



**THE
EFFECTIVENESS
OF IN-STORE
RETAIL MEDIA**

**A Moving Walls'
White Paper**
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**THE RISE OF
IN-STORE
RETAIL
MEDIA**

01

The Rise of In-Store Retail Media

In-store retail media refers to advertising and promotional content displayed within physical retail environments. This can include digital displays, interactive kiosks, shelf-edge screens, and even traditional signage. The growth in this sector is part of a broader trend in retail technology and data-driven marketing.

Global Ad Spend and Growth Trends:

In 2023, global spending on retail media surpassed USD 128 billion, marking a substantial increase driven by the digital transformation of retail environments.

(Source: Statista)

This growth can be attributed to several factors:

- **Digital Transformation**

Retailers are increasingly digitizing their physical stores, creating new opportunities for dynamic, targeted advertising.

- **First-Party Data Utilization**

Retailers possess valuable customer data, which they can leverage to offer advertisers highly targeted ad placements.

- **Omnichannel Integration**

In-store media is often part of broader omnichannel strategies, connecting online and offline shopping experiences.



- **Covid-19 Impact**

The pandemic accelerated digital adoption in retail, indirectly boosting investment in in-store digital media.

The Dominance of Key Players:

Amazon's leadership in this space is noteworthy:

- **Market Share**

Amazon's 75% share of the US market and 54% of the European digital retail media market in 2023 demonstrates its dominance.

- **Amazon's Advantage**

The company's vast e-commerce data, combined with its growing physical retail presence (Whole Foods, Amazon Go stores), gives it a unique position to offer valuable insights to advertisers.

- **Competition Response**

Other major retailers like Walmart, Target, and Kroger in the US, and Tesco, Carrefour in Europe, are rapidly developing their own retail media networks to compete.



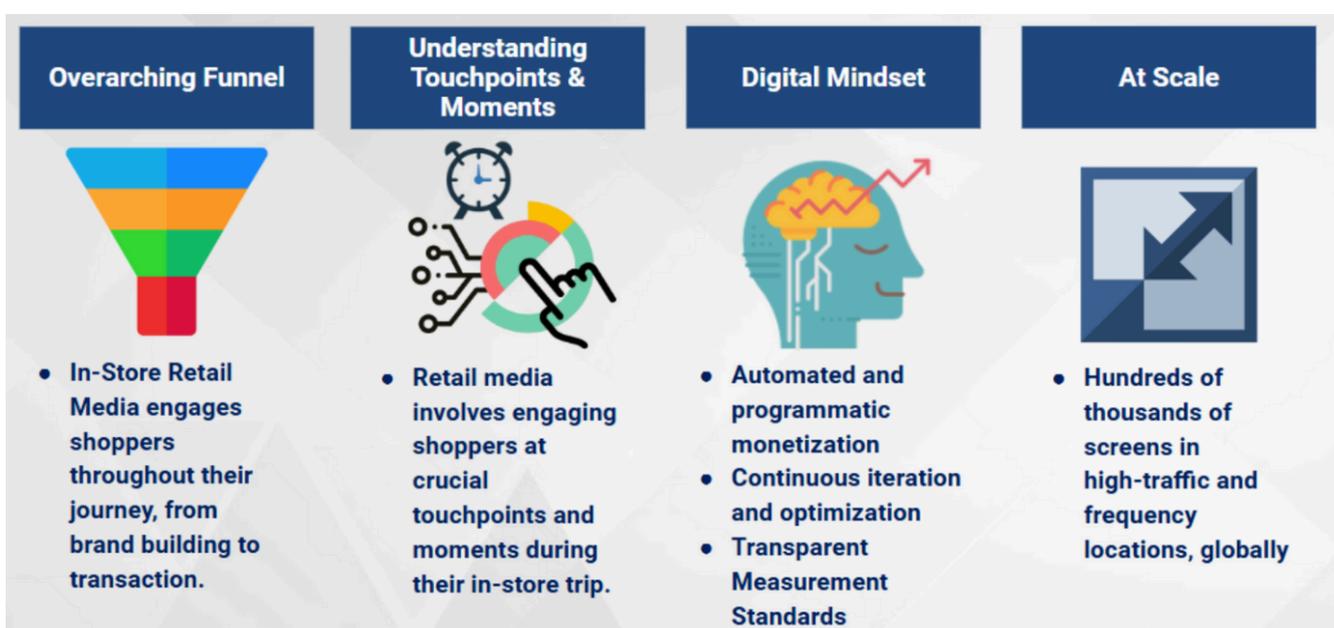


**IN-STORE
MEDIA
VS.
DIGITAL
CHANNELS**

02

In-Store Media vs. Digital Channels

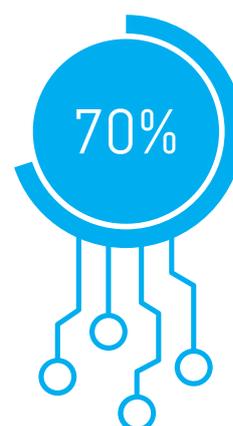
Data from Placer.ai and Comscore Media Metrix Multi-Platform indicate that in-store retail media reaches audiences an average of 70% more effectively than digital channels in major retail environments.



In-store retail media offers unmatched reach and engagement compared to traditional digital channels, with data indicating that it reaches audiences an average of 70% more effectively than digital channels in major retail environments. This significant advantage stems from several key factors inherent to the physical shopping experience.

One of the primary strengths of in-store media is its ability to capture attention when consumers are already in a shopping mindset. Unlike digital ads that can be easily ignored or blocked, in-store media is often an unavoidable and integrated part of the shopping experience.

More efficient and Capture attention



Shoppers in a store represent a captive audience, often spending considerable time browsing aisles and making purchase decisions. This extended exposure time increases the chances of ad messaging being noticed and retained.

The contextual relevance of in-store media plays a crucial role in its effectiveness. Advertisements can be strategically placed near relevant products or in areas where specific decisions are being made, boosting engagement compared to more general digital ads. Furthermore, physical retail environments engage multiple senses, creating a more immersive and memorable advertising experience that can have a direct and immediate impact on purchase decisions, potentially influencing impulse buys more effectively than digital ads.



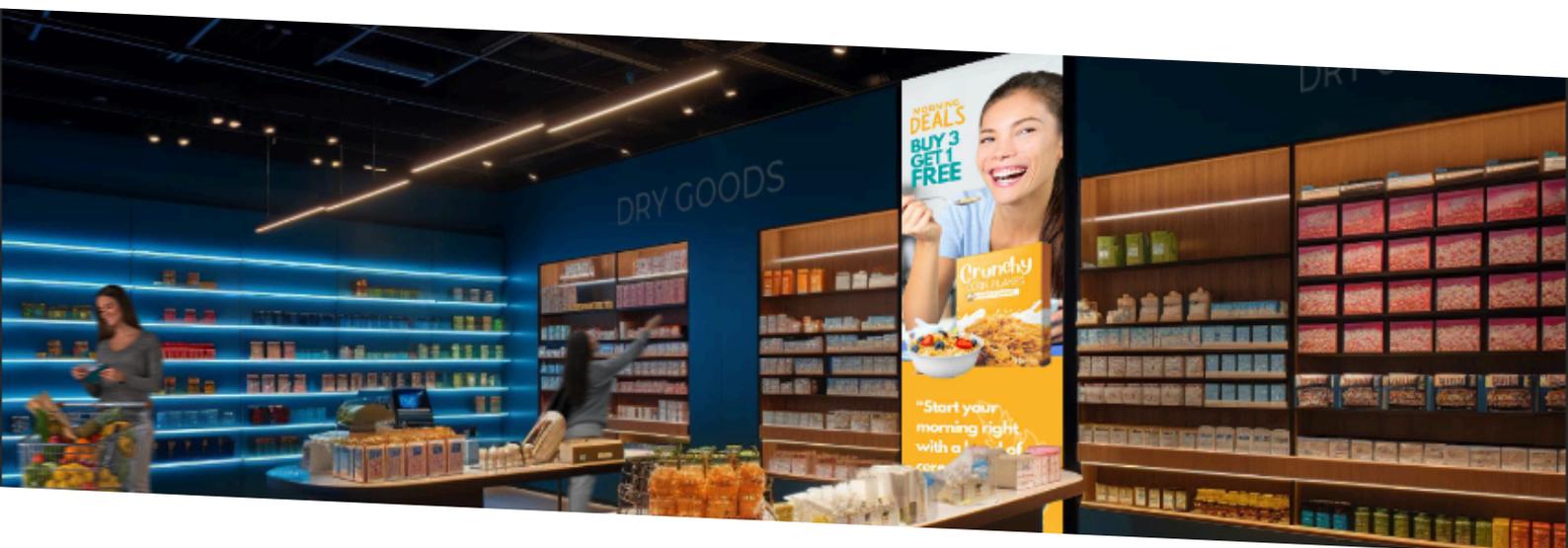
In-store media also has the advantage of reaching demographics that might be less active on digital platforms, such as older consumers or those less engaged with technology. This broad reach is particularly valuable in an era where digital platforms often suffer from ad fatigue and banner blindness, with users becoming desensitized to online advertisements. In contrast, in-store media, especially when dynamic and well-integrated, can feel fresher and more engaging to consumers.





Advancements in analytics and tracking technologies have significantly improved the measurability and attribution of in-store media effectiveness. Retailers can now track foot traffic patterns, dwell time near displays, and correlate ad exposure with purchase data, providing valuable insights to advertisers. Many in-store media solutions now integrate with mobile devices, bridging the gap between physical and digital experiences through features like QR codes, NFC tags, or location-based notifications.

When well-executed, in-store media can feel more authentic and trustworthy as it's part of the overall shopping experience. This contrasts with some digital ads that may be perceived as intrusive or less credible. The ability to tailor in-store media to local preferences, store-specific promotions, or even personalize based on loyalty program data further enhances its relevance and engagement potential.



TRANSFORMATION OF RETAIL ENVIRONMENTS

03

Transformation of Retail Environments

The digitization of physical stores has revolutionized retail environments, enabling retailers to offer dynamic, interactive media experiences:

Evolution of Interactive Experiences: Retailers now integrate media touchpoints across various store locations, such as shelves, end caps, cooler doors, and checkout aisles, enhancing consumer engagement throughout the shopping journey.

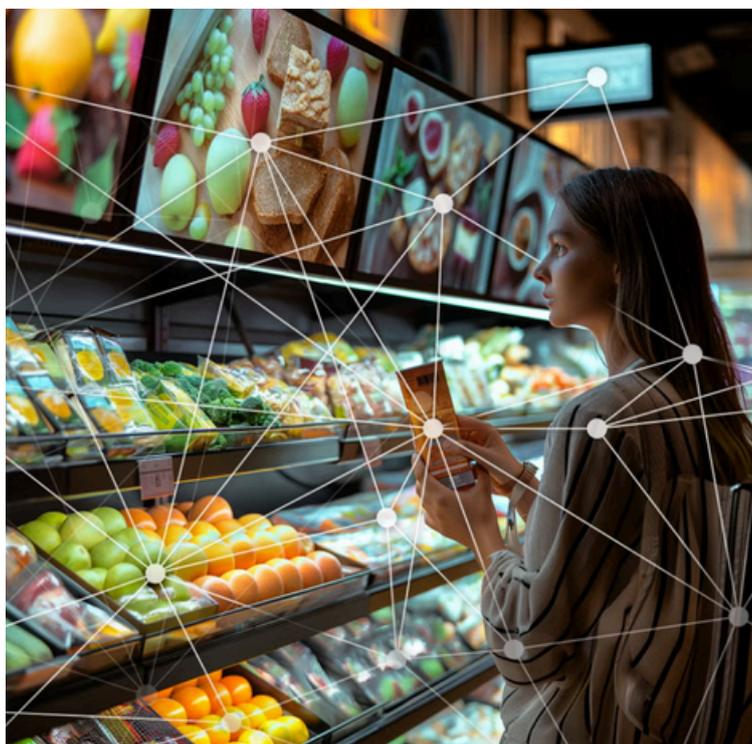
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It's important to note that in-store media doesn't replace digital strategies but complements them, creating a more holistic omnichannel approach. This synergy between physical and digital can amplify overall campaign effectiveness.

EFFECTIVENESS AND IMPACT



04

Effectiveness and Impact



In-store retail media drives significant outcomes for brands, including enhanced brand awareness and engagement:

Statistics and Case Studies:

Insights from 2023/2024 highlight substantial ad spend growth and increasing brand awareness metrics among retail media users. Case studies demonstrate how brands leverage in-store media to achieve measurable ROI and brand recall.



FUTURE TRENDS AND OPPORTUNITIES

05

Future Trends and Opportunities

| | | | | | |
|---|---|--|--|--|--|
| USD128+ Billion spent in 2023 | | USD141+ Billion forecasted spend in 2024 | | 23% of retailers share campaign data/analysis in real-time | |
| | 18.5% of US retail media ad spend in 2024 | | 64% of US retailers to implement RMN by the end of 2024 | | The average brand works with 23 ad tech platforms every quarter |
| UK Retail Media hit £3 Billion | | Total of 216 Retail Media Networks Globally | | 30% of CPGs are investing in training/upskilling to keep up with the proliferation of RMNs | |
| | 75% of shoppers use app or website when they're in stores | | 30% of advertisers say they use retail media to build brand awareness. | | Spend Sequence by Vertical: <ul style="list-style-type: none"> • Tech • Electronics • Pharma • Healthcare • CPG |
| 85% of brands and agencies agree retail media drives upper-funnel brand awareness is growing stronger | | 47% of advertisers say their retail media is coordinated/integrated with other digital ad channels | | 90% of Target's Gen Z shoppers use their app or website in store | |
| Sources: econsultancy, Statista, eMarketer, Reuters, Giltbox | 28% of CPGs are forming dedicated retail media teams | | The average brand works with 22 media agencies every quarter | | 92% of publishers satisfied with RMN's timelines |

In the past, retail media was primarily used as a basic form of in-store advertising and product promotion. Traditional methods included static displays, printed posters, shelf talkers, and occasionally, rudimentary audio announcements. These forms of media were often generic, with limited targeting capabilities and minimal integration with broader marketing strategies. Retailers typically sold this advertising space to brands as a supplementary revenue stream, but its impact was difficult to measure accurately. The focus was mainly on driving immediate sales through point-of-purchase promotions and creating brand awareness within the store environment. However, these efforts were largely disconnected from other marketing channels and lacked the sophistication to deliver personalized experiences or gather meaningful consumer insights.



Today, retail media has evolved into a sophisticated, data-driven marketing ecosystem that extends far beyond the physical store. It now encompasses a wide array of digital touch points, including websites, mobile apps, social media platforms, and interactive in-store displays. Retailers leverage their vast troves of first-party customer data to offer highly targeted advertising opportunities to brands, enabling personalized messaging and product recommendations.



This modern retail media is used to create seamless omnichannel experiences, bridging the gap between online and offline shopping journeys. It's employed for precise audience targeting, real-time inventory management, dynamic pricing strategies, and detailed performance analytics. Retailers now use these platforms to monetize their digital assets more effectively, turning their e-commerce sites and apps into valuable advertising real estate. Additionally, retail media is increasingly utilized for brand storytelling, content marketing, and building long-term customer relationships, moving beyond mere transactional promotions to become a key component of the overall customer experience and loyalty programs.



MOVING WALLS' ROLE AND SOLUTIONS

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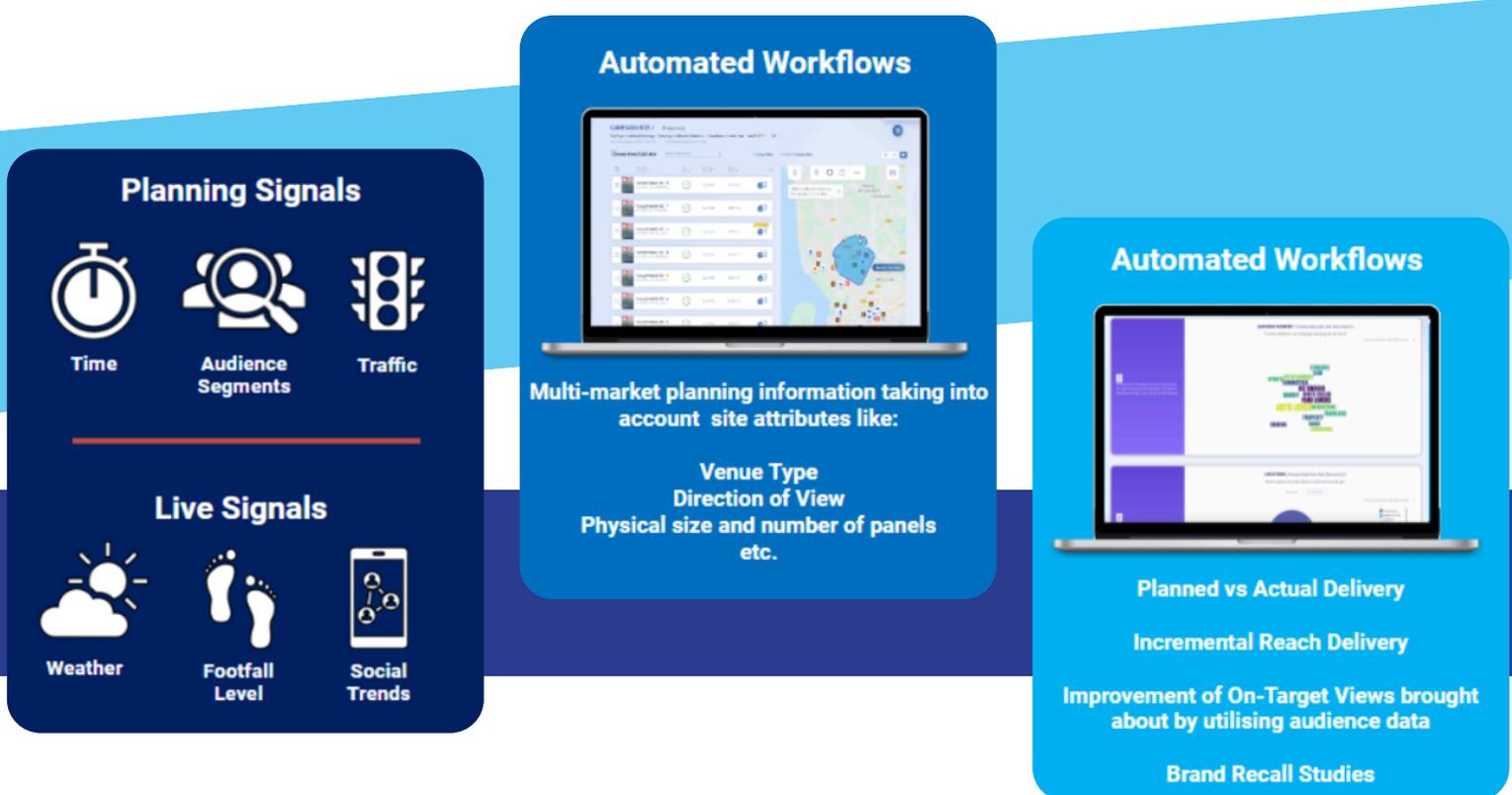
06

Moving Walls' Role and Solutions

Moving Walls offers cutting-edge solutions tailored for in-store retail media.

Overview of Moving Walls' Solutions:

1. Tools for comprehensive planning, advanced analytics, and programmatic activation enable brands to optimize their campaigns effectively.
2. Integration capabilities across retail and digital media platforms enhance operational efficiency and campaign performance.





**CASE STUDIES
AND
SUCCESS STORIES**

07

Case Studies and Success Stories

Real-world examples illustrate the impact of Moving Walls' solutions across diverse markets.



Lagardere Travel, Aus
Full stack inventory and booking management system for digital signage in Travel Retail stores



ProwTech, Vietnam
Largest digital signage network in supermarkets and pharmacies across Vietnam powered by our CMS and SSP



T'Order, Korea
Partnership for Customized Ad Platform for Restaurant Digital Signage company in Korea



Industry Examples:

Partnerships with:

- Lagardere Travel in Australia
- ProwTech in Vietnam
- T'Order in Korea

These partnership showcase how Moving Walls enhances inventory management, campaign optimization, and scalability for impactful advertising campaigns.

CONCLUSION

08

Conclusion

In-store retail media presents a transformative opportunity for brands to engage consumers effectively at crucial touch points within physical stores. As the industry continues to evolve with advancements in technology and consumer behavior, brands can capitalize on the power of in-store media to drive meaningful connections and achieve measurable business outcomes.



About Moving Walls

Moving Walls is a world-renowned AdTech company that specializes in innovative out of home (OOH) media solutions. With a strong presence across the globe, we take pride in our diverse team that spans across 15+ countries, all working towards our common goal of digitizing the OOH media landscape.

With over 2000 campaigns powered by our technology, we have helped businesses launch audience-based OOH plans, programmatic DOOH campaigns, and generate billboard reports. Our ecosystem spans over 120,000 digital, static, indoor, and outdoor media sites across the globe.

Out of Home media today is everywhere – across venue types, both indoor and outdoor, and in so many formats. We understand the challenges of planning and buying across markets and media owners. The Moving Audiences platform enables marketers to automate traditional planning, activate programmatic screens, and measure the performance of campaigns across the globe.



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