

# NEWS

## When digital signage is part of the inventory

Why the screen is no longer a marketing expense, but a sales item and what the requirements are.

3 June 2026, Tobias Engl



### 01The market - from cost factor to sales position

The scale is real: in the USA, retail media will approach around USD 70 billion in 2026 and grow faster than the rest of the digital advertising market. In the DACH region, the curve runs parallel - Germany +17 % in 2025, the European market is projected to reach around EUR 31 billion in 2028. The driver in stores is DOOH, which already accounts for 44% of the OOH market in Germany (+22%); Migros in Switzerland is equipping up to 400 stores with in-store screens. The IAB defines retail media using three building blocks: 1. retailer's own inventory, 2. own transaction data and 3. closed-loop impact measurement. A screen therefore only counts as inventory if it generates measurable contacts, plays in a context-related manner and has a verifiable effect right up to the receipt.

### 02The diagnosis - why most screens fail the inventory test

Traditional digital signage was built for one-way content distribution, not measurable advertising inventory. Three structural gaps keep the space outside the retail media economy:

**Gap 1 - no measuring level.** If you can't show how many people have seen an ad, you won't get an advertising budget. Anonymous measurement of reach and dwell time is becoming a basic requirement - older CMSs do not record this without sensors.

**Gap 2 - no closed-loop attribution.** Without a bridge between the screen, the loyalty system and the checkout, it is impossible to prove that shoppers who have been reached buy the product shortly afterwards - and without proof, there are no premium prices.

**Gap 3 - no contextual relevance.** Monetizable inventory requires the baking station to play out bread and baking messages and the wine department to play out wine - not out of taste, but as a structural condition.

### 03 The invisible part - the operating model decides

The decision for an in-store retail media network is not a question of technology, but of operating model; it affects store operations, marketing, IT, finance and suppliers at the same time. Up to now, marketing has owned the screens. In the retail media model, an ad operations team is responsible for the inventory, sells it to brands and manages campaigns in exchange for measurable performance - marketing becomes one of several internal customers. The key figures change accordingly. Instead of runtime and availability, contact utilization, CPM per zone, attributively confirmed uplift, rebooking rate and contribution margin per screen count. Remember: starting is not operating, selling is not retaining, turnover is not contribution margin.

### 04 The European way - data protection as a moat

In the US, audience measurement is often thought of in terms of demographic segments; in the EU, this is neither necessary nor the easiest path. The EU AI Act prohibits emotion recognition in the workplace and in educational institutions and strictly limits biometric categorization; customer-oriented emotion evaluation is considered a high risk and is bound to consent and data minimization via the GDPR. Reliable inventory is therefore created differently in Europe - through anonymous, aggregated visual contact and dwell time measurement, which is processed directly on the device, does not store any images and does not identify any individuals. Contact opportunities are counted, not faces. This is enough to price inventory against digital benchmarks and turns compliance from a mandatory issue into a competitive advantage.

### 05 The timetable - 18 to 24 months

**First 30 days - Footprint audit.** Count screens, document the platform, check each device to see whether it can report contact and reach data. What passes the test is sellable inventory today; the rest is the size of the investment.

**Two quarters - P&L structure.** Decide whether the network sits in marketing or as its own profit and loss account. The winners in 2026 will choose the latter and set up ad operations with responsibility for measurement before chasing brand sales.

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**SOURCES:**Goldbach (Retail Media DACH, Q1 2026: DE +17 %, Migros up to 400 stores) - invidis (Outlook 2026) - maresmedia/onetoone (DOOH 44 % of OOH, +22.4 %) - Tinuiti (US spend close to USD 70 bn) - eyefactive (EU retail media ~€ 31 bn by 2028) - IAB Retail Media Buyer's Guide - Regulation (EU) 2024/1689 (AI Act), Art. 5; GDPR.