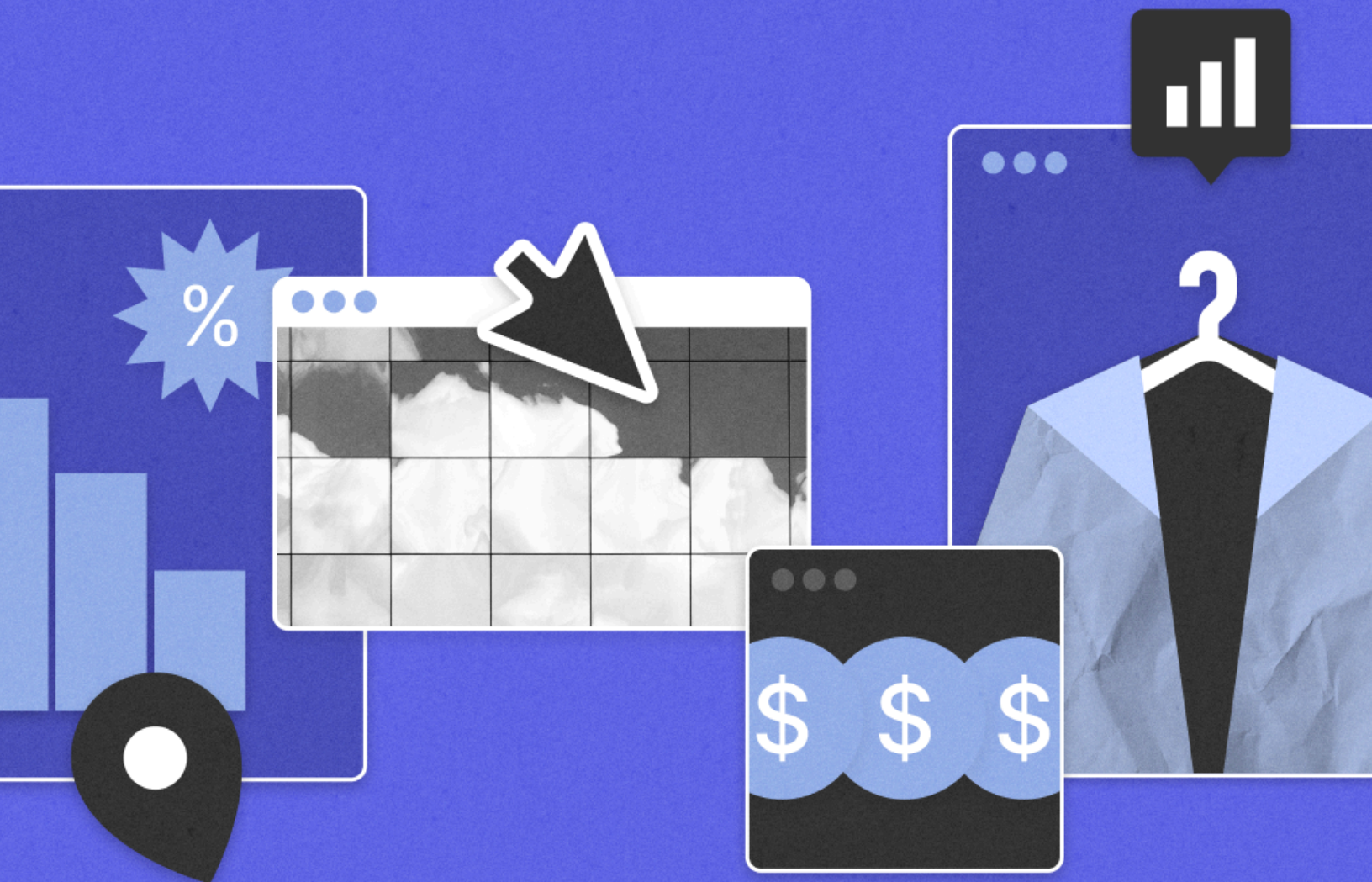


Table of Contents

The Store as a Media Channel	4
Kroger: Many Audiences, New Endcap Screens	4
Using Dwell Time to Guide the Endcap Rollout	4
Different Banners, Different Shopper Audiences	5
Sam's Club: A Growing Audience, And Retail Media's Moment at the Pump	7
A Growing Audience for Advertisers	7
Traffic Fuels a New Ad Channel	8
CVS: Consumer Behavior and Strategy Align	10
Retail Media's Weekday Traffic Opportunity	10
Quick Trips, Quick Messages	11
Three Playbooks, One Common Thread	12

Key Takeaways:

Kroger: Using Dwell Time to Guide the Endcap Rollout

Kroger is adding digital endcap screens meant to spark discovery and longer visits. Markets or locations where the average stay falls below the chainwide average, could signal early priorities, and a change in visit duration over time could help measure the screens' impact. The same approach can guide any retailer in quantifying offline engagement.

Kroger: Different Banners, Different Shopper Audiences

Kroger Precision Marketing spans more than a dozen grocery banners that can draw very different audiences. For advertisers, an umbrella retail media network with many audiences is a selling point, allowing for precision targeting and broad reach.

Sam's Club: A Growing Audience for Advertisers

Sam's Club visits and unique visitors rose year-over-year (YoY) in every month from October 2025 through September 2026, giving its retail media network a growing audience of both new and returning visitors. For any in-store network, growth in both visits and unique visitors is one of the strongest proof points to bring to advertisers.

Sam's Club: Traffic Fuels a New Ad Channel

Sam's Club began selling ads on its fuel-pump screens in April 2026, just as repeat fuel visitors posted double-digit YoY gains. Frequent, routine stops beyond the main store, such as fuel or pickup, can become valuable media placements, especially when that traffic is on the rise.

CVS: Retail Media's Weekday Traffic Opportunity

While discretionary and essentials chains peak on Saturday, CVS draws an above-average share of visits on weekdays, giving its in-store media a steady audience of errand-driven shoppers ready to buy. Consumer behavior should shape the most valuable advertising windows and retail media strategy.

CVS: Quick Trips, Quick Messages

More than two-thirds of CVS visits last under 15 minutes. Screens in pharmacy waiting

areas, on endcaps and at checkout, along with storewide audio, suit those short trips with quick, timely messages. For any retail media network, ad length and placement should match how long shoppers actually stay.

The Store as a Media Channel

Retail media networks continue to develop, and in many stores, advertisements on screens, on personal devices, or over audio have become a regular part of the shopping trip. For the brands buying that in-store retail media space, getting ROI on their ad spend begins with a few simple questions that shape every media plan: who are the shoppers, when do they visit, how long do they stay for, and how often do they come back.

Using the latest location intelligence, this report examines three leading retailers with media networks (Kroger, Sam's Club, and CVS) to reveal what drives their strategy and what sets them apart: how Kroger's banners reach diverse audiences in search of discovery and inspiration, how Sam's Club attracts both new and returning visitors motivated – in part – by fuel discounts, and how CVS engages mission-driven consumers. We dove into the data to find out what these insights mean for advertisers and any brand with a stake in retail media.

Kroger: Many Audiences, New Endcap Screens

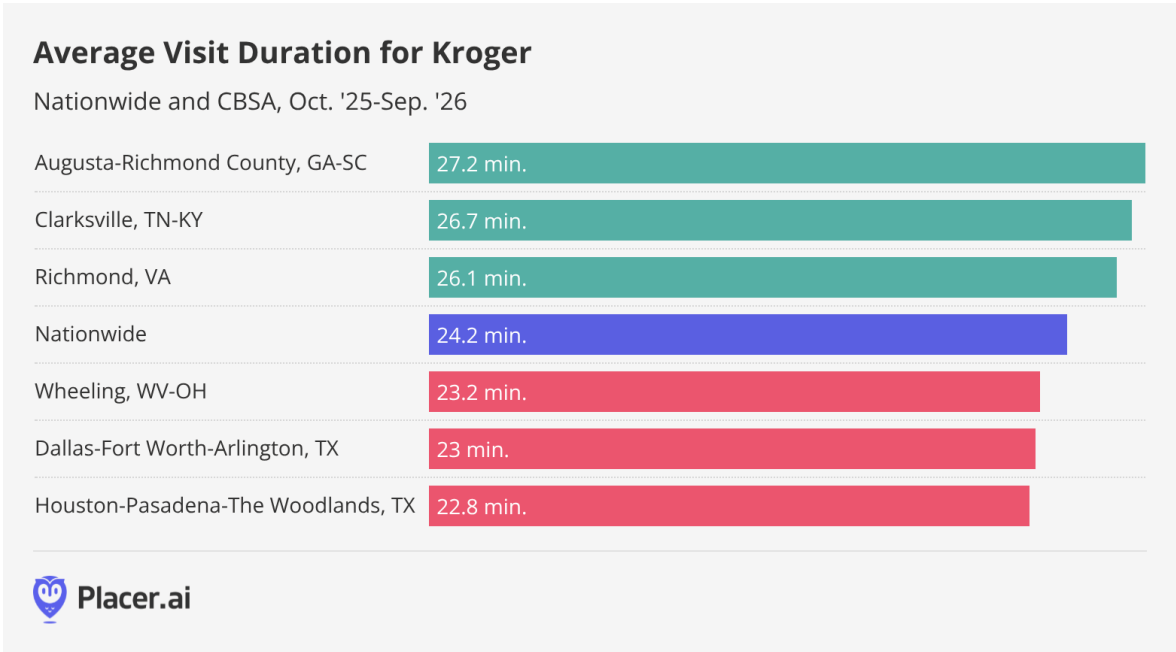
Among other marketing solutions, Kroger's cross-banner retail media network, [Kroger Precision Marketing \(KPM\)](#), has been rolling out digital [endcaps](#) and screens in various sections of Kroger [stores](#).

Using Dwell Time to Guide the Endcap Rollout

KPM is [prioritizing](#) endcap screens in grocery and health & beauty aisles in order to help shoppers discover products and “inspire more dwell time” in those categories.

And as the initiative expands to more locations, average visit duration can help decide where those screens have the most room to work. Between October 2025 and

September 2026, the average Kroger visit lasted 24.2 minutes. Shoppers stayed longer in markets like Augusta-Richmond County, GA-SC (27.2 minutes), Clarksville, TN-KY (26.7) and Richmond, VA (26.1), and moved through faster in Wheeling, WV-OH (23.2), Dallas-Fort Worth-Arlington, TX (23.0) and Houston-Pasadena-The Woodlands, TX (22.8).



Shorter visits can reflect many things, from store size and layout to a higher share of quick fill-in trips. Either way, markets and individual stores that fall below the national average could indicate where screens designed to extend browsing have the most room to make a difference by increasing engagement, which could make them good places to prioritize in the rollout. Where digital endcaps are already in place, the same measure can track their impact: comparing average visit duration before and after installation, and against similar stores without screens, would show whether the displays are adding time to the shopping trip.

Different Banners, Different Shopper Audiences

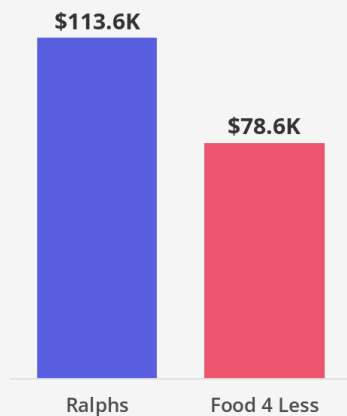
For advertisers, one of KPM's strengths is its reach across more than a dozen grocery banners, and as the data below shows, each appealing to different shopper

segments. In the Riverside, CA metro area, for example, two Kroger chains in the same market – Ralphs and Food 4 Less – drive traffic from distinctly different cohorts. Over the past 12 months in the metro, Ralphs' [trade area](#) had a median household income of \$113.6K, compared with \$78.6K for Food 4 Less. Meanwhile, Food 4 Less skewed toward larger families: 38.1% of households within its trade area had children and 43.8% had four or more people, compared to 29.6% and 31.4% for Ralphs. This suggests that whether a brand is targeting higher-income shoppers or larger, value-focused families, Kroger's network can reach them.

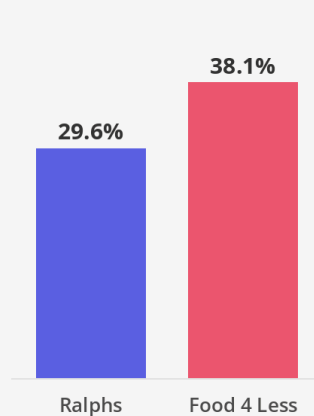
Kroger Banners, Ralphs and Food 4 Less, Drive Traffic From Distinct Audiences

Audience Segmentation, Riverside-San Bernardino-Ontario, CA Metro Area, Oct. '25-Sep. '26

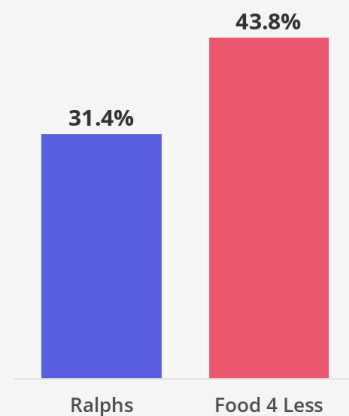
Household Median Income



Households With Children



4+ Person Households



Based on STI: PopStats dataset and Placer.ai captured market data.

Sam's Club: A Growing Audience, And Retail Media's Moment at the Pump

Sam's Club sells its retail media through [Sam's Club Connect](#) (formerly Member Access Platform, or MAP), which includes ad placements across its more than [600 U.S. clubs](#), including video ads on in-club display screens and audio on Sam's Club Radio.

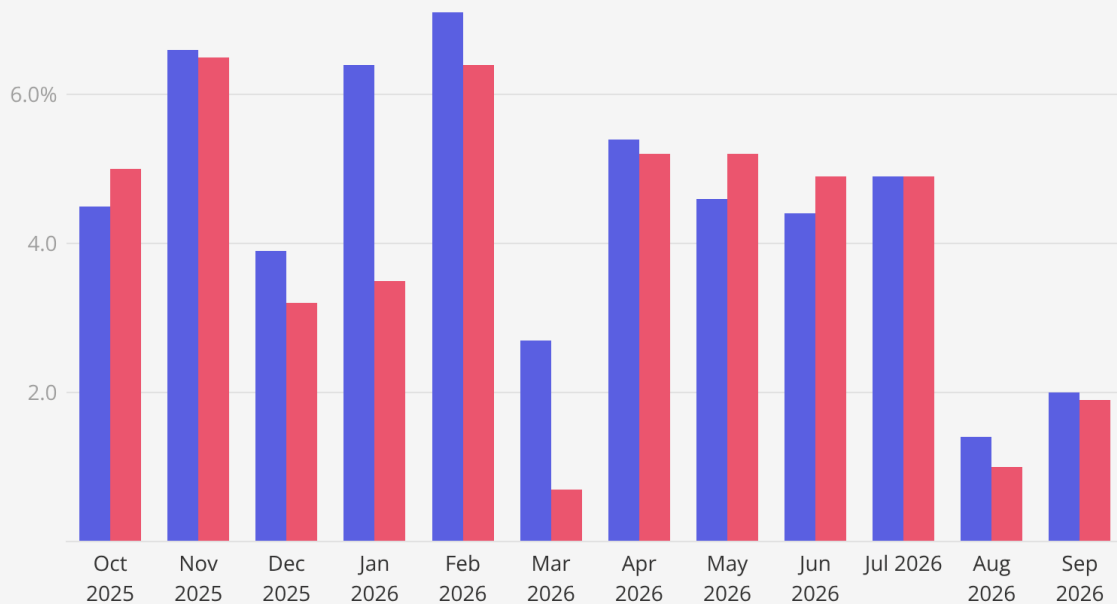
A Growing Audience for Advertisers

Location intelligence shows that what makes Sam's Club's retail media stand out for advertisers is the chain's growing audience. The retailer saw visits and unique visitors increase year-over-year (YoY) in every month from October 2025 through September 2026, indicating that traffic gains came from more shoppers, not just the same shoppers visiting more often. For Sam's Club Connect, more unique visitors and visits mean a larger audience and more potential impressions, strengthening its position when pitching and pricing campaigns. For advertisers, that growth offers broader reach, along with repeat exposure among shoppers who keep coming back.

Sam's Club Sees Visit and Unique Visitor Growth

Nationwide, Year-Over-Year

■ Visits ■ Unique Visitors



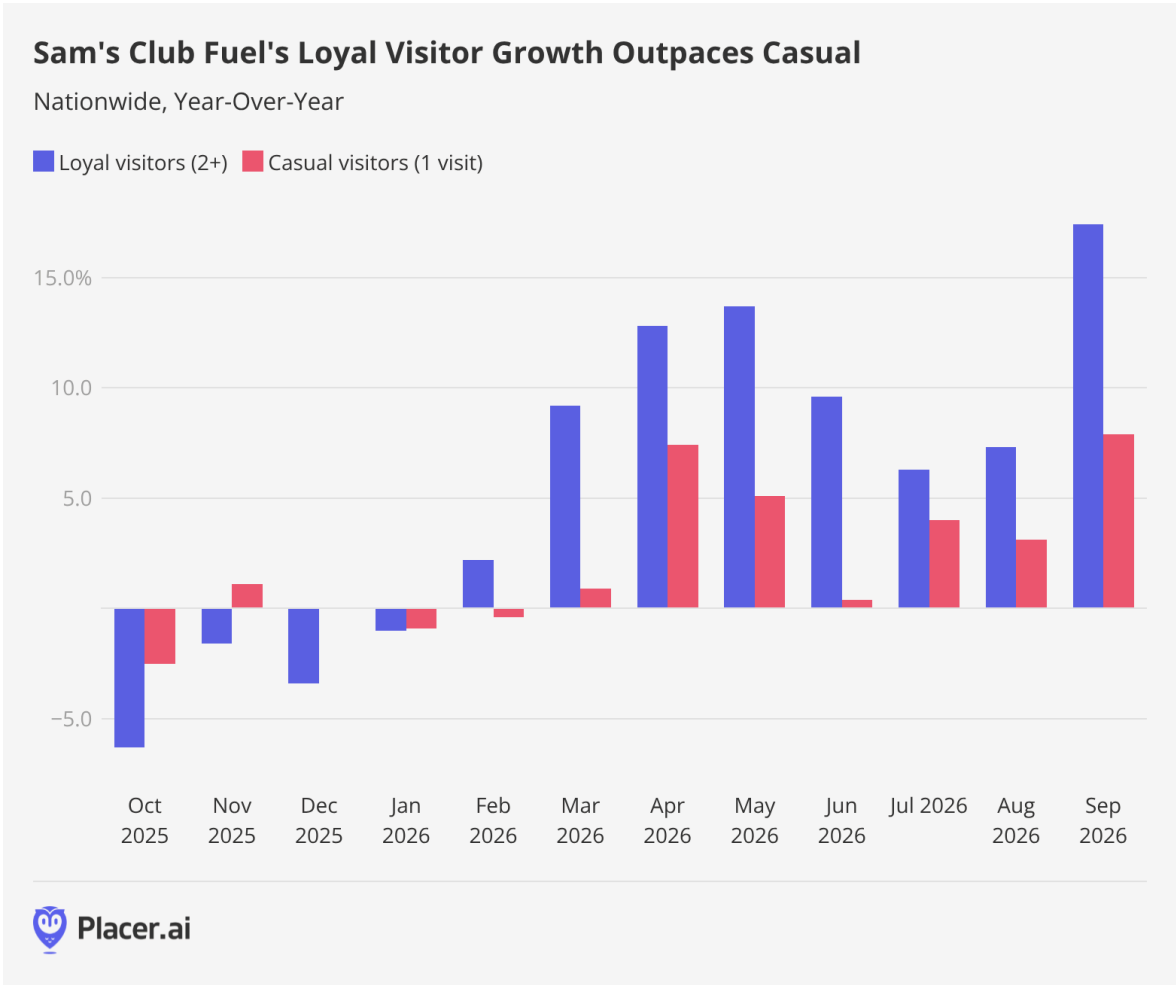
Traffic Fuels a New Ad Channel

Sam's Club's retail media network isn't confined to its warehouse clubs. In April 2026, it began selling ads on the screens at its [fuel pumps](#), which operate at more than 500 locations, giving brands a few minutes with members while they refuel. And this step appears to have come at a critical juncture.

After falling YoY in late 2025, the number of loyal fuel visitors (those who fueled up two or more times in a month) turned upward in early 2026. As average [gas prices](#) rose from \$2.94/gallon in late February to above \$4 by early April, more Sam's Club

members appear to have taken advantage of discounted fuel. Loyal fuel visitors increased by 9.2% YoY in March, 12.8% in April, and 13.7% in May, spiking again by 17.4% in September when prices climbed toward \$4.5/gallon. Once-a-month visitors have increased YoY since March 2026 as well, likely as newcomers were drawn to Sam’s Club Fuel.

Driven by higher gas prices, Sam’s Club Fuel is having a moment – and the pump screens seem to have arrived right on time. Growth in casual fuel visitors gives advertisers new reach, while rising loyal visitors deliver repeat exposure, giving Sam’s Club Connect a strong case to make as it pitches its newest channel.



CVS: Consumer Behavior and Strategy Align

CVS Pharmacy offers its retail media through [CVS Media Exchange \(CMX\)](#), and is [expanding](#) its in-store advertising offerings – including digital screens in pharmacy waiting areas, on endcaps, and at checkout, along with storewide audio ads.

Retail Media's Weekday Traffic Opportunity

For most retailers, weekends bring the biggest crowds. If visits were spread evenly across the week, each day would get about 14.3% of them. Between October 2025 and September 2026, discretionary chains, where shoppers are more likely to browse, drew 20.3% of their weekly visits on Saturday alone. Essentials chains such as grocers, superstores and dollar stores also peaked on Saturday, at 16.8%.

CVS, however, flips the pattern. The chain drove an above-average share of visits on every weekday, peaking at 15.8% on Friday, while Saturday (14.0%) and Sunday (11.4%) were its slowest days. Unlike more discretionary shopping trips, visits to CVS are often driven by specific needs, such as picking up prescriptions or restocking household essentials. For advertisers, this means CMX's in-store placements offer opportunities to reach shoppers on purposeful trips throughout the workweek, when much of the retail sector sees a smaller share of its traffic.

CVS Claims Greater Share of Monday-Thursday Visits Compared to Other Essentials and Discretionary Chains

Nationwide, Share of Daily Visits, Oct. '25-Sep. '26

	CVS/pharmacy	Essentials Chains	Discretionary Chains
Monday	14.4%	13.3%	12.6%
Tuesday	14.8%	13.1%	12.3%
Wednesday	15.3%	13.6%	12.6%
Thursday	14.5%	12.9%	12.1%
Friday	15.8%	15.3%	16.0%
Saturday	14.0%	16.8%	20.3%
Sunday	11.4%	15.1%	14.1%



Quick Trips, Quick Messages

Alongside this weekday visit pattern, the data also reveals that CVS visits tend to be on retail's shorter side. More than two-thirds of visits to CVS (68.2%) last under 15 minutes – compared to 40.1% at essentials chains (such as grocers, superstores, and dollar stores) and 28.1% at discretionary retailers (such as apparel, electronics, and sporting good stores).

CVS's in-store network appears well suited to this pattern. Screens in pharmacy waiting areas reach shoppers during an average wait of [3.5 minutes](#), while front entrance, endcap, and checkout screens offer opportunities to engage shoppers throughout their visits. Storewide audio, meanwhile, reaches shoppers without requiring them to stop. For advertisers, this creates opportunities to deliver short, timely messages that align with how CVS customers actually shop.

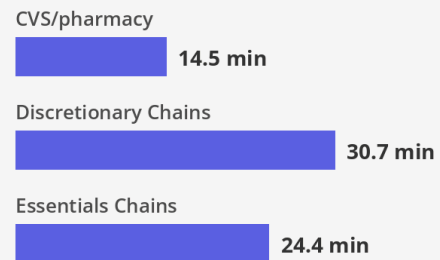
CVS's Large Share of Short Visits Informs Its Retail Media

Visit Duration by Category, Nationwide, Oct. '25-Sep. '26

Share of Visits by Visit Duration

	CVS/pharmacy	Discretionary Chains	Essentials Chains
Under 15 min	68.2%	28.1%	40.1%
15-30 min	22.6%	34.9%	33.1%
30-60 min	6.9%	26.3%	20.6%
60+ min	2.3%	10.7%	6.2%

Average Stay



Three Playbooks, One Common Thread

Kroger, Sam's Club, and CVS's media networks each offer a unique value proposition while aligning with the behavior and preferences of their shoppers. Kroger's broad audience reach and shoppers' desire for discovery, Sam's Club's strong overall visits and discount fuel demand, and CVS's steady stream of mission-driven weekday shoppers each provide distinct advantages to advertisers. As more screens and audio spread through stores, foot traffic data gives retailers and their advertising partners a way to see who those placements reach, where to put them next, and whether they are working.