

IAB Europe In-Store Retail Media Definitions and Measurement Standards

*Version 2 Incorporating the outcomes of the IAB Europe In-Store
Measurement Workshop July 2026*

Draft For Industry Review - September 2026

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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 2024, 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 standards for industry feedback. Read more [here](#). Alongside this, IAB US published a Playbook on DOOH and In-Store Retail Media in May 2024.

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.

Version 1 of the standards was finalised in December 2024 following a public comment period from September through to November 2024, where a range of stakeholders from across Europe and the US provided feedback and insights to shape the final version.

This document is Version 2 of the standards. It incorporates the outcomes of the IAB Europe In-Store Measurement Workshop held in July 2026, at which retailers reviewed how the Version 1 standards were being applied in practice. Applying the standards surfaced several nuances worth understanding, and Version 2 responds to them: it clarifies how measurement differs between store zones, re-anchors the in-store impression on footfall rather than ad play, introduces a simplified six-metric calculation of Opportunity To See (OTS) as the core in-store media measurement, sets out four methods for measuring aisle penetration, and aligns the sales measurement section to a 28-day window.

IAB Europe is calling all industry stakeholders that this is relevant to to provide comments or feedback by 23rd October.

Summary of Changes in Version 2

The following changes have been made in Version 2 as agreed at the In-Store Measurement Workshop of 1 July 2026. All other definitions carry over from Version 1 unchanged.

Area	Version 1 (December 2024)	Version 2 (September 2026)
Store Zones (Section 4)	Five zones defined by location and placement type	Unchanged zones, with measurement guidance added: Zone 1 follows established OOH conventions; Zones 2–5 are assumption-driven unless sensor technology is deployed
Impression definition (Section 5)	RMNs report on ad play and gross impressions; OTS positioned as the future proxy for a viewable impression	The impression is defined as visual contact with the ad and is the overarching trading currency. Footfall, not ad play, is the starting point for media measurement. OTS and LTS describe how the impression is measured
Footfall (Section 5)	Listed as a disclosure item (transaction data, panels, technology)	New sub-section: footfall measured via door scanners or loyalty data at purchase, with guidance on category dynamics (grocery vs consumer electronics)
OTS calculation (Section 5)	Had an example based on 8 variables to get to OTS	Simplified six-metric core calculation based on daily footfall (OTS 36,000,000). The additional Version 1 variables are retained as optional layers for higher fidelity
Aisle penetration (Section 5)	Single variable in the OTS example	New sub-section setting out four measurement methods, from most to least precise
Campaign Reporting Duration (Section 6)	30 days pre-exposure and 30 days post-exposure	Adjusted to 28 days pre-exposure and 28 days post-exposure
Incrementality (Section 6)	Standalone sub-section	Removed. Incrementality continues to be addressed under Incremental Sales/Brand Lift

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) in 2024. 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.

For media exterior to the store, established OOH measurement conventions apply. In the UK, retailers rely on Route; in Germany, IDOOH provides the reference approach. Version 2 of these standards adopts a definition of the in-store impression consistent with how IDOOH and Route treat it (see Section 5).

Section 2 – The Focus of the Standards

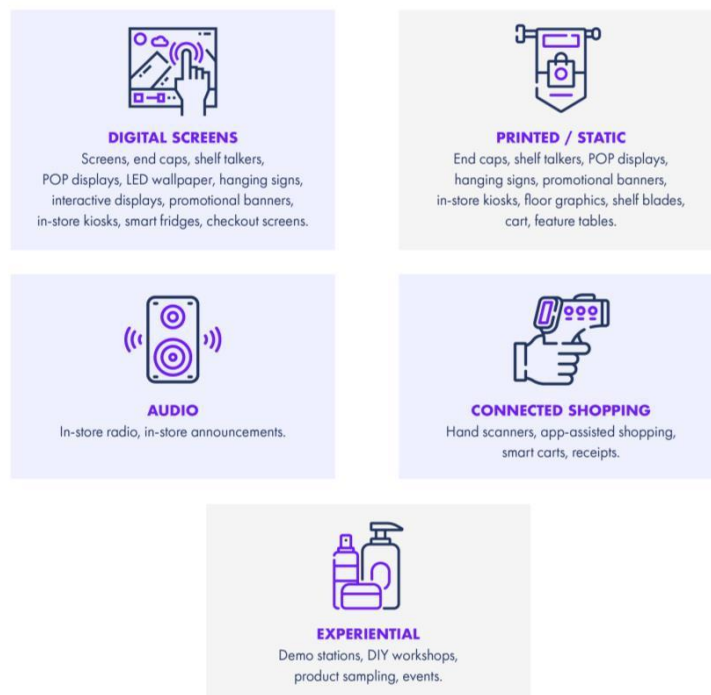
The Standards cover the following areas:

- Store Zones
- Media Metrics
 - Ad Serving Metrics
 - Ad Impression Metrics
 - Traffic and Exposure Metrics, including Footfall and Aisle Penetration
- 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:

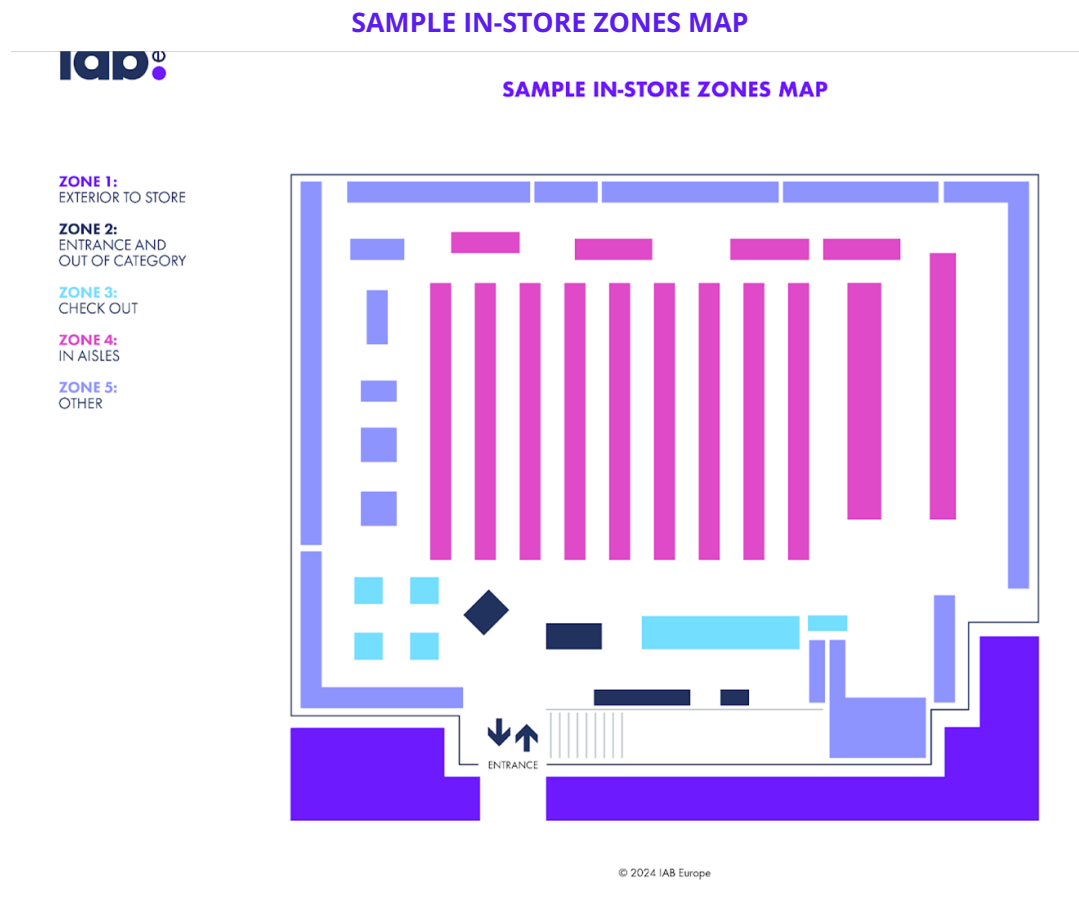


NB: Formats in the purple boxes are the focus of these standards.

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 the appendix 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.



Zone 1: Exterior to store · Zone 2: Entrance and out of category · Zone 3: Check out · Zone 4: In aisles · Zone 5: Other. © 2024 IAB Europe

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 an 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

How Measurement Differs by Zone

Applying the standards in practice has shown that the zones are not measured in the same way. The measurement approach for each zone is summarised below and explained in Section 5.

Zone	Location	Measurement approach
Zone 1	Exterior to store	Established OOH conventions apply
Zone 2	Entrance and out of category	Assumption-driven (OTS) unless sensor technology is deployed (LTS)
Zone 3	Check out	Assumption-driven (OTS) unless sensor technology is deployed (LTS)
Zone 4	In aisles	Assumption-driven (OTS) unless sensor technology is deployed (LTS)
Zone 5	Other & connected store	Assumption-driven (OTS) unless sensor technology is deployed (LTS)

Zone 1 follows established OOH conventions

For media exterior to the store, existing OOH measurement applies. In the UK, retailers rely on Route; in some markets, retailers can access GPS coordinates from mobile devices to report impressions.

Interior zones remain assumption-driven

Across Zones 2–5, measurement of Impressions and Opportunity To See is still largely subjective for retailers not using sensor technology. Only retailers with such technology can report Likelihood To See (LTS) impressions. Without sensors, the assumptions behind the benchmark calculation (footfall, aisle penetration, touchpoint compliance) effectively are the measurement, which is why transparency on those assumptions is critical. Retailers should disclose the assumptions and data sources used, as set out under Disclosure in Section 5.

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

The in-store impression

The definition of an impression was debated at the In-Store Measurement Workshop. Ad Play is not the right starting point for media measurement; footfall is. Consistent with how IDOOH in Germany and Route in the UK handle it, an in-store impression is defined as visual contact with the ad.

The impression is treated as the overarching trading currency, while Opportunity To See (OTS) and Likelihood To See (LTS) describe how it is measured. RMNs should report impressions on this basis and disclose the formula used to determine each metric. Ad play and gross impressions should continue to be disclosed as supporting metrics, but neither is the trading currency on its own.

Opportunity To See is the best proxy available for a viewable ad impression in the in-store environment and is the core media measurement inside the store when LTS is not available. To report on OTS, retailers can apply the benchmark calculation set out later in this section or use technology providers of choice. Only retailers with sensor technology can report LTS impressions.

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.

Impression metrics hierarchy

Metric	Definition	Basis
Ad Play	Number of times an ad is displayed or rendered on a particular format. A supporting ad serving metric; not the starting point for media measurement.	Ad play (digital)
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 × ad play.	Presence in Display Exposure Zone

Metric	Definition	Basis
Opportunity To See (OTS) – 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). 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. OTS is the core in-store media measurement when LTS is not available.	Viewability condition exists
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 and can only be reported by retailers with such technology in place. NB: This might have GDPR implications.	Evidence ad has been seen

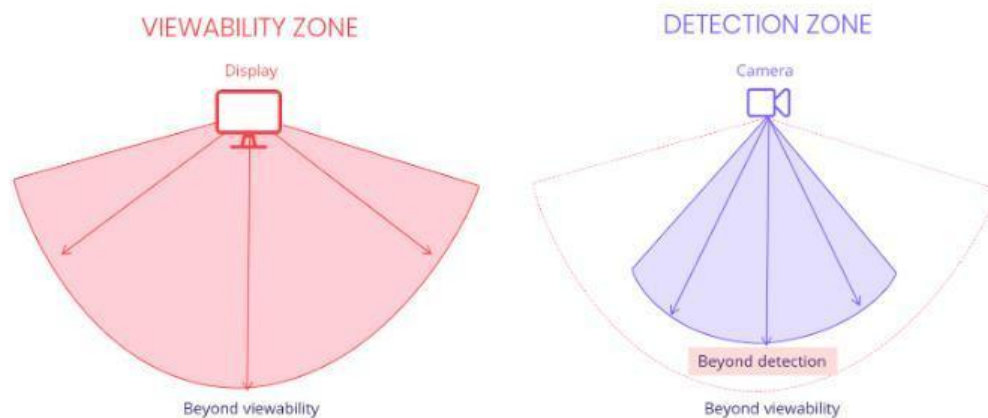
The methods used for measuring digital place-based media that should be disclosed and supported include, based on the IAB/MRC Retail Media Measurement Guidelines:

- 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



Footfall

Footfall is the starting point for in-store media measurement. Footfall can be measured using scanners at the door or loyalty data when a purchase is made.

Category dynamics

Category dynamics affect media measurement, not just sales measurement. In grocery, the starting point for footfall is often a transaction. Tesco, for example, counts a purchase as an impression and de-duplicates where a shopper makes multiple store visits within the reporting window. In consumer electronics, that proxy breaks down: shoppers visit to research without buying, so store presence cannot be inferred from purchase behaviour, and transaction data lags the actual visit. Scanners at the door therefore become more important in these categories.

Opportunity To See (OTS) Calculation

IAB proposes a simplified way of measuring OTS that requires six metrics. This is the core media measurement inside the store and applies when LTS is not available. Additional metrics can be layered on top for a higher level of fidelity where they are available.

Core calculation (six metrics)

Variable	Definition	Example
Average daily store footfall	A retailer-specific figure outlining the average number of shoppers to enter a store each day	50,000
No. of Stores	The number of stores the activity was activated in	100
No. of Days	The number of days the activity was live for	20
Number of placements in store	Number of placements in store; this metric should account for share of voice on the screen (if relevant)	3
Aisle penetration (% of shoppers that notice the media)	The % of shoppers in-store who will actively walk past the media location (see Measuring Aisle Penetration below)	80%
SOV Campaign	Share of Voice of the Campaign	15%
OTS for the campaign	Average daily store footfall × No. of Stores × No. of Days × Number of placements × Aisle penetration × SOV Campaign	36,000,000

Worked example: $50,000 \times 100 \times 20 \times 3 \times 80\% \times 15\% = 36,000,000$ OTS for the campaign.

Additional metrics for higher fidelity

Where the data is available, the following touchpoint-specific variables from the Version 1 calculation can be layered on top of the core calculation. Retailers should disclose which additional variables have been applied.

Variable	Definition	Example
Average touchpoint compliance	A retailer and touchpoint specific figure that allows us to account for non-compliance	80%

Variable	Definition	Example
OTS per visit	A touchpoint specific figure defining the number of times the activation may be seen by each shopper (e.g. Security Covers are likely to be seen on entrance and 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

The Version 1 example calculation was created with input from SMG and Scala/PRN. The simplified six-metric calculation was agreed at the In-Store Measurement Workshop, 1 July 2026.

Measuring Aisle Penetration

Aisle penetration can be measured using four methods, from most to least precise:

1. **Beacons in every store, at aisle level.** Full deployment provides direct visibility into shopper movement and delivers the highest fidelity.
2. **Extrapolation from a beacon-equipped sample.** Fitting a representative subset of stores with beacons and extrapolating the average provides a good proxy for aisle penetration across the estate.
3. **Category transaction inference.** If a customer bought cereal, and cereal sits in the “Cereal, Bread and Milk” aisle, it is fair to assume they were exposed to any advertising within that aisle. Purchases become a proxy for aisle presence.
4. **One-off market study.** Research commissioned from a third party providing insights into shopper behaviour at the category level.

Retailers should disclose which method has been used when reporting aisle penetration.

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

Because the assumptions behind the OTS calculation (footfall, aisle penetration, touchpoint compliance) effectively are the measurement for retailers without sensor technology, retailers should also disclose those assumptions, the aisle penetration method used, and whether reported impressions are OTS or LTS.

Section 6 – Sales Measurement Metrics

Campaign Reporting Duration

It is recommended that the sales are reported for 28 days pre-exposure, for the duration of the campaign, and a 28 days post exposure reporting window is used as standard. Retailers need to be able to provide flexible windows to brands when asked for it.

Version 1 set the pre- and post-exposure windows at 30 days. Version 2 aligns them to 28 days.

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. 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 analyses how subgroups of individuals behave, and uses those observations to make general conclusions about the store population.

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. If a retailer is doing something more advanced as the purchase cycles, then these should be disclosed.

Three time frames will be adopted:

Purchase cycle	Examples	Time frame
Regularly purchased	shampoo, banana, diaper, milk	0–6 weeks
Semi-regularly purchased	jeans, mascara, cartridges	7–26 weeks
Infrequently purchased	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.

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

Purchase cycle	Examples	Time frame
Regularly purchased	shampoo, banana, diaper, milk	0–6 weeks
Semi-regularly purchased	jeans, mascara, cartridges	7–26 weeks
Infrequently purchased	TVs, vacuum, winter coat, sofa	27+ weeks

Incrementality

Follows the same guidelines as the incrementality guide, [here](#)

Appendix – Ad Format Examples

Digital Screens

Ad Format: Screen

Brand: Laneige

Retail Media Network: Boots



Ad Format: Interactive Display

Brand: PepsiCo

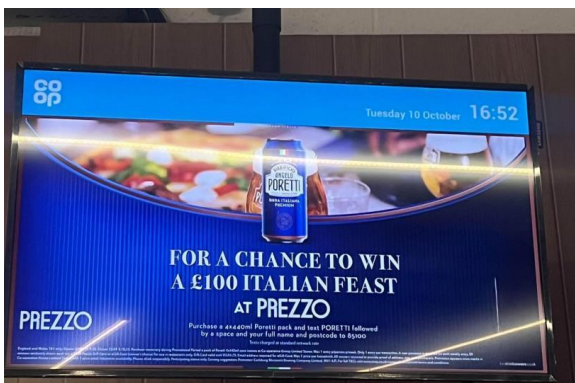
Retail Media Network: Tesco



Ad Format: Screen (within Kiosk)

Brand: Carlsberg

Retail Media Network: Co-op



Ad Format: Screen

Brand: N/A

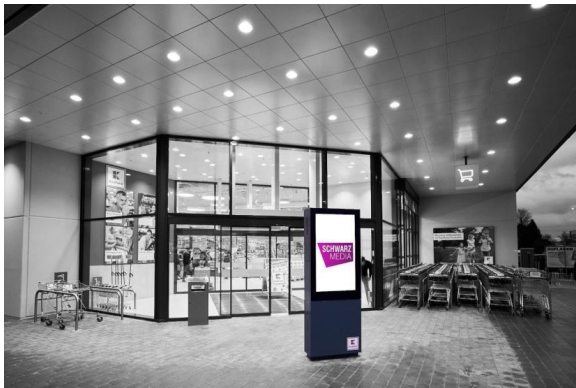
Retail Media Network: Ahold Delhaize



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

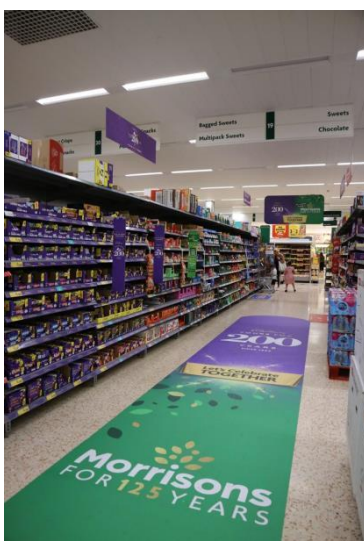
Retail Media Network: Tesco



Ad Format: Floor Graphic

Brand: Mondelez / Muller

Retail Media Network: Morrisons

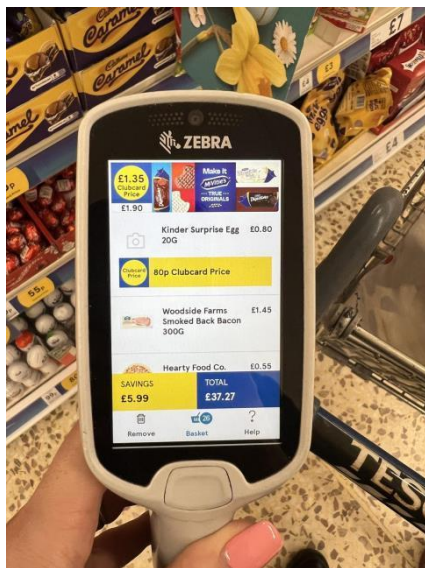


Ad Format: Shelf Blocker
Brand: Gin
Retail Media Network: Tesco



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



Contact Details

For more information on the work of IAB Europe and our In-Store Retail Media Standards, or to get involved in developing future iterations of this document, please contact: retailmediastandards@iab europe.eu.