

THE DUO EFFECT OF RETAIL MEDIA AND CTV

IT'S NO SECRET THAT CONSUMERS ARE SHIFTING FROM LINEAR TV TO CONNECTED STREAMING PLATFORMS, AND SIMULTANEOUSLY RESHAPING HOW THEY SHOP. AS INNOVATIONS IN AGENTIC COMMERCE ACCELERATE, THIS EVOLUTION IS ONLY SET TO CONTINUE. SO WHAT DOES THIS MEAN FOR MARKETERS AND THE RETAIL MEDIA AND CTV ECOSYSTEM?

This is something we started to explore during our inaugural Retail Media Impact Summit last month. Whilst the audience was arguably heavy on retail media executives, what struck me was the optimism in the audience about the power of collaboration between the two ecosystems. Whilst some are describing this as a "battleground", I think we should be thinking about this as a new paradigm with waves of opportunity for all players: retailers, broadcasters, media owners and marketers.

Inspired by Daniel Knapp's presentation at the Retail Media Impact Summit, I'm framing this first section through the lens of the retail media activist and the TV activist—two perspectives that, together, capture the unique strengths of each ecosystem.

THE RETAIL MEDIA ACTIVIST

Advertisers today crave data, targeting, and measurable outcomes, and Retail Media feeds this craving. Highlights from Daniel's presentation include:



Retail media is booming, with global ad spend reaching \$29 billion and growing fast—even without Amazon's contribution.



The store is becoming the new screen, with retail media offering infrastructure that powers all media, not just a channel.



Retail media is already partnering with creators like MrBeast and platforms like Walmart's upfronts, claiming the next generation of video belongs to them.



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THE TV ACTIVIST

However, TV's scale and power arguably trump any other marketing channel. Highlights from Daniel's presentation include:



TV still dominates in total media spend, especially when aggregating linear, CTV, and other formats.



Decades of brand-building evidence support TV's long-term effectiveness, with compounding impact over time.



TV has created cultural icons – retail media, not so much.

Some of the core themes we are observing here are:

CTV Integration: Retail media ad spend on CTV is projected to grow three times faster than retail media search, signalling a major shift toward video-based commerce advertising.

Commerce Signal Targeting: Brands are leveraging first-party data—like purchase history and browsing behaviour – to deliver highly personalised ads in CTV environments.

Omnichannel Attribution: Retail media networks are expanding their measurement capabilities to track performance across digital, in-store, and CTV touchpoints.

Performance-Driven CTV: CTV is evolving from a brand-awareness tool to a full-funnel performance platform, capable of driving conversions and measurable ROI.

Interactive Ad Formats: QR codes, gamified experiences, and mobile-TV syncing are becoming more widely adopted, allowing viewers to engage directly with ads.

The session also included a compelling case study from RTL and OBI, showcasing how the fusion of retailer data with the expansive reach of Connected TV translates into real-world impact. Their partnership exemplifies how advertisers can activate full-funnel campaigns – combining precise audience targeting, such as 'Home Movers', with scalable reach and sophisticated measurement capabilities.

A CALL FOR UNITY

As outlined at the beginning, I believe, and the discussion during the event certainly highlighted this, the power and future of both Retail Media and CTV lie in unity and partnership. Case studies demonstrate that both channels are growing, especially with the rise of CTV. Strategic partnerships – like those between Walmart and creators—suggest a future where retail media and TV can coexist and complement each other.

CURRENT USE CASES

Precise Targeting: Retailers can use transaction data, loyalty program data, and user-generated content to create actionable segments like “Home Movers.” This segment can then be targeted with relevant ads on CTV for products such as communication services, insurance, and electricity providers.

Reaching new target groups: Partnerships between retailers and publishers allow advertisers to reach new target groups by combining retail data with inventory on big screens, web areas, or mobile phones.

Supporting lower-funnel marketing: Retail data can be used to support lower-funnel campaigns and offer new targeting options, especially for clients who already have high brand awareness and want to encourage purchases.

Activating users across the ecosystem: Retail media’s main use case is targeting across different platforms outside of the retail environment, collaborating with premium partners to drive reach for advertisers.

Offering products for specific life moments: Data segments can be created for special life moments (e.g., people moving or building houses) to offer relevant products from insurances or financial institutions.

Extending targeting with lookalikes: Overlapped audiences can be extended with “lookalikes” to reach potential customers who are likely to purchase, even if they are not current customers.

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THE FUTURE ISN'T ABOUT COMPETITION BETWEEN RETAIL MEDIA AND CTV — IT'S ABOUT COLLABORATION. TOGETHER, WE CAN DELIVER CAMPAIGNS THAT COMBINE REACH WITH MEASURABLE SALES IMPACT, CREATING REAL VALUE FOR BOTH BRANDS AND CONSUMERS.

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