

Digital Out of Home (DOOH) & In-Store Retail Media Playbook 2024



iab.

TABLE OF CONTENTS



Chapter 1: Merchandising, Shopper Marketing, and the Integration of Digital Technologies 4

 1.1 Introduction to Merchandising and In-Store Shopper Marketing 5

 1.2 Enhancing In-Store Marketing and Collaboration 9

 1.3 Complexity and Challenges 14

 1.4 Sustainability 16

Chapter 2: Consumer-Centric Strategies in Retail Media 17

 2.1 Setting Campaign Objectives and Audience Strategy 20

 2.2 Different Advertising Formats 22

 2.3 Importance of Content Contextualization and Creative Strategy 23

 2.4 Retailtainment and Experiential Activations 25

 2.5 Endemic vs Non-Endemic 28

Chapter 3: Advanced Measurement and Optimization 29

 3.1 Measurement and Data Utilization 30

 3.2 Defining In-Store Retail Media Metrics 33

 3.3 Testing Framework and Performance Analysis 36

 3.4 Understanding the Impression Multiplier 42

 3.5 Data Privacy and Consumer Opt In 46

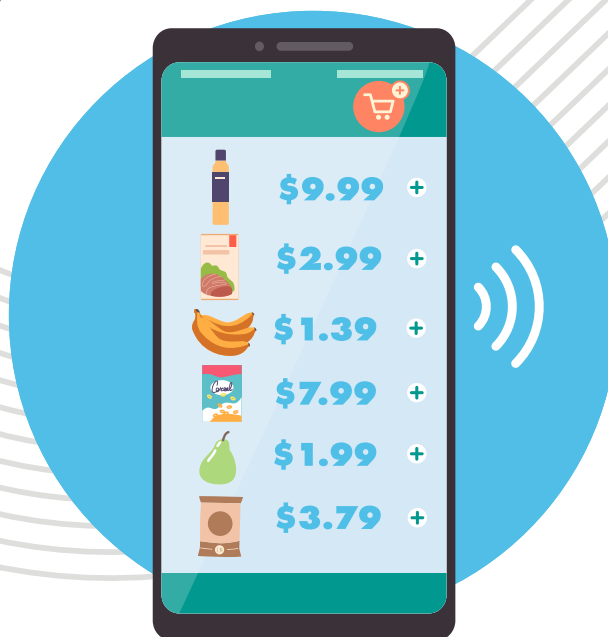
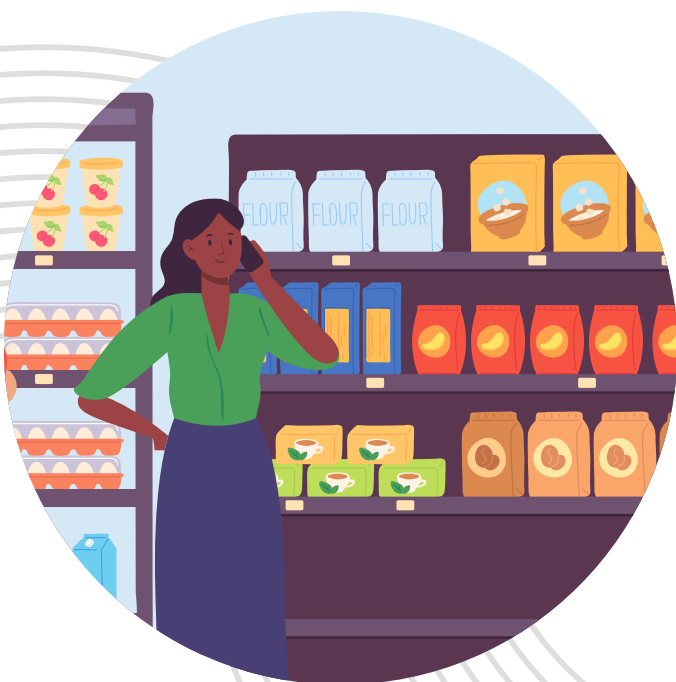
 3.6 Measurement Considerations 50

TABLE OF CONTENTS



- Chapter 4: Venues, Zones and Technology Overview** 52
 - 4.1 In-Store Venues and Zones 53
 - 4.2 Technology Overview 55
 - 4.3 Uptime Detection 66
- Acknowledgement** 67
- Contributors** 69
- About IAB** 74
- Contact Information** 75
- Appendix** 76
 - Retailer Zones 77

1. MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



1 MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



1.1 INTRODUCTION TO MERCHANDISING AND IN-STORE SHOPPER MARKETING

Merchandising represents the backbone of the retail sector, involving a variety of strategies and practices aimed at promoting the sale of products to consumers. At its core, merchandising encompasses product selection, presentation, packaging, pricing, and promotion strategies designed to enhance customer appeal and maximize sales. In the intricate dance of retail operations, retail media, shopper marketing, and category teams play pivotal roles, acting as the liaisons between suppliers and retailers to ensure that product offerings meet consumer demand while aligning with the retailer's marketing and sales objectives.

The importance of merchandising cannot be overstated. It directly impacts a customer's in-store experience and purchasing decisions, influencing not just the immediate sale but also long-term brand loyalty and perception. It is also a critical part of the commercial relationship between brands and retailers—depending on the market and category merchandising spend can represent from 15-30% of the total



gross sales of the brand to the retailer. Effective merchandising strategies ensure that products are displayed in a way that is accessible, appealing, and informative, thereby enhancing the overall shopping experience.

Product Selection: Product selection is the foundational element of merchandising, requiring retailers to understand their target market deeply. This involves analyzing consumer trends, preferences, and buying behavior to decide which products to offer. Retailers must balance a mix of core staples and innovative new items to keep the inventory fresh and engaging for customers.

1

MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



This understanding is distilled into a planogram—the design of what brand goes where, and how many “facings” or forward-facing placements each brand receives.

Packaging: Packaging color, form, and size impact product placement on the shelf and differentiate products and retailers. Retailer packaging preferences can be based on specific basket insights, and/or trends to establish innovation or uniqueness.

Presentation: This includes the layout of the store, the design of displays, the proximity of signage to product, and the organization of products. Effective presentation strategies use lighting, color, and spacing to highlight products and make them easily accessible to shoppers. Eye-catching window displays and themed end-caps can draw customers into the store and encourage exploration.

Adjacencies—what is presented next to what else—can be a critical part of the merchandising process. These adjacencies can be permanent in terms of store layout, or temporary that integrate solutions across categories.

Pricing Strategy: Pricing is a critical component of merchandising that directly affects consumer perception and value assessment. Competitive pricing strategies, dynamic pricing based on demand, and psychological pricing (e.g., \$9.99 instead of \$10.00) are all tactics used to influence purchasing decisions. Promotions, discounts, and loyalty programs are also integral to pricing strategies, designed to incentivize purchases and build customer loyalty.

Promotion: Promotion encompasses the various marketing and communication strategies employed to raise awareness and generate interest in products. This includes in-store signage, in-store audio, online and offline advertising, social media marketing, paper, displays, and special events. Promotions not only inform customers about the products and offers available but also create a sense of urgency or exclusivity that can drive sales. Additionally, displays in store supplement the shelf with additional supply to support promotions and price reductions within the store which inherently drive quantity demanded among customers.

Regional Considerations: It is crucial to consider regional buying behaviors. For example, the difference in items that are popular in various cities is significant. While the tendency for retailers may be to stock a product mix that aligns with the national average, understanding and catering to regional preferences can substantially improve sales performance.

Understanding and optimizing the in-store environment is crucial for effective retail media, with product presentation and customer journey mapping playing pivotal roles in this process. Both elements work in concert to create a shopping experience that not only meets the customer’s needs but also maximizes sales opportunities for the retailer. By carefully considering how products are displayed and how consumers interact with these displays at various stages of their shopping journey, retailers can significantly enhance the effectiveness of their in-store retail media strategies.

1

MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



INTEGRATING PLANOGRAMS WITH CUSTOMER JOURNEY INSIGHT

Planograms serve as strategic blueprints for arranging products in a way that enhances visibility, accessibility, and aesthetic appeal. These detailed diagrams take into account the physical layout of the store, shelf space, and product attributes to determine the optimal placement for each item. The primary goal is to arrange products in a manner that mirrors the natural shopping behavior and preferences of the target customer, making it easier for them to find what they are looking for and dis-

cover new products. Planograms also serve a critical operational function in the ability for the retailer to stay in stock. Offering sufficient shelf space, and therefore a sufficient product supply, on the shelf will allow products to be available for customers to purchase between restocking periods and prevent out-of-stocks. A planogram that appropriately reflects selling patterns, coordinated with store-level restock rhythms, is critical to remain in stock for customers.

Integrating customer journey mapping into space planning and category strategies adds a layer of depth to this process. Customer journey mapping involves analyzing the touchpoints and pathways customers take from the moment they enter the store to the point of purchase. By understanding this journey, retailers can tailor their planograms to align with the different stages of the shopping experience, from initial attraction and engagement to consideration and conversion.

For example, high-traffic or high consideration areas might be optimized for eye-catching displays that introduce new products or promotions, capturing the attention of customers as they begin their shopping journey. Key decision points within the store can be enhanced with informational signage or interactive displays that assist customers in the evaluation phase, providing them with the details they need to make informed purchasing decisions. Finally, areas near the check-out can be strategically used for impulse purchases, leveraging the planogram to place small, high-margin items in the direct path of customers ready to make a purchase.

It's crucial to consider the shopper's mindset upon entering the store; the entrance often serves as a staging zone where customers are too distracted to engage effectively with complex displays or promotions. A subtler approach at the entrance might better prepare customers for upcoming interactions and offers, maximizing the effectiveness of subsequent high-engagement areas. Moreover, given the general walking pace of people at about 2 MPH, and even brisker at 3 MPH, in-store content must be designed to be clean, clear, and consistent. With sometimes only 3-5 seconds of exposure to any piece of creative work, it's essential that messaging is immediately understandable to maximize impact during the limited time consumers engage with it while shopping.

1 MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



The seamless integration of space planning and category planogramming with customer journey insights is imperative for the success of in-store retail media for several reasons. It ensures that marketing efforts are highly targeted and relevant to the customer, increasing the likelihood of engagement and conversion. By placing the right message in the right place at the right time, retailers can significantly enhance the impact of their in-store advertisements and promotions.

Integrating the space planning and planogramming processes with customer journey mapping is vital for enhancing in-store retail media, striking a balance between contextually relevant shopping experiences and maximizing retail space efficiency. This approach not only caters to shopper preferences, creating a journey of discovery and convenience, but also ensures that every inch of the store works harder to boost sales and customer satisfaction. However, it's crucial to navigate the



tensions between merchants, focused on product sales, and retail media teams, aiming for engaging customer experiences that generate advertiser funding and compelling media inventory. By aligning both teams around the shared goals of improving sales performance and enhancing the shopping environment, retailers can effectively leverage their space across these objectives. This collaboration fosters a retailer environment that is both shopper-friendly and aligned with business objectives, blending the art of merchandising with the science of customer behavior to drive brand loyalty and sales.

1

MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



1.2 ENHANCING IN-STORE MARKETING AND COLLABORATION

In-store marketing is a critical component of the retail mix, serving to engage customers the moment they step into a store. It encompasses a variety of techniques, from point-of-sale displays to in-store promotions, audio and signage, all designed to attract attention and encourage purchase behavior.

Collaboration between merchants and marketing teams is essential in optimizing in-store space, often referred to as “white space.” This collaboration involves strategic planning to make the most of the retail space available, ensuring that products are displayed in a way that maximizes visibility and appeal. Techniques such as visual merchandising, category management, strategic product placement, timely audio messages, and thematic digital and physical displays can significantly impact sales and customer experience.

The collaboration between merchants and retail media teams is pivotal for enhancing in-store marketing, yet it often comes with its share of challenges and tensions. Understanding these dynamics and addressing the concerns from both sides is essential for improving collaboration and achieving mutual goals.

Space Utilization: One primary source of tension revolves around the use of in-store space. Merchants are traditionally focused on product assortment, placement, and inventory management to maximize sales per square foot. In contrast, retail media teams aim to leverage the same

space to enhance customer engagement through advertisements, promotions, and digital displays. This can lead to conflicts over how much floor space is allocated for product displays versus marketing efforts, which is why marketing assets should ideally be placed in locations that aren’t/can’t be occupied by product (i.e. hung from the ceiling, placed on top of shelves, or attached to the front/sides of fridges/freezers or bulk storage bins.)

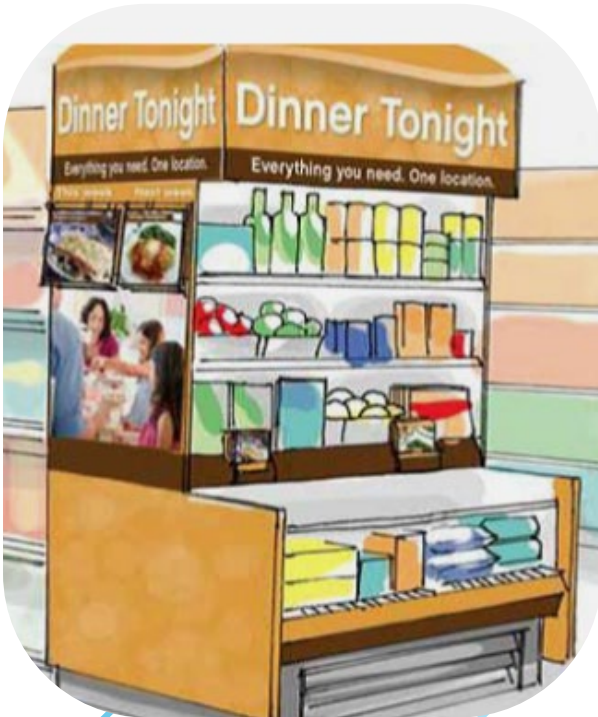
This approach underscores the complementary roles of both teams: While merchants optimize product visibility, retail media teams strategically integrate advertising into these spaces. Collaboration enhances the shopping experience and supports a governance strategy that aligns with consumer preferences, demonstrating that there need not be competition for space, but a joint effort to facilitate the best possible in-store journey.

Revenue vs. Experience: Balancing the immediate revenue concerns of merchants with the long-term brand engagement focus of retail media teams presents a notable challenge. Merchants often prioritize product placements based on historical sales data or seasonal trends to maximize short-term revenue. In contrast, retail media teams advocate for innovative marketing strategies that enhance customer experience and brand loyalty, potentially without immediate sales impact.

This tension can be mitigated by fostering collaboration between teams. Placing the consumer at the center of sales strategies does not mean disregarding the activation of frequently consumed brands and products. Instead, merchant teams can benefit from adopting data-driven

1

MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



en approaches similar to those used by retail media teams, focusing not only on past purchase history but also on current consumer behavior insights.

For example, in fast-moving consumer goods (FMCG) sectors, where stock availability and competition are critical, the integration of media placements with product placements can reassure large brands. They may hesitate to invest in retail media if it risks displacing their products or doesn't offer additional, often premium, placement. By designing retail solutions that combine media exposure with strategic product placement, retailers can effectively balance both immediate sales and long-term brand engagement, easing concerns about space competition and enhancing overall store strategy.

Visual Consistency vs. Marketing Creativity: The balance between maintaining visual consistency and embracing innovative retail media campaigns is a delicate one. Merchants typically strive for a cohesive store aesthetic, while retail media teams look to introduce bold, attention-grabbing displays that might stand out. This situation is further complicated when brands distribute their own printed advertising materials like stoppers and banners, which can conflict with retail media's strategic efforts.

A clear understanding of the purpose and placement of digital deployments can enhance this strategy. Identifying why a digital screen or speaker should be added—considering the value it brings to the customer experience and determining which department benefits most—helps clarify its role in the store. The placement should also be strategic: considering the consumer's in-store journey, the screen or speaker's location should be where it best captures consumer attention without disrupting shopping flow. Details such as screen orientation, viewability, and audio direction are crucial to maximizing effectiveness and maintaining the store's visual harmony. These considerations are essential for creating effective creative and audience strategies, and could be explored further in chapter three of a more comprehensive discussion or report.

1

MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



Retail media teams should guide brands away from self-managed print advertising by highlighting the advantages of participating in coordinated retail media solutions. By showcasing the potential benefits and ROI of integrated campaigns, retail media teams can encourage brands to align their marketing efforts with the overall store design, helping to ensure a unified and appealing shopping experience

By addressing these tensions and working towards improved collaboration, merchants and retail media teams can more effectively leverage in-store marketing to enhance customer experiences and drive sales, creating a win-win situation for both teams and the overall retail organization.

- **Establishing Common Goals:** Improving collaboration starts with aligning both teams around common business goals that balance short-term revenue targets with long-term brand objectives. Regular meetings to discuss strategies, share insights, and review performance metrics can help ensure that both teams are working towards the same objectives.
- **Cross-functional Teams:** Creating cross-functional teams that include members from both the merchant and retail media teams can foster a culture of collaboration and mutual understanding. These teams can work on joint projects, allowing for shared ownership of both the challenges and successes of in-store marketing initiatives.
- **Data Sharing and Analytics:** Leveraging data analytics can also bridge the gap between merchants and retail media teams. Sharing data on customer behavior, sales performance, and campaign results

can provide a common ground for decision-making. For instance, data showing how specific marketing campaigns have directly influenced product sales can help validate retail media strategies to merchants.

- To enhance this process, it's vital to establish clear responsibilities for the dynamics of frequent data sharing within the retailer. This could involve determining whether the CRM, Data, or Data Analytics team should take the lead, fostering a data-driven culture that supports continuous improvement and collaboration.
- Generating analyses that reveal the significant influence of retail media on sales conversions is crucial. Such insights can persuade commercial teams of retail media's value beyond just boosting immediate sales—it can also be a strategic tool for reducing reliance on price promotions. By showing that consumers might purchase items without discounts if effectively influenced by retail media, these analyses highlight how smart use of retail media tools can lead to significant savings on price promotions, aligning marketing efforts with broader financial efficiency and enhancing overall retail strategy.
- Data sharing from merchants to retail media teams can improve retail media performance and promotion effectiveness. For example, if a merchant is running a strong promotion, that brand can layer in retail media to drive promo awareness and increase brand sales more than the retail media or promotion could on its own. Conversely, a merchant might be running a strong promotion for a brand's competitor, which creates an uphill battle for an uninformed retail media campaign.

1 MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



- **Pilot Programs and Testing:** Implementing pilot programs and A/B testing for new marketing initiatives can help mitigate concerns by proving effectiveness before a full rollout. This approach allows for experimentation with marketing placements and strategies on a smaller scale, providing tangible results that can inform broader strategies and alleviate merchant concerns.
- **Communication and Feedback Loops:** Establishing open lines of communication and regular feedback loops between merchants and retail media teams is crucial. Encouraging constructive feedback and being open to adjustments based on each other's expertise can lead to more effective in-store marketing strategies that satisfy both sales and engagement objectives.



In-store ad campaigns and creative approvals require input from the merchant or store operations marketing departments. Brands must coordinate with the retail media network and appropriate service provider prior to campaign activation. Typically review of campaign details and creative approval by the merchant marketer will take between 3 and 7 business days in advance. Establish which KPIs they will pursue throughout this dynamic of constant exchanges and feedback to help determine an analysis based on measurements that make sense for the business.

1 MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



MEDIA INFLUENCE AND COMMERCIAL PLANNING

The role of media in shaping merchandising and in-store marketing strategies has grown exponentially with the rise of digital technologies. Digital signage, interactive displays, and audio experiences offer new ways to engage customers, providing dynamic content that can influence purchasing decisions. These technologies not only enhance the customer experience but also provide retailers with valuable data on customer preferences and behavior.

Commercial planning within retail media involves a careful balancing act between operational efficiency and the execution of marketing strategies. Budget considerations play a crucial role in this process, requiring teams to allocate resources effectively to achieve the desired impact. This includes determining the mix of digital and analogue media, selecting the right technology platforms, and investing in the development of compelling content.

The integration of digital technologies into retail environments has revolutionized the way



retailers approach merchandising and trade. By leveraging these technologies, retailers can create immersive shopping experiences that resonate with today's tech-savvy consumers, driving sales and building brand loyalty. However, this digital transformation also demands a strategic approach to budgeting and commercial planning, as well as a deep understanding of consumer behavior and expectations.

1

MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



1.3 COMPLEXITY AND CHALLENGES

As the in-store options from retail media networks (RMNs) continue to evolve and expand, brands are confronted with both burgeoning opportunities and significant challenges. This intricate landscape necessitates a strategic approach to funding, resource allocation, and the measurement of marketing efforts, all while maintaining a focus on enhancing the consumer shopping experience.

Strategic Allocation and the Strain on Resources: The growth of in-store retail media options presents brands with a conundrum regarding funding and resource allocation. With budgets under pressure, brands are compelled to develop more sophisticated decision-making frameworks to navigate Joint Business Plans (JBPs) effectively. This expansion not only strains financial resources but also places additional demands on content teams, which may impact the focus and quality of Product Detail Pages (PDPs). Brands must weigh the potential dilution of digital presence against the opportunity to refine and prioritize their in-store and online strategies.

Evolving Marketing Measurement Models (MMMs): The diversification of retail media networks choices calls for a critical reevaluation of MMMs. Brands face the challenge of determining whether the broadening array of retail media options simplifies or further complicates the landscape of retail media measurement. This includes grappling with the dichotomy between digital and physical shelves: digital

offers clear metrics such as glance views and conversion rates, while advancements in in-store retail media networks promise to shed light on the once opaque metrics of the physical shelf, offering deeper insights into consumer behavior and advertising effectiveness.

Technological and Data Sharing Challenges: The advent of technologies enabling reverse attribution metrics opens a new frontier in understanding the consumer journey from ad exposure to in-store action. However, this opportunity is tempered by retailers' reluctance to share crucial data on the efficacy of in-store screens and audio in driving sales. This highlights the importance of fostering transparent partnerships between retailers and brands, aligning on shared goals to overcome data sharing hurdles.

- **Data-Driven Technology:** Advances in retail media, supported by real-time analytics, AI-powered customer segmentation, and dwell time analysis, can help retailers swiftly adjust marketing strategies and improve inventory management.
- **Build Partnerships:** Creating collaborations with suppliers, brands, and technology providers can maximize the strengths of retail media and enhance the overall shopping experience.
- **Lack of Standardization:** The limited measurement standardization problem is compounded within the in-store space where the ability to do 1:1 measurement is limited today, and may be further impacted by privacy regulation in the future.

1 MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



Moreover, accurately allocating ‘credit’ for in-store sales amidst various influences—from retail media ad exposures and trade spend activities to traditional shopper marketing activations—poses a nuanced challenge. Brands must navigate this complexity with precision, leveraging technological innovations such as QR codes for responsible data collection, and balancing interactive versus view-only screens to optimize retail media strategies effectively.

At the core of in-store retail media strategies is enhancing the consumer experience. Brands must carefully balance the content displayed, considering not only the quantity and quality of ads but also the broader scope of content that enriches the shopping journey. This includes various forms of messaging beyond traditional advertisements, such as informational displays, educational content, and interactive experiences that serve both the retailer and the shopper.

A meticulous focus on content quality, coupled with an in-depth understanding of consumer preferences, is crucial. Effective in-store retail media efforts should enrich rather than impede the shopping experience, curating an atmosphere that adds value to the consumer journey. This requires a strategic perspective on all types of shopper-enhancing content, ensuring that each piece contributes positively to the overall environment and fosters engagement with the brand.

Developing a comprehensive programming strategy that incorporates these elements will help maximize the impact of retail media and promote a positive perception of the brand among consumers.

As brands navigate the expanding and complex terrain of in-store retail media, a multifaceted strategy encompassing thoughtful resource allocation, adaptive measurement models, technological innovation, and a consumer-centric approach to advertising will be critical in seizing opportunities and overcoming challenges in the modern retail landscape.

Top Organizational Inhibitors Standing in the Way of US Physical Store Retailers Taking Advantage of Store Modernization, July 2022

% of respondents



Note: percentages based on top 3 responses selected
Source: Retail Systems Research (RSR), "What Can Retailers Do In Stores That Amazon Still Can't?" Aug 2022

1

MERCHANDISING, SHOPPER MARKETING, AND THE INTEGRATION OF DIGITAL TECHNOLOGIES



1.4 SUSTAINABILITY

As environmental concerns become increasingly important to consumers, integrating sustainability into retail media strategies is crucial.

Traditionally in-store advertising has been static physical advertising displays made up of materials like cardboard or plastic. Advancements in digital signage technology present the opportunity to replace these executions with digital screens in-store. Neither is a perfectly sustainable approach, but each has unique benefits.

Digital signage has large upfront installation costs, but from a sustainability perspective installations can last for multiple years. These screens require an ongoing power supply which has a consistent but low carbon impact. Screen hardware decisions can also be made to reduce energy use. For example, LED displays are more efficient than LCD technology in screens, brightness adjustments, and automated power off settings conserve energy.

Static signage has lower upfront installation costs, and no direct power usage, but requires replacement and re-installation for new messaging campaigns. Materials for each campaign can potentially be sustainably sourced, and recycled.

The largest carbon cost of static signage is production and removal, which generates more physical waste than the digital alternative. Digital signage, conversely, offers the advantage of engaging shoppers with visuals that can be refreshed or even targeted with minimal carbon cost. A 2023 KPMG study in France estimated that the energy consumption of DOOH was 0.32 gCO₂e, compared with 0.55-0.66 gCO₂e for digital internet media, based on a calculation per audience impression.

This can involve using energy-efficient digital displays, eco-friendly materials for physical advertising, and minimizing waste through precise targeting and digital over physical advertising methods.

2. CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



Adopting a consumer-centric approach in retail media necessitates a deep understanding of shopper behaviors, preferences, and the pathways they take through both physical and digital retail environments. By leveraging differentiated advertising strategies and channels, and prioritizing content contextualization and creative strategy, retailers and brands can create meaningful connections with consumers, ultimately driving engagement, purchase, and loyalty. This approach requires continuous adaptation and innovation as consumer behaviors evolve and new technologies emerge, ensuring that retail media strategies remain effective and relevant in an ever-changing retail landscape.

Modern consumers expect not just transactions but experiences that are engaging, personalized, and seamless across all touchpoints.

Consumer pathing, or the study of how consumers navigate both physical and digital retail spaces, is another critical aspect of developing a shopper-centric strategy. Retailers can use this information to optimize store layouts, placing high-demand products or promoted



items along common routes to increase visibility and encourage purchases. In digital spaces, understanding pathing helps create intuitive navigation that can enhance user experiences and increase sales.

Start by mapping out the typical customer journey within the store. Identify key decision points, high-traffic areas, and common routes taken by shoppers, as well as popular dwell areas. It's also important to gather insights related to common store areas vs. specific granular pathing because they have different layouts. Use this map to pinpoint areas where customers might need extra information, guidance, or inspiration. These are opportunities to add value through targeted media placements. For example, the baking aisle might be a location to share trusted tips for success.

Analyzing the retailer audience shopper behavior in-store and potential engagement points in their shopping process will dictate what type of hardware platform, content/media, and advertiser categories will be effective. Some examples of customer personas and engagement behavior include:

2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



CUSTOMER PERSONA	ENGAGEMENT BEHAVIOR	POTENTIAL ENGAGEMENT POINTS IN STORE
Discovery Seekers	Seeking new products and experiences	High-traffic areas, new product displays
Promo Seekers	Looking for promotions and deals	Entrance, promotional displays, checkout areas
Dwell Time “Distractions”	Engaging with products while spending time	Popular dwell areas, near seating or slower-paced sections
Cross Merchandising	Interested in complementary products	Adjacent aisles with related products
Education/Experiential	Looking to learn or experience something new	Sporting goods, lawn & garden, beauty sections
Discerning Shoppers	Comparing brands/products within a portfolio	Areas with multiple brand options within the same category
Co-development (Comarketing)	Trust-building through brand-retailer collaboration	Anywhere co-developed content is featured
Considering Trip Mission	Varies by purpose (e.g., impulse, stocking up)	Relevant sections based on trip purpose (e.g., near entrance for quick trips)
Impulse Buyers	Making unplanned purchases	Checkout areas, near popular and eye-catching items
“In and Out” Shoppers	Quick visits, specific purchases	Efficiently organized and clearly marked aisles
Leisure Shoppers	Enjoying the shopping experience	Leisurely paced sections, cafes within the store
Inspirational Shoppers	Looking for ideas and inspiration	Decor, books, creative aisles
Education/Learning	Seeking information and learning	Sections with informational kiosks or interactive displays
Stocking Up	Buying in bulk or for long-term needs	Bulk items area, sales on multipacks, back of the store

2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



2.1 SETTING CAMPAIGN OBJECTIVES AND AUDIENCE STRATEGY

The foundation of any successful retail media campaign lies in setting clear, measurable objectives and understanding the target audience deeply. Objectives can range from increasing brand awareness to driving in-store traffic or boosting specific product sales. These goals should be SMART: Specific, Measurable, Achievable, Relevant, and Time-bound.

SETTING CLEAR OBJECTIVES

The first step in any successful in-store retail media campaign is ensuring clarity on how to measure the success of a campaign; marrying the relevant KPI to SMART objectives. Retail media is no longer just about driving short term performance, it is now a proven way to build brands. Campaign objectives should be both long, and short term, and the KPI's should reflect that.

Short-Term objectives could look like:

- Boosting product sales, KPI of incremental sales or ROAS or ROI.
- Drive traffic to site or onsite engagement, KPI of clicks, add to cart, or onsite dwell times.

Long-term objectives could be but are not limited to:

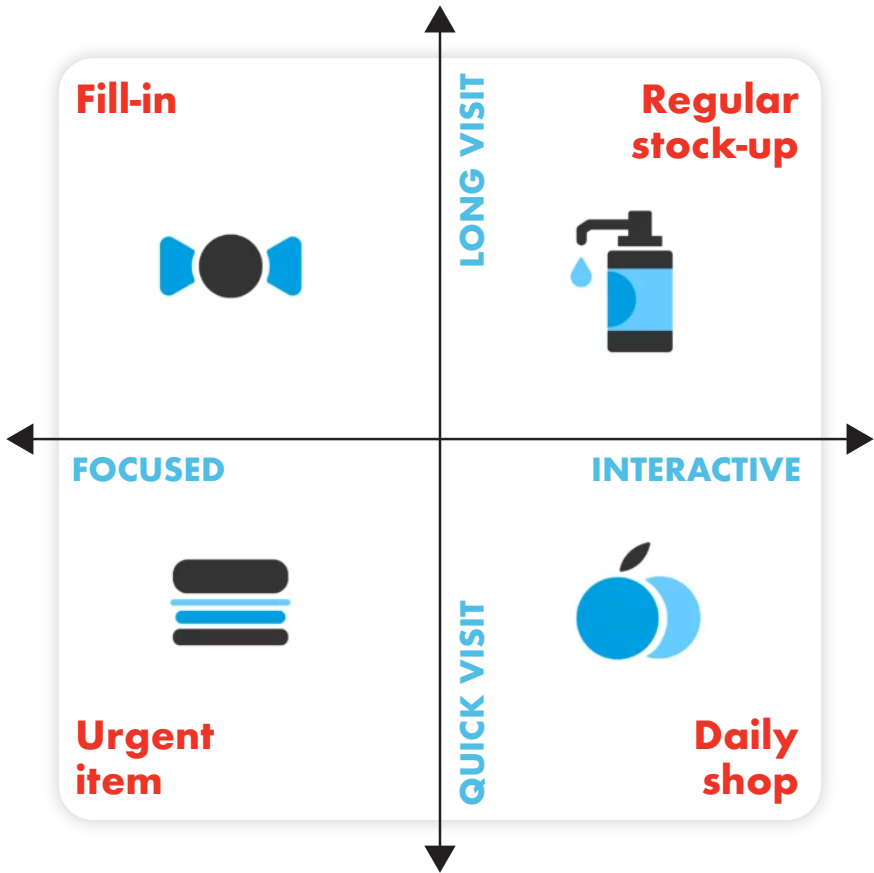
- Increasing customer lifetime value with a KPI of average customer value over time.
- Recruit new customers to your brand with a KPI of incremental customers.
- Grow the category with a KPI of increased category value or repeat purchase.

Softer objectives could include the following:

- Strengthening relationships with retailers or suppliers, negotiating better terms or placements.
- Increasing brand or service awareness by elevating the profile of a brand or product within the retail environment.
- Increasing department visitation by encouraging customers to move from the perimeter of the store to the center of the store.
- Elevating customer experience through enhanced in-store content.
- Achieving dominance in specific product categories by improving category profitability through cross-selling or introducing new products.

2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



DEVELOPING AN AUDIENCE STRATEGY

Understanding who the target audience is and how to engage them is crucial. This involves a deep dive into audience segmentation and marrying with the campaign objectives. This can include, but is not limited to:

Geographic Targeting: Tailors campaigns to local tastes, preferences, and demographic profiles, ensuring relevance at the community level.

Store-specific Strategies: Considers the unique characteristics of each store location, seasonality variations, including layout, customer demographics, and sales data, to customize messaging.

Behavioral Insights: Leverages data from loyalty programs, purchase histories, and in-store analytics to create segments based on shopping behaviors and preferences.

Contextual Targeting: Uses insights from the consumer path mapping to deliver messages and solutions that are relevant to the shopper's current context and needs, such as quick meal solutions near the entrance during rush hour.

Retailer Insight Targeting: Employs data and propensity modeling using the retailer's first-party data (1PD) to build out audience segments based on their in-store and online buying behaviors.

2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



2.2 DIFFERENT ADVERTISING FORMATS

- **Digital Displays:** Influence customer behavior with digital impressions through static, video, or dynamic content.
- **Physical Displays:** In-store programs include at-shelf signs, cart & basket liners, coupon machines, floor signs and checkout lane dividers.
- **Video:** Interactive video, shoppable videos, and CTV offers the ability to engage consumers with compelling narratives or product demonstrations. Video can also capture the consumer's eye with a smaller format/screen, which requires a smaller footprint and enhanced content flexibility.
- **Audio:** Used in stores to influence at-shelf decision-making, impulse shopping, or as part of digital out-of-home (DOOH) advertising. Go beyond just providing background music or spoken messages and develop advertising creative which aligns with the brands overall in-store digital campaign to influence purchasing behavior.
- **Receipt:** Includes both digital and printed receipt advertising. In-store printed and digital receipts can deliver savings offers & coupons for future purchases, as well as endemic and non-endemic brand advertising messages.
- **Social:** Reaching and influencing customers through social media channels such as Facebook, Instagram, TikTok, Pinterest, etc.
- **Onsite:** Reaching customers through onsite formats (sponsored search) to capture lower funnel and high intent audiences at the point of purchase.

Each of these formats has unique strengths, and the most effective advertising strategies often involve a combination of mediums, tailored to the specific context and target audience.



2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



2.3 IMPORTANCE OF CONTENT CONTEXTUALIZATION AND CREATIVE STRATEGY

Contextualization in retail media goes beyond alignment of products with external conditions; it involves a nuanced understanding of the shopper's mindset, the physical space of the store, and the temporal aspects of shopping behavior. With focus on the shopper, contextual relevance can include both endemic and non-endemic brand content.

In a realistic setting, contextualization needs to balance ambition with feasibility. Retailers have varying capabilities which may span from content management system (CMS) integrations to real-time data signals. Regardless, there are a variety of ways to be contextually relevant to the consumer at that moment.

Seasonal Themes: Aligning content with broader seasonal themes, which are predictable and require less frequent updating, can still resonate with consumers. For instance, retailers may emphasize comfort food during winter or hydration products in summer.

Simplified Behavioral Triggers: In addition to hyper-personalization, retailers can use broader shopper behavior insights, such as peak shopping times for certain demographics, to inform content scheduling on digital signage

Product Adjacency: For areas of the store dedicated to specific product types, like electronics or beauty, tailoring content that highlights product use cases, customer reviews, or tutorials can add value without needing constant updates. Additionally, by focusing on store area, there is an opportunity for cross-promotion of relevant items that might not be located in that particular section. Examples are crackers promoted in the soup aisle or cheese promoted in the wine aisle.

2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



CMS Integrations: Allow retailers to manage and plan the content on their in-store signage. Capabilities of CMS companies include scheduling content for campaigns, organizing in-store networks, and monetizing inventory on the retailer network.

Creative efforts can be constrained by budgets, time and human resources. Small to medium-sized retailers, in particular, may find it challenging to produce the level of content variety and personalization that larger chains can. Nevertheless, impactful creative strategies can still be developed by:

- **Template-Based Designs:** Using templates for in-store digital content that can be easily updated with new products, promotions, or simple messages. This strategy reduces the need for constant creative development.
- **Repurposed Content:** Content that has run across other media buys which have already been approved reduces the lift of content development.
- **User-Generated Content:** Encouraging customers to share their experiences with products through social media or direct submissions can be featured in-store. This approach adds a personal touch and builds community without the high cost of content production.

Bringing together contextualization and creative strategies in a real-world retail environment means recognizing and working within limitations:

- **Focus on Clear Messaging:** Concentrating on purposeful messaging which communicates the product's value proposition and brand ethos without the need for elaborate narrative or high-tech interactive features.
- **Technology Limitations:** Not all retail spaces will have the infrastructure for advanced digital signage or interactive kiosks. Solutions might involve simpler digital photo frames for product highlights or basic tablets for customer lookup.
- **Budget Constraints:** Budgets might not always allow for the development of extensive creative content or the implementation of sophisticated targeting technologies. Prioritizing high-impact areas or times (e.g., holiday seasons) can help manage costs.
- **Privacy Considerations:** Balancing personalized marketing with privacy concerns is crucial. Retailers must ensure that any data collection complies with privacy laws and is transparent to customers, which may limit the extent of personalization possible.

2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



2.4 RETAILTAINMENT AND EXPERIENTIAL ACTIVATIONS

Retailers' offerings of different customer experiences are becoming increasingly important for brands. Stores are transitioning into discovery spaces where customers not only view products on shelves but also explore new items, try them out, and share their experiences with others simultaneously. The customer experience occasions that retailers offer to brands in the media scope include:

Integration of Loyalty Programs: As the importance of first-party data is understood, the significance of retailers' pool of most valuable customers will also be better understood. Inviting these top-tier customers to stores to experience exclusive brand offerings, gathering their feedback, and evaluating their opinions about brands' products or services are among the opportunities presented.

Sampling: Viewing sampling events as media-focused activities and encouraging customers to share their experiences can be considered a branding activity.

Virtual Try-On Areas: Specifically created for cosmetic products, virtual try-on areas allow customers to instantly try and approve products via digital screens, ensuring that the experience is interactive and enjoyable.

Gaming Areas: E-gaming areas where young customers can participate surrounded by areas dedicated to showcasing technology and gaming products can enhance the customer experience.



2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



Special Events: When the retail space is conceptualized as a launch pad for films or books, a party area for special customers, or a space for celebrating special occasions (such as Halloween or New Year), it can emerge as a crucial branding space for brands.

Parking Lot Events: With the proliferation of next-generation electric cars, retailers' store fronts or parking lots can serve as spaces where automotive companies can introduce their cars and customers can test-drive them.

Social Media-Worthy Locations: Photogenic spots developed creatively at some specific section of the store to match the theme or occasion of the day. These are places that people are inclined to photograph and share on their social media accounts due to their aesthetic appeal, unique features, or interesting elements creating a huge branding opportunity that is placed within the location.

Product Islands: Installing creative product displays in interesting areas of the store for special occasions and themes, and providing customers with detailed product information via digital screens, enriches the customer experience.

Workshops: Integrating brands into gastronomic experiences in kitchen setups within the store, as well as organizing hobby workshops in specific areas of the store, can be highly beneficial for many brands to showcase their products.

These suggestions can help retailers design customer experience occasions more effectively, thus enhancing brand loyalty.

2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



ONSITE ADVERTISING: IN-STORE

The examples detailed above reference “out of aisle” options to introduce experiences beyond the aisle. Within the planogram, in-aisle, options are being developed to bring screens into the aisle. Audio messaging can also drive shoppers into the aisle, to purchase an item based on that virtual experience.

For example, the shopper is at point-of-sale (POS) in a planogram of coffee then align the experience with the category planogram space. The key question for retailers and brands to answer here is: how do you enhance the shopper experience while also offering a monetization opportunity?

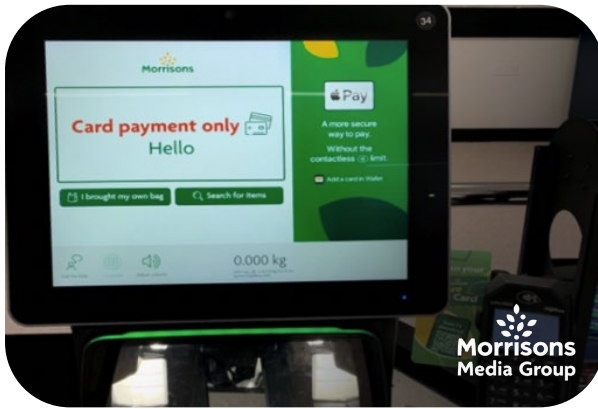
ON PREMISE

On premise marketing is a powerful strategy marketers use to influence buyers at the point of purchase. Showcased products highlight available items within the physical location, bringing personalized recommendations to shoppers. By leveraging on-premise marketing, retailers can create increased brand awareness and memorable shopping experiences contributing to brand loyalty.



2

CONSUMER-CENTRIC STRATEGIES IN RETAIL MEDIA



2.5 ENDEMIC VS NON-ENDEMIC

The strategic use of endemic and nonendemic advertising in in-store retail media requires a nuanced understanding of consumer behavior, store layout, and product synergy. Both retailers and brands must carefully weigh the benefits of aligning advertisements closely with the shopper's immediate context against the potential rewards of reaching broader audiences through unexpected channels. For non-endemic advertising to be mutually beneficial for the retailer and the advertiser the advert cannot be detrimental to the shopper experience. To avoid this there needs to be a coherent, complementary and appropriate fit

between retailer and brand. Ultimately, the goal is to create a cohesive, engaging shopping experience that drives sales and builds brand loyalty through direct relevance or strategic discovery.

Endemic Advertising: advertisements or promotional content that is directly related to the store's primary product categories or the shopper's immediate needs within that retail environment. For example, a health food brand advertising in a grocery store's organic section is considered endemic because the product is inherently related to the store's offerings and the shoppers' interests.

Non-Endemic Advertising: involves promoting products or services that are not sold in the store where they are being advertised. Non-endemic brands leverage in-store retail media as a way to establish a frequent touchpoint with their target audience in a brand-safe environment. They can leverage contextual messaging in their campaign creative to increase the impact and relevance to shoppers. An example would be a bank that offers shoppers points for grocery purchases. By advertising their points program at the point-of-purchase—when shoppers have their wallets out—the bank is providing relevant advertising to their audience.

Category Non-Endemic/Cross-Category: A product might be relevant to the overall store but nonendemic to specific categories within it. For instance, sports drinks advertised in the electronics section of a department store, a TV ad next to a Super Bowl snack display.

Store Non-Endemic: Here, the advertised products or services do not directly relate to the store's main offerings, such as a travel agency, telecom provider, or bank advertising in a grocery store. The opportunity to reach the shopper is highly desired by many non-endemic brands. Historically, this category of advertising has been directed to the pre or post-shopping experience (i.e. at check out or directly outside of the store) to capture the attention of the target audience outside of the endemic product offerings. This form of advertising can be highly profitable for the retailers and should be accepted as incremental revenue.

3. ADVANCED MEASUREMENT AND OPTIMIZATION





ADVANCED MEASUREMENT AND OPTIMIZATION



As retail media evolves, measurement and optimization remain at the forefront, ensuring that strategies not only resonate with consumers but also drive measurable results. The future of retail media will be characterized by more relevant, engaging, and environmentally responsible advertising strategies, leveraging the latest technologies to create meaningful connections with consumers. The ongoing evolution in data analytics and privacy regulations will require retailers and brands to be agile and forward-thinking, ready to adopt new methodologies for measurement and optimization. In this dynamic landscape, the ability to anticipate and adapt to changes will be key to success.

3.1 MEASUREMENT AND DATA UTILIZATION

When considering the measurement of in-store activity, it needs to be considered as both a single-focus (measuring the impact of the tactic in consideration), as well as holistically—how the in-store activity performs in relation to the full omnichannel marketing activity. The in-store activity not only needs to be considered as part of the whole, but also how it impacts and is impacted by other out-of-store and online activity.

Measuring the audience exposed to an In-Store Retail Media advertisement can be approached, through Bottom-Up or Top-Down measurement methods and technologies.

- A **Top-Down** measurement approach uses a large neutral data set, such as store traffic, as the starting point for an audience model and applies various discounting factors to determine the exposed audience. Typically, the model qualifies a part of the circulation as having

a reasonable, realistic, or likely opportunity to look at the ad. This methodology will continue to be employed when retailers reject technology solutions based on privacy or other environmental factors.

- A **Bottom-Up** measurement methodology uses always-on detection technology attached to or in the vicinity of the in-store screen to feed a real-time or near-time audience model. In such a methodology, the calculation of the exposed audience relies upon sensors which capture the presence of individuals in front of or viewing the screen when the ad is played. However, in-store rarely delivers 1:1 messaging (as experienced with online/digital media), but rather offers 1:many reach.

In retail media, the ability to measure the effectiveness of campaigns accurately is paramount. Key metrics such as foot traffic, sales uplift, consumer uplift, new consumers to brand or category, conversion rates, ad impressions and sales data offer insights into how well advertisements are driving tangible results. On the other hand, it should be comparable to a previous period (previous campaign period or activity stores vs no activity stores). However, beyond these traditional metrics, retailers and brands are increasingly looking at customer engagement levels, dwell and attention times in certain store areas, and interaction rates with digital interfaces to gauge the impact of their strategies comprehensively.

Data enablement is crucial in retail measurement, leveraging advanced analytics, machine learning, consumer analytics, and artificial intelligence to sift through large datasets for actionable insights. It's important to differentiate that the shopper data used here is distinct from



ADVANCED MEASUREMENT AND OPTIMIZATION



digital tracking methods such as in-store screen interactions, which are not directly linked to individual transactions. Instead, measurement techniques might include consumer surveys and analyzing zone impressions or screen engagement using point-of-sale (POS) data at individual stores.

Calculating attributable sales often involves methodologies like control test groups. Though not as direct as online tracking, these approaches offer valuable insights into consumer behavior within physical retail environments.

Privacy and consent management are increasingly vital as consumers become more conscious of their data rights. Retailers and brands must ensure transparency and comply with stringent regulations like the Gen-

eral Data Protection Regulation (GDPR) in Europe and the California Privacy Rights Act (CPRA). Additionally, understanding the nuances of U.S. state-specific statutes, such as Illinois' Biometric Information Privacy Act (BIPA) or privacy laws in Texas, Oregon, and Washington, is crucial for retailers operating across multiple states. These laws vary significantly and affect how consumer data is managed.

When we think about measuring in store activity, we have to consider the impact on multiple stakeholders and each stakeholder's expectation for outcomes. The marketers are interested in how the specific tactic is performing, and thus are interested in the metrics that show how best to optimize performance against a specific campaign objective, the brand is focused on driving sales outcomes for the brand/product, and the retailer is focused on driving shoppers into the store, and driving volume



ADVANCED MEASUREMENT AND OPTIMIZATION



of products purchased. Thus, the metrics we analyze and consider in evaluating performance have to be thought about from each of these points of view, as well as to the overall experience of the shopper with the tactic - which will impact everyone.

Impression: Unlike online where an impression is a count of advertisement plays, in programmatic DOOH an 'impression' is the count of how many people are exposed to an advertisement play.

Audience Segmentation: Leverages data analytics to refine targeting strategies, ensuring that media placements resonate with the intended demographic segments.

In-Store Traffic and Conversion: Drawing parallels to online metrics, in-store traffic and conversion rates emerge as fundamental KPIs, gauging potential customer presence and the efficacy of advertisements in converting engagements into sales. Utilizing sensors and Wi-Fi analytics, retailers can capture nuanced data on foot traffic patterns and dwell times, offering a granular view of consumer behavior within the retail space. Retailers are encouraged to work with third-party companies to validate and audit results. Some of these companies use SDK, radio frequency, time of flight sensor/LIDAR, or facial detection. However, it is up to the retailer to decide which third-party company is right for their measurement needs.

Unique Visitors and Dwell Time: The detection of unique mobile devices affords a comprehensive understanding of unique store visitors, akin to unique website visitors, enriching the dataset with insights

on repeat visits and engagement depth. Such metrics underscore the importance of tailoring the in-store experience to foster both initial discovery and repeat interactions.

Engagement KPIs: Leveraging anonymous sensor-based analytics, retailers can delve deeper into consumer interactions, assessing metrics like attention time, passers-by to onlooker conversion ratio, product pick-up, etc. This level of engagement analysis transcends traditional impression counts, enabling a deeper understanding of how consumers interact with in-store media.

Sales Measurement: The integration of sales data with in-store media exposure offers a direct line of sight into the impact of advertising on purchase behavior. This connection facilitates a clearer attribution model, linking specific media exposures to sales outcomes and providing a robust framework for ROI and contribution analysis. Even in the absence of a granular view of consumer behavior in the retail space, the POS scan data can still offer valuable and reliable insights about the effectiveness of an in-store campaign and the benefit of back to the brand and retailer. Additionally, establishing a sales measurement framework for determining ROIs consistent with that used to measure the success of other tactics will allow for the unbiased comparison of tactic performance.

Many retailers today still lack a deterministic way to attribute whether an in-store sale is attributed to a customer. Sales measurement is usually limited to the context of measuring sales lift (i.e. sales uptake) using A/B testing and its variations.



ADVANCED MEASUREMENT AND OPTIMIZATION



3.2 DEFINING IN-STORE RETAIL MEDIA METRICS

METRIC/KPI	WHAT IS IT?	IN-STORE RETAIL MEDIA CONTEXT
In-Store Traffic	The number of measurable customers inside the store, located at various points (total store, entrance, near screens, shelves, aisles, check-out).	Traffic measurement is performed using various types of sensors such as cameras or passive WiFi detection, providing insights into customer flow and behavior.
In-Store Conversion	Measurement of direct incremental sales by various methodologies (methodology confirmed by 3rd party and/or aligned to industry best practices). Not limited to incremental, conversion can also include “gain new consumers” and “consumers uplift”.	Conversion in a retail setting is directly linked to sales, providing a clear measure of campaign effectiveness.
Unique Visitors	A count of unique people in the store.	Allows measurement of unique and returning visitors, akin to unique traffic in digital advertising. Also provides data on average in-store dwell time.
Dwell Time	The time spent within view of the advertising display, indicating the opportunity to engage. Retailers should provide aggregate or average time as well as a distance matrix of viewability by zones for transparency.	In-store, Dwell Time is acquired at the screen or shelf level, showing how long a potential watcher had a chance to be exposed to an ad.



ADVANCED MEASUREMENT AND OPTIMIZATION



METRIC/KPI	WHAT IS IT?	IN-STORE RETAIL MEDIA CONTEXT
<p>Visual Engagement KPIs</p>	<p>Metrics such as Attention Time, Glances, Distance, Mood, measured using Anonymous Video Analytics sensors, and product pickup sensors. Retailers should be able to choose their audience measurement methodology, however, they need to share this with brands.</p>	<p>These metrics offer in-depth analysis of customer engagement with ads or products. For example, Attention Time indicates how long a customer actually watched an ad.</p>
<p>Ad Impression</p>	<p>The potential exposure by an individual of a particular advertising content play. Viewing should be understood as the opportunity to look at the screen when an ad was confirmed as played for someone who was in front of that screen, not as the confirmation that this person did watch the screen. Audioibility is considered exposure in Zone All of Store and confirmed as played.</p>	<p>This metric helps advertisers assess the effectiveness of their campaigns within retail environments to achieve multiple exposures/contacts during a single play and leads to measurement comparability between online and in-store.</p> <p>Screen uptime validation should be a criteria before confirming the “ad impression”, however, the retailer should choose the methodology.</p> <p>There are many reasons why a physical screen might not be working—zero brightness, wrong source selected, screen broken, power disconnected, etc.</p>



ADVANCED MEASUREMENT AND OPTIMIZATION



METRIC/KPI	WHAT IS IT?	IN-STORE RETAIL MEDIA CONTEXT
Audience Segmentation	Detailed demographics, budget share , basket habits, (age, gender), enriched with socio-economic aspects, interests, and preferences.	Enables precise targeting in in-store environments, using sensor-based analytics and/or consented mobile location data.
Sales Measurement	Measures the impact of advertising on product interest and purchase behavior.	Sales data, coupled with store-level proof-of-play reporting and other data sets such as Impressions, Dwell Time, and/or Engagement KPIs like Attention Time or product pickups, helps evaluate the impact of campaigns on customer behavior, and ultimately sales. Easier to analyze in in-store settings due to the shorter path to purchase.
Brand Lift	Measures changes in customer perceptions about a brand/product following a marketing campaign. This includes metrics like brand awareness, consideration, favorability, and purchase intent.	Measured through direct customer feedback, sales data, and engagement metrics within the store. Retailers can utilize surveys, digital interactions, and purchase patterns to assess the impact of in-store advertising on brand perception.



ADVANCED MEASUREMENT AND OPTIMIZATION



3.3 TESTING FRAMEWORK AND PERFORMANCE ANALYSIS

Developing a robust testing framework is essential for understanding the efficacy of different advertising strategies and channels. A/B testing, split tests, and before-and-after analyses allow retailers to compare campaign variants directly, identifying the most effective approaches. This iterative process of testing, learning, and optimizing is crucial for refining retail media strategies over time.

A/B TESTING

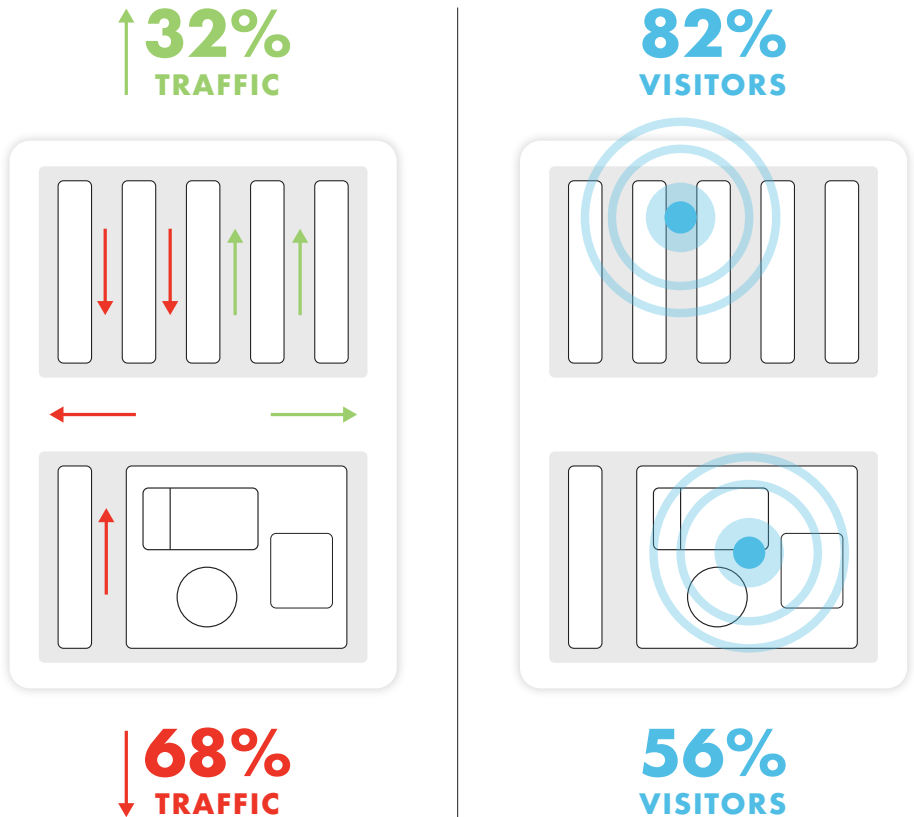
A/B testing, also known as split testing, involves comparing two versions of a media element to see which one performs better on a specific metric, such as sales uplift, customer engagement, or dwell time.

Application in In-Store Retail Media:

Digital Signage Content: Testing effectiveness outcomes between two different ad creatives on identical screens in similar store locations to determine which one generates more attention, higher brand favorability, or leads to higher product sales.

Endcap Displays or In-Line Advertising: Comparing the performance of different product arrangements or promotional messaging on endcap displays or in shelf planograms to assess which configuration attracts more customers or results in more purchases.

Successful A/B tests ideally have no additional variable factors, so it is important to work with your retail partners' data team to understand any baseline performance differences in the environment which may impact the outcome of any A/B test.





ADVANCED MEASUREMENT AND OPTIMIZATION



MULTIVARIATE TESTING

Multivariate testing allows retailers to test multiple variables simultaneously to see which combination produces the best outcome. This approach is more complex than A/B testing but can offer more nuanced insights.

Application in In-Store Retail Media:

Interactive Kiosks: Testing combinations of variables such as screen layout, call-to-action button placement, and content type to determine the most effective configuration for customer engagement and conversion.

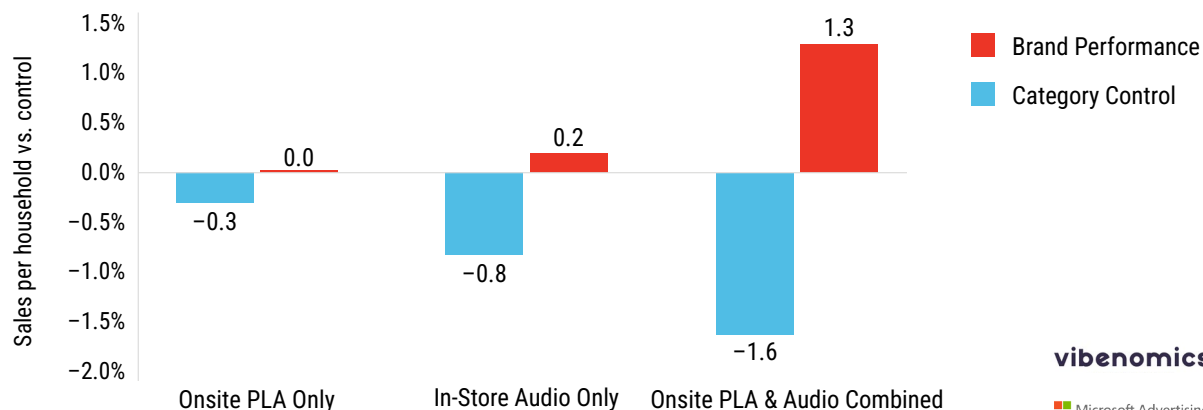
Shelf Placement and Lighting: Experimenting with product shelf placement in conjunction with different lighting conditions to identify the optimal setup for maximizing product visibility and appeal.

Cross-Channel and Incremental Lift: employing multivariate testing can also test combinations of media across segments and geographies, such as in-store campaigns combined with onsite (product listing ads or display) and offsite (audience or geo-target-

ed with strong POS identification). Employing shopper identification tactics like loyalty program matching can measure lift and incremental sales when running media in combination vs stand-alone campaigns.

Creative Testing: With real-time creative controls available with In-store formats, a variety of multivariate creative tests can also be run and optimized during the duration of a single campaign, such as: creative content/style, frequency, length of creative (for audio or video), and focus or call-to-action.

MEDIA	GEO 1	GEO 2	GEO 3	GEO 4
On-Site	Control	Test	Control	Test
In-Store Audio	Control	Control	Test	Test



vibonomics

Microsoft Advertising



ADVANCED MEASUREMENT AND OPTIMIZATION



BEFORE-AND-AFTER ANALYSIS

This method compares key metrics pre-campaign, during-campaign, and post-campaign after implementing a new advertising strategy or media campaign, providing a clear picture of a campaign's performance. It is critical to understand the time periods being assessed in a Before-and-After comparison with a defined look back period and post campaign period. The timeframes used are specific to the product type, channel, located, store, distribution and context in which it is sold. Few example scenarios:

- Media campaigns promoting highly seasonal products (i.e. Holiday or Summer related products) might be best assessed by looking at the impact of media on YoY sales, while products with little seasonal variance may benefit from a more recent and longer lookback period of several weeks prior to media running.
- Products in distribution a full 52 weeks prior to the campaign period could also rely on a YoY analysis.
- Newly distributed products could be compared to a look-a-like product, or isolate a group of stores as a control group to receive an indication of the campaign impact
- Measuring the effectiveness of campaigns can be assessed by reviewing a variety of metrics including Sales Volume as measured in Dollars or Units, share of Category or Brand sales, or New Customers. The metrics offered may vary from retailer to retailer, so consult your partners to understand what metrics are assessed prior to your campaign. The relative increase of these metrics before the campaign period should be compared to the time period of live media, and should account for any shifts seen in uncontrolled variables or control groups if applicable.
- Product and season relationship, target audience selection, campaign channel should be analyzed. Accordingly, campaign ROI and contribution can be calculated and optimized by comparing YoY changes.

When possible products in regular distribution, should include post campaign analysis including in-store purchase frequency, onsite search and attributable sales.

Beyond the impact on the advertised product, analysis could include the impact of the total category, share and source of share to have an understanding if there was any cannibalization, new shoppers, trade up or down, increase purchase, etc.). Merchants focus not just on sales of the advertised products but also the total category to understand the overall effectiveness of the campaign.



ADVANCED MEASUREMENT AND OPTIMIZATION



Application in In-Store Retail Media:

Seasonal Campaigns: Measure foot traffic, dwell time, sales and consumer data before and after launching a seasonal promotional campaign to evaluate its effectiveness in boosting customer interest and sales.

Technology Implementations: Assess changes in customer behavior and sales patterns before and after the introduction of new technologies, such as augmented reality displays or personalized recommendation engines.





ADVANCED MEASUREMENT AND OPTIMIZATION



AD AWARE TEST AND CONTROL GROUP TESTING

Control group testing involves comparing the behavior of customers exposed to an advertising campaign against a group that has not been exposed to it, helping isolate the effect of the campaign from other variables. Control testing can also be achieved by assessing the impact of media at a store level by holding some store locations from media as a baseline for performance and sales lift. In this method, it is important to closely match the test and control groups and understand any baseline performance differences in the Control set which may skew results, such as regularly having lower than average sales.

Application in In-Store Retail Media:

Loyalty Program Promotions: Analyze purchase behavior and basket size of loyalty program members who received targeted in-store promotions versus those who did not to gauge the promotion's effectiveness.

Geographical Comparisons: Compare sales and traffic data from stores in different regions or demographics, where one set of stores features the new advertising campaign and another set does not, to understand the campaign's impact across diverse customer bases.

Artificial Control / Holdout: Compare sales from stores with media/displays vs sales from stores without media/displays. Hold outs and their comparable match stores should either be identified prior to the campaign as having similar sales patterns, or should have those differing sales patterns factored into the resulting performance analysis.

Randomized Test and Control Groups: Consider these based on category trends, demographic profiles, etc. in order to create two homogeneous cells. Environmental factors also need to be considered (i.e. surge in covid nationally created a 25% spike in cold/flu brand ahead of the official season start, resulting in advertised brand sales in a pre-period).



ADVANCED MEASUREMENT AND OPTIMIZATION



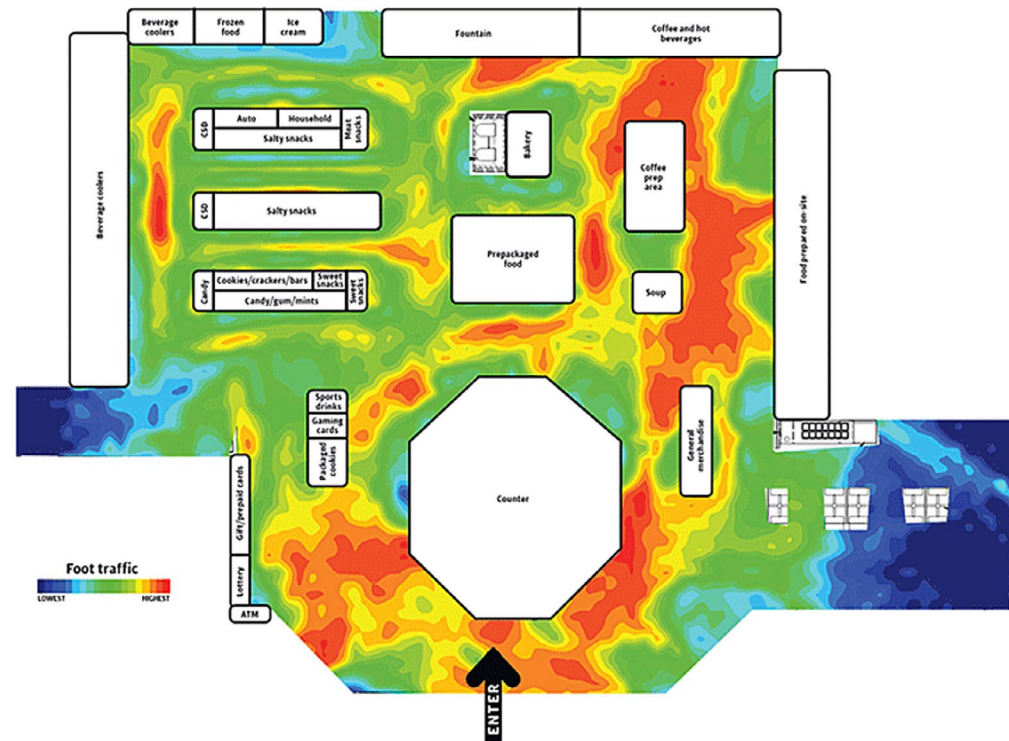
REAL-TIME DATA ANALYSIS

Leveraging real-time data collection and analysis to make immediate adjustments to campaigns based on current performance indicators. This agile approach allows for rapid iteration and optimization. However, given the one to many nature of in-store displays, careful thought must be given to how to best optimize to ensure a proper content experience. For example, which demographic in front of a screen is the content optimized for? The application of real time dynamic content optimization (DCO) is fairly limited to broad category and demographic levels.

Application in In-Store Retail Media:

Dynamic Content Adjustment: Anonymous video analytics can analyze demographics in real time to trigger content against targeted demographics and optimize against.

Heat Maps and Customer Flow: Analyze real-time heat maps of customer movement within the store to adjust advertising screens and product displays dynamically, optimizing for current shopping patterns.

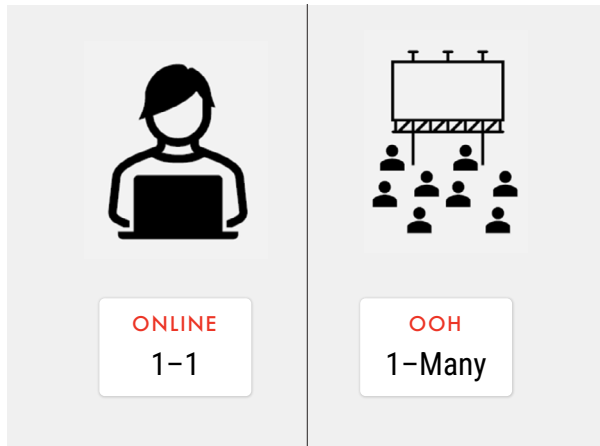


Inventory trends: Leverage real-time changes in inventory data to optimize spend away from stores where inventory is low or zero and into stores with the highest opportunity to move units.

Internet connectivity is imperative to ensuring effective in-store media campaigns. From either video, audio, or both, technology needs bandwidth and an consistent IP connectivity for effective playback and in-flight/post-campaign reporting. Challenges with WiFi connectivity should be addressed and considered.



ADVANCED MEASUREMENT AND OPTIMIZATION



3.4 UNDERSTANDING THE IMPRESSION MULTIPLIER

The Impression Multiplier is a variable factor applied to Ad Play counts of any One-to-Many media formats to more accurately reflect the number of shoppers who are exposed to the ad during the time of the Ad Play.

Each Screen or Media Device should be assigned a unique Impression Multiplier based on a number of factors including Venue and Zone foot traffic, field of view, and exposure time, and may additionally vary based on the time of day. There are multiple organizations which assist in the validation of Impression

Multipliers so it is important to understand the individual methodology used by your retail partner, as well as if their inventory has been assessed by a third party.

Three scenarios:

- **Audio:** Use location-based and in-store sensors to estimate the number of shoppers within a venue in a specific time frame.
- **Display:** Use heat-mapping and in-store sensors to estimate the number of shoppers within view of a screen.
- **Display Zone:** Use screen specific sensors to specify the number of viewers within the viewable range of a screen.

The actual impression count, in the context of in-store retail media, is the count of total shoppers exposed to digital creative and is calculated by Ad Plays multiplied by the media channel / devices' Impression Multiplier. This can be either throughout the venue (for example with In Store Audio) or each time a shopper passes in front of or engages with a digital display .

Similar to online ads, not all who pass by will notice or engage with the advertisement. Factors such as the angle of view, distance from the display, customer speed, and even the shopper's focus can significantly impact the likelihood of the ad being seen and absorbed. Ad Impressions represent an opportunity to see and may not necessarily reflect true viewed impressions.

Why It's Needed: In the dynamic environment of a retail store, not every shopper has an equal chance of experiencing and engaging with an advertisement. The Impression Multiplier adjusts for these variances, providing a more realistic estimate of actual impression delivery. This adjustment is crucial for optimizing ad placements, scheduling, and content, to ensure that advertising efforts are targeted and efficient.



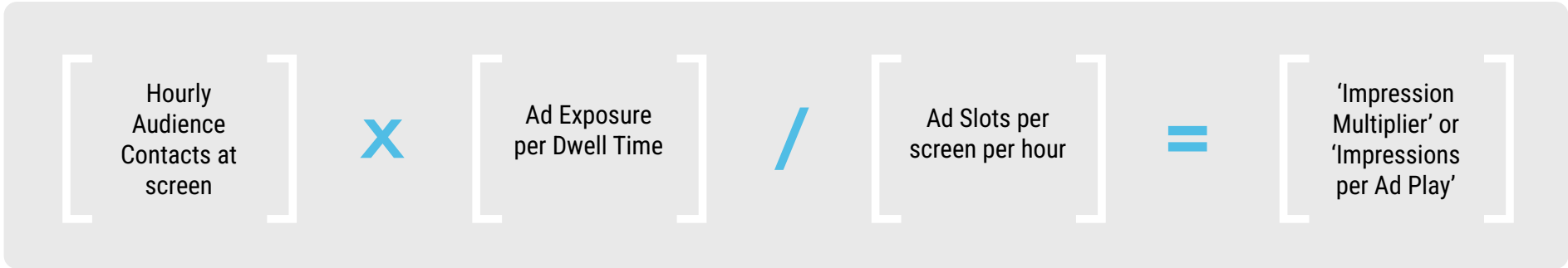
ADVANCED MEASUREMENT AND OPTIMIZATION



How It's Calculated: Ideally the Impression Multiplier takes into account foot-traffic, observational studies, shopper behavior analytics, and engagement metrics gathered through technologies such as location-based device analysis, visual sensors or anonymous video analytics. Factors considered in its calculation may include foot traffic

analysis for the department the ad is located in, the proportion of visitors looking in the direction of the ad, the average dwell time near the ad, engagement rates with interactive content, as well as the distance to the screen and its placement.

Impression Multiplier formula example



Example calculation

2,242 CONTACTS

Seen at Screen A between 7-7:59am on an average Monday



3.88 ADS VIEWED

Based on a Dwell Time of 24 seconds at Screen A on Monday 7-7:59am. Ad slot length of 8 seconds.



450 AD SLOTS

Seconds in the hour (3600) / Ad play duration (8 seconds)



19.33

Average Impressions per ad play at Screen A between 7-7:59am on a Monday



ADVANCED MEASUREMENT AND OPTIMIZATION



MEASURING EFFECTIVENESS

With the application of an Impression Multiplier, retailers and brands can achieve a more nuanced understanding of their in-store advertising performance. This enhanced measurement capability allows for:

- **Better ROI Analysis:** By providing a more accurate count of meaningful impressions, businesses can calculate the return on ad spend (ROAS) with greater precision.
- **Strategic Content Placement:** Insights from adjusted impression counts help in identifying high-impact areas within the store, enabling more strategic placement of advertising content.
- **Improved Customer Engagement:** Understanding which ads capture attention and engage shoppers supports the refinement of creative strategies, leading to higher quality interactions.
- **Frequency Optimization:** Combining the Impressions with an understanding of unique shopper Reach can help inform the optimal frequency of messaging to generate a conversion action

Ad Exposure Calculation

A person can enter the viewing corridor at any time during the ad play, from the first second an ad plays right up until the last second the ad plays. The ‘real world’ model takes into all possible ad play combinations a person could see from the moment they enter the viewing corridor.

Using the MREC standard of 1 second for an ad to be deemed viewable, the value of ‘1’ is used as the ‘minimum in-view time’ in the ad exposure calculation.

Example: When the Ad slot duration is 8 sec, and the screen dwell time is 24 sec.

AD-PLAY COMBINATION	AD 1 (SEC)	AD 2 (SEC)	AD 3 (SEC)	AD 4 (SEC)	DWELL TIME (SEC)	NO. OF AD EXPOSURES
#1	1	8	8	7	24	4
#2	2	8	8	6	24	4
#3	3	8	8	5	24	4
#4	4	8	8	4	24	4
#5	5	8	8	3	24	4
#6	6	8	8	2	24	4
#7	7	8	8	1	24	4
#8	8	8	8	0	24	3

Probabilistic Calculation

$$\left[\begin{array}{l} \text{Ad Slot Duration +} \\ \text{Screen Dwell Time} \\ - \text{Minimum} \\ \text{In-view Time} \end{array} \right] / \left[\begin{array}{l} \text{Ad Slot} \\ \text{Duration} \end{array} \right] = \left[\begin{array}{l} \text{Ad Exposure per} \\ \text{Screen Dwell Time} \end{array} \right]$$

Calculation Applied in Example

$$\left[\begin{array}{l} 8 + 24 - 1 \end{array} \right] / \left[\begin{array}{l} 8 \end{array} \right] = \left[\begin{array}{l} 3.88 \end{array} \right]$$



ADVANCED MEASUREMENT AND OPTIMIZATION



LIMITATIONS OF THE IMPRESSION MULTIPLIER

While the Impression Multiplier is a valuable tool for enhancing the accuracy of in-store advertising metrics, it's important to acknowledge its limitations, potential drawbacks, and lack of current standardized methodology. Understanding these aspects is crucial for retailers and brands to make informed decisions and interpretations of their retail media data.

- **Estimation and Assumptions:** The Impression Multiplier relies on assumptions and estimations to adjust raw impression counts, when using a top-down approach, however, not with a bottom-up approach such as sensor based ones. These assumptions are based on general observations and industry standards, which might not accurately reflect the unique behaviors and interactions of consumers in every retail environment. The risk is that if these estimations are off, they could lead to inaccurate representations of ad effectiveness. This is of particular importance when the errors differ between stores or among retailers as this type of noise is harder to compensate for than a consistent systematic error.
- **Variability in Consumer Behavior:** Consumer behavior can vary significantly due to numerous factors such as time of day, day of the week, seasonality, and current events. Depending on how it is calculated, the Impression Multiplier, while adjustable, might not always account for these fluctuations, potentially leading to discrepancies between estimated and actual ad engagement. The use of real time sensors addresses this challenge, as well as changes in store layout.
- **Changes in Store Layout and Technology:** Retail environments are dynamic, with frequent changes in layout, product placement, and even the introduction of new technologies. Such changes can affect the accuracy of the Impression Multiplier, requiring regular updates and recalibrations to ensure it reflects the current store environment.
- **Complexity and Resource Intensiveness:** Implementing and maintaining an accurate Impression Multiplier requires a significant investment in terms of technology, data analytics, and manpower. For smaller retailers or brands with limited resources, the complexity of continuously updating and calibrating the multiplier may pose a substantial challenge.
- **Overreliance on Technology:** There's a risk of becoming overly reliant on technology-driven metrics like the Impression Multiplier, potentially overlooking the qualitative aspects of consumer engagement that are harder to quantify. Human elements such as emotional connection and brand loyalty are critical to the overall effectiveness of in-store advertising but might not be fully captured by quantitative metrics.
- **Privacy Concerns:** While the Impression Multiplier itself does not directly involve the collection of personal data, the technologies used to gather the underlying data (such as visual sensors and Wi-Fi tracking) must navigate privacy laws and consumer expectations. Mismanagement in this area can lead to privacy concerns and erode consumer trust.



ADVANCED MEASUREMENT AND OPTIMIZATION



- **Lack of Standardization:** Current impression multiplier frameworks are varied, based on network sourced and statistically unvalidated inputs and the provider assumptions. They can vary widely between sources.

For all of the reasons mentioned above it is important to ask how impression multipliers are calculated, or if the assigned impression multipliers have been audited by any 3rd party when purchasing any 1:many medium and to assume an appropriate amount of “fuzz” in the resulting metrics. Consequently, measured results or effects that are smaller than the margin of error within the impression multiplier should be treated as suspect as they are just as likely to be statistical ghosts as actual effects of a campaign.

3.5 DATA PRIVACY AND CONSUMER OPT IN

Consumer data privacy is at the heart of a brand’s or retailer’s obligation to collect and use data responsibly. The key drivers are data privacy regulations and rising consumer awareness and expectations of privacy.

On the regulatory front, 15 US states have enacted data privacy laws, with more coming. (At the time of writing, a federal bill recently passed the House). The primary regulators are the Federal Trade Commission (FTC), State Attorneys General, and specific privacy bureaus, such as the California Privacy Protection Agency. Privacy regulators enforce their state’s privacy laws and unfair and deceptive practice laws (the FTC just enforces the latter). In the US, privacy laws generally give consumers the right to opt-out of data processing for targeted advertising,

along with disclosure and transparency requirements for brands collecting and processing personal data. In some jurisdictions, highly sensitive data such as biometrics or health data is subject to stricter rules and obligations.

Consumer awareness of privacy rights is generally increasing, driven by increased legislative activity, enforcement, and media attention. Being on the wrong side of a privacy breach can cause significant brand and reputational damage and erosion of customer trust.

Some general rules and obligations:

Transparency: Be clear with how sensitive and personal data is collected and processed and the purposes (such as analytics and targeted advertising) for which the data is used. Privacy communications should be clear and easy to understand

Choice and Control: Most privacy laws refer to consent and choice. That is, brands must provide consumers with either opt-in or opt-out choices on their data processing, depending on the jurisdiction or type of data and data processing.

Consumer Rights: Most privacy laws give consumers the right to access, delete, correct, and port their personal data. Businesses must ensure they have the processes in place to fulfill these requests in a timely manner.



ADVANCED MEASUREMENT AND OPTIMIZATION



- A note on deletion requests: In some cases, anonymization may not be enough. The true test is whether the anonymized data can be used to re-identify an individual.

The application layer and key capabilities include:

Data Discovery and Classification:

Brands should understand what data they collect and store and make it easily findable across their data ecosystem. Since privacy laws center around “sensitive and personal data” and may have different obligations for various data types, the correct labeling of data matters. (This is also important for AI applications that rely on data and metadata classification.)

Consent and Preference Management:

Consent can take many forms based on the data processing type and jurisdiction. The most common are opt-in and opt-out modules. Both opt-in and opt-out come with notice and disclosure obligations. Consent is not just something that happens at the moment of data collection; it should also include a preference center where consumers can return and change consent options.

Permissioning and Orchestration: Permission is a broader form of consent, essentially, “what companies can do with this data.” Permission can come from a consumer through an opt-in or option to opt-out. Permitted uses usually extend to specific “purposes,” such as measurement, target advertising, or personalization. Orchestration is the ability to send the permission signal to your downstream data systems and partners.

PRIVACY APPLICATIONS

Data Discovery & Classification	Consent & Preference Management	Permissioning / Orchestration	Data Subject Rights Automation	Audits & Reporting
---------------------------------	---------------------------------	-------------------------------	--------------------------------	--------------------

CORE ENABLING TECHNOLOGIES

Identity Management				
Data System Registry & Scanning				
Permit Vault				
Transponder	Experience Server	Orchestration		
PI & Sensitive Data Discovery	Redaction, Masking Differential Privacy	Privacy Content Management System	Workflow Automation Engine	



IAB / IAB TECH LAB SPECS

Privacy Taxonomy (TBC)	Global Privacy Platform TCF String	Data Deletic Spec Accountability Platform
------------------------	------------------------------------	---



ADVANCED MEASUREMENT AND OPTIMIZATION



Data Subject Rights Automation: “Data Subjects” is a fancy, legal-ese word for “people.” Data Subject Rights refers to an individual’s rights to access and delete data or have it modified or corrected. Fulfilling these rights can be costly for businesses, and an automated process can improve the customer experience for these requests, reduce the operational cost for businesses, and reduce the time taken to fulfill them.

Audits and Reporting: Most data privacy laws include provisions for risk assessments (have the potential harms or risks associated with a data processing activity been evaluated?), audits, and reporting that include whether consent has been appropriately recognized and enforced. The permit vault is the key enabling technology for audits, enabling instant lookback and total recall of permitted uses.

An important enabling technology to note is identity management. It’s essential because consumers want their choices reflected across their devices. For example, they consent on one device (their phone) and have it reflected on another device (their browser) in their privacy interactions with brands. When sending privacy signals downstream, identity management also helps downstream vendors identify to whom the consent signal applies. For example, when sending consent signals to Adobe for person A, Adobe needs the Adobe ID associated with that person.

There are also several IAB and IAB tech lab specs that help:

1. [Privacy Taxonomy Project](#)
2. [Global Privacy Platform](#)
3. [GDPR Transparency Consent Framework](#)
4. [Data Deletion Request Framework](#)
5. [Accountability Platform](#)

Privacy and consent management are increasingly vital as consumers become more conscious of their data rights. Retailers and brands must ensure transparency and comply with stringent regulations like the GDPR in Europe and the CPRA in California. Additionally, understanding the nuances of U.S. state-specific statutes, such as Illinois’ BIPA or privacy laws in Texas, Oregon, and Washington, is crucial for retailers operating across multiple states. These laws vary significantly and affect how consumer data is managed.

In the United States, privacy and biometric data laws have evolved to address the collection and use of biometric information. States like California, Illinois, and Texas are leading this legislative movement. For example, California’s CPRA includes biometric data as “sensitive personal information,” requiring businesses to adhere to strict handling procedures, such as obtaining explicit consent before collection and minimizing data retention (Goodwin) (WireWheel).



ADVANCED MEASUREMENT AND OPTIMIZATION



Illinois' BIPA sets a high standard by requiring informed consent before collecting biometric information, detailing the purpose and terms of data use, and specifying data destruction policies. It also allows individuals to sue for mishandling of their biometric data (BCLP Global Law Firm) (The National Law Review).

Texas and Washington have also enacted biometric laws, each with distinct enforcement mechanisms. Texas requires prior consent for capturing biometric identifiers and imposes significant civil penalties for violations, but lacks a private right of action. Conversely, Washington requires consent and notice before using biometric data for commercial purposes, with enforcement delegated to the state attorney general rather than through private lawsuits (The National Law Review).

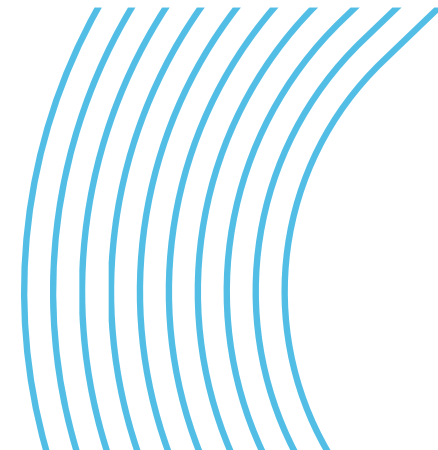
This diverse landscape of state regulations underscores the importance for businesses to meticulously monitor and comply with biometric privacy requirements in each jurisdiction they operate, ensuring not only legal compliance but also fostering consumer trust.

COLLECTING DATA IN-STORE

There are a variety of technologies that can be leveraged to effectively activate digital in-store media. Each of these vary in precision and cost. Additionally, each technology carries with it some level of consumer privacy concern. While not exhaustive, the list below outlines a few of the commonly employed technologies and considerations on how the tech might be used.

There are a host of either active or proposed legislations that retailers and brands must consider when using in-store technologies to track and measure shoppers. Some, like the Illinois Biometric Information Privacy Act (BIPA) include onerous penalties and include an individual cause of action. While providing a state by state analysis of what technologies should be employed is outside the scope of this document, the following are a few best practices for retailers and brands.

1. Collect the least amount of customer data necessary for your analysis.
2. Anonymize all collected data.
3. Focus on localizing content or personalizing content based on engagement, not collected data.
4. Provide clear disclosures to customers outlining the data collected and how it is stored.
5. Where possible, provide customers with the opportunity to opt out.





ADVANCED MEASUREMENT AND OPTIMIZATION



3.6 MEASUREMENT CONSIDERATIONS

Accuracy and Reliability: Whether measuring the impact of digital in-store media or signage, interactive kiosks, audio ads, or traditional printed displays, ensuring the accuracy and reliability of data collected is paramount. This includes calibrating of sensors and validating data collection methodologies to ensure that impressions, dwell times, and engagement metrics truly reflect consumer behavior.

Privacy Compliance: As technologies like visual sensors, Wi-Fi tracking, and mobile beacons become more prevalent in measuring consumer interactions with in-store media, adhering to privacy regulations and ethical standards or implementing identity-blind, solutions which do not collect personal information are essential. This consideration must uniformly apply to all formats, ensuring that consumer data is collected and used in a manner that respects privacy and secures consent where necessary.

Providing Access to In-Store Purchase Data Is a Key Untapped Opportunity for Retail Media Networks

Criteria	Opportunity gap	Importance	Score
Access to in-store/ omnichannel purchase data	1.18	3.86	2.69
Reporting metrics and KPIs	1.13	4.31	3.18
Return on ad spend (ROAS)	1.09	4.34	3.25
First-party consumer insights data	1.04	4.25	3.21
Audience targeting capabilities	1.00	4.32	3.32
Closed-loop sales attribution	0.98	3.99	3.01
Traffic quality	0.95	4.43	3.48
Advertising relevance	0.71	4.15	3.43
Platform ease of use	0.59	3.66	3.08
Advertising load	0.53	3.46	2.93
Off-site targeting capability	0.45	3.28	2.83
Traffic scale	0.40	3.98	3.58
Variety of available ad formats	0.30	3.49	3.19

Note: respondents were asked to rate 13 different attributes on a 5-point scale according to their importance in deciding which retail media networks to use for advertising, with 5="extremely important"
 Source: Insider Intelligence | eMarketer, "US CPG Retail Media Network Survey 2023," May 2023



ADVANCED MEASUREMENT AND OPTIMIZATION



Integration with Sales Data: Connecting engagement metrics with actual sales data provides a comprehensive view of the effectiveness of in-store retail media campaigns. Regardless of the format—be it a QR code on a shelf talker or an interactive digital display—integrating these insights with point-of-sale data allows for a deeper analysis of how media exposure influences purchasing decisions.

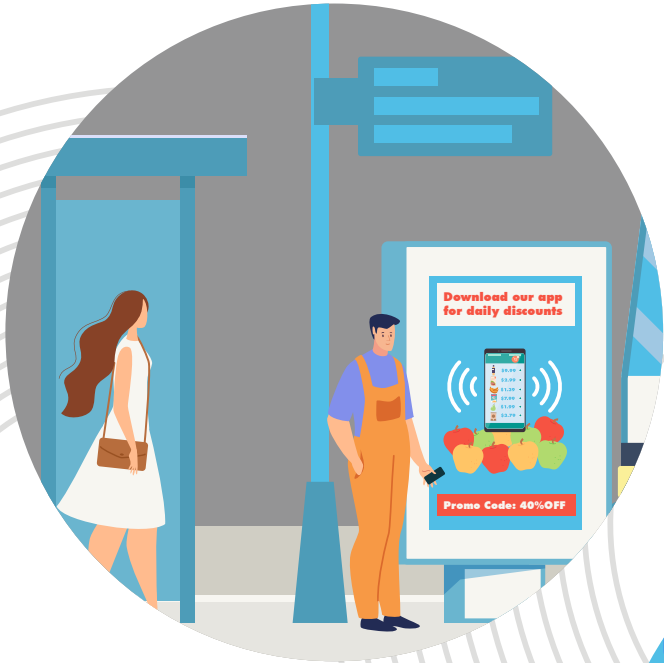
Audience Segmentation and Targeting: Understanding and segmenting the in-store audience based on demographic, behavioral, and psychographic data enhances the relevance and impact of retail media. This approach should be consistent across all media formats, enabling personalized and targeted messaging that resonates with specific shopper segments, thereby improving the overall effectiveness of the media strategy.

Engagement and Interaction Metrics: Beyond simple impression counts, measuring the quality of engagement and interaction with in-store media offers valuable insights into consumer interest and campaign performance. Metrics such as dwell time, interaction rates with touchscreens, QR code scans, and responses to audio messages should be considered across all formats. These metrics help in understanding not just how many, but how deeply consumers are engaging with the content, providing a basis for optimization and creative refinement.

Incorporate Merchant Activity: Merchants have significant power over products and unit volume for in-store sales (after all, they're typically the folks ordering units from brands). The levers mentioned in section 1.1 can increase or decrease brand sales to the point where the best retail media campaign will show poor performance if a merchant de-prioritizes a brand in-store. On the other side of the coin - a valid question often asked by brands when a retail media network reports high ROAS is "what role did promos play in unit volume?". Without informing retail media with merchant activity, brands run the risk of fighting an uphill battle or erroneously claiming sales attribution. To combat this, brands should strategize retail media around merchant activity to maximize the performance of their holistic retail marketing investments.

By maintaining consistency in these five measurement considerations across all in-store retail media formats, retailers and brands can ensure a holistic and nuanced understanding of campaign performance. This strategic approach enables the optimization of media placements, content, and messaging, leading to more effective in-store marketing strategies that drive engagement, sales, and customer loyalty.

4. VENUES, ZONES AND TECHNOLOGY OVERVIEW



4 VENUES, ZONES AND TECHNOLOGY OVERVIEW



4.1 IN-STORE VENUES AND ZONES

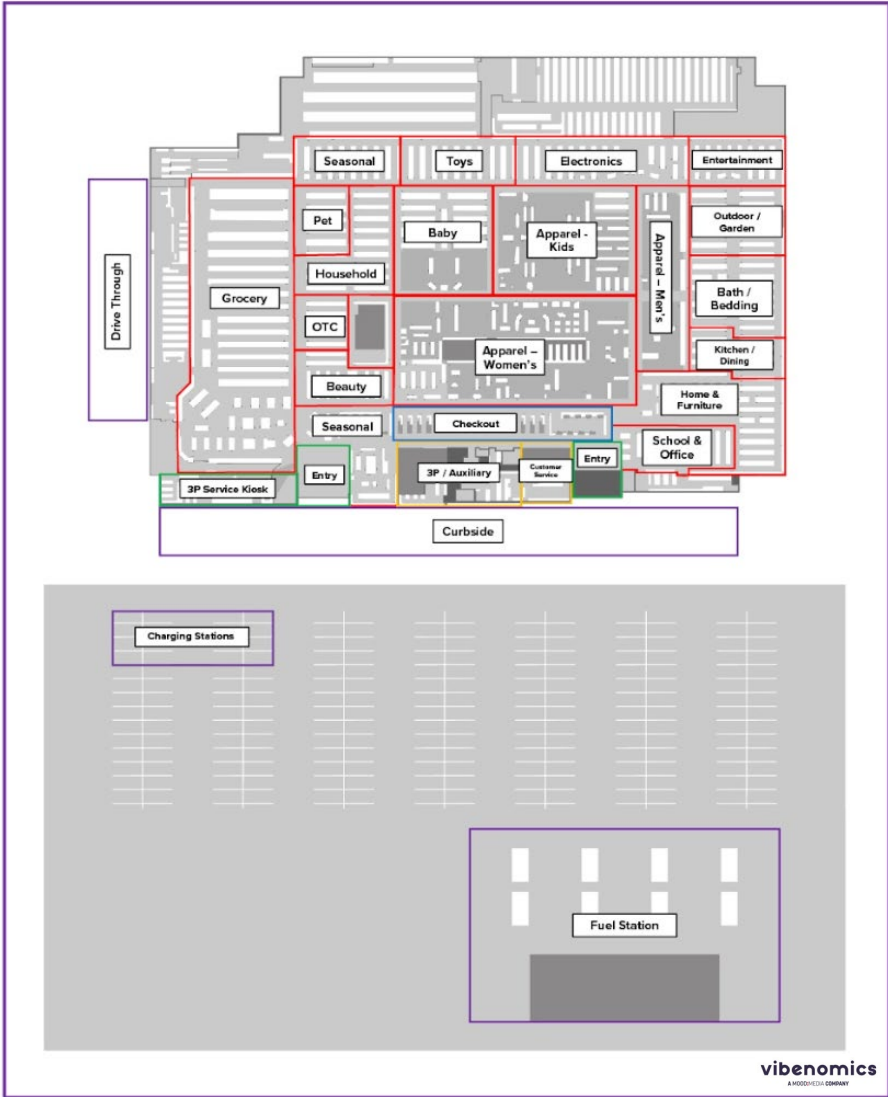
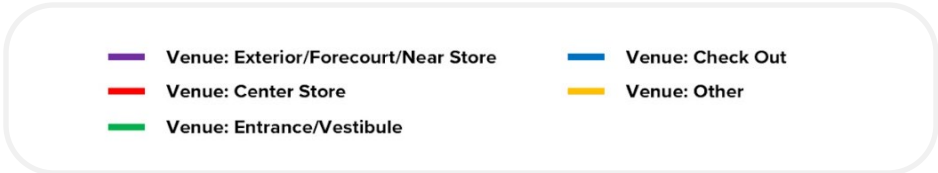
Media offerings and their placements will vary from retailer to retailer. To ensure consistency between offerings and to better allow for more direct purchase strategy and performance comparisons, each retailer should have their media classified in a structure of Venues, Zones, and Devices/Positions to help buyers better understand their physical placements.

VENUES

Venues is the broadest position definition and grouping. This provides a description of where, on the total retail property, the media resides.

Venue Taxonomy

- Exterior/Forecourt/Near Store
- Entrance/Vestibule
- Center Store
- Check Out
- Other



4 VENUES, ZONES AND TECHNOLOGY OVERVIEW



ZONES

Each Venue is divided into Zones to further refine the physical location of media as well as differentiate the contextual exposure to in-store shoppers. Zones must be overlaid to allow for Exposure and Dwell Time to be applied through location-based foot traffic, screen specific sensors, or other verifiable positioning technology. Traffic that passes through the Zone will be calculated as the audience for that Zone for the purposes of targeting, reach, or ad impressions at the time of campaign delivery. Measurement providers must provide both the audience of each individual zone and in aggregate for the venue and retail location.

The taxonomy for zones will include a broader naming convention to allow for the distinct departments that exist within different retailers and venues, while providing consistency for shared zones where applicable. An example of this would be the Center Store Venue. The zones within a Center Store venue may vary between retailers of differing functions like Target, Home Depot, and Walgreens, but should be consistent between comparable retailers like Walgreens and CVS.

Example:

	TARGET	HOME DEPOT	WALGREENS
CENTER STORE	Grocery	Lumber	Allergy
	Apparel	Garden	Cough/Cold
	Electronics	Tools	Pain Relief
	Toys	Flooring	Personal Care
	Home & Garden	Paint	Beauty
	Health & Beauty	Lighting	Nutrition

A full list of Zones, which are sorted by Venue and retailer grouping can be found in the appendix.

Beyond the Zone, a final classification should be given to all media to further refine where the media is relative to the products and store layout similar to the following:

- End Cap
- Center Aisle
- Hanging Display

SHARE OF ZONES

Share of Zone may be the desired focus of a brand when considering how a specific Zone will be targeted. Category specific inventory availability within a Zone will be provided at the discretion of the retailer.

4

VENUES, ZONES AND TECHNOLOGY OVERVIEW



END-CAP / SHELF ACTIVATION



Retail Engagement Solution with visual sensors to optimize the shopper engagement funnel at the point of interest

IN-STORE COMMUNICATION



Content Intelligence platform with demographics-based contextualization, real-time triggering, and A/B tests to influence shoppers at the point of purchase



DIGITAL OUT-OF-HOME



Outdoor Audience Measurement Platform with vehicle and body detections, connected live to programmatic exchanges to monetize outdoor audiences

RETAIL MEDIA



Indoor Audience Measurement Platform with face and body detections, connected live to programmatic exchanges to monetize store traffic

4.2 TECHNOLOGY OVERVIEW

This section provides an overview of the various technological solutions currently available for enhancing retail operations and advertising strategies. It is important to clarify that while the Interactive Advertising Bureau (IAB) presents these technologies, it does not endorse or mandate their use. The decision to implement any of these technologies rests solely with the retail owner. Each retailer may choose to adopt these technologies based on their specific needs and strategic goals, or decide not to use them at all. This flexibility allows retailers to tailor their approach to technology in a way that best suits their operational dynamics and customer engagement objectives.



4 VENUES, ZONES AND TECHNOLOGY OVERVIEW



ANONYMOUS VIDEO SENSORS

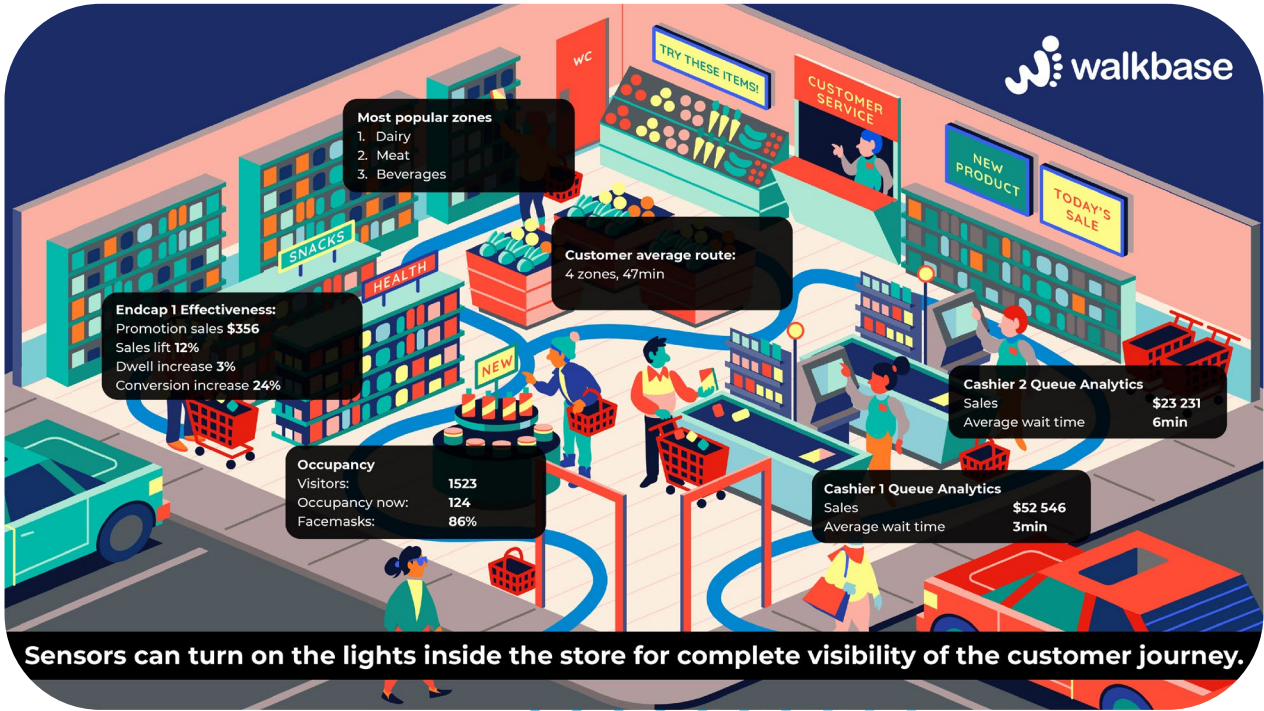
Uses image recognition technology to gather data on customer flow, engagement, visitor per section, time spent, product interactions, ad impressions, and conversions. This data is crucial for optimizing product placement and identifying high-traffic areas for premium advertising. However, the accuracy of these sensor-based systems can vary with changes in lighting or store layout, requiring regular recalibration.



Example: A technology company can employ visual sensors at checkout with wide-angle cameras that activate advertisements when detecting a customer's presence. These sensors are calibrated to trigger ads only when a customer is exposed to the digital display maximizing ad exposures and overall creative effectiveness. Additionally, the system also monitors the duration and frequency of customer engagement with the content.

- Anonymous video sensors can be used to detect the presence of a store guest near a digital screen. Once identified, these sensors can trigger content changes. For example, the non-triggered content might include an attention grabbing motion graphic to entice shoppers to approach the screen while the triggered content might include very specific information regarding the product's features.
- These sensors can also detect audience presence by time of day or day of week and the varying dwell times for these shopping patterns. This data can be utilized to enable different content strategies to complement the variety of shopping patterns.
- These sensors can also detect when a shopper engages with the shelf and even detect the product that a shopper has picked up. This can be used to select additional content variations to make the experience more personal.

4 VENUES, ZONES AND TECHNOLOGY OVERVIEW



MEASUREMENT CONSIDERATIONS

Accuracy and Privacy: Ensure visual sensors are precise in tracking anonymized customer attributes, interactions and movements, while maintaining privacy through techniques like face-blurring.

Sales Insights: Analyze the correlation between customer behavior, such as traffic patterns and dwell times, with sales data, employing A/B testing to evaluate layout changes.

Viewer Feedback: Use AI-powered visual sensors to assess and feedback on the effectiveness of advertising content for brands and retailers.

4 VENUES, ZONES AND TECHNOLOGY OVERVIEW



SHOPPING CART AND BASKET SENSORS

Technology fixed to physical retail assets can monitor shopper movements and proximity to in-store media, providing insights into shopping behavior like preferred paths, zones, and time spent in the store or in proximity to media displays. These sensors can also integrate with in-store devices like screens, enhancing the overall shopping experience.

Example: A retailer equipped carts and baskets with sensors, integrating them with in-store screens and checkouts. This setup tracked customer exposure to relevant commercials and linked it to their purchases, allowing for precise measurement of advertising impact. Using this technology, a Spirits brand campaign reached 33,000 impressions and saw a 186% increase in conversion rates among shoppers who viewed the ads, indicating a highly effective campaign and strong return on ad spend (ROAS).



MEASUREMENT CONSIDERATIONS:

- **Precision and Range:** Ensure sensors have the precision and range to accurately detect and track cart and basket movements throughout the store.
- **Consistency and Calibration:** Regularly maintain and calibrate sensors to ensure consistent and reliable data collection. Implement correct masking mechanisms to ensure to solely track sensors installed in carts and baskets and to avoid data noise.
- **Integration with Other Data:** Combine cart and basket tracking data with other sources (e.g., purchase data, loyalty card, hand scanners, customer feedback) for a comprehensive understanding of shopping behavior and enablement of close-loop-measurement.

4 VENUES, ZONES AND TECHNOLOGY OVERVIEW



MEASUREMENT CONSIDERATIONS

- **Geolocation Accuracy:** Verify the precision of location tracking to ensure relevant and accurate data collection.
- **Data Integration:** Integrate data from the smartphone apps with other sources for a comprehensive view.
- **Conversion and Engagement Analysis:** Track the effectiveness of personalized coupons and ads in influencing purchase behavior, store visits, and converting engagement into actual sales.

BEACONS AND BLUETOOTH IN RETAIL

Implement bluetooth beacons to allow specialized mobile apps to track customer location and movement patterns within the store.

Example: An electronics retailer operates a proprietary in-store beacon network with over 5000 beacons deployed nationally. These beacons are used to trigger relevant ads based on location within the store. They trigger messages either at the entrance or by select departments. Users receive a push message that opens into a full-screen ad experience, ensuring consumer consent through opt-ins.



4

VENUES, ZONES AND TECHNOLOGY OVERVIEW



PASSIVE WI-FI IN RETAIL

Measure the number of customers in an impression zone by counting customer smartphones near a sensor as a proxy. Unlike Bluetooth beacons, no mobile app is required on the customer's smartphone, so all customers with smartphones are counted.

Example: A department store wants to measure customer presence in each zone in the store in real time (to guide staffing levels) and historically (to compare traffic between zones and across stores). Store circulation measurements serve as an intermediary between drive-to-store advertising and PoS receipts.

MEASUREMENT CONSIDERATIONS

- **Utilize Customer Presence Data:** Employ Passive Wi-Fi to gather anonymized data on customer numbers, dwell time, and recurrence for better in-store signage and marketing strategies. These sensors can also be configured to ignore non-customer devices such as mobile point of sale equipment, printers, and associate handhelds.
- **Customize Detection Areas:** Adjust Passive Wi-Fi's detection zones, both in shape and size, to match specific store layouts for more precise customer traffic analysis. This shaping is key when these sensors are used in conjunction with digital displays for the purpose of measuring an individual's opportunity to view.
- **Integrate Sales Data for ROI Analysis:** Combine Passive Wi-Fi metrics with point-of-sale data to enhance privacy compliance and accurately evaluate sales lift, ROI, and shopper conversion rates in various store areas.
- **Cohorting of Passive Wi-Fi Sensors:** Integrate sensors across zones to understand customer pathing and category cross-merchandising opportunities.

4 VENUES, ZONES AND TECHNOLOGY OVERVIEW



INTERACTIVE KIOSKS AND DISPLAYS:

Kiosks and Display offer brands an opportunity to visually display messaging to shoppers that are inherently within distinct Zones of the store, allowing for contextually relevant messages. There is also opportunity to dis-

play messaging throughout a store which may drive shoppers to Zones they may otherwise not have browsed based on their trip mission.

These displays may be either passive or active, in that messaging can be displayed while no shopper action or engagement is occurring, or while a shopper is directly engaging with the device. Devices may collect data on customer interactions with digital kiosks and displays for product information and purchases.

Example: An electronics retailer uses interactive kiosks where customers can compare products, read reviews, and check inventory. The kiosks collect data on the most viewed items and queries, assisting in tailoring future advertising and stock decisions.

Example: A toy brand leveraged in-store digital displays to drive awareness of a new product line launch. The displays featured the brand name, product images, and price point. Post campaign, the brand was able to assess sales and brand adoption based on the presence of media within each store to determine efficacy of the campaign.

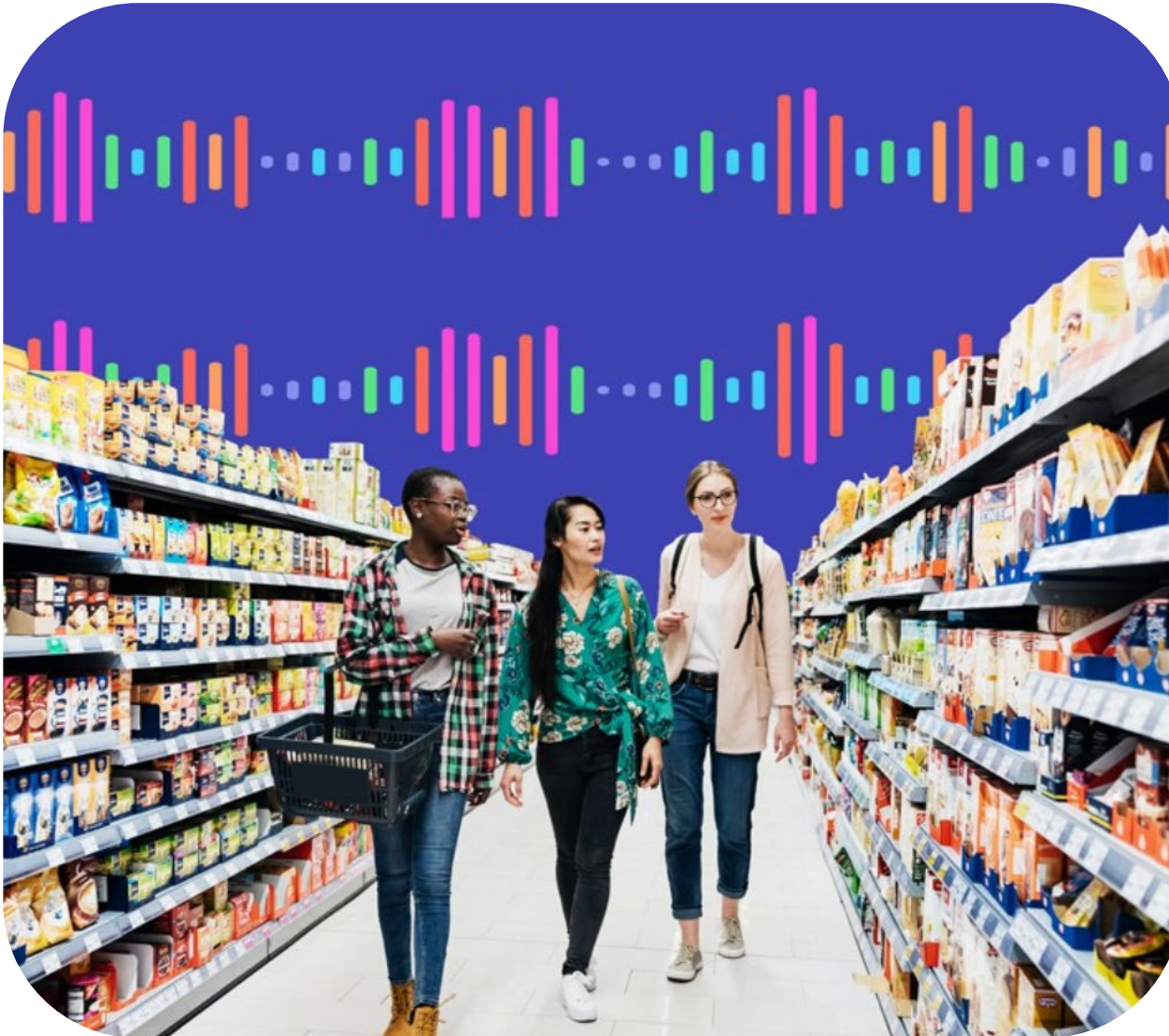
CREATIVE AND AUDIENCE STRATEGY

- Responsive Targeting/Creative can be used to trigger relevant ads based on the products or categories of products searched or scanned on the device. The ability to deliver ads based on scans or searches for competitive products may not be supported by all retailers.
- QR codes which link to dedicated landing destinations or exclusive deals can be used to generate reporting based on additional actions users take which may occur outside of the display itself.

MEASUREMENT CONSIDERATIONS

- **Interaction and Sales Impact:** Track user interactions with kiosks, including time spent and choices made, and analyze how these interactions influence purchasing decisions.
- **Content Visibility:** Ensure that the content displayed is clear, engaging, and easily accessible.
- **Customer Feedback:** Collect and measure customer feedback for continuous improvement.

4 VENUES, ZONES AND TECHNOLOGY OVERVIEW



AUDIO PROGRAMMING

In-Store audio advertising allows brands to have a “voice” speaking directly to the consumer in a brand safe environment throughout the whole store. The audio platform gives brands the ability to customize messages, reach unique audiences, and inspire brand engagement driving both lower funnel and upper funnel objectives. Audio messages can be customized to include a mix of retailer promotions, in-store public address (PAs) systems and relevant paid advertising content tailored to the demographic profile of the shopper audience.

Example: A national skin care brand focused on regimen building within its line of products. It is able to leverage in-store audio to drive intent and engagement with customers as they shop/dwell in-store. The brand can use demographic data, foot traffic data, and product distribution data to place, and optimize, media most efficiently. Post campaign the brand can garner measurement into a myriad of different metrics such as test vs control sales/unit lift, impressions and unique visitors, and customer behavior insights.

4

VENUES, ZONES AND TECHNOLOGY OVERVIEW



TARGETING CAPABILITIES (ONE TO MANY)

- **Location-Based:** Impression multipliers compiled through location-based data are used for audience sizing and profiling by demographics to allow for more targeted advertising by store and dayparting based upon traffic.
- **Product/Category Data:** This allows brands to measure sales, units, availability, and distribution.
- **Retailer Data:** Measures audiences, language preferences, and offers customer behavior insights.

MEASUREMENT CONSIDERATIONS (ONE TO MANY)

- **Campaign Delivery:** Impressions multipliers compiled through location based data are used for audience sizing.
- **Audibility Confirmation:** A mix of technology that confirms spot delivery.
- **Sales Attribution:** Programmatic compatible result files allow for store location, impressions served and time relevant analysis. POS data can be used to show in-store sales lift or omni-channel lift attributable to in-store tactics.
- **Customer Behavior Insights:** Offers demographic segment purchase behavior, customer loyalty, and shopper feedback.
- **Brand Health Metrics:** Measures awareness and brand recall or sentiment.

4 VENUES, ZONES AND TECHNOLOGY OVERVIEW



SMART SCREENS IN THE AISLE:

Media placed within the aisles or departments of stores offers one of the highest impact opportunities to affect shopper decisions.

PLACEMENT CONSIDERATIONS

Placements vary from hanging over the aisle to being embedded within the coolers, racking or other departmental infrastructure but all of them are intended to deliver a message to the shopper as close to the moment of decision as possible while minimally disrupting the flow of traffic through the department. For this reason, interactive displays are less often sited within the aisles.

Due to the specific context of the placements, media technology that can play varying content in each aisle while still facilitating whole-store messages is generally used for in-aisle placements. For large chains or those managing multiple stores it is even more important to have robust content delivery and network management tools because the contexts in each store may vary and require signals from each location's POS or store management team to trigger content.



Media placed so close to the point of decision require content that is appropriately tailored to that decision. Screens in the butcher aisle should deliver content highly relevant to butcher purchases, just like audio content in the cereal aisle should be focused on breakfast as much as possible. While non-departmental content can be included, its effectiveness may vary based on specific goals. For example, while it may be less effective in driving conversion for advertised products, it can still be impactful in driving consideration for adjacent brands among shoppers with a higher propensity for those products. Therefore, the effectiveness of content placement depends on the goal—whether it's to drive conversion, increase complementary purchases, meal solutions, or other objectives.

4 VENUES, ZONES AND TECHNOLOGY OVERVIEW



Depending on the retailer's tactic, content length may be short to promote efficient traffic flow or lengthy to encourage longer dwell times. Most advanced systems allow the specification of different content lengths depending on the placement.

Content may be triggered by any number of signals from time of day, stock levels, price changes, interaction with sensors (cameras, proximity, wifi, IR, touch, etc.) or other factors depending on the retailer/vendor tactics and the capabilities of the technology supporting the media.

EXAMPLES

Transform traditional physical surfaces, like cooler or freezer doors, into identity-blind digital smart screens that help brands influence shopper choice at the point of decision. These AI-enabled screens adjust the customer experience to the engagement level, distance, and dwell time of the shopper, based on embedded sensors in the device and a wide range of signals.

- A national ice cream brand aimed to boost trial and awareness in a leading grocery chain, leveraging freezer-mounted screens, over two months, targeting relevant buying occasions for impulse and routine purchases.
- A big box store looking to provide a flexible messaging platform for displaying important notices and brand promotions features a sophisticated digital signage network within the store. This includes strategically placed screens at the entrance, refrigerated section, payment area, and a floor projector with anonymous biometric mea-

surement system, enabling the analysis of customer flow and demographics, thus optimizing the in-store experience.

- A grocer looking to reduce spoilage integrates their POS with the content management system powering their in-aisle screens to trigger relevant content and ads. When produce managers mark down avocados it triggers a notice of the markdown in relevant departments along with a 5 second piece of content on "how to make perfect guacamole". Simultaneously, an advertising opportunity is auctioned off to the various corn-chip makers and is won by Frito-lay. Shoppers see the markdown notice for avocados, the how-to content and a "brought to you by Tostitos" ad immediately following it.

MEASUREMENT CONSIDERATIONS

- **Test vs. Control Measurement:** Use test vs. control store methodology to compare performance and isolate the campaign's impact on product sales and unit volume.
- **Category Share Analysis:** Measure share of category sales over the campaign period to prove impact over and above category norms or competitor brands.
- **Purchase Insight:** Consider which audience segments were more likely to engage with the campaign and subsequently purchase the product during the campaign period to better inform future campaigns.

4

VENUES, ZONES AND TECHNOLOGY OVERVIEW



4.3 UPTIME DETECTION

- Remote monitoring dashboards
- Verifying content & ads served
- Hardware health / status
- SLAs
- Visual Sensors to monitor
- Matrix of multiple data points to have confidence that the playlog was displayed on the screen and not just on the media player. Speaks to viewability standards in in-store media



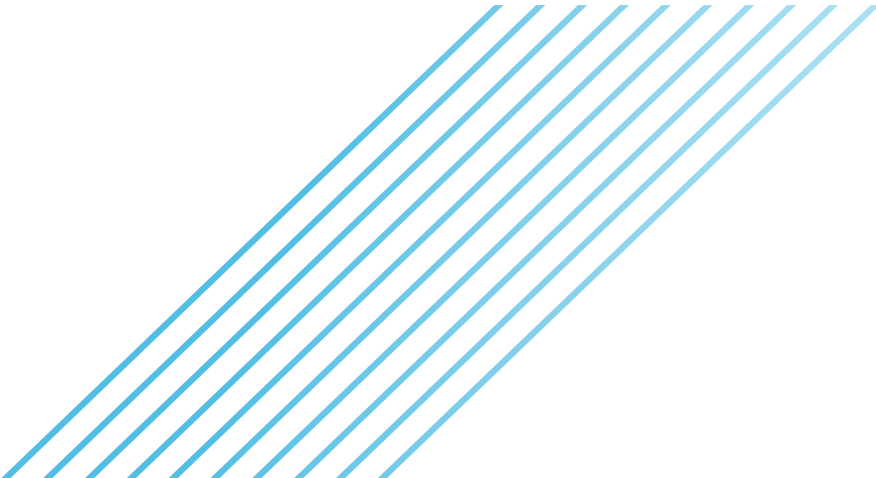


ACKNOWLEDGEMENT



**THIS DOCUMENT WAS DEVELOPED BY THE IAB
DOOH & IN-STORE RETAIL MEDIA WORKING GROUP**

This project represents months of collaboration and sharing of expert insights from a cross-section of our industry with the objective of providing a tactical playbook on how retailers and brands can plan, activate, test, and measure DOOH & In-Store opportunities within a Retailer’s physical location. IAB would like to extend a special thanks to the following companies and individuals that contributed their time & insight in support of this playbook.





ACKNOWLEDGEMENT



COMPANY PARTICIPANTS

Advertima	Evergreen Trading	MiQ	Stingray Advertising
Ahold Delhaize USA	Fairlife	MonetizeMe	STRATACACHE
Albertsons Media Collective	Frameplay	Monster Energy	super{set}
Amazon Ads	Gradient.io	Northwestern University	The Home Depot
Barrows	Google	NRS Digital Media	Mars United Commerce
Basis Technologies	GroceryTV	Orange Apron Media	The Trade Desk
Beauty Co-Lab	GSTV	Ovative Group	Threefold
Best Buy	Infillion	OXXO	T-Mobile
BigQuest	Integral Ad Science	PRN	Undertone
Broadsign	Instacart	Prohaska Consulting	Unlimitail
Carat	Kellanova	Publicis Groupe	Volta Charging
Colgate-Palmolive	Koddi	Publicis Commerce	Verve Group
Confluence Commerce	Kroger 84.51	Quividi	Vibonomics, a Mood Media company
Cooler X	Liveramp	relevanC	Vital Farms
Criteo	L'Oréal	Retail Media Works	Walgreens Advertising Group
Cuebiq	Lowe's One Roof Media Network	Rockbot	Walmart Connect
CVS Media Exchange	Marriott International	Roundel	Walmart Global Tech
Digital Trends Media Group	Meijer	Samsung Ads	Walmart Luminate
DoubleVerify	Microsoft	SAS Institute	Western Union
Epsilon	Mimeda	Scala	



CONTRIBUTORS



Abhinav Bhardwaj, Senior Solutions Engineer, *MiQ*

Abu Balandan, Director, Software Engineering, *T-Mobile*

Adam Green, Senior Vice President, Strategy, *Broadsign*

Adam Opitz, National Director, Sales, *Broadsign*

Adam Skinner, Managing Director, Unified Retail Media, *Epsilon*

Aidan Rush, Senior Manager, Product Marketing, *T-Mobile*

Alexei Moltchan, Director, Product Management, Strategy, Partnerships, *Verve Group*

Alison Rank, Director, Enterprise Accounts, *Scala*

Alix Le Boteroff, Associate Product Manager, US Local Product, *MiQ*

Alyssa Anzalone, Senior Program Manager, Measurement Standards Compliance, *Amazon Ads*

Amber Roberts, Partnership Director, North America, *Threefold*

Ameet Shah, Partner, Global Senior Vice President, Publisher Operations, Tech Strategy, *Prohaska Consulting*

Ami Lathia, Director, Product Management, Off Platform Commercialization Strategy, *Roundel*

Amy Cronin, Director, Performance Targeting & Analytics, *Mars United Commerce*

Anand Muralidharan, Chief Growth Officer, *Cooler Screens*

Andrea Burillo, Product Lead, Retailtainment, *Walmart de México y Centroamérica*

Andrew Norcom, Senior Manager, New Initiatives, *Orange Apron Media*

Andy Murray, CEO, *BigQuest*

Anna Barnes, Associate Manager, Campaign Operations, *Meijer*

Anna Kruse, VP, Best Buy Ads, Media Strategy, *Best Buy*

Ash Khan, Lean, Global Client Management, *Marriott International*

Ashley Nickell, Senior Director, Marketing, *Grocery TV*

Aubriana Lopez, Head, Data, Global Product Marketing, *Samsung Ads*

Ben Reynolds, VP, Business Development, *PRN/STRATACACHE*

Benedict Wagstaff, Senior Director, Business Development, Retail Media - NA, *The Trade Desk*

Betty Chung, Head of Growth, Retail Media, *Microsoft*

Bill Rosenberg, Partnerships, *Microsoft*

Blandine Multrier Genix, Managing Director, *relevanC*

Bobby Figueroa, Chief Operating Officer, *Gradient.io*

Brendan Rodgers, Lead Director, In-Store Monetization Strategy, *CVS Media Exchange*

Brian Elles, Director, Visual Solutions, *Rockbot*

Brian Quinn, Chief Revenue Officer, *Digital Trends Media Group*

Bryan Gildenberg, Founder, CEO, *Confluence Commerce*



CONTRIBUTORS



Bryan McGuirk, Chief Revenue Officer, *Stingray Advertising*

Cary Tilds, Strategic Advisor, *Frameplay*

Cherian Thomas, Senior Director, Retail Media Network, DOOH, *T-Mobile*

Chris Allison, General Manager, DOOH, *Samsung Ads*

Chris Riegel, Chief Executive Officer, *STRATACACHE*

Chris Ryan, Vice President, Sales, *Stingray Advertising*

Christina Klenotic, Head, Retail Media Monetization Strategy, Integrated Planning, *Lowe's One Roof Media Network*

Chuck Billups, SVP of Retail Media, *PRN/STRATACACHE*

Cynthia Viadella, Head, B2B Marketing, *Walgreens Advertising Group*

Claire Wyatt, VP, Business Strategy & Marketing Strategy, *Albertsons Media Collective*

Colin Lewis, Director, *Retail Media Works*

Cristiane Leal Sampaio, Executive, Retail Media, *Data Monetization*

Dallas Griffin, Head, Data, *Grocery TV*

Deborah Lee, Lead, Account Strategy, *Criteo*

Denis Gaumondie, Chief Marketing Officer, *Quividi*

Derek Nelson, Senior Director, Retail Media Consulting, *Ovative Group*

Dionne Resnik, Director, Product Marketing, In-Store Ad Experiences, *Walmart Connect*

Drew Thachuck, Head, Channel Partnerships, *Broadsign*

Elena Laftchiyska, Principal Director, Strategy, *Roundel*

Eli Korn, Chief Operating Officer, *NRS Digital Media*

Elizabeth Neubauer-Donovan, Head, Marriott Media Network, Global Ad Revenue, *Marriott International*

Ethan Goodman, Executive Vice President, Global Digital Commerce, *Mars United Commerce*

Eric Brackmann, Vice President, Commerce Media, *Koddi*

Eric Haddad, Vice President, Client Leadership, Customer Development, *Mars United Commerce*

Esther Hebbard, Director, National Sales, *Vibnomics, a Mood Media company*

Gamze Uçkan Balık, Head, Data, Analytics, Insights, *Mimeda*

Garret Dodge, Chief Executive Officer, *Rockbot*

Gary Samuelson, Senior, Solutions Architect, *Integral Ad Science*

Gayle deDie, SVP, Marketing, *CoolerX (formerly CoolerScreens)*

Gretchen Reisner, Director, Client Insights, Strategy, *CVS Media Exchange*

Gretchen Werley, Senior Manager, Measurement, Insights Partnerships, *T-Mobile*

Hae Kim, Director, Media Innovation, Consumer Acquisition, CPD, CDMO, *L'Oréal*

Hamitcan Balci, Head, New Business, Adtech, Ad Operations, *Mimeda*



CONTRIBUTORS



Hannah Parsons, Manager, Marketing,
Vibonomics, a Mood Media company

Hope Fleming, Assistant Vice President, Le
Retail Media, *L'Oréal*

Iman Nahvi, Co-Founder, CEO, *Advertima*

Isha Chhatwal, Principal Manager, Product,
Walmart Connect

Jaime Rocafuerte, Consultant, DACH,
Commerce, *Publicis Groupe*

Jamie Reed, Director, GTM Strategy,
Operations, *Instacart*

Jay Lundin, Director, Product Management,
Lowe's One Roof Media Network

Jessica Chappell, Senior Vice President,
Managing Director, DOOH, *Evergreen Trading*

Jessica Ellickson, Senior Director, Shopper
Marketing, *Fairlife*

Jill Cruz, EVP, Commerce Strategy, *Publicis
Commerce*

Joe McCorkle, Vice President, American Sales,
In-Store & Omnichannel, *Criteo*

John Storms, Senior Director, Head of Sales,
Business Development, *Lowe's One Roof Media
Network*

Jon Suarez-Davis, Chief Commercial Officer,
super{set}

Jonathan Rosen, SVP, Content, Strategy,
Consumer Experience, *PRN/STRATACACHE*

Jonatan Fasano, Head of Product, *Walmart de
México y Centroamérica*

Josh Bernstein, Director, Media Network
Program Enablement, *Western Union*

Juan Guillermo Restrepo, Director, Retail &
Digital Media Services, *OXXO*

Julia Miller, Group VP, Commerce Media, *Mars
United Commerce*

Julie Argonis, VP Media Strategy, *Mars United
Commerce*

Justin Cauli, Senior Account Executive, CPG,
Google

Kandi Arrington, Group Senior Vice President,
General Manager, *Mars United Commerce*

Karim Kanji, Head, Sales, Americas, *Broadsign*

Kayla (Gearin) Foxcurran, Senior Manager,
Product Marketing, *T-Mobile*

Kelly Kachnowski, VP, Growth & Engagement,
Data & Analytics, *Mars United Commerce*

Kelly Torgeson, Director, Business
Development, *Walgreens Advertising Group*

Kevin Carbone, Chief Executive Officer, *Scala*

Kim Cortes, Head, Creative, Enterprise
Americas, *Criteo*

Kina Demirel, Managing Director, *Mimeda*

Kristal Walton, SVP, CPG & Retail Industry,
GSTV

Kristy Day, Vice President, Strategy, Sales, *NRS
Digital Media*

Kyley Rouse, Manager, Commercial Product,
In-Store Media, *Kroger 84.51*

Larry DeGaris, Executive Director, Medill
Spiegel Research Center, *Northwestern
University*

Lauren Freedman Autry, Senior Director,
Integrated Marketing, eCommerce, Away from
Home, *Kellanova*



CONTRIBUTORS



Lauren Sidler, Senior Product Marketing Manager, *Advertima*

Lawrence Leung, Manager, Product, In-Store Measurement, *Walmart Connect*

Lindell Bennett, Chief Revenue Officer, *Cooler Screens*

Liz Donovan, Account Director, *Carat*

Lori Johnsoy, Head of Global Retail Media & CPG Strategy, *LiveRamp*

Luciana Barchini, Founder, *MonetizeMe*

Luca Bocchiardi, Director, Product, *Cuebig*

Lucile Roose, Director, Product Marketing, *Criteo*

Margit Kittridge, Lead, Advertising Technology, Retail Media, *Ahold Delhaize USA*

Mariam Bechaoui, Director, Business Development, *DoubleVerify*

Mario Siano, Co-Founder, Head, Market Development, *Advertima*

Mark Bausinger, Senior Director, Business Development, *DoubleVerify*

Mark Donohue, Vice President, Marketing, Media Network, *Western Union*

Mark Heitke, Director, Ad Product, Audience Strategy, *Best Buy Ads*

Mark Molyneaux, Senior, Solutions Architect, *Amazon Ads*

Marlow Nickell, Founder, CEO, *Grocery TV*

Matt Shapo, Director, Digital Audio & Video, *IAB*

Maya Ivanova, Manager, Technical Product, *Basis*

Max Aggrey, Principal, Global Business Development, Strategic Partnerships, *Google*

Meera Patel, Senior Director, Global Advanced Analytics, *Kellanova*

Megan Cahill, Associate Director, Retail Media, *Acronym Media*

Meghan Heltne, Senior Vice President, Customer Development, *Mars United Commerce*

Meghan Zidar, Head, Data, Measurement, Analytics, Technology Consumer Electronics, *Google*

Michael Halverson, Innovation, *Albertsons Media Collective*

Mike Wessel, Director, Activations, In-Store Media, *Kroger 84.51*

Mitchell Wade, SVP, Sales NA, *Quividi*

Monica Ramirez Nadela, Manager, Shopper Marketing, *Vital Farms*

Nate Pinkston, Head of Growth, Retail Media, *Microsoft*

Nathan Sodoro, Manager, Internal Audit Compliance, *Amazon Ads*

Nathan West, Director, Product Management, *Vericast*

Natريان Maxwell, Head, Product, Research, Data Partnerships, *Volta Charging*

Nicolas Pirog, Director, Measurement Strategy, *Roundel*

Nishant Kakar, VP, Product, US, *MiQ*

Nolan Johnson, Senior Vice President, Media Partnerships, *GroceryTV*

Olivier Duizabo, President, *Quividi*



CONTRIBUTORS



Parbinder Dhariwal, VP, GM, *CVS Media Exchange*

Paul Brenner, SVP, Retail Media & Partnerships, *Vibonomics, a Mood Media company*

Paul Longo, Global Head of Retail Media Sales, *Microsoft*

Paul Prior, Chief Operating Officer, *Undertone*

Paulo Gaudencio dos Anjos, Director, Data & Analytics Solutions, *Microsoft*

Paulo Schiavon, Chief Revenue Officer, Latin America, *Unlimitail*

Robert L. Brown, National Director, Strategic Partnerships Orange Apron Media, *The Home Depot*

Roy Reeves, Principal, Business Development Specialist, AdTech, *SAS Institute*

Sabrina Sirhal, Senior Director, Digital Media, *Monster Energy*

Sam Nehme, Executive Director, Retail Practice Lead, *Beauty Co-Lab*

Scott Warren, Senior Manager, In-Store Product, *CVS Media Exchange*

Sean Crawford, Managing Director- North America, *Threefold*

Serena Corrigan, Manager, In-Store Retail Media, *Ahold Delhaize USA*

Shawn McGahee, Head of Retail Media, *Google*

Stephen Kelly, Director, Market Development, *Advertima*

Steven Suthiana, Head, Global Marketing Technology, Innovation, *Western Union*

Tara Hekmat, Client Director, *Threefold*

Taylor Andersen, Senior Manager, Product, *Roundel*

Theo Schilter, Chief Product and Technology Officer, *Advertima*

Tim Bagwell, Chief Product and Data Officer, *Barrows*

Tom Pirog, Lead Manager, Product Marketing, In-Store Ad Experiences, *Walmart Connect*

Todd Hassenfelt, Senior Director, Global Digital Commerce, *Colgate-Palmolive*

Troy Kehoe, Managing Director, *Infillion*

Vince Webster, Manager, Product, *Vericast*

Vishak Nag Ashoka, Director, Engineering, Ad Experience, *Walmart Global Tech*

William Young, Walmart Data Ventures, New Business Development, Role, *Walmart Luminate*

Yesu Paulraj, Senior Director, Engineering, *Walmart*

Yoni Tamir, Solutions Architect, Measurement, Ads, Data Science, *Amazon Ads*

Yura Zelditch, Director, Product Management, *Basis Technologies*



WWW.IAB.COM

The Interactive Advertising Bureau (IAB) empowers the media and marketing industries to thrive in the digital economy. Its membership comprises more than 700 leading media companies, brands, agencies, and the technology firms responsible for selling, delivering, and optimizing digital ad marketing campaigns. The trade group fields critical research on interactive advertising, while also educating brands, agencies, and the wider business community on the importance of digital marketing. In affiliation with the IAB Tech Lab, IAB develops technical standards and solutions. IAB is committed to professional development and elevating the knowledge, skills, expertise, and diversity of the workforce across the industry. Through the work of its public policy office in Washington, D.C., the trade association advocates for its members and promotes the value of the interactive advertising industry to legislators and policymakers. Founded in 1996, IAB is headquartered in New York City.



IAB.COM/ORGANIZATIONS/MEASUREMENT-ADDRESSABILITY-DATA-CENTER

The collection and use of data to reach audiences and measure online advertising campaigns is central to powering the digital advertising ecosystem. The Measurement, Addressability & Data Center aims to provide essential industry guidance and education on solutions amid changes in underlying technology, privacy regulations in a constantly evolving ecosystem.

The Measurement, Addressability & Data (MAD) Center focuses on the following initiatives:

Measurement & Attribution | Addressability | Privacy | Retail Media | State of Data



CONTACT INFORMATION



JEFFREY BUSTOS

**Vice President Measurement,
Addressability & Data Center**

jeffrey@iab.com

IAB MEASUREMENT, ADDRESSABILITY & DATA CENTER

data@iab.com

IAB MEDIA CONTACTS

Kate Tumino
212-896-1252
ktumino@kcsa.com

Brittany Tibaldi
347-487-6794
btibaldi@kcsa.com

V APPENDIX



RETAILER ZONES

VENUE: EXTERIOR/FORECOURT/ NEAR STORE	VENUE: ENTRANCE/VESTIBULE	VENUE: CHECK OUT	VENUE: OTHER
<ul style="list-style-type: none"> • Charging Station • Curbside • Drive Through • Exterior Building Wall • Fuel Station • Lighting Posts/Fixtures 	<ul style="list-style-type: none"> • Third-Party Service Kiosk • Building Wall • Stand Alone Display 	<ul style="list-style-type: none"> • Belt/Surface • Check Aisle • Consumer Facing Transaction Screen at POS • Post-Transaction Receipt/ Confirmation • Pre-Transaction Self Check Screen 	<ul style="list-style-type: none"> • 3P/Auxiliary Service <ul style="list-style-type: none"> – This is meant to be a catch-all for anything including bank branches, coffee shops, optometrists, or any other service within a In-Store location which is typically located between the check lanes and the entrance/exit of a store • Buy Online Pickup in Store (BOPIS) • Customer Service

V APPENDIX



RETAILER DISTINCT ZONES

Venue: Center Store

DEPARTMENT	GROCERY	PHARMACY/DRUG	C-STORE	HOME IMPROVEMENT	OTHER?
Apparel	Bakery	Advanced Adult Care	Beverages	Appliances	
Baby	Baking & Cooking	Antacids, Laxatives	Dry Grocery	Bath & Faucets	
Beauty	Beverages	Baby / Pediatrics	Snacks & Candy	Blinds & Window	
Electronics	Breakfast & Coffee	Bath	Baked Goods	Building Materials	
Grocery	Condiments	Beverages / Adult Beverage	Fresh Foods	Household Essentials & Cleaning	
Health & OTC	Dairy	Candy / Snack	Health & OTC	Home & Furniture	
Home & Furniture	Deli & Meat	Cosmetics / Beauty Accessories	Auto Service	Doors & Windows	
Household Essentials & Cleaning	Frozen	Cough, Cold, Allergy	Electronics	Electrical	
Kitchen & Dining	Beauty & Personal Care	Diabetes / Health Testing	Tobacco Products	Flooring	
Other	Health & Wellness	Eye / Ear	Personal Care	Hardware & Tools	

V APPENDIX



DEPARTMENT	GROCERY	PHARMACY/DRUG	C-STORE	HOME IMPROVEMENT	OTHER?
Outdoor & Garden	Baby	First Aid	Alcohol	Heating & Cooling	
Pets	Household Essentials & Cleaning	Foot Needs	Lottery	Kitchen & Dining	
School & Office Supply	Pets	Gifting / Seasonal		Outdoor & Garden	
Seasonal	Outdoor & Garden	Greeting Cards / Gift Cards		Paint	
Sporting Goods	Toys & Sporting Goods	Grocery / Freezer		Seasonal	
Auto	Produce	Grooming		Lighting	
Bath & Bedding		Household		Plumbing	
Personal Care		Oral Care		Storage Organization	
Toys		Pain		Lumber	
Entertainment / Media		Pet Needs		Other	
Womens Apparel		Pharmacy / Health Care Services			

V APPENDIX



DEPARTMENT	GROCERY	PHARMACY/DRUG	C-STORE	HOME IMPROVEMENT	OTHER?
Mens Apparel		Photo / Electronics			
Kids Apparel		Sanitary / Fem Hygiene			
		Sexual Wellness			
		Sleep			
		Suncare / skincare			
		Tobacco / Smoking cessations			
		Toys / art			
		Vitamins			
		Weight Management			