

POINT OF VIEW

Retail CMOs: Turn screen space into profit with RMNs

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Today's CMOs and CDOs face pressure on three fronts: the erosion of traditional digital ad effectiveness as cookies disappear and privacy rules tighten, the fragmentation of media ecosystems across channels, and the relentless demands to prove ROI on every marketing dollar. Retail media networks (RMNs) promise a worthy solution by offering closed-loop distribution, activated via rich first-party media delivery across digital and physical touchpoints.

According to industry estimates, RMNs' spend will exceed \$179 billion by 2025, outpacing TV and rivaling traditional digital media growth. In the US alone, RMNs are expected to approach \$60 billion in annual spend this year and hit \$100 billion by 2028, growing at roughly 20% year-over-year.

Wipro's VisionEDGE is a credible platform in the RMN space, which can turn stores' digital signage into a profit engine by linking attention, engagement, and POS data.

The retail store economics work well for a Wipro VisionEDGE-like solution

Wipro VisionEDGE aligns well with HFS Retail Framework, encompassing experiential stores, anticipatory retail, and measurable customer experience (see Exhibit 1). The platform works well in stadiums and airports, but the economics shine on the retail fleet scale.

RMN monetization compounds. For example, a nationwide retail chain can reach millions of shoppers across thousands of stores daily, linking ad exposure directly to point-of-sale transactions. That scale multiplies reach and turns every screen into a measurable profit engine.

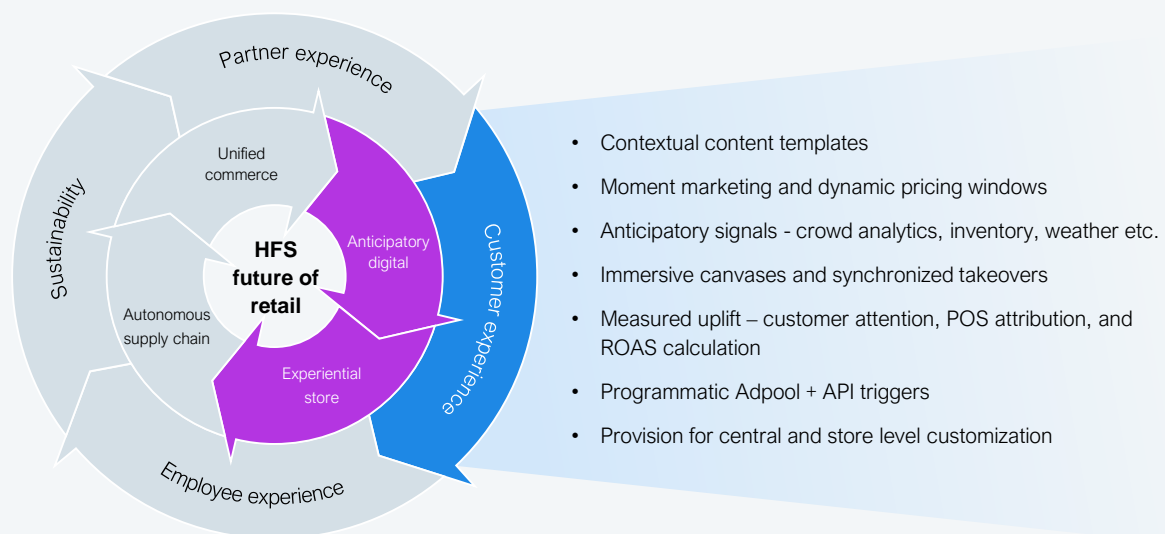
However, the industry is only beginning the journey. Many retail stores lack digital

infrastructure, high-speed networks, and standard screen deployments. Wipro VisionEDGE bridges this gap with a flexible player strategy (supporting cloud/on-prem), secure IPsec network overlays, and field deployment plus day-2 ops services. The platform can bring even less digitally mature stores into the RMN fold, accelerating access to what will become a billion-dollar industry opportunity.

How Wipro VisionEDGE aligns perfectly with the HFS Retail Framework

As illustrated in Exhibit 1, Wipro VisionEDGE anchors experiential and anticipatory capabilities in the inner flywheel of the HFS framework. In contrast, the outer flywheel, i.e., higher customer experience, is lifted by transparent measurement and optimization at fleet scale.

Exhibit 1: How the platform powers three critical levers for retailers: experiential stores, anticipatory retail, and measurable CX



Source: HFS Analysis of Wipro's VisionEDGE

Ditch the static signs: Create an in-store media network that shoppers notice

The platform centralizes control for thousands of endpoints and synchronizes content across mixed screen zones and video walls. Based on the demo given to HFS analysts, the result feels like 'real media,' not static signage: synchronized takeovers, interactive kiosks, endless aisles, dynamic menu boards, and electronic shelf labels (ESLs), all mapped to merchandising moments and brand activations. That's the core of an experiential store.

Move beyond schedules: Let stores react in real time to shopper signals

Anticipatory means the store reacts before the shopper asks. Screens shift from static loops to moment-based marketing, such as sunscreen when the sun comes out, promotions before shelves run dry, or brand takeovers triggered by live events. Wipro's demo showed how data ingestion, rule sets, and AdPool fills make this real. Device-to-cloud flexibility drives scale, but the true differentiator is attribution and monetization.

RMNs improve shopper journey and engagement

Imagine entering a store and seeing a display promoting a seasonal jacket based on current weather, or receiving loyalty tier offers personalized to your profile as you approach a digital kiosk. Such experiences reduce friction, create relevant moments, and drive incremental basket lift.

Prove screens drive sales, not screen spam

The outer flywheel improves because attention drives 'engagement,' which leads to 'purchase' that can be measured and tuned. Wipro VisionEDGE combines proof-of-play with computer-vision attention/dwell, then stitches to POS/loyalty for attribution. That closes the loop, reduces 'screen spam,' and earns higher CPMs (cost per thousand impressions) and better in-store outcomes.

Don't buy screens; Buy sales impact

HFS analyzed (see Exhibit 2) how Wipro VisionEDGE connects content and monetization to edge playback, finally closing the loop with audience analytics and POS-linked attribution, all supported by network, cloud deployment, and services.

Wipro VisionEDGE is a modular platform that a retailer can buy as software plus services or as an all-in bundle:

- **Core platform** manages thousands of endpoints, synchronizes content across mixed screen zones and video walls, and layers multiple content types on the same canvas.
- **Ad monetization** via Wipro VisionEDGE AdPool turns screens/slots into programmatic

inventory, pipes bids/creatives to endpoints, and produces proof of play and audience analytics dashboards. Retailers already using this approach prove that screens go beyond informing to selling. The scale economics work once you move beyond pilots.

- **Data and analytics** use computer vision to estimate attention and dwell, combined with POS data for campaign attribution (e.g., off-the-shelf, gender split, attention, and conversion trends).
- **Infrastructure and services** include network design/operations (often Cisco), field deployment, content ops through Designit (Wipro's design unit), and 24×7 run support.
- **Commercial models** span per display or per store, plus revenue share tied to realized ad revenue; appealing to CMOs/CDOs and store operations leaders who own outcomes.

Exhibit 2: Value loop and architecture for retail



Source: HFS Analysis of the Wipro VisionEdge

The ROI math proves that screens can pay for themselves fast

HFS estimates (see Exhibit 3) demonstrate that in-store retail media can be one of the highest-margin businesses a retailer can launch. The economics are clear: break-even hits at just one-third ad fill with CPMs as low as \$5. From there, returns rise steeply; at CPM, \$6 and 60% fill, and ROI exceeds 117% per store. Every CMO and CFO should run this math against their telemetry: footfall, dwell, reach, and conversion. The line between a loss-making pilot and a scaled profit engine comes down to two levers: how quickly you fill inventory and whether you can prove sales impact. If you do not control those, your competitor will. Amazon Ads continues to dominate with nearly \$50 billion in ad revenues, larger than all other US RMNs combined. Walmart Connect is a distant second with \$4.4 billion in 2025, up 27% year-over-year.

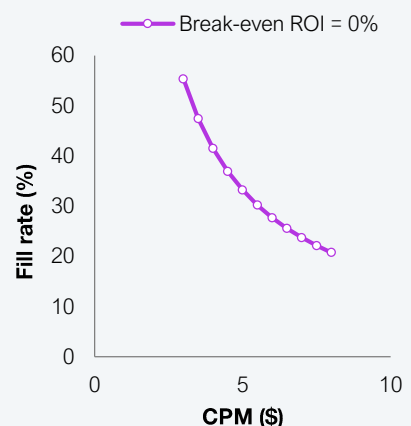
This model is already proven at scale, so why aren't you using it in your stores?

Wipro VisionEDGE has sports venues and airports as clients with proven synchronization, control, and storytelling canvases. For example, successful installations at a leading sports venue and one of the busiest airports in the US have clear metrics to prove revenue maximization and elevated customer experience. If stadiums and airports can monetize attention in real time, imagine the economics of a 2,500-store retail fleet. One of North America's largest retail-adjacent media networks showcases how synchronized content and real-time analytics can transform screens into revenue engines. The platform's current retail pipeline includes several multi-thousand store retail opportunities, including one of the largest pharmacy chains in the US where the economics may dwarf other verticals.

Exhibit 3: Showcase a single-view ROI sensitivity heatmap

Fill % / CPM \$	3.0	3.5	4.0	4.5	5.0	5.5	6.0	6.5	7.0	7.5	8.0
30%	-46%	-37%	-28%	-19%	-10%	-1%	8%	17%	26%	36%	45%
35%	-37%	-26%	-16%	-5%	5%	16%	26%	37%	48%	58%	69%
40%	-28%	-16%	-4%	8%	20%	32%	45%	57%	69%	81%	93%
45%	-19%	-5%	8%	22%	36%	49%	63%	76%	90%	103%	117%
50%	-10%	5%	20%	36%	51%	66%	81%	96%	111%	126%	141%
55%	-1%	16%	32%	49%	66%	82%	99%	115%	132%	148%	165%
60%	8%	26%	45%	63%	81%	99%	117%	135%	153%	171%	189%
65%	17%	37%	57%	76%	96%	115%	135%	154%	174%	194%	213%
70%	26%	48%	69%	90%	111%	132%	153%	174%	195%	216%	237%
75%	36%	58%	81%	103%	126%	148%	171%	194%	216%	239%	261%
80%	45%	69%	93%	117%	141%	165%	189%	213%	237%	261%	285%
85%	54%	79%	105%	130%	156%	182%	207%	233%	258%	284%	310%
90%	63%	90%	117%	144%	171%	198%	225%	252%	279%	307%	334%

Break-even fill by CPM



HFS assumptions per store: footfall 900/day, reach 55%, effective ad exposures 10 per reached shopper, annual run-cost \$3,000. ROI = (ad revenue - cost) / cost. Revenue = CPM × (impressions + 1,000), impressions/day = footfall × reach × exposures × fill. Replace with retailer telemetry to calibrate.

Source: HFS Research Analysis, 2025

Five mistakes that retailers make that kill RMN value before it starts

- **Measurement fragmentation:** RMNs live on trust; retailers must standardize incrementality and ROAS beyond attention metrics. The platform provides dashboards plus POS linking, and auditable reporting is insisted on.
- **Content operations:** Templates don't replace a content factory; governance and steady creative ops (Wipro enables it through Designit) are needed to avoid 'screen spam.'
- **Privacy and optics:** Computer vision must remain privacy-preserving, aggregated, and anonymized, with clear shopper messaging.
- **Store IT readiness:** Networks must meet SLOs; Wipro leans on Cisco and day-2 ops, but readiness varies by fleet/franchise.
- **Commercial transparency:** Revenue-share is attractive but requires clear baselines and controls.

Who should be in the room for an effective RMN setup?

- CMO/CDO: Define media and marketing strategy and own ROI
- Store operations: Ensure hardware, network, and daily tech reliability
- IT/Security: Safeguard infrastructure, deployment, and data compliance
- Merchandising: Enable dynamic triggers (e.g., inventory-aware messages)
- Media/analytics teams: Set measurement KPIs, attribution, and optimization criteria
- Finance/commercial leaders: Align on investment models (subscription, revenue share)

The Bottom Line: Every idle screen is lost revenue and lost influence. Wipro VisionEDGE makes screens pay, but only if CMOs and CDOs govern them like a revenue business, not wall decor.

Retailers considering in-store RMNs should:

1. **Prove the economics fast:** Launch a controlled 10–20 store pilot that blends endemic and nonendemic ads, with auditable POS-linked attribution. Treat this as a board-level test case, not a marketing experiment.
2. **Govern the creative like revenue:** Establish a content council spanning brand, merchandising, RMN, and store ops. Fund it like you would a sales channel. Templates alone won't stop "screen spam."
3. **Lock trust before you scale:** Set unbreakable guardrails for privacy, consent, and network performance. If shoppers or store ops don't trust the system, your RMNs collapse before it starts.

HFS Research author



Ashish Chaturvedi is an Executive Research Leader for HFS Research. He leads coverage for supply chain operations, the retail and CPG industry, and business 'data' services. He is an accomplished IT industry analyst, regarded as a top retail expert globally, and is featured regularly in various IT media publications. Additionally, he is a member of multiple industry associations, including RetailWire BrainTrust and RETHINK Retail. With more than 16 years of technology research experience, Ashish has authored over 100 research reports covering retail technologies, enterprise modernization, the platform economy, future supply networks, data platforms, and digital-driven growth.

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