

Roku + dentsu + LUTH
RESEARCH

Shoppable Screens

It's Retail Media's Moment

 **THE QUIRK'S EVENT**
FOR MARKETING RESEARCH & INSIGHTS PROFESSIONALS

Today's Speakers



**Steve
Montgomery**

SVP,
Research

LUTH
RESEARCH



**Jeff
Bustos**

SVP,
Retail Media and Analytics

dentsu



**Zoe
Zirlin**

Ad Research
Manager

ROKU

Roku is half of all streaming.

1 in 2

U.S. Broadband
Streaming HHs

more than

125
million

people see our home
screen every day



Nearly Half

the US streaming time of 4 of the
largest streaming apps is on Roku.

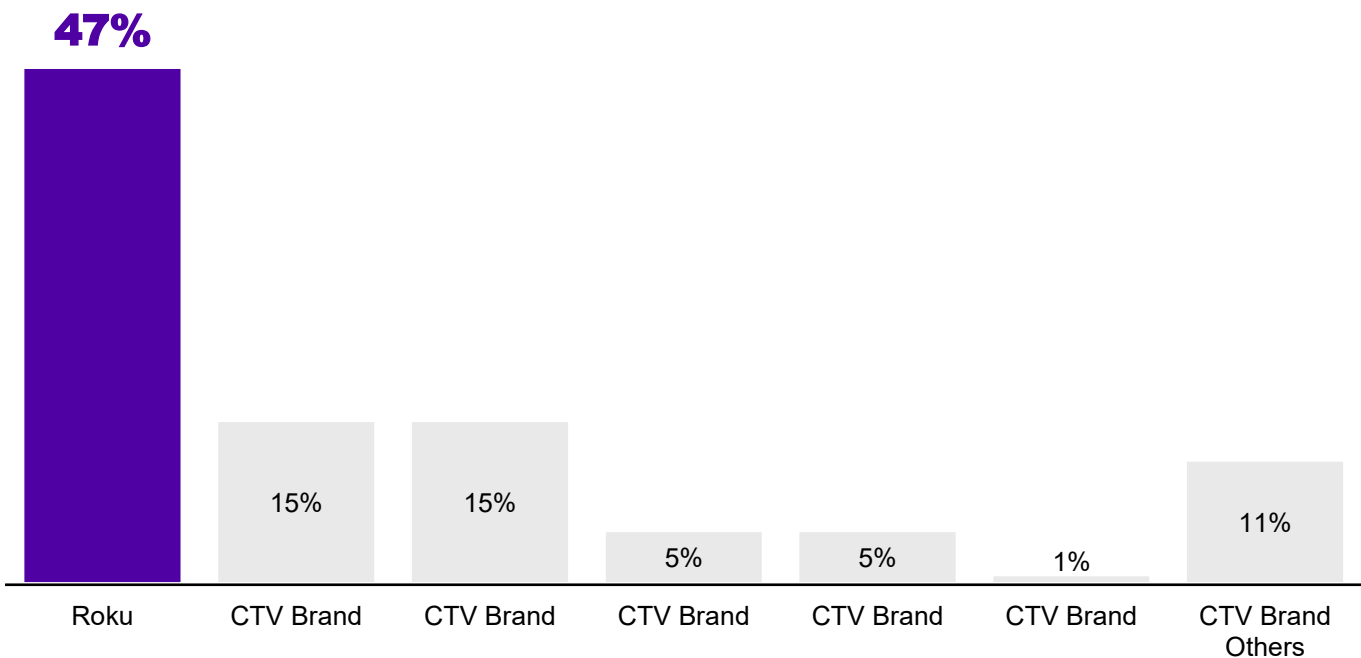


hulu

max

YouTube

Percentage of time spent by CTV brand in the U.S.



A global network of powerhouse agencies innovating to impact as one dentsu



Transformative
Creativity



End-to-End Production
Making Ideas Land

iPROSPECT

Brands Accelerated

CARAT

Designing for People

dentsu x

Experience Beyond

↳MERKLE

Powering the
Experience Economy

71,000 people | 110+ markets | 16,000 clients | No. 7 in the world | Powered by 100% renewable energy

About Luth Research



1977

Founded in
San Diego, CA

1999

Online Panel
Developed

2010

Passive Digital
Tracking with
ZQ Intelligence®

2022

Full Global
Capabilities

2025

In-App
Tracking at
Scale

Shoppable Screens

It's Retail Media's Moment

Initiatives

1

Understanding the impact of shoppable screens on consumer behavior and purchasing decisions.

2

Identifying challenges and trends in the adoption of shoppable screens.

3

Exploring the role of retail media in modern commerce.

The Methodology



WE CAPTURED



Attitudes and perceptions on retail media.

INTEGRATED

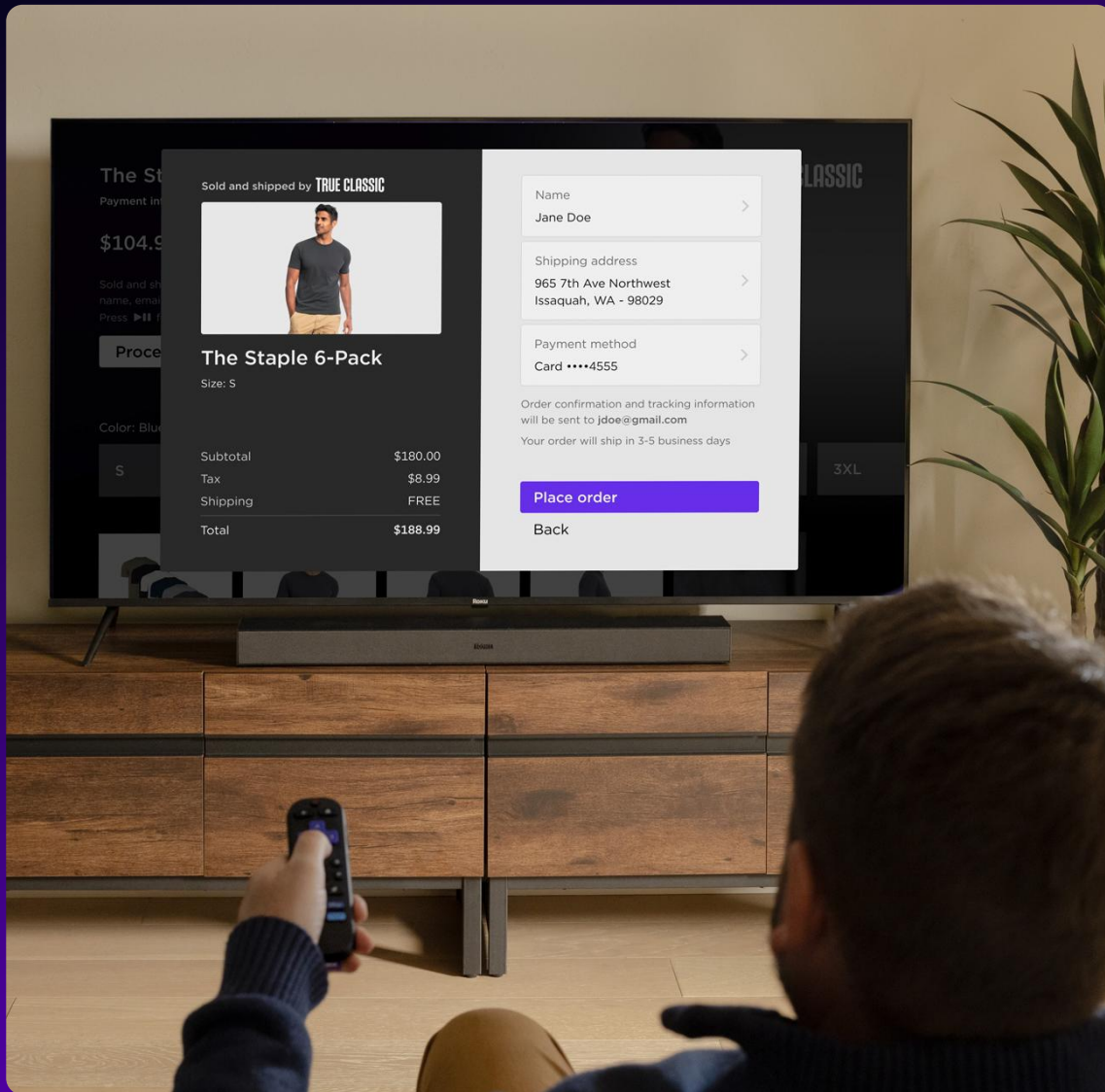


Behavioral digital data from Luth's ZQ Intelligence panel.

ZQ INTELLIGENCE DELIVERS



Holistic understanding of how today's consumers approach shoppable TV.



51%

of TV streamers, roughly
44 million households,
engage in commerce-related
activities on their TV.

The Challenge

While 83% of streamers agree that ads based on products or services relevant to them are valuable, only 34% agree that they would pay attention to these ads.

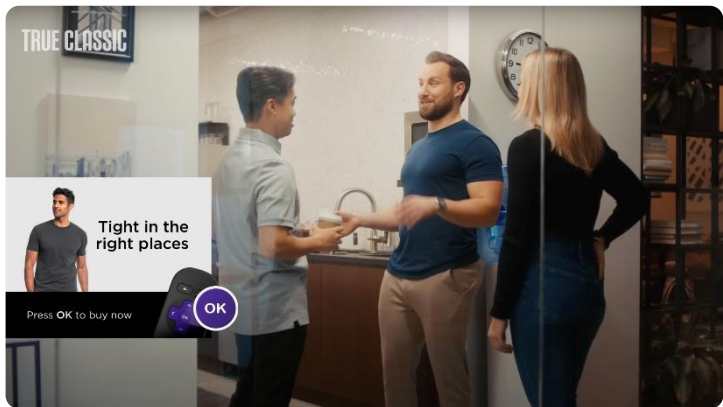
Consumers may like relevant ads, but that doesn't mean they garner more attention. You need interactivity to draw the eye, but value-exchange to convert the purchase.

The Solve

Streamers crave relevant, valuable and frictionless experiences on their TVs. These instances increase recall, purchase intent and motivate shoppers to spend time with your brand.

Shoppable units can deliver full-funnel solutions.

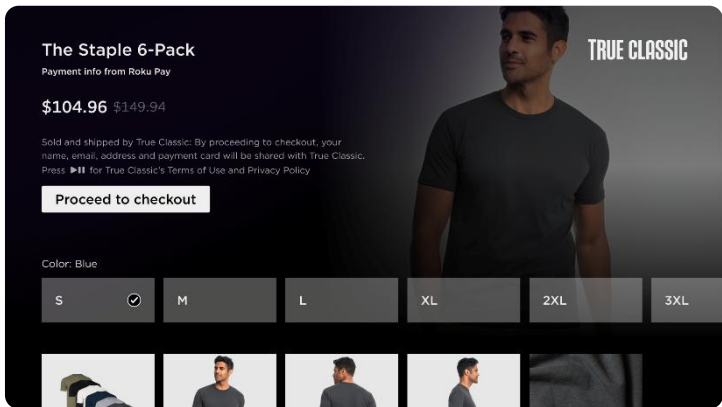
Attract



Reach relevant audiences at scale.



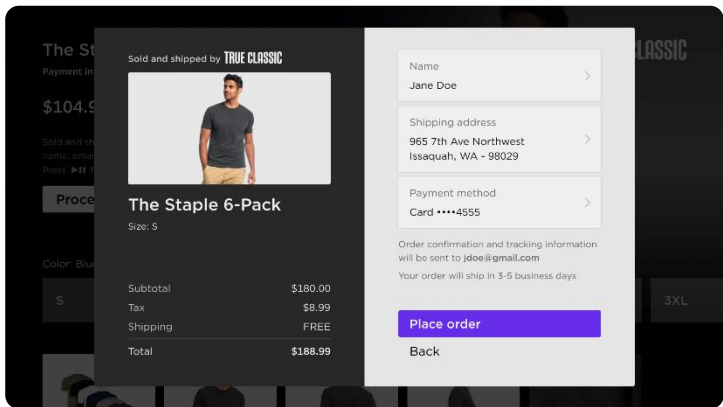
Interact



Build awareness and consideration of brand/products.

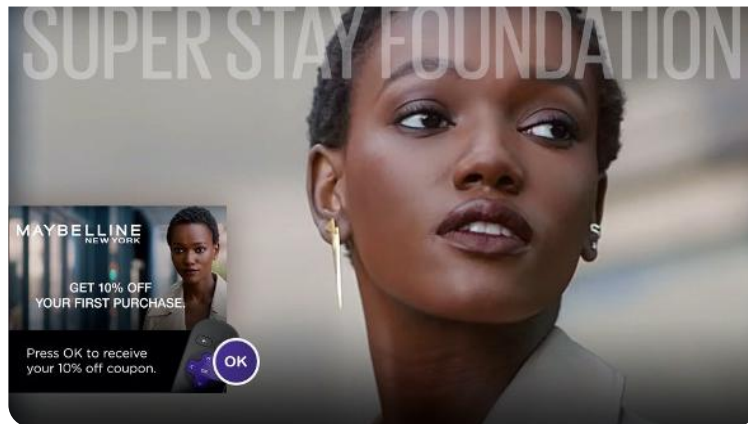


Transact

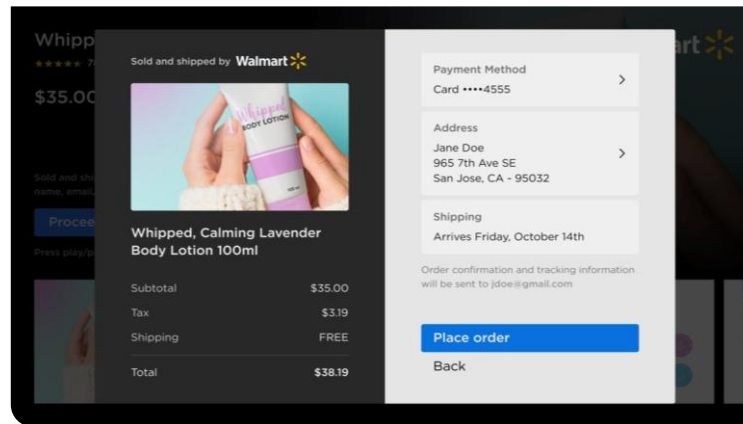


Drive engagement and purchase intent through engaging streaming TV ads.

OK-to-Text



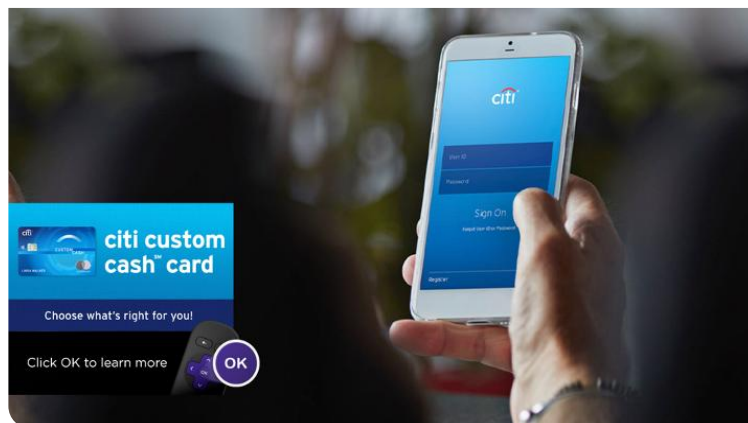
OK-to-Checkout



Interactive Overlay: Custom Vignette



OK-to-Email



Scannable Video



Interactive Overlay: In-Content



Ad 1 of 1



This is an interactive ad
Press OK to get started



OK

**GREAT DECOR FROM
TREES TO INFLATABLES**

Press OK to enter now



The combination of interactive and shoppable ads capture attention and generate upper-funnel lift.



+58%

Video Ads + Interactive Ads
add a +58% stronger unaided
brand recall opportunity.

Ads that facilitate content discovery or deliver seamless shopping experiences on TV capture the attention of more than half of viewers, offering significant potential to enhance brand recognition and ad impact.

Breaking the 4th Wall

Smart remotes make the brand to consumer connection seamless and drive users to engage directly from the TV screen.



1 in 3

streamers A18-34 agree that ads enabling them to buy products featured in movies, shows or live events are valuable to them.

+20%

improvement in response rate performance when the video creative includes a direct voiceover to use the Roku remote to engage.

Roku streamers are

118x

more likely to pick up their remote and Press OK than scan a QR code.

Nearly

50%

of viewers pay more attention to ads related to the content they are watching.

Streamers who interact with shoppable ad units for longer are more likely to make a purchase.

This engagement can be enhanced when brands apply contextual relevance to their shoppable ads, for example, by aligning with the content that makes the experience more valuable.



There is a 96% correlation with on-screen dwell time* and conversions.

Average dwell time is :24s, showing how shoppable experiences add extra time spent with your brand, nearly doubling consumers' time spent with your :30s ad.

More than a quarter of streamers would be likely to consider completing purchases on their TV if ...

... they received competitive pricing they could not get anywhere else online or in-store.	37%
... they received a special offer or limited-time deal exclusively for TV purchase.	30%
... the ad brings unique loyalty programs and rewards only available through TV purchase.	25%

Aligning shoppable ad formats with consumer motivations.

- This matrix helps us evaluate shoppable formats against real consumer needs and behaviors
- By mapping different viewer segments to tailored ad approaches, we can generate brand affinity via targeted shoppable solutions
- We can match specific shoppable formats to viewer mindsets — whether that's loyalty-based recued ad loads for existing customers, content-integrated discovery for browsers, or limited-time offers during peak viewing hours
- This strategic approach transforms campaigns from hopeful exposure to purposeful problem-solving for streamers



Shoppable Value Exchange Matrix			
Format / Feature	Price Sensitivity	Convenience	Discovery / Novelty
Limited-time offers (LTOs)	Strong value	Not the focus	Medium, if exclusive
Bundled product offers	If savings are clear	Reduces purchase friction	Not novel
Reduced ad load (sponsored break)	Price agnostic	High convenience	Medium, if content is exclusive
Product tie-ins to shows/movies	Price agnostic, with potential LTO	Medium	High novelty and contextual appeal
Shop-the-screen / instant add-to-cart	Medium	Streamlines journey	Medium, depends on UX
Personalized cart savings	Strong value	Reduces steps	Medium, if recco's feel fresh

Roku Users & Retail Media

Roku users are significantly more likely than non-Roku users to show interest in a variety of e-Commerce related activities.



Buying advertised products directly from my TV.

Index 129

Walmart

Buying products from Walmart directly from my TV.

Index 122



Buying a product directly from my TV with pre-saved credentials / loyalty or rewards account.

Index 119



Buying ingredients directly from TV for a recipe I see while watching food / cooking content.

Index 118



Buying products featured in a show or movie directly from my TV.

Index 116



Adding a product I see advertised on TV to my digital shopping cart.

Index 115

Roku users show strong behavioral metrics in terms of online visitation and time spent at key retailers.

They perform well in key categories such as apparel, home goods/home improvement, sporting goods, and luxury.

Apparel



Walmart



Home Goods / Improvement

amazon



LOWE'S

Sporting Goods

amazon



Walmart

Luxury Goods

COACH



CHANEL

Key Findings

Personalization enhances attention but has limits

- While 83% of streamers agree that ads based on products or services relevant to them are valuable, only 34% agree that they would pay attention to these ads

Value drives engagement in shoppable TV

- Consumers are more likely to engage with shoppable TV ads when they perceive clear value
- Over half of consumers are interested in features like adding advertised products to a digital cart or purchasing directly via pre-saved credentials

Interactive ads build long-term brand equity

- Combining video ads with interactive formats increases unaided brand recall by 58%, demonstrating the long-term impact of these ads even when conversions aren't immediate

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