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IN-STORE RETAIL MEDIA DEFINITIONS AND MEASUREMENT STANDARDS

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Introduction

In-store media activations are not new. Recent years have seen significant advancements in the planning, execution, and measurement of in-store media. The combination of in-store media's reach and the growth of retail media networks presents substantial opportunities for both advertisers and retailers.

In July, IAB Europe brought together 14 retail media networks from across the region and vertical in a two-day Workshop to agree on a set of definitions standards for industry feedback. This foundational work will act as the basis of subsequent work streams on in-store retail media. The Workshop also featured presentations from industry analyst, Andrew Lipsman, RMNs Ahold Delhaize and SMG. Read more [here](#). Alongside this, IAB US published [a Playbook on DOOH and In-Store Retail Media](#) in May 2024. The Playbook served as the groundwork for the IAB Europe workshop as well as diving deeper into examining store zones and measurement best practices.

IAB Europe and IAB US then closely collaborated to align standards where possible and have one version of In-Store Retail Media Definitions and Measurement Standards to reduce market complexity and simplify buying across continents.

For the purposes of this document, we will refer to IAB Europe IAB US' joint effort as IAB. This is the final version of the standards following a public comment period during September, October and November 2024, where a range of stakeholders from across Europe and the US provided feedback and insights to shape the final version.

Section 1 - IAB Standards in the Context of Other Industry Initiatives

It is worth noting that IAB Europe and IAB US/ MRC published standards for retail media measurement in online environments (on-site and off-site) earlier this year. Where possible, we have maintained similar standards for in-store digital retail media.

- [IAB Europe Retail Media Measurement Standards](#)
- [IAB US / MRC Retail Media Measurement Standards](#)

IAB recognises the fact that there has already been some progress made on the development of standards for DOOH media which can be seen in the [MRC Digital OOH Measurement Guidelines](#). Retail stores not only offer more diverse formats than Digital OOH but they also differ in that they are tied to a point of sale and as such required some refinement to Digital OOH Measurement. The MRC Guidelines have been used as the basis for the development of these standards.

Section 2 - The Focus of the Standards

The Standards cover the following areas:

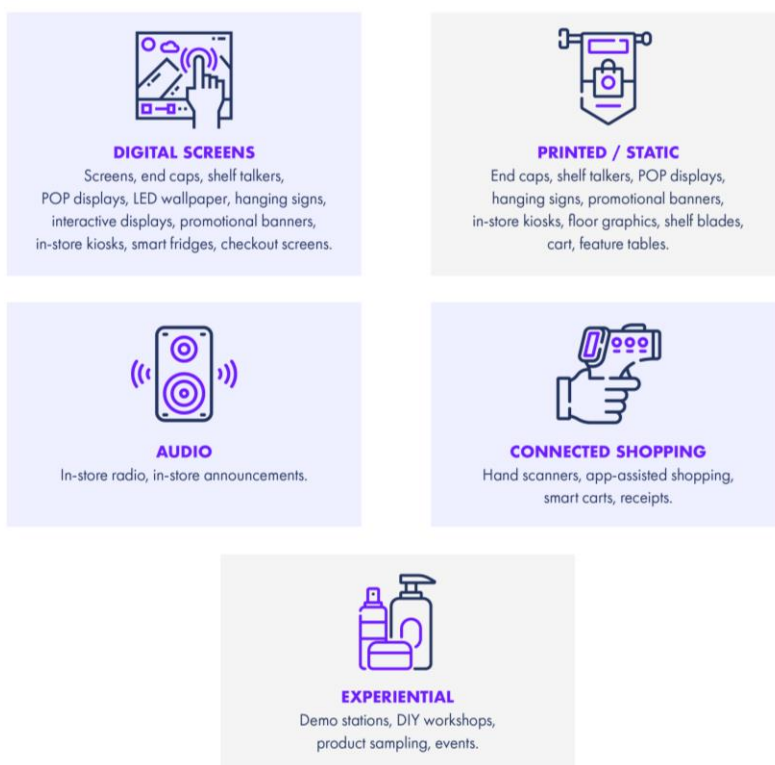
- Store Zones
- Media Metrics
 - Ad Serving Metrics
 - Ad Impression Metrics
- Sales Measurement Metrics

Section 3 - Standard In-Store Retail Media Definitions

In-Store Retail Media refers to the advertising inventory that uses retail data for planning, execution and measurement in a store which is available to brands. It can be digital (video, display or audio) or static (print, physical activations) inventory.

In-Store Retail Media Ad Formats can include any of the following:

NB: Formats in the purple boxes are the focus of these standards



The Standards covered in this document are focused on digital screens, audio and connected shopping formats. Standards for the other ad formats will be covered in future iterations. Examples of the ad formats are enclosed in appendix 1 of this document.

Section 4 - Store Zones

IAB has defined five zones that in-store retail media could be placed in. The store format will vary by category and size. This is meant to represent a larger big box store with generalisations made across the board. The retailer, can add nuances at any given time to better reflect their store.

SAMPLE IN-STORE ZONES MAP

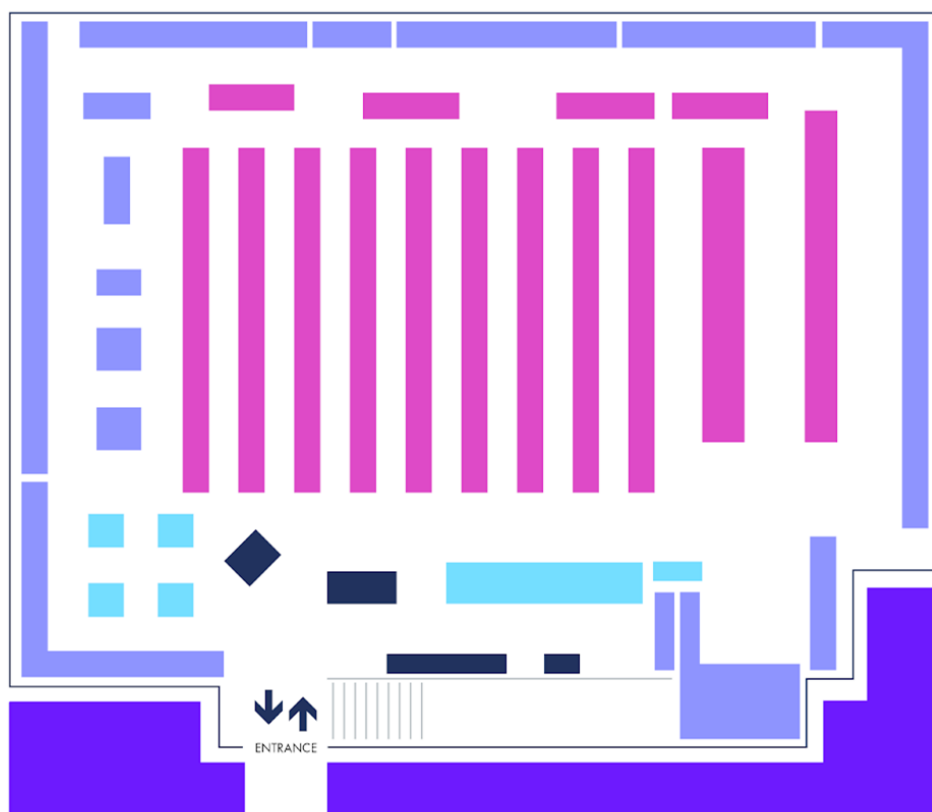
ZONE 1:
EXTERIOR TO STORE

ZONE 2:
ENTRANCE AND
OUT OF CATEGORY

ZONE 3:
CHECK OUT

ZONE 4:
IN AISLES

ZONE 5:
OTHER



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Zone 1 - Exterior to Store

- Charging Station
- ATM Machines
- Curbside
- Drive Through
- Exterior Building Wall
- Fuel Station
- Shopping Centres
- Lighting Posts/Fixtures
- Parking lot
- Window Display (that can be seen from the exterior)

Zone 2 - Entrance and Out of Category

- Security Barriers / Entrance Gate Covers
- Foyer Displays
- Service Kiosk (e.g. self-service terminal, vending machine, tobacco kiosks....)
- Building Wall
- Stand Alone Display
- Post Check-out / Store Exit
- Power Aisle

Zone 3 – Check out

- Belt/surface
- In-queue
- Shopper facing transaction screen at POS
- Self-service check-out

Zone 4 – In Aisles

This would include prime promotional areas such as Power Aisles and Gondola Ends.

Zone 5 – Other & Connected Store

- 3P/Auxiliary Service
 - *NB: This is 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 checkout lanes and the entrance/exit of a store*
- Buy Online Pickup in Store
- Customer Service
- Smart Cart

Section 5 - Media Metrics

Ad Serving Metrics

- **Ad Loop Duration:** The number of seconds required to view all of the ads in a rotation or Loop. This applies to situations in which an ad rotation or a Loop exists.
- **Ad Segment:** The portion of the Loop, or some other defined period of time, containing advertising content. The Ad Segment can contain one or more Ad Units and is also referred to as a commercial pod.
- **Ad Unit (Unit):** A piece of creative content designed to deliver a message (i.e., an ad) intended for an advertiser's existing or prospective shopper base. Ad Units are designed to conform to the media in which they will be delivered.
- **Ad Unit Length (Ad Duration or Ad Length):** The duration of the Ad Unit as applicable to video and audio.
- **Loop:** Segments of content and advertising programmed to a specific length that repeats on standard intervals. Example: A six-minute Loop that contains 11-15 second ad positions along with editorial content.

Impression Metrics

Today RMNs should report on ad play and gross impressions. The formula used to determine the following metrics should be disclosed.

In the future for digital activations opportunity to see is the best proxy available for a viewable ad impression in the In-Store environment. To report on opportunity to see retailers can apply a benchmark calculation based on zones or use technology providers of choice.

A viewable ad impression is a more accurate measure of an ad's visibility, as it takes into account whether the ad had the opportunity to be seen by the user. Viewable adjustment measures applied for digital place-based media are expected to conform to the requirement for digital video in that it represents an opportunity to see, rather than confirmation that someone has seen the ad.

Per the IAB/ MRC Retail Media Measurement Guidelines, audiences for DPB environments are in the context of exposures per time unit. The audience is the number of individuals counted as present in a specific venue zone with measured presence in the exposure zone with dwell time for a digital placed-based screen within the venue while a viewability condition exists and who viewed (as defined herein) that content. Audibility is considered to have an exposure zone of the entire venue unless noted otherwise by the retailer. Retail media measurement of in-store activity should adhere to the MRC Digital Place-Based Audience Measurement Standards where applicable.

To be counted in audience for program content both presence and view are required; viewability ensures that content is rendered in a manner that allows individuals to be exposed to, or view the content and/or ads.

To qualify for inclusion in audience estimates, the following characteristics must be present: presence at the venue and screen exposure zone, dwell time, and view. The screen must be both visible and, where applicable, audible during the audience dwell time, and the viewability condition must be met. Each of these audience components must be measured with sufficient quality and frequency, with calculation rigour and transparency.

<p>Ad Play: number of times an ad is displayed or rendered on a particular format.</p>	<p>Ad play (digital)</p>
<p>Gross Impression: the number of individuals over a period of time, where presence in the defined Display Exposure Zone exists while the Display is functional. This metric, however, does not necessarily mean that the ad was seen. For example, the ad might have been displayed but no one was in direct proximity or in store. Ad impression = audience x ad play.</p>	<p>Presence in Display Exposure Zone</p>
<p>Opportunity To See (viewable impression): Single opportunity to view an advert. This is the number of people who could pass by an in-store activation (or in the case of in-store radio, who could hear it).</p> <p>The word ‘opportunity’ is key here - it isn’t that the individuals saw the advert but that by entering a store they had an opportunity to see the advert. It is important to note here that an ad may be displayed on a screen in an area of the store a customer didn’t visit which would be considered an impression.</p>	<p>Viewability condition exists</p>
<p>LTS Impressions (Likelihood-To-See): A further refinement of Viewable Impressions whereby an adjustment is applied to account for the likelihood individuals noticed or saw the content or advert on the display. Likelihood to see is determined using sensor / analytic technology.</p> <p>NB: This might have GDPR implications</p>	<p>Evidence ad has been seen</p>

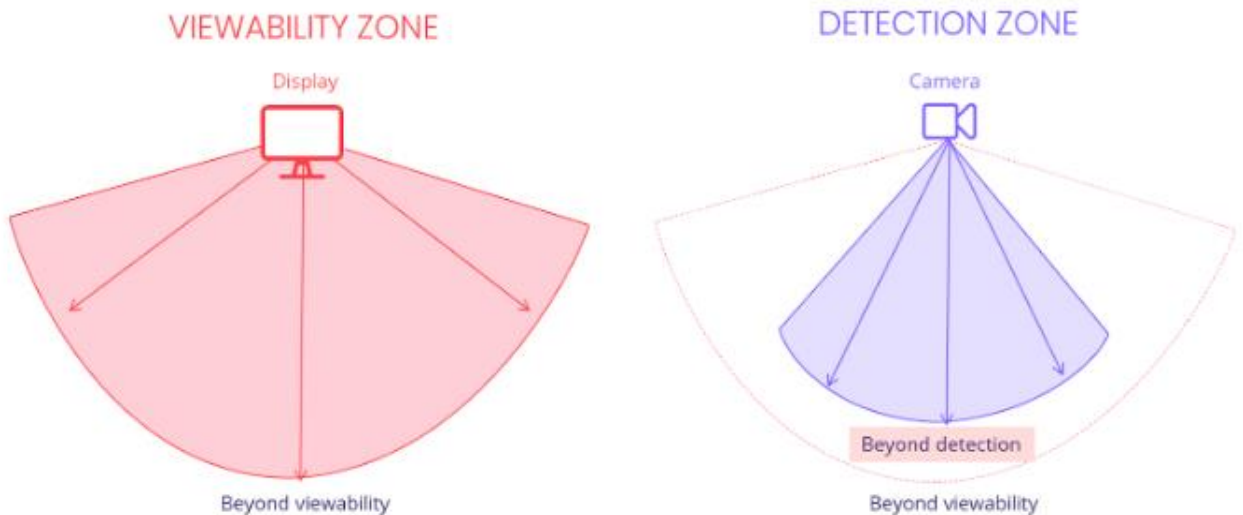
The methods used for measuring digital place-based media that should be disclosed and supported include based on the IAB/MRC Retail Media Measurement Guidelines:

- Establishing venue traffic counts of appropriate quality. These establish the estimate of potential unduplicated screen traffic or screen audience by virtue of presence in the venue. The screen traffic counts and unduplicated audience estimates can never be more than the venue traffic counts.
- Establishing screen traffic counts of appropriate quality. These establish the counts of potential audience to the screen by presence within a zone where the individuals have an opportunity for exposure to the screen while a viewability condition exists.
- Establishing screen audience estimates of appropriate quality. These represent the number of individuals which were present with opportunity to see and/or hear the source while a viewability condition exists, and who viewed the screen.
- Calculating average ad unit audience estimate of appropriate quality, where applicable. This represents a refinement of screen audience estimates to account for actual ad units viewed and/or heard and based on dwell time of the individuals.

Traffic and Exposure Metrics

- **In-Store Traffic:** The number of measurable shoppers in-store, located at various zones (total store, entrance, near screens, shelves, aisles, check-out).
- **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 (see below) by zones for transparency.
- **Display Exposure Zone:** An area in which exposure to the video can be determined, and there is no assurance as to whether the ad can be seen. This area is referred to as the Visual Exposure Zone.
- **Audio Exposure Zone:** An area in which the audio can be heard though there is no assurance as to whether the audio is audible.

Distance Matrix of Viewability



Disclosure

The calculation used to determine the ad impression should be disclosed as well as how the store traffic data has been gathered. Store traffic/footfall data could be collected via:

- Transaction data
- Panels
- Technology solutions e.g. sensors, door counters and beacons

Here is an example of an opportunity to see (OTS) calculation:

Variable	Definition	Example
Average weekly store footfall	A retailer specific figure outlining the average number of shoppers to enter a store each week	50,000
No. of Stores	The number of stores the activity was activated in	100
No. of Weeks	The number of weeks the activity was live for	4
Aisle penetration or % of shoppers that notice the media (if using technology)	The % of shoppers in-store who will actively walk past the media location	80%
Share of voice or time spent	A touchpoint specific figure outlining the % of time and space taken up by the brand's activation (E.g A digital screen ad may only be visible 50% of the time)	100%
Average touchpoint compliance	A retailer & touchpoint specific figure that allows us to account for non-compliance	80%
OTS per visit	A touchpoint specific figure defining the number of times the activation may be seen by each shopper (E.g Security Covers likely be seen on entrance & exit)	1
Discount for media location	A touchpoint specific figure that allows us to account for media placement which may be awkward to see or not at eye-level (i.e Floor Stickers / Hanging Signs)	1
Final Estimated OTS		12,800,000

Example calculation created with input from SMG and Scala/PRN

Section 6 - Sales Measurement Metrics

Campaign Reporting Duration

It is recommended that the sales are reported for 30 days pre-exposure, for the duration of the campaign, and a 30 days post exposure reporting window is used as standard. Retailers need to be able to provide flexible windows to brands when asked for it.

Sales Lift and Brand Sales Lift

Sales Lift reports on the product advertised, Brand Lift reports on the total brand (same category). This measurement should exclude any stores where the media is not activated. Brand Lift is a parallel to Halo in the IAB Europe Online Retail Media Measurement Standards. The standard definition for Halo is: Same Brand, Same Category (Category as defined by the retailer catalogue).

Sales Extrapolation

Extrapolation can be defined as a set of rules used to estimate the impact of media on non-identified users (e.g. through loyalty cards) by leveraging the media impact of a set (or all) identified users consumers. Retailers should disclose which metrics the extrapolation is done through. For example, a retailer could assume that sales per impression are the same for non-identified users as identified users.

Sales Variance

Measures the delta of sales of the featured product or brand, presumed driven by media, using methods such as before and after testing. This analysis method compares sales before, during, and after a campaign to gauge its effectiveness. It's crucial to consider specific timeframes and contexts relevant to the product, season, and sales channel. This method should be used only when Incremental Sales studies are not possible.

Brand Variance

Measures the delta of sales of the brand, presumed driven by media, using methods such as panels and surveys. This behaviour-based method analysis how subgroups of individuals behave, and uses those observations to make general conclusions about the store population

Incremental Sales/Brand Lift

Measures the delta of sales of the featured product or brand, presumed driven by media, using various testing methods. Those methods are expected to normalise for all other variables and as such can be deemed Incremental:

1. Test Vs Control:

Test Vs Control, also known as split testing, involves comparing the behaviour of two groups where one is exposed to a treatment (media exposure, promotion, etc.) and another identical group is not exposed to that treatment. The difference in behaviour between these groups is often referred to as "lift" and can be compared across a number of potential metrics such as order value, purchase frequency or survey-based perceptions such as brand equity.

Ideally a consumer is sorted into these two groups randomly to ensure that there are minimal differences between them across factors which may influence behaviour (demographics, shopping behaviour, search behaviour, etc.) Where random selection is not possible the groups should be intentionally designed to have similar distributions of consumers across these types of characteristics.

Reporting of these lift test results should always include details on the size of each group as well the statistical significance of the tests.

Test Vs Control Best Practices

The following criteria should be considered when selecting test and control stores:

- Sales in the pre period - sales in the test and control stores should be as closely matched as possible in the pre period.
- Other activity - ensure that only the impact of the media channels being measured are taken into account by controlling for any other activity in store such as feature space.
- Price promotions - ensure that price and promotions are the same in the test and control stores.
- Store size & format - test and control matches should be selected from the same store format and size. i.e. one should not compare a test convenience format store with a control supermarket store. It is also helpful to take the size of the store and the product range into account.

2. Multivariate Testing

Multivariate testing analyses multiple variables simultaneously to identify the best combination for optimal outcomes, offering nuanced insights beyond simple Test Vs Control. They also allow for real-time adjustments of creative aspects like content style, frequency, and length during campaigns to optimise engagement and effectiveness based on ongoing results.

Multivariate testing is particularly useful in instances there are multiple external factors that cannot easily be controlled for. For example, if prices and promotions vary across stores, it will be difficult to isolate the impact of the media from the impact of price / promotion changes. In this instance a test vs control methodology might not be suitable and multivariate testing will allow for "control" of all of the external factors.

3. One to One (requires heavy tech investment)

One to one measurement enables a shopper-by-shopper level understanding of the impact of advertising. This can be used to understand the incremental impact of in-store campaigns to the standard of online reporting. This approach, although it is the most accurate, has scale and privacy limitations. It highly relies on technology/implementations and/or high loyalty program usage. Retail media networks should decide if and when this method serves their commercial and privacy needs.

New to Brand

A shopper who has not purchased any products from specified brands pre campaign and subsequently purchased during or post campaign (within the assigned time frames) is “New to Brand”. Inversely, if they had purchased pre campaign and purchased during or post campaign, they can be considered “Repeat Brand Shoppers”.

The time frame will vary per product purchase cycle. Retailers need to provide pre campaign, during the campaign and post campaign data based on the relevant purchase cycle. If asked by the brand, they should also be able to provide flexible reporting duration. IAB will aim to standardise product categories in the next version of the standards. If a retailer is doing something more advanced as the purchase cycles, then these should be disclosed.

Three time frames will be adopted and categories will be further defined:

Regularly purchased (e.g. shampoo, banana, diaper, milk..)	0-6 weeks
Semi-Regular purchased (e.g. jeans, mascara, cartridges..)	7-26 weeks
Infrequent (e.g. TVs, vacuum, winter coat, sofa)	27+ weeks

New to Category/Repeat Shoppers

A shopper who has not purchased any products from specified categories pre campaign and subsequently purchased during or post campaign (within the assigned time frames) is “New to Category”. Inversely, if they had purchased pre campaign and purchased during or post campaign, they can be considered “Repeat Category Shoppers”.

The time frame will vary per product purchase cycle. Retailers need to provide pre campaign, during the campaign and post campaign data based on the relevant purchase cycle. If asked by the brand, they should also be able to provide flexible reporting duration. IAB will aim to standardise product categories in the next version of the standards. If a retailer is doing something more advanced as the purchase cycles then these should be disclosed.

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Acknowledgements

These definitions and standards have been developed by IAB Europe's Retail Media Committee members, Retailer Council and the IAB Retail Media Measurement Working Group, which operates under the umbrella of the IAB Retail Media Committee within the IAB Measurement, Addressability & Data Center. The creation of this document has been made possible through a collaborative endeavour involving IAB Europe, the Interactive Advertising Bureau (IAB) and the Media Rating Council (MRC).

The retailers and retail media networks that participated include:

- Albertsons Media Collective
- Ahold Delhaize USA
- Ahold Delhaize (Europe)
- Auchan
- CVS Media Exchange
- Coop Media Network
- Douglas Marketing Solutions
- Dunnhumby (Tesco Media)
- FNAC
- ICA
- Instacart
- Kingfisher
- Kroger Precision Marketing
- REWE
- Roundel
- Schwarz Media
- Shopper Media Group (representing the media networks for Asda, Boots, Coop, Morrisons)
- The Home Depot
- Walgreens Advertising Group
- Walmart Connect

About IAB

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.

About IAB Europe

IAB Europe is the European-level association for the digital marketing and advertising ecosystem. Through its membership of national IABs and media, technology and marketing companies, its mission is to lead political representation and promote industry collaboration to deliver frameworks, standards and industry programmes that enable businesses to thrive in the European market.

Appendix – Ad Format Examples

Digital Screens

Ad Format: Screen

Brand: Laneige

Retail Media Network: Boots



Ad Format: Interactive Display

Brand: PepsiCo

Retail Media Network: Tesco



Ad Format: Screen (within Kiosk)

Brand: Carlsberg

Retail Media Network: Co-op



Ad Format: Screen

Brand: N/A

Retail Media Network: Ahold Delhaize



Ad Format: Screen (within welcome area)

Brand: N/A

Retail Media Network: Schwarz Media



Ad Format: Screen (within checkout area)

Brand: N/A

Retail Media Network: Schwarz Media



Printed / Static

Ad Format: Shelf Talker

Brand: Mondelez (Yorkshire Tea)

Retail Media Network: Morrisons



Ad Format: Hanging Sign

Brand: N/A

Retail Media Network: Tesco



Ad Format: Shelf Wobbler

Brand: N/A

Retail Media Network: Ahold Delhaize



Ad Format: Shelf Blade

Brand: Munchies

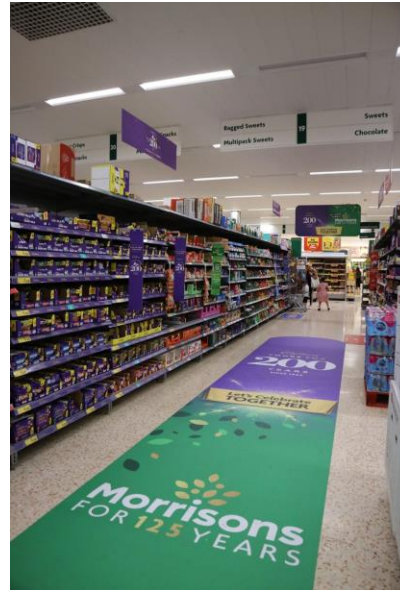
Retail Media Network: Tesco



Ad Format: Floor Graphic

Brand: Mondelez / Muller

Retail Media Network: Morrisons



Ad Format: Shelf Blocker

Brand: Gin

Retail Media Network: Tesco

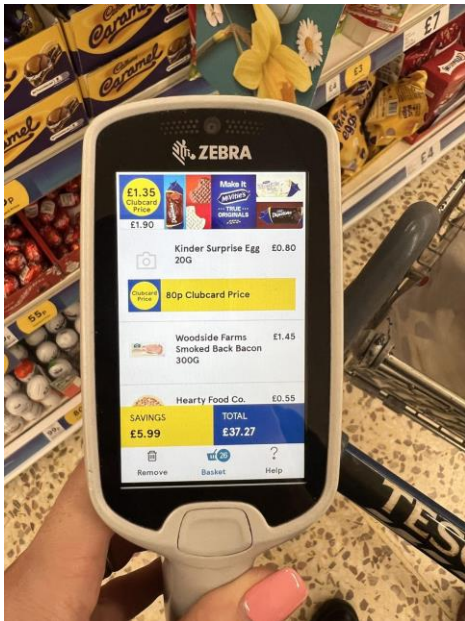


Connected Shopping

Ad Format: Handscanner

Brand: Pladis

Retail Media Network: Tesco



Ad Format: Handscanners

Brand: N/A

Retail Media Network: Ahold Delhaize



Experiential

Ad Format: Product Sampling

Brand: Quaker Oats

Retail Media Network: Tesco



Ad Format: Product Sampling

Brand: Walkers

Retail Media Network: Tesco



Ad Format: Product Sampling

Brand: Heineken

Retail Media Network: Co-op



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