

Digitization of the physical store is an emerging media opportunity for brands

Article

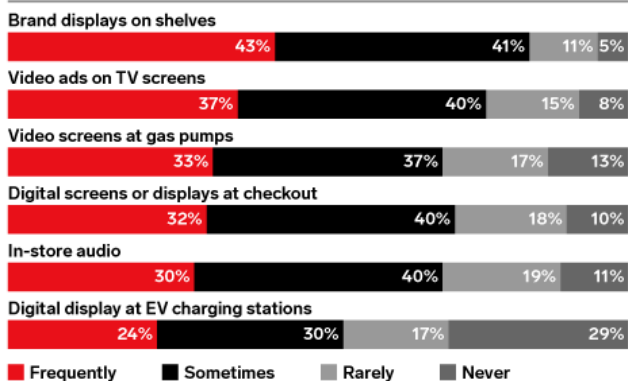
The rise of in-store retail media—through the digitization of surfaces in physical retail—will transform the store experience, the financial fortunes of retailers, and the advertising

opportunities for brands.

- **Physical stores possess many surfaces for digital media experiences.** These include TV walls, front-of-store kiosks, between-aisle signage, digital shelving, checkout aisles, self-checkout terminals, smart carts, end caps, and cooler doors. Nearby exterior experiences, such as digital signage at gas station pumps and electric vehicle (EV) charging stations, will also factor in. These surfaces offer the ability to reach receptive shoppers at contextually relevant moments.
- **Several startups are enabling in-store retail media inventory.** Key players include Cooler Screens (cooler doors), Perch (end caps), Grocery TV (checkout), and Veeve (smart carts). There's also in-store audio, offered by players like Stingray and Vibonomics. The adjacent exterior of retail establishments features GSTV (gas pumps) and Volta (EV charging stations). Many of these startups are already expanding into other parts of the store.
- **The most noticeable surfaces are on-shelf and video displays.** A July 2022 study from the Path to Purchase Institute found that US shoppers were most likely to frequently notice brand displays on shelves (43%), followed by video ads on TV screens (37%). Digitized cooler doors and TV walls in retailers like Best Buy and Walmart offer perhaps the most impactful examples of these surfaces.

Frequency With Which US Shoppers Notice Brands' In-Store Advertising, by Ad Format, July 2022

% of respondents in each group



Source: Path to Purchase Institute, "Shopper Engagement with Retail Media," Oct 3, 2022

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