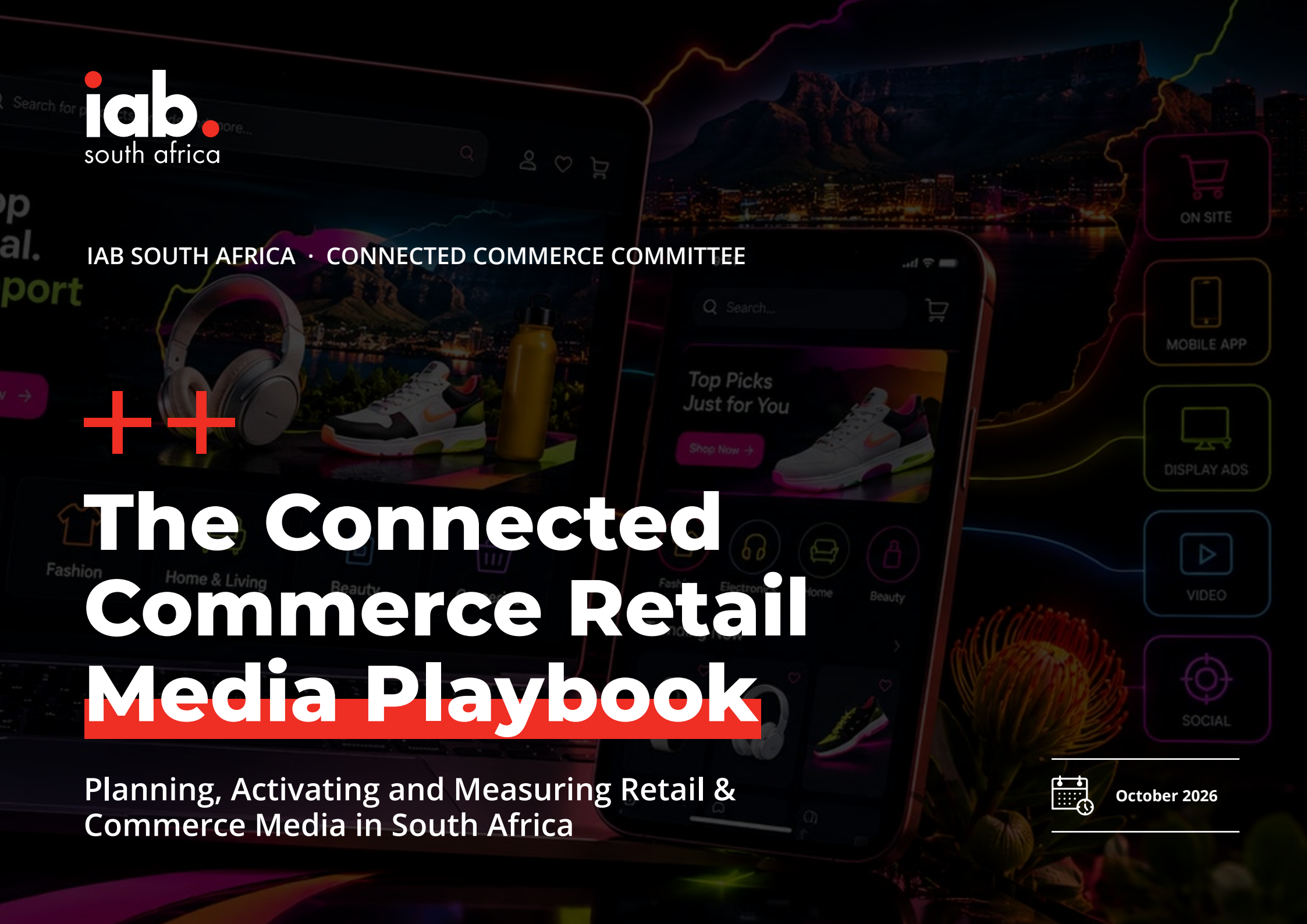
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The Connected Commerce Retail Media Playbook

Planning, Activating and Measuring Retail & Commerce Media in South Africa

October 2026

Foreword

Retail media is the fastest-growing segment of digital advertising, in South Africa as much as anywhere in the world. Retailers sit on something advertisers have spent a decade trying to rebuild in the wake of the disappearing third-party cookie: verified, consented, transaction-level knowledge of who their customers are and what they actually buy. When that data is connected to advertising and to the moment of purchase, it produces a rare thing in our industry: a closed loop between spend and sale.

Yet across our market, the promise is running ahead of the plumbing. Brands are experimenting in isolation. Every retail media network report on its own terms, so what looks like a strong ROAS on one platform cannot be meaningfully compared to another. Trade, media, brand and performance teams still operate in separate budgets and separate rooms. The result is duplicated effort, guarded optimism and investment that stalls at the pilot stage because no one can absolutely prove, to a finance director's satisfaction, that the investment worked.

This playbook is the IAB SA Connected Commerce Committee's guide to support the solution. It is a practical guide, a shared language and a set of frameworks that brands, agencies, retailers and technology partners can pick up and use to plan, activate and measure retail media consistently. We have drawn on global reference points, measurement frameworks and the IAB Europe measurement standards, and we have adapted them for the realities of the South African market: a formal retail sector that rivals developed markets, a vast and vital informal economy, a mobile-first and price-sensitive consumer, and the unique dominance of communication channels like WhatsApp.

Our ambition is straightforward. If the whole ecosystem agrees on what an impression is, what counts as a sale, and how incrementality should be proven, then investment can move with confidence and the whole market grows. That is the outcome this document is built to enable.

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How to use this playbook

This playbook follows retail media the way practitioners do: understand the market, know the formats, plan the campaign, activate it, then measure and optimise. Each section is designed to stand on its own so teams can jump to what they need.

Who this is for

Brands and advertisers, to build the internal case, brief with rigour and hold partners to a consistent standard.

Agencies, to plan and buy across a fragmented set of networks with a common framework.

Retailers and retail media networks, to align products, reporting and definitions with an emerging market standard.

Data and technology partners, to build interoperable measurement and clean-room capability.

A note on scope. This is a strategic and operational playbook, not a certification standard. Where we recommend definitions and metrics, we align to international IAB and IAB/MRC standards so that South African practice is globally compatible from the outset. Availability and sophistication vary widely between networks; treat the frameworks as a maturity path instead of a compliance checklist.

The South African market



1. Retail Media, the South African Way

1.1 Why retail media's moment is now

Retail media has moved from an emerging channel to a core component of the marketing mix. Globally it is the fastest-growing category of digital advertising; in South Africa the sector is at an earlier stage of maturity, but momentum is unmistakable. The country is unique in Sub-Saharan Africa in that formal retail clearly dominates: a handful of national chains, Shoprite (including Checkers and Usave), Pick n Pay, Spar, Woolworths and Massmart / Walmart, together control an estimated 60–80% of the formal food-retail market, supported by dense store networks, advanced logistics and mature loyalty programmes. For international brands and technology providers, South Africa is often described as the closest approximation to a developed-market retail environment on the continent.

Three forces are turning that potential into momentum:

- **Digital commerce growth**. Online retail has roughly doubled its share of total retail since 2020 and is on track to pass 10% of retail sales, with mobile devices driving most of the web traffic. On-demand grocery, Checkers Sixty60, Pick n Pay asap!, Woolies Dash, has become one of the clearest engines of digital retail competition.

- **First-party data in a cookieless world.** Loyalty programmes such as Xtra Savings, Smart Shopper and WRewards give retailers consented, transaction-level data that advertisers can no longer easily assemble elsewhere.

- **Pressure to prove ROI**. In a price-sensitive economy with squeezed margins, brands are under pressure to justify every rand. Closed-loop measurement, linking exposure to real sales, is retail media's central promise.

The numbers show just how quickly the market is moving. Online retail grew 35% in 2024 to an estimated R96 billion, representing around 8% of total retail sales. It was on track to pass R130 billion, or roughly 10% of the market, by the end of 2025. (World Wide Worx, Online Retail in South Africa 2025). This growth has moved digital commerce from a niche channel to a meaningful part of total retail spend.

Retail media in South Africa is still nascent, but the growth curve, the loyalty data already in place, and the willingness of brands to invest are all pointing the same way. The rest of this playbook moves quickly from why to how: what each environment, on-site, off-site and in-store, looks like in practice (Section 4).



The South African context in four facts

1. **Formal retail is concentrated and sophisticated**, a small number of groups reach the large majority of formal grocery shoppers.
2. **The informal economy is enormous**, spaza shops, township traders and independent wholesalers turn over an estimated R190bn+ a year and in some quarters out-grow the big chains. Any “omnichannel” view that ignores it is incomplete.
3. **The consumer is mobile-first and price-led**, promotions, data cost and convenience shape behaviour more than in most developed markets.
4. **WhatsApp is a primary commerce channel**, uniquely dominant for both large retailers and micro-merchants, and a genuine point of difference versus global playbooks.

1.2 The retailer and platform landscape

Good planning starts with a simple question: who owns the relationship with the shopper? South Africa’s commerce landscape spans multiple ecosystems, each with its own physical footprint, digital proposition, audience assets and level of retail media maturity. For advertisers, scale alone does not determine the right environment. Category relevance, shopper behaviour, purchase mission and the ability to connect media exposure to commercial outcomes matter just as much.

Commerce ecosystem	Examples / role	Retail media & data characteristics
Integrated retail ecosystems	Checkers / Rainmaker; Pick n Pay; Woolworths; Massmart / Makro; Boxer (Bmedia)	Physical retail plus digital commerce, loyalty and/or first-party purchase signals. Capabilities can span on-site, off-site and in-store environments, with differing levels of maturity.
Digital & marketplace pure players	Takealot Group Advertising; Amazon SA	Primarily digital commerce environments with strong search, marketplace and transactional signals. Takealot is estimated at ~35–40% of SA e-commerce; Amazon SA is included as an emerging digital commerce environment.
Commerce aggregators & platforms	Mr D; Uber Eats; Bash	Aggregated demand and transaction environments that can extend shopper reach beyond a retailer's owned estate. Their role in media and audience extension is evolving as platform capabilities develop.
Quick-commerce & emerging commerce platforms	Zulzi; Yassir Express	Convenience- and mission-led commerce environments with high-frequency purchase signals and emerging first-party audience opportunities.

No single commerce ecosystem reflects the full South African shopper journey. Being the biggest retailer does not automatically make an environment the most relevant for every campaign. Audience composition, shopping missions, purchase frequency and category performance vary across ecosystems. Investment should therefore follow the role each environment plays for the shopper and the objective, rather than market share alone. that makes objective-led planning and comparable measurement essential.

1.3 Why this matters, by stakeholder

Retail media isn't only a retailer growth story. It changes what "good" looks like for brands and agencies too:

For retailers	For brands	For agencies
New high-margin revenue streams Increased supplier investment Better use of existing first-party data assets Monetisation beyond product sales	Proximity to purchase Closed-loop attribution Access to first-party audiences Measurable ROAS and sales outcomes	New measurement frameworks to master Commerce strategy capability Direct retailer partnerships Deeper audience-planning expertise

Retail media increasingly sits at the intersection of media, trade and eCommerce. That makes connected ways of working as important as connected technology.

1.4 Lessons from global platforms

South Africa does not need to reinvent retail media. More mature markets have already tested many of the models. The opportunity is to learn from what has worked, then adapt those lessons to local realities.

- **Amazon Advertising (Sponsored Products, DSP, Marketing Cloud)**. Proof that self-service tooling plus a clean room for advertiser-safe data sharing scales both SME and enterprise spend at once, a model Takealot Group Advertising is already following.
- **Walmart Connect.** Shows the value of in-store and online inventory sold as one connected system rather than two separate teams, relevant wherever a retailer has both a large store footprint and a growing app.
- **Tesco Media and Insight Platform (Dunnhumby)**. Demonstrates monetising loyalty data as its own product line, not just as a targeting input, a path Xtra Savings and Smart Shopper could follow.
- **Carrefour Links.** An example of a retailer building a shared measurement layer with brand partners upfront, rather than retrofitting standardisation after networks have already fragmented, the exact risk of leaving definitions and measurement to fragment on their own.

These models cannot be simply transplanted into South Africa. Loyalty penetration, informal trade and mobile data costs change the equation. But they do offer something valuable: tested starting points rather than a blank page.

Where retail media flourishes



2. Retail media formats and opportunities

Working definition. Retail media is the advertising inventory and audience solutions a retailer offers using its own channels, shopper insights and first-party data. Everything in this section is a variation on that one idea, who is selling the inventory, where it appears, and what data stands behind it.

The first step to a common language is defining the advertising products in the ecosystem. In South Africa, retail media products organise into four environments. Each has its own targeting logic, formats and metrics, but all should connect under a single measurement and optimisation framework.









2.1 On-site retail media

On-site retail media covers advertising within a retailer's own digital environment, from websites and apps to marketplaces. For many South African networks, it represents the most mature retail media environment and the foundation on which broader capabilities can be built. Locally, this includes Takealot Group Advertising, Amazon.co.za and fast-growing on-demand grocery platforms, with Checkers Sixty60 introducing sponsored search to reach shoppers closer to the point of purchase.

Sub-category	Description	Typical formats	Objectives
Search ads	Promote products in the retailer's search results	Sponsored Products, Sponsored Brands	Consideration, conversion
Display ads	Banners / modules on homepage, category or product pages (PDP)	Homepage takeover, banners, custom modules	Awareness, consideration
Video ads	Video advertising within digital properties	Pre-roll, in-feed video, PDP video	Awareness, engage-ment

Brand store	Custom branded space within the site	Micro-sites, brand stores	Brand building, conversion
Hybrid search + display	Combined search targeting with display placements	Dynamic modules, AI search-display	Efficient conversion

2.2 Off-site retail media

Off-site retail media takes retailer intelligence beyond the retailer's own environment. First-party data is used to reach relevant audiences across other channels while retaining a connection to real commercial outcomes. Its role is typically to extend reach into awareness and consideration through display, video, social and search, while coordinating messaging, frequency and creative sequencing across touchpoints. Done well, off-site does not operate as a disconnected media layer. It extends the retailer's relationship with the shopper across more of the journey.

Channel	Description	Typical platforms	Use cases
Programmatic display	Display on external sites using retailer audiences	DSPs, PMPs, direct media	Awareness, consideration, retargeting
Video (OLV / CTV)	Video targeting built on retailer first-party data	YouTube, CTV / AVOD, social	Awareness, engagement
Paid social	Social campaigns using retailer audiences	Meta, TikTok, Pinterest	Prospecting, retargeting, lookalikes
Off-site search	Search-engine activations with retailer data	Google Ads, Bing	Consideration, retargeting

2.3 Direct marketing

Direct marketing occupies a particularly important place in South Africa because many retailers already have large, active customer bases, particularly through loyalty programmes. That creates an opportunity to reach shoppers directly with more relevant, personalised communication across retargeting, launches and exclusive promotions. WhatsApp is especially important in the local market. The bigger challenge is not access to audiences, but connecting those databases to measurement. Many retailers have substantial databases that are not yet fully integrated with attribution and reporting systems.

Channel	Description	Objectives	Requirements
Email	Targeted messages to defined segments	Retargeting, retention, conversion	Clean base + opt-in + relevant content
SMS	Short messages to mobile customers	Fast tactical activations	Segmented mobile base
WhatsApp	Two-way channel, opt-in required	Conversion, engagement	Very popular in SA, high CTR
Push notifications	Messages from app or web	Immediate activations	Active app / web presence
Sampling / couponing	Physical samples or digital coupons to segments	Awareness, product trial, conversion	Strongest when integrated with POS

2.4 In-store retail media

In-store may be one of South Africa's most underestimated retail media opportunities. The majority of FMCG sales still take place in physical stores, making in-store integration essential to any genuinely omnichannel view of performance. It is also a significant area of potential growth. Tier-one chains are expanding digital signage and electronic shelf labels, while tier-two franchises, liquor outlets, cash-and-carries and independent buying groups offer an opportunity to reach millions of shoppers beyond the major malls..

Measuring in-store advertising means answering three questions:

- **Where is the advertising activated?** Which zones of the store carry the message.
- **Which formats are used?** Traditional, digital or experiential.
- **How are exposure and conversion measured?** With reliable metrics that connect presence to business results.

2.4.1 Store zones and their impact

Choosing the right location matters as much as the creative. Each zone has a distinct role that determines visibility and impact.

Zone	Description	Primary objectives
Entrance	First point of contact, high traffic, immediate visibility	Awareness, launches, mass promotions
Power aisles	Highest-circulation corridors connecting categories	Consideration, cross-category
Gondolas & shelving	The decision zone; products compete directly	Conversion, trade-up
Checkout	Last contact before paying	Impulse, tactical promotions
On-premises / exit	Just outside the store, exit aisles, alarm gates	Final reinforcement, branding

Heat mapping, product rotation and GMROI can help turn location from an assumption into something measurable, showing how different zones contribute to sales and SKU-level efficiency.

2.4.2 In-store advertising formats

Retailers increasingly combine traditional and digital formats to make the most of store traffic and create richer experiences.

Format	Description	Typical location	Strategic role
Digital signage	Dynamic content, creative rotation, programmatic	Entrances, aisles, checkout	Awareness & consideration in high-traffic zones
Electronic shelf labels (ESL)	Dynamic pricing and real-time promotions	Gondolas & shelving	Direct conversion, tactical promotions
POP displays & shelf talkers	Physical signage highlighting products	Gondolas, endcaps	SKU visibility, launches, impulse
Checkout media	Messages right before payment	Till / checkout area	Impulse purchase, cross-sell
In-store audio	Announcements over the PA system	Whole store	Tactical awareness, short-term promotions
Windows / displays	LED screens, vinyls, themed set-ups	Store front	Awareness, branding, launches
Smart carts / beacons	Proximity-triggered messages on mobile	Strategic aisles	Contextual personalisation, targeted promos
Reattainment & activations	Live experiences and tastings	High-traffic zones	Engagement, product trial, branding

Turning ambition into a plan



3. Planning frameworks

Good retail media planning begins before a single placement is bought. It connects the business objective to the right audience, environment and metric, while deciding upfront how success will be demonstrated.This section provides practical frameworks to make those decisions more consistent.

3.1 The connected commerce funnel

These measure the delivery and quality of digital advertising exposure, and apply to both on-site and off-site

Funnel stage	Primary objective	Best-fit environments & formats	Lead metrics
Awareness	Reach and mental availability	In-store / Off-site video / CTV on-site display, signage & windows	Reach, viewable impressions, brand lift
Consideration	Get on the shopping list	On-site display & video, off-site social, power-aisle signage	CTR, dwell time, add-to-cart, search lift
Conversion	Win the purchase	On-site search (Sponsored Products/Brands), ESL, checkout media, coupons	CVR, ROAS, coupon redemption
Loyalty / repeat	Retain and grow value	Direct marketing (WhatsApp, email), CRM audi-ences, sampling	Repeat rate, frequency, CLV

3.2 The objective-to-metric planning grid

Every brief should be able to answer these questions: what are we trying to achieve, where will we activate, who are we trying to reach, and how will we know it worked? One useful way to express that is: “We are investing to achieve [objective], activated through [environment], reaching [audience], and we will judge it on [primary metric], proven by [measurement method].” The following grid turns that principle into a practical starting point.

If the objective is…	Prioritise…	Primary metric	Proof method
Launch a new product	NTB / NTC audiences, awareness + search	NTB %, incremental sales	Geo / control test
Grow category share	Category conquest, share of search	Brand vs category share	Pre/post + control
Defend a hero SKU	Sponsored Products, ESL, always-on search	ROAS, share of shelf	Attribution + holdout
Drive trial	Sampling, couponing, direct marketing	Redemption, trial rate	Coupon match to POS
Clear stock / promote	Checkout media, ESL, push / WhatsApp	Sell-through, AOV	POS uplift vs baseline

What does that look like in practice? A brand launching a new snack SKU could prioritise new-to-brand audiences, combining awareness and search activity. Before the campaign goes live, the team agrees that new-to-brand rate and incremental sales will be the primary measures of success and sets up a geo or control-group test to prove impact. The important point is that success is defined before activation, not reverse-engineered from the results afterwards."

3.3 Breaking the silos: joint business planning

The biggest planning failure in South African retail media is organisational, not technical. Trade / shopper budgets, brand media budgets and performance budgets are usually owned by different teams and planned separately, so the same shopper is targeted three times with no coordination and no single view of return. A connected commerce plan should:

- Convene trade, brand and performance in one planning cycle, with one shared set of objectives and metrics.
- Agree a single audience strategy per campaign, mapped to the retailer's first-party segments, to control frequency and sequencing across environments.
- Set the measurement design before spending - decide the control group, lookback window and incrementality method up front, not after the fact.
- Establish a joint business plan (JBP) with priority retailers - annual, data-shared, with agreed test-and-learn roadmaps rather than campaign-by-campaign buying.

Objective and metric should be agreed before a campaign goes live, not read off whatever the platform happens to report afterwards:

Campaign objective	Primary success metric	Secondary metrics	Business KPI
Awareness	Reach	Impressions, frequency, VTR	Brand lift
Consideration	Product views	CTR, PDP engagement, add-to-Wishlist	Consideration lift
Conversion	Sales / ROAS	CPC, conversion rate, add-to-cart	Revenue
Loyalty	Repeat purchase	Basket size, purchase frequency	Customer lifetime value
Category growth	Incremental sales	Share of category, new-to-brand	Market share

3.4 Budget-setting and the maturity ladder

Networks and brands are at very different stages. Rather than a one-size budget rule, plan against a maturity ladder and move up it deliberately.

Maturity stage	Characteristics	Focus for the next step
1. Foundational	Sponsored Products only; last-touch ROAS; siloed budgets	Standardise definitions; add viewability; agree reporting
2. Structured	On-site search + display; some off-site; consistent metrics	Introduce incrementality tests; joint planning
3. Connected	Full-funnel across environments; JBPs; control-group testing	Clean rooms; multi-touch attribution; in-store integration
4. Optimised	Omnichannel measurement; predictive optimisation; ML attribution	Real-time optimisation as competitive advantage

Turning the plan into action



4. Activation models

Activation is where the plan meets a fragmented, fast-moving set of platforms. The operating model in South Africa is platform-agnostic: build capability across ecosystems and design around the client's objective rather than the tools of any single network. For clarity, this section focuses on three core activation models — on-site, off-site and in-store — while direct marketing remains covered as a broader commerce environment in Section 2 and within planning frameworks where relevant.

4.1 Activating on-site

Definition. Media bought and served inside the retailer's own website, app or marketplace, using its search, browse and product pages as inventory.

- **Start with search**. Sponsored Products are the highest-intent, most measurable entry point. Structure campaigns by shopper mission and category, protect hero SKUs with always-on defensive search, and use CPC controls to manage efficiency.
- **Layer display and video** for consideration and to build brand within the retailer's environment (brand stores, homepage, PDP video).
- **Design creative for mobile-first, data-light users**. Most South African traffic is mobile; keep assets light and legible. Adopt flexible aspect ratios so a single creative set works across screens and networks.

4.2 Activating off-site

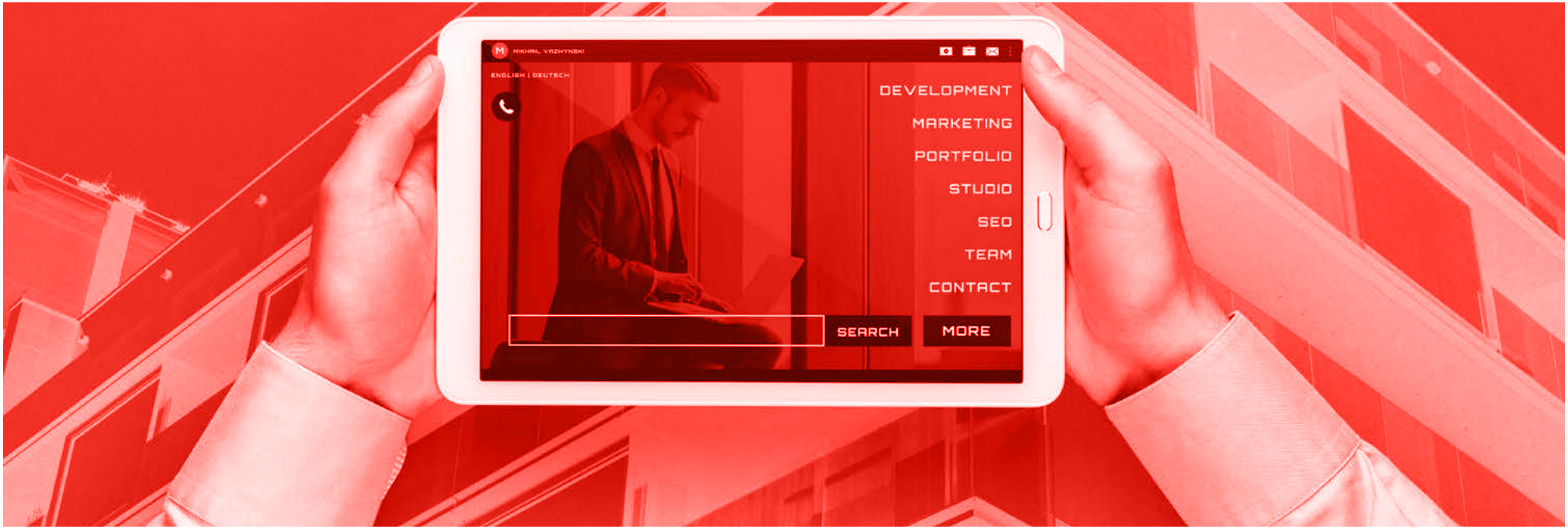
Definition. Media that uses a retailer's first-party shopper data to reach audiences beyond the retailer's own platform, on the open web, social or CTV.

- **Use retailer first-party audiences** to extend reach into video, CTV and social while keeping targeting rooted in real purchase behaviour.
- **Coordinate frequency and sequence** with on-site and in-store so the shopper sees a coherent story, not three disconnected ads.
- **Retarget deliberately**, move exposed non-purchasers down the funnel toward on-site conversion.

4.3 Activating in-store

Definition. Paid media inside the physical store, screens, audio, shelf-edge and till-point media, that reaches shoppers at or near the point of purchase.

- **Match format to zone**, signage and windows at entrance for awareness; power-aisle and end-cap for consideration; ESL, shelf talkers and checkout media for conversion.
- **Bridge digital and physical** with QR codes and coupons that carry a measurable identifier from shelf to POS.
- **Look beyond tier one**. Tier-two franchises, liquor outlets, cash-and-carries and independent buying groups are a large, under-served in-store opportunity reaching shoppers the big malls miss.



Measure what matters

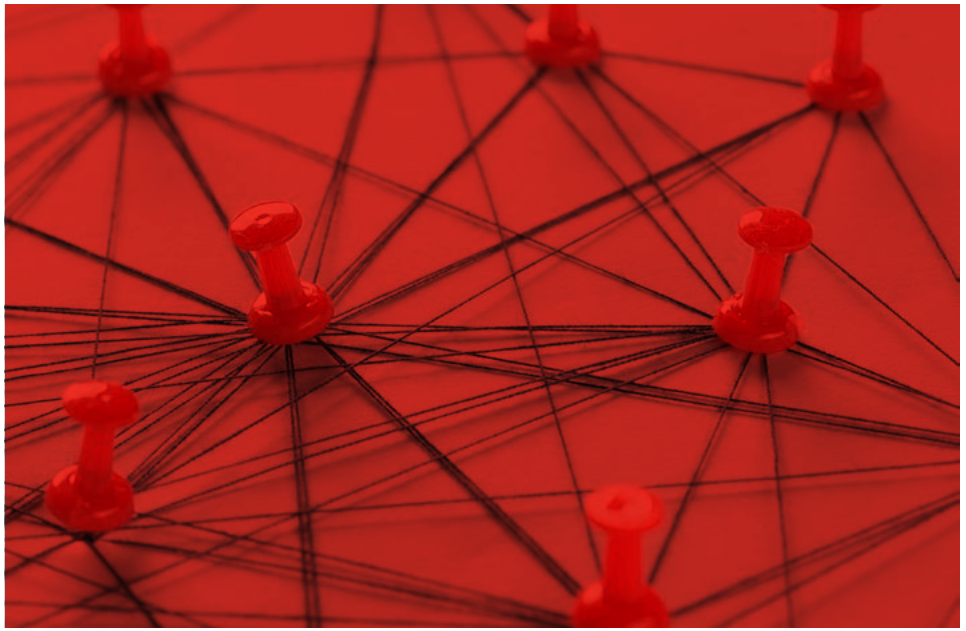


5. Measurement guidance

Measuring well is not just proving a campaign “worked”. It is understanding how much real value it created, which touchpoints contributed, and which outcomes were incremental. Advanced measurement has three objectives: attribute the contribution of each channel (on-site, off-site, in-store); understand total impact on the consumer and the business, including branding, behaviour and halo effects; and quantify incrementality (the sales that would not have happened without the campaign).

Inconsistent definitions are one of the biggest barriers to retail media growth. South Africa is not alone in facing this challenge. Retail media markets in the US, UK and Europe have all had to move towards greater standardisation. When every network measures and reports differently, comparison becomes difficult and optimisation slows.

This section establishes a shared vocabulary across four areas: digital advertising performance, conversion and commercial effectiveness, customer behaviour, and in-store exposure and conversion.These should be treated as common foundations to build from, rather than a mandatory checklist. Capabilities differ between networks and will mature at different speeds.



Four principles for regional consistency

Progressive standardisation - adopt clear, homogeneous definitions for impressions, clicks, conversions and incrementality; start with the fundamentals every network can implement, then mature.

Methodological transparency - state clearly how metrics are calculated, including whether viewability, invalid-traffic filtering (SIVT) or extrapolation are applied.

Interoperability - metrics must be comparable across networks, campaigns and markets. A CTR must mean the same thing on Takealot as on Sixty60.

Omnichannel coverage - metrics must capture both digital exposure (on-site and off-site) and physical exposure (in-store) to build a genuinely unified funnel.

Where possible, South African definitions should align to the IAB / MRC Retail Media Measurement Guidelines and the IAB Europe Commerce (incl. Retail) Media Measurement Standards, including the convention of a 30-day lookback window as the reporting default, so local practice is globally compatible from day one.

5.1 Essential digital performance metrics

These measure the delivery and quality of digital advertising exposure and apply to both on-site and off-site.

Metric	Definition	Recommended SA standard
Impressions	Total number of times an ad is served	Mandatory baseline
Viewable impressions	Impressions meeting viewability criteria	IAB / MRC standard
Display viewability	≥ 50% of pixels in view for ≥ 1 second	Progressive adoption on-site & DSP
Video viewability	≥ 50% of pixels in view for ≥ 2 seconds	Relevant for awareness
Clicks	Interactions leading to PDP, brand store or cart	Differentiate valid clicks
CTR	Clicks ÷ impressions	Engagement indicator
CPM / CPC	Cost per thousand / cost per click	Pricing metrics

Not every network currently supports integrated on-site viewability. Where capability allows, however, viewability should be prioritised for off-site and video. Sponsored Products are typically managed against CPC and clicks. Adding exposure measures such as viewability and viewable impressions creates a fuller picture of performance and gives teams more signals to optimise against.

5.2 Conversion and commercial effectiveness metrics

These connect exposure to real purchase behaviour and let teams evaluate return and efficiency.

KPI	Definition	Typical formula
Sales (conversions)	Total purchases attributable to the campaign	Count of attributable transactions
Total units	Attributable products sold	Sum of units
Unique buyers	Distinct customers with at least one conversion	Count of unique IDs
Conversion rate (CVR)	Share of users who buy after interacting	(Sales ÷ clicks) × 100
Cost per acquisition (CPA)	Average cost per sale	Spend ÷ sales
ROAS	Return on ad spend	Attributed sales ÷ spend
Incremental sales	Additional sales caused by the campaign	Exposed sales − control sales
AOV	Average order value	Revenue ÷ orders
Add-to-cart rate	Early purchase intent	Add-to-cart ÷ impressions or visits

SKU-level analysis, combined with near-real-time tracking, lets teams make agile decisions and optimise on granular data, particularly valuable for in-store campaigns.

5.3 Customer-behaviour metrics

These reveal who is responding and how their relationship with the brand or category evolves.

Metric	Definition	Notes for SA
New-to-brand (NTB)	A shopper who buys the brand for the first time in a defined period	Align window to IAB standard (e.g. 5 generic timeframes)
New-to-category (NTC)	A shopper who buys any product in the category for the first time within the agreed lookback period	Period defined per business unit
Lapsed shopper	A shopper who previously bought the brand or category but has not purchased again within a defined period	Often valued as "2× NTB"
Halo effect	Incremental sales on related, complementary or portfolio SKUs not directly advertised, within the same brand / category	Very relevant for large portfolios
Purchase frequency	Average number of purchases per shopper in a period	FMCG vs durable goods differ sharply
Average ticket	Average spends per transaction	Indicator of incremental value

5.4 In-store metrics

Measuring in a physical store means translating digital concepts like "impression" and "engagement" into physical signals. Two foundational concepts help structure this:

Concept	Definition	Use
OTS (Opportunity to See)	Estimate of how many people passed a zone where an ad was shown	Establishes potential reach
LTS (Likelihood to See)	Real probability a person saw the ad, given traffic, angles and dwell time	Estimates effective exposure

For interactive formats (QR, sampling, touchscreens) use direct engagement metrics, scans, interactions, participations. For commercial impact, connect POS data, coupon redemptions, incremental sales and changes in average ticket. A robust approach combines traffic and zone data (OTS / LTS), point-of-contact interactions, and commercial results (sales, GMROI, redemption, SKU rotation).

5.4.1 In-store exposure

Metric	Definition	Source
Ad plays	Times the creative played on screens / audio	CMS, media players
Gross impressions	Ad plays × estimated zone traffic	CMS + traffic counts
Adjusted impressions	Estimated times a shopper likely saw the ad (OTS / LTS + rotations)	CMS + traffic sensors + visibility models
Avg. viewing time	Average time a shopper observes the ad	Anonymised cameras, sensors
Exposure frequency	Average times a shopper was exposed per visit	CMS + traffic analytics

5.4.2 In-store conversion and effectiveness

Metric	What it indicates	Source
In-store conversion rate	Direct impact of advertising on sales	POS + exposure matching
Dwell time in zone	Ability of the ad to generate interest	Motion sensors, heat maps
Redemption rate	Percentage of issued coupons, voucher codes or offers that are redeemed	Promo systems, POS

Post-exposure avg. ticket	Uplift in basket value	POS + zone data
Incremental sales	Real business impact	Incrementality models + POS
Brand vs category share	Competitive shift driven by the campaign	POS, category analysis
GMROI	Gross margin per rand invested in advertised inventory	Inventory systems + POS

Measurement works best as a connected system, not a collection of isolated metrics. The five layers below move from operational fundamentals to the business outcomes the entire system is ultimately designed to influence. Each level depends on the one beneath it. Strong media performance means little when product availability or pricing is weak. And business growth cannot be attributed confidently when the shopper and commerce signals underneath it are inconsistent. The stronger the foundations, the more confidently teams can connect media activity to business impact.

Level	Focus	Example metrics
L1 – Operational metrics	Whether the basics are in place to sell and advertise the product at all	Stock availability, PDP quality, price competitiveness, promotion compliance, share of search
L2 – Media performance	Delivery and quality of the media itself	Impressions, reach, frequency, CTR, CPC, CPM, VTR, engagement rate
L3 – Shopper behaviour	What shoppers do once exposed	Product views, add-to-cart, wishlist, basket abandonment, repeat purchase, search behaviour
L4 – Commerce performance	Commercial return	ROAS, incremental ROAS, new-to-brand, basket size, conversion rate
L5 – Business growth	The outcomes the whole system exists to drive	Incremental revenue, market share, category growth, lifetime value

5.5 Attribution models and incrementality

Attribution distributes the credit for a conversion across the touchpoints that influenced it. No single model is universally correct; the choice trades simplicity against accuracy.

Model	Description	Strength	Limitation
Last touch	All credit to the final touch before purchase	Simple, widely used	Ignores the earlier journey; over-credits lower funnel
First-touch	All credit to the first touch	Useful for awareness	Misses later contributions
Linear	Equal credit to all touches	Recognises whole funnel	Ignores real weight of each touch
Time-decay	More credit to touches near conversion	Reflects timing	Still relies on fixed assumptions
Multi-touch (MTA)	Statistical proportional credit	More accurate, real journeys	Needs complex data integration
Machine learning	Algorithmic, dynamic weighting	Adapts to real patterns	Technically complex; needs large volumes

Most local networks start with last touch. Some tier-one players are testing linear or time-decay on-site, and MTA in closed environments. Machine-learning attribution is nascent but is a significant opportunity for large-scale omnichannel campaigns.

Attribution alone does not establish causality. Incrementality, covered next, addresses the causal question: what additional sales would not have happened without the campaign? Together, the two approaches provide a stronger basis for understanding contribution and commercial impact.

5.6 Incrementality: measuring real impact

Attribution answers which channels took part; incrementality answers how many sales the campaign actually caused. It is the most important metric for proving the value of retail media, especially for high-rotation products or leading brands, where many sales would have happened anyway..

Method	Description	Best for	Limitation
Randomised control trials	Randomly split audiences or stores into test and control	Large campaigns, controlled settings	Needs scale and time; not always feasible
Matched-market testing	Compare similar markets, one with and one without the campaign	In-store, geo-tests, regional launches	Hard to find perfectly equivalent markets
Propensity-score matching	Match similar exposed vs unexposed individuals	On/off-site with good 1P data	Needs clean, robust databases
Synthetic control	Build a synthetic baseline from historical data	Campaigns with stable history	Needs long, stable data series
Econometric / MMM	Aggregate models of media effect on sales	Cross-channel, macro view	Less granular; depends on input quality

5.7 Brand and behavioural measurement

Not all retail media impact is direct-to-sale. Campaigns also shift awareness, consideration and behaviour, measures that are less developed locally but increasingly demanded to justify upper-funnel and full-funnel investment.

Method	What it measures	Typical application
Brand lift studies	Change in awareness, consideration or preference	On-site video, off-site CTV, upper funnel
Search lift analysis	Uplift in internal brand searches after a campaign	On-site search, awareness
Pre/post behaviour	Change in purchase patterns before vs after	In-store, CRM, loyalty
Halo-effect measurement	Incremental sales on complementary SKUs	FMCG with broad portfolios

5.8 From measurement to optimisation

Measuring precisely is essential but not the goal. The real value of a sound measurement system is its ability to feed decisions that improve business performance in near-real time. In a market as dynamic and price sensitive as South Africa, the ability to read early signals and adjust in-flight is a decisive advantage.

Leading indicators let teams act without waiting weeks for final sales:

Environment	Leading indicators	What they anticipate	Optimisation actions
On-site	Add-to-cart rate, time on page, CTR	Purchase intent, creative relevance, audience fit	Adjust bids, rotate creative, prioritise best placements
Off-site	Brand search lift, VCR, engagement	Effective awareness, message fit, re-targeting potential	Reallocate to higher-lift segments; adjust frequency / sequence
In-store	Coupon redemption, activation interaction, dwell time	Point-of-sale engagement, impulse, cross-sell	Change activation zones, reinforce sampling / audio, coordinate with digital

Where does a given network or partnership currently sit? A short-hand maturity model helps benchmark it, and points to what the next investment should unlock. Most South African retailers currently sit between levels 1 and 2:

Level	Stage	What it looks like
1	Foundational	Media delivery, basic reporting on impressions, clicks and spend
2	Developing	Commerce metrics, sales, ROAS and conversions
3	Advanced	Shopper analytics, basket insights, repeat purchase, audience segmentation
4	Leading	Closed-loop measurement, online + offline attribution, incrementality testing
5	Transformative	Predictive commerce intelligence, incrementality + MMM + AI optimisation

Beyond early signals, structured experimentation, A/B tests, multivariate tests and well-designed pilots, is the basis for systematic optimisation. Two technologies enable a step-change:

- Machine learning predicts outcomes before they happen, corrects observational bias and drives dynamic optimisation of bids, audiences and creative.
- Data clean rooms connect dispersed signals across on-site, off-site, CRM and in-store, enabling decisions based on the whole customer journey rather than isolated silos, while protecting consumer privacy under POPIA.

The direction is the same for everyone, even as the pace varies by retailer: measurement must become an active lever for optimisation and growth. That shift is what separates brands that simply “measure well” from those that turn measurement into real competitive advantage.

5.9 AI in connected commerce

The same shift, from reporting to active optimisation, is what's driving AI adoption across retail media globally. Four applications are already relevant locally, even where full adoption is still early:

- Generative creative. Producing and resizing campaign assets at the speed multi-retailer, multi-format activation now demands.
- Predictive audiences. Modelling which shoppers are likely to convert or lapse, ahead of the behaviour happening, rather than only segmenting on past purchases.
- AI shopping assistants. Conversational and search interfaces that will increasingly mediate discovery and will need their own measurement approach as they scale.
- Retail media optimisation. Machine-learning bidding and budget allocation, the natural extension of the manual leading-indicator adjustments described above.

(Treat this as a watch list to revisit each edition rather than a finished framework: measurement standards need to exist before AI optimisation can be trusted against them)



6. Case studies and use cases

The examples below illustrate how the frameworks in this playbook apply in the South African market. They draw on publicly reported market developments and are presented as illustrative use cases to show the pattern of good practice, not as audited performance claims.

6.1 On-site search at scale, the marketplace model

Use case: Sponsored Products on a national marketplace

Context. Takealot Group Advertising (relaunched as "Takealot Group Advertising") offers a full-funnel, self-service retail media platform, the first self-service model of its kind reported in South Africa, built on first-party data, dynamic formats and closed-loop measurement across 40M+ monthly visits.

Approach. A brand structures Sponsored Products by category and keyword, uses flexible budget controls, and reads platform data insights to optimise toward conversion, protecting discoverability on high-competition search terms.

Why it works. Sponsored search meets shoppers close to the decision point, while CPC buying provides a clear efficiency signal. Self-service control and reporting then give brands the ability to learn, adjust and optimise rather than simply buy and wait.

Playbook link. Section 3.2 (objective-to-metric), Section 4.1 (activating on-site), Section 5.5 (attribution).

6.2 Grocery goes shoppable, sponsored search on quick commerce

Use case: Sponsored Search on an on-demand grocery app

Context. The introduction of Sponsored Search on Checkers Sixty60 lets brands reach app-based grocery shoppers at the point of purchase for the first time, a milestone for South Africa's online grocery market.

Approach. Because grocery is shaped by shopper missions, purchase frequency and perishability, campaigns are designed around basket behaviour and "share of shelf", not generic e-commerce tactics.

Why it works. Loyalty data (Xtra Savings) enables precise targeting; the closed loop from search to basket makes incrementality provable via geo / control testing.

Playbook link. Section 3.1 (funnel), Section 5.6 (incrementality), Section 5.3 (behavioural metrics).

6.3 The connected retailer, data, media and closed loop

Use case: Building a retail media network on loyalty data

Context. Shoprite Group built retail media capability (Rainmaker Media) on top of its loyalty and data assets, reporting a network reaching tens of millions of shoppers monthly across its store brands, plus a supplier data platform for a single customer view.

Approach. Brands combine on-site and in-store placements with loyalty-based targeting, and measure with closed-loop attribution linking exposure to Xtra Savings purchase data.

Why it works. Scale plus first-party data plus a physical footprint is exactly the first-party-data-plus-physical-footprint combination this playbook opened with, and it is most powerful where in-store sales dominate.

Playbook link. Section 1.1 (first-party data), Section 2.4 (in-store), Section 3.3 (joint business planning).

6.4 Conversational commerce, the WhatsApp play

Use case: WhatsApp-led direct marketing and re-engagement

Context. WhatsApp is a dominant, high-CTR channel unique to markets like South Africa, used by national retailers for promotions and service and by micro-merchants as a primary sales channel.

Approach. An opt-in base is segmented and messaged two-way for launches and re-engagement; every message is instrumented with UTMs and IDs and mapped to defined conversion windows.

Why it works. It reaches the individual shopper at low cost with high engagement; disciplined instrumentation converts a "black box" into a measurable channel that connects to POS.

Playbook link. Section 2.3 (direct marketing), Section 5.8 (leading indicators).



6.5 The in-store frontier, beyond tier one

Use case: Digital in-store media in tier-two and independent retail

Context. While tier-one grocery chains are the visible adopters, a large opportunity is emerging in tier-two franchises, liquor outlets, cash-and-carries and independent buying groups serving millions of shoppers outside the malls, and in a vast informal economy worth an estimated R190bn+ a year.

Approach. Digital signage and ESL are matched to store zones; QR and coupon identifiers bridge shelf to POS so exposure can be linked to sales; OTS / LTS structure the exposure estimate.

Why it works. It captures the majority of FMCG sales that still happen in physical stores, in exactly the retail footprint that global playbooks overlook. Playbook link. Section 2.4 (in-store), Section 3.4 (in-store metrics), Section 5.4 (activating in-store

Playbook link. Section 2.4 (in-store), Section 5.4 (in-store metrics), Section 4.3 (activating in-store).



Glossary



Glossary

A shared vocabulary is the foundation of comparable measurement. The glossary below uses IAB South Africa's Retail Media Glossary, August 2026, as the terminology reference for this playbook.

Term	Definition
Addressable audience	The group of shoppers a retailer or platform can actively reach through media, CRM or targeting tools, based on available identifiers and consent.
Advertising cost of sales (ACOS)	A sponsored-search efficiency metric calculated as ad spend divided by attributed sales. ACOS is expressed as the percentage of sales spent on advertising. A lower ACOS means the campaign generated more sales for each rand spent.
Aggregated market data	Combined retail or commerce data used to understand category, brand, shopper or sales trends across a market or defined retailer set.
At-home sampling	Delivery of a free product sample to a shopper's home, often linked to a retail order, product trial or later purchase measurement.
Attributes	Characteristics used to describe a shopper, product, order or audience segment, such as category bought, location, pack size or purchase frequency.
Attribution	The process of assigning credit to the media touchpoints that may have influenced a shopper action or sale.
Average cart/basket size	The average value of an order or basket during a campaign period. It is usually calculated as sales revenue divided by orders.
Brand page	A retailer or marketplace page where a brand can group its products, storytelling, offers and shoppable links in one destination.
catalogue / sales catalogue	A retail promotional communication showing featured products, specials or offers for a defined period, either printed or digital.
Category share	The proportion of category sales, orders or units represented by a brand or product set within a retailer, platform or market.

Closed-loop measurement	Measurement that connects media exposure or engagement to a later purchase, ideally at shopper, order, SKU or store level where data allows.
Commerce & retail media	Retail media is advertising bought through a retailer, marketplace or commerce platform using shopping context, inventory or retailer shopper data to influence purchases.
Commerce data	Data linked to shopping behaviour, such as searches, product views, baskets, orders, units sold or loyalty activity.
Commerce intent	Signals that show a shopper is likely to buy, such as a search query, product view, add-to-cart, repeat purchase or category browse.
Connected media	Media that links a non-retail or offline touchpoint to a digital retail journey, such as through a trackable link, QR code or shoppable destination.
Consumer journey or customer journey or shopper journey	The steps a shopper takes from awareness and consideration through to purchase, repeat purchase and loyalty.
Custom audience	A defined audience segment built from approved shopper, campaign, CRM or platform data for a specific campaign purpose.
Customer targeting	Reaching a defined group of shoppers with a relevant retail media or direct communication message.
Digital catalogue	A digital version of a retailer's specials or product feature list, sometimes delivered as a PDF, webpage, in-app page or shoppable campaign unit.
Digital coupons	A digital code or offer that gives a shopper a discount, reward or incentive and can be tracked against redemption and sales.
Digital shelf	The online version of the retail shelf, including product visibility, ranking, content, price, promotions, availability and reviews.
First to basket	A measure of whether a product was the first item added to a digital basket before other products or competitors.
First-party data	Data collected directly by a retailer, platform or brand from its own shoppers, users, loyalty programme members or customers, subject to consent and privacy rules.
Full funnel marketing	A campaign approach that supports awareness, consideration, conversion and loyalty, rather than only one stage of the journey.

Geotargeting	Targeting shoppers or campaign delivery based on location, delivery area, store catchment, city, province or region.
Identity data & resolution	The process of matching shopper identifiers such as loyalty IDs, hashed emails, mobile numbers or device IDs across approved data sets to improve targeting and measurement.
In-store digital screens	Digital screens placed in retail environments to deliver shopper messaging, brand advertising or promotional content.
In-store retail media	Paid media opportunities inside a physical retail environment, such as screens, audio, shelf media, point-of-sale material or till-point messaging.
In-store sales value	The rand value of sales generated through physical stores during a defined campaign, product or measurement period.
Incremental sales	Additional sales generated above an expected baseline, often used to judge the true sales impact of a campaign.
Long-loop data	Shopper behaviour observed over a longer period, used to understand repeat purchase, loyalty, frequency, category switching and customer value.
look-back window	The time period after an impression, click or engagement during which a sale can be attributed back to the campaign.
Marketplaces	Digital platforms where multiple sellers or brands can list and sell products to shoppers through one retail destination.
Monetisation / media monetisation	The process of turning retailer-owned channels, shopper data or digital inventory into paid media revenue.
off-site / off-network / off-platform retail media	Retail media that uses retailer data or retail audiences outside the retailer's own website, app or store environment.
Omnichannel retail	Retail that connects physical stores, online platforms, apps, delivery and click-and-collect into one shopper experience.
Omnichannel retail media	Retail media that runs across more than one channel, such as app, web, in-store, CRM and offsite media.
On-site / on-network / on-platform retail media	Advertising served within a retailer's own digital environment, such as its website, app, marketplace or ecommerce platform.

On-site display	Display advertising placed within a retailer's own digital environment, such as home page banners, category banners or product-page banners.
Online/offline sales conversion	A measured sale that happens either online or in-store after a shopper was exposed to, clicked on or engaged with retail media.
Point-of-sale data	Transaction data captured when a shopper buys a product, including product, quantity, value, store, date and basket information where available.
Predictive audiences	Audience segments created using models that predict likely future behaviour, such as likely buyers, lapsed shoppers or high-value customers.
Product catalogue / shopping feed	A structured product data file that feeds product names, images, prices, availability and other details into retail media or ecommerce systems.
Product feed management	The process of maintaining accurate product data, images, prices, availability and attributes in feeds used by ecommerce and media platforms.
Product listing optimisation	Improving product pages and listings so shoppers can find, understand and buy the product more easily.
Product recommendations	Suggested products shown to shoppers based on browsing, purchase behaviour, basket contents or retailer algorithms.
Product search	A shopper's search for products on a retailer or marketplace, and the paid or organic results that appear from that search.
Real-time targeting	Serving a message based on a shopper's current context or behaviour, such as location, search, basket or product page activity.
Research online buy in-store (ROBIS) / research online shop in-store (ROSI) / research online purchase offline (ROPO)	All these variations refer to the concept where shoppers research brands, offers, and products online before making an in-store purchase.
Retail media network (RMN)	A retailer-owned or retailer-enabled media business that lets brands buy advertising using the retailer's digital, in-store or shopper-data assets.
Retail media platform	Technology used by retailers, marketplaces or media teams to plan, sell, serve, optimise and report retail media campaigns.

Return on ad spend (ROAS)	A performance metric calculated as attributed revenue divided by ad spend. For example, a ROAS of 5 means R5 in attributed sales for every R1 spent.
Return on investment (ROI)	A broader performance metric that compares the financial return from an activity against total investment, including media and other costs.
Sales uplift	The increase in sales during or after a campaign compared with a previous period, baseline or control group.
Screen networks	A network of digital screens inside or around retail environments used to serve brand or shopper messages.
Self-serve platform	A platform that allows advertisers or agencies to set up, manage, optimise and report campaigns directly, without every task being handled manually by the retailer.
Shoppable content	Content that lets a shopper move directly from inspiration or information to a product page, basket, retailer or purchase path.
Shoppable media	Media that connects directly to a shopping action, such as add-to-cart, product page visit, coupon redemption or purchase.
Shopper marketing	Marketing focused on influencing shoppers along the path to purchase, including in-store, online, promotional and retail partner touchpoints.
Showrooming	A behaviour where shoppers view or compare products in a store but later purchase online.
Sponsored product ads (also known as promoted products)	Paid product placements that appear in search results, category pages or product grids, usually triggered by keyword, category or product targeting.
Stock keeping unit (SKU)	A unique product variant identifier used to track sales, stock, pricing and reporting at product level.
Supply-side retail media	Retailer-side technology and processes that help sell, manage, serve and measure retail media inventory.
Trade marketing	Marketing activity funded or planned through retailer, distributor or trade relationships to drive product availability, visibility, promotion and sell-through.

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About IAB South Africa

The IAB South Africa is the industry body representing the digital advertising and marketing ecosystem in South Africa. It sets standards and best practice, produces research such as the annual AdSpend Survey, and convenes brands, agencies, publishers, platforms and technology partners to grow the industry responsibly.

This playbook is a product of the IAB SA Connected Commerce Committee, a group of senior practitioners drawn from brands, retailers, agencies, marketplaces, and data and technology partners, reflecting how connected commerce actually operates. The committee exists to meet the growing need for shared standards, consistent measurement and clearer ways of working across the ecosystem.

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