

CONNECTED TV. CONNECTED GROWTH

THE SCREEN THAT SELL: CTV'S IMPACT ON PREMIUM BRAND PERCEPTION

This study is a research collaboration between CTV Scale and dentsu, presented as a category case study for baby diapers. All brand and product names have been anonymized for confidentiality purposes.

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supported by YouGov

INTRODUCTION

SECTION-01

RESEARCH BACKGROUND & OBJECTIVES

The research was conducted from 30 Dec 2025 and 8 Jan 2026, at a time when the shift to digital terrestrial TV was accelerating Smart TV and CTV adoption, particularly among middle- to upper-income households:

- This shift is creating a timely opportunity for brands to leverage premium video formats to influence affluent parents.
- At the same time, brands are under increasing pressure to strengthen premium positioning and improve campaign performance among high-value parent segments, especially in the highly competitive baby diaper category.
- Understanding the impact of Smart TV and CTV adoption on advertising campaign performance has thus become a critical area of inquiry, with the premium baby diaper brand category serving as a key case study.

KEY QUESTION AND OBJECTIVE

Key question:

How can CTV strengthen premium brand perception and drive growth within the affluent parent segment?

Study objective:

To evaluate the impact of CTV campaign (OTT+OEM) on brand awareness, premium perception, and purchase intent.

HYPOTHESES AND SCOPE

Premium storytelling:

Longer, high-quality CTV formats builds trust and expertise.

Targeted reach:

CTV efficiently reaches affluent urban parents with higher propensity to consider premium diapers.

Additional reads:

Understand CTV viewing habits and audience reactions to CTV ads.

RESEARCH METHODOLOGY & SAMPLE

- To measure campaign effectiveness in a channel-led environment like CTV, this study uses a control-group design, comparing audiences exposed to the campaign with unexposed audiences during the same period.
- This approach enables a clean read on campaign contribution to brand and intent outcomes, while keeping the execution efficient through a single survey.

TARGET GROUP

Moms 21–35, kids <5 years, Upper-Middle SEC, nationwide, Smart TV/CTV internet viewing ≥1x/week

DATA COLLECTION

Online self-completion survey via YouGov panel

SAMPLE SIZE

N=1,000 (demographic distribution follows natural fallout).

EVALUATION DESIGN

Control group approach comparing CTV-exposed vs non-exposed audiences in the same period.

WHY THIS DESIGN

Clear exposure separation for CTV, direct contrast under identical conditions, and achievable in one survey.

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EXECUTIVE SUMMARY

SECTION-02

KEY FINDING

77%

viewed Smart TV in daily, with viewing peaking in prime time (82%) and mainly watch movies, music, kids' content, news, and series.

72%

of target audience has been exposed to the baby diaper ad on Smart TV.

2.4x

more likely to consider to use the baby diaper brand for Exposed group, even stronger (3.5x) among those who correctly recall the brand.



KEY HIGHLIGHTS

Exposure to the Smart TV ad made consumers 2.4× more likely to consider the baby diaper brand, and 1.65× more likely to choose it as BUMO. The **baby diaper campaign on Smart TV** generated high visibility (72% saw the ad) and strong message recall around absorbency and mobility and significantly lifted brand performance.

.....

Crucially, correct brand recall multiplies impact, with correct-recall viewers being 3.5× more likely to consider the baby diaper brand and 2.74× more likely to choose it as BUMO, demonstrating the critical role of strong branding on Smart TV.

.....

Smart TV viewers are primarily young, urban, upper-middle moms who use Smart TV daily (77%), with viewing peaking during prime time (82%). Their usage heavily centers mainly watching movies, music, kids' content, and news, also positioning Smart TV as a premium, high-frequency environment for long-form brand storytelling.

Across media touchpoints, Smart TV/CTV (46–52%) and e-commerce (46–49%) emerge as the top drivers of diaper ad awareness, while TikTok (32–36%) leads social platforms.

Overall, the findings show that Smart TV is a high-impact, high-visibility medium that drives meaningful uplift in brand metrics, especially when creatives deliver clear branding, focused benefit messages, and strong attribution.

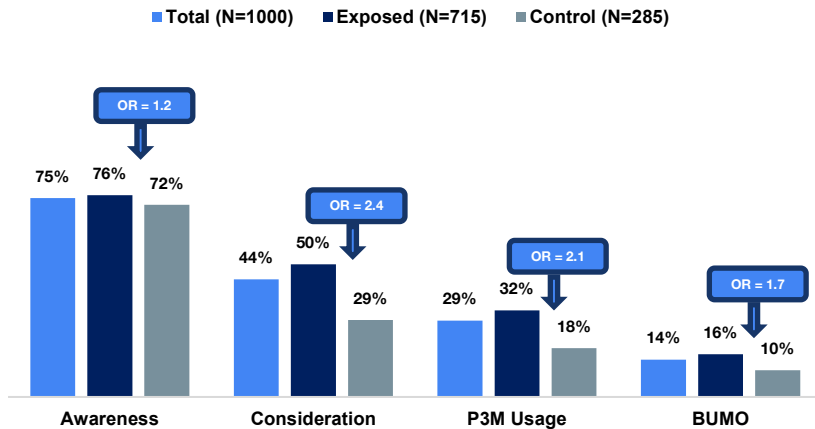
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RESEARCH FINDING

SECTION-03

**MEASURE IMPACT OF
AD CAMPAIGN ON SMART TV**

SMART TV DRIVES BABY DIAPER BRAND LINKAGE



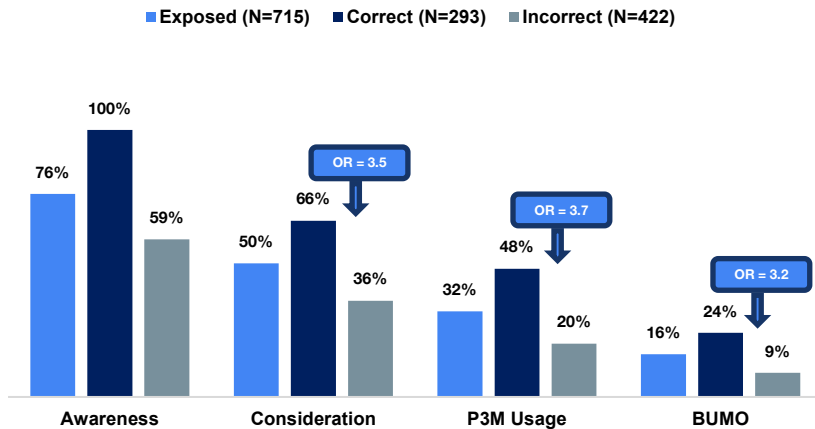
OR1 = Odds Ratio* of respective metric between Exposed towards Control Group.

Compared with the control group, consumers exposed to the Smart TV ad are 2.4x more likely to consider the brand, 2.1x more likely to have used it in the past 3 months, and 1.7x more likely to make it their main diaper brand, indicating strong brand linkage driven by Smart TV Exposure.

*Odds ratio analysis conducted by Dentsu using YouGov Data

SMART TV EXPOSURE STRENGTHENS BRAND LINKAGE ACROSS FUNNEL

CORRECT BRAND RECALL MULTIPLIES THE IMPACT



Among those who correctly recalled the brand from the ad, the uplift is even stronger—3.5× for consideration, 3.7× for P3M usage, and 3.2× for BUMO usage—vs. the brand-slippage group.

*Odds ratio analysis conducted by Dentsu using YouGov Data

OR2 = Odds Ratio* of respective metric between Correct Brand Recall towards Brand Slippage Group.

CORRECT BRAND RECALL STRENGTHENS THE IMPACT FURTHER,
INDICATING STRONGER BRAND LINKAGE

SMART TV AD EXPOSURE INCREASES BRAND CONSIDERATION & P3M USAGE

SMART TV AD EXPOSURE SIGNIFICANTLY BOOSTS BRAND METRICS

Exposure to the Smart TV ad leads to meaningful improvements in brand outcomes compared with the control group:

- 2.4× more likely to consider the brand.
- 2.1× more likely to have used the brand in the past 3 months (P3M).
- 1.7× more likely to use the brand as the main diaper brand (BUMO).

CORRECT BRAND RECALL MULTIPLIES THE IMPACT EVEN FURTHER

When viewers correctly recall the brand as the advertised brand, the effect becomes much stronger than average exposure:

- 3.5× uplift in consideration.
- 3.7× uplift in P3M usage.
- 2.74× uplift in BUMO usage.

SUMMARY IMPACT

Smart TV exposure delivers meaningful uplift across key brand metrics, with correct brand recall acting as a multiplier that substantially amplifies consideration, trial, and brand choice.

SMART TV USAGE HABITS

SMART TV AD VIEWING HABITS & USAGE PATTERNS

- **Smart TV is a Daily Habit:**

77% of viewers use Smart TV every day, indicating strong penetration and routine usage.

- **Prime Time Dominates Viewing:**

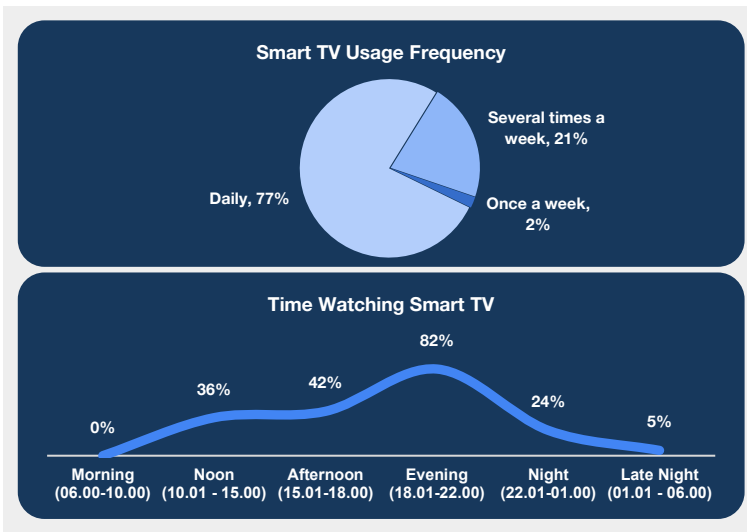
Viewing peaks in the evening (18:00–22:00) at 82%, making this the highest-attention window.

- **Usage Builds Through The Day:**

Viewing gradually increases from afternoon into evening, reinforcing Smart TV as a planned, lean-back activity.

- The combination of daily use and evening concentration positions Smart TV as a strong platform for impactful, long-form storytelling.

Base: All respondents (N = 1000)

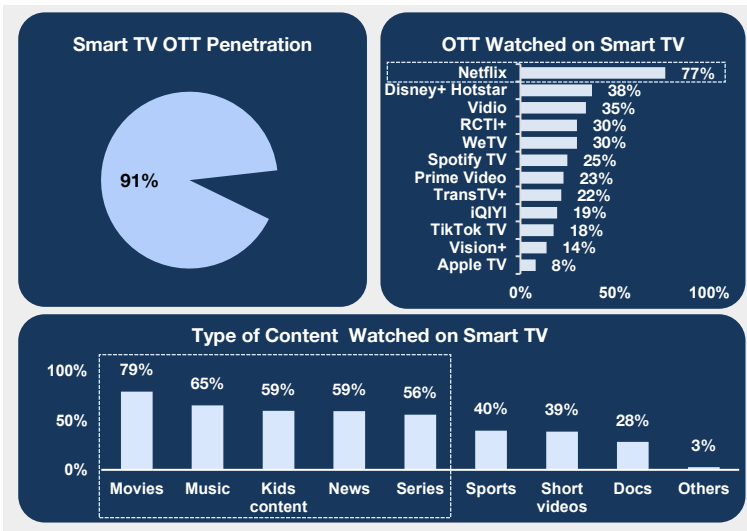


**DAILY SMART TV HABIT WITH PRIME-TIME PEAK,
IDEAL FOR LEAN-BACK LONG-FORM STORYTELLING.**

SMART TV OTT & CONTENT TYPE PREFERENCES

- 91% of viewers stream OTT content on Smart TV with Netflix leading strongly (77%), followed by Disney+ Hotstar (38%), Vidio (35%), and RCTI+ / WeTV (30% each).
- Content preferences led by movies (79%), music (65%), kids content and news (both 59%), and series (56%).

Base: All respondents (N = 1000)



**NETFLIX LEADS OTT ON SMART TV,
MOVIES CONTENT DOMINATE VIEWING.**

SMART TV ATTITUDE TOWARD AD

SMART TV AD FORMATS, TYPES, AND PLACEMENTS

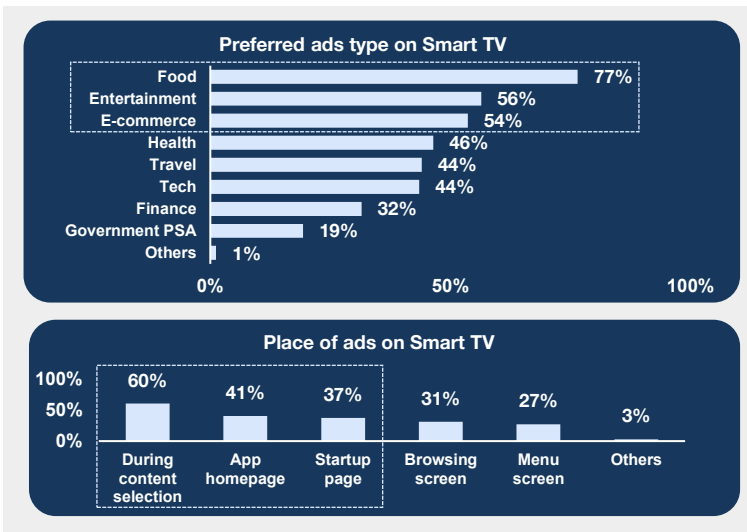
- **Category Fit:**

Viewers are most open to Food (77%), Entertainment (56%), and E-commerce ads (54%) on Smart TV.

- **Best Placements:**

Ads are most noticed during content selection (60%), then on the app homepage (41%) and startup page (37%).

Base: All respondents (N = 1000)



SMART TV ADS ARE MOST NOTICED DURING CONTENT SELECTION WITH HIGH-RECEPTIVITY CATEGORIES SUCH AS FOOD, ENTERTAINMENT, AND E-COMMERCE.

SMART TV DRIVES DIAPER AD AWARENESS

Across brands, ad exposure is most frequently recalled on Smart TV/CTV (46–52%) and e-commerce sites (46–49%), with TikTok (32–36%) as the strongest social driver.

Base: Who are aware to brand

DIAPER AD CHANNELS										
	SMART TV/CTV	E-COMMERCE WEBSITE	TIK TOK	INSTAGRAM	YOUTUBE	CONVENTIONAL TELEVISION	PARTNER	FACEBOOK	ONLINE NEWS CHANNEL	SPONSORSHIP EVENT
Brand A (n=745)	49%	47%	32%	30%	28%	27%	23%	19%	16%	11%
Brand B (n=916)	52%	47%	33%	29%	26%	28%	27%	16%	18%	13%
Brand C (n=756)	47%	46%	35%	32%	28%	25%	23%	19%	18%	13%
Brand D (n=64)	46%	49%	36%	29%	26%	24%	27%	18%	18%	10%

Note:
These figures are based on self-reported recall and may include organic exposure or misattribution; they are not a direct indicator of paid media investment.

SMART TV ADS DELIVER WITH COMFORT AND ATTENTION

- **Ads are Clearly Breaking Through:**

A strong 62% say they often notice Smart TV ads, and 67% perceive them as effective. This shows Smart TV is not just delivering exposure, it is also delivering perceived impact.

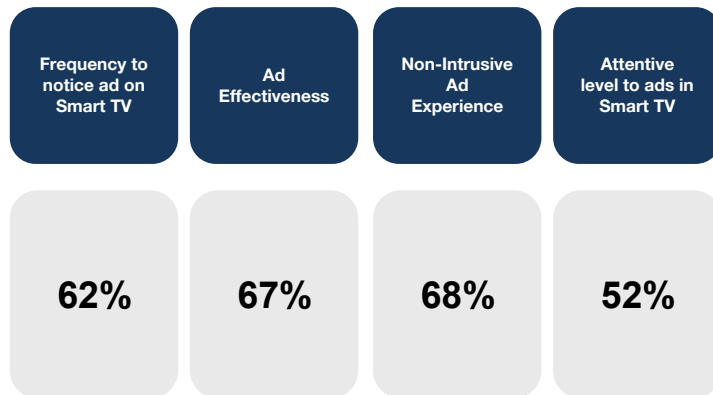
- **The Ad Experience Feels Comfortable:**

68% say Smart TV ads are non-intrusive, which means viewers generally accept ads in this environment. A comfortable experience helps reduce resistance and supports better message reception.

- **Attention is Meaningful and Actionable:**

52% say they are attentive when ads appear, giving campaigns a solid base to land key brand messages. With clear branding and strong early hooks, this attention can be translated into stronger recall and intent.

Base: All respondents (N = 1000)



**SMART TV OFFERS A STRONG BALANCE OF VISIBILITY, COMFORT,
AND ENGAGEMENT, MAKING IT A HIGH-POTENTIAL CHANNEL
FOR BRAND-BUILDING.**

SMART TV USAGE, HABITS & ATTITUDE - KEY FINDINGS

SMART TV EMERGES AS A HIGH-IMPACT STORYTELLING PLATFORM

Smart TV is part of daily life, with 77% daily usage and peak viewing in prime time (18:00–22:00). OTT dominates Smart TV consumption, with 91% streaming OTT content, led by movies, music, kids content, news, and series.

AD PREFERENCES ON SMART TV

- Most receptive categories: Food, Entertainment, E-commerce.
- Ads are most noticed during content selection (60%).

AD LANDSCAPE & CATEGORY VISIBILITY

- Smart TV ad exposure is led by Food, Beauty, and E-commerce.
- Within baby diapers category, the ad recall of Brand A (55%) is on the second place after Brand B (77%)

SMART TV/CTV AND E-COMMERCE ARE THE PRIMARY DRIVERS

Across all diaper brands, Smart TV/CTV (46–52%) and E-commerce websites (46–49%) are the top ad exposure channels, indicating that connected TV and online shopping environments play the biggest role in brand visibility.

DELIVERY & ENGAGEMENT

- Ads are noticed (62%), effective (67%), and non-intrusive (68%).
- Attention is moderate (52%), signaling room to deepen engagement.

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RECOMMENDATION

SECTION-04

RECOMMENDATIONS

POSITION CTV AS A CORE CHANNEL WITHIN THE MEDIA MIX

- Integrate CTV into the channel mix to capitalize on 91% Smart TV penetration and 72% visibility, securing a dominant *lean-back* brand presence during peak prime-time habits.
- Leverage CTV's power to multiply impact (3.5x higher recall), directly converting high-quality exposure into significant lifts for Brand Consideration (2.4x) and BUMO (1.65x).

STRENGTHEN EARLY AND CONSISTENT BRAND CUE DELIVERY

- Correct brand recall significantly amplifies campaign impact.
- Ensure clear branding appears early and consistently across Smart TV formats to reduce brand slippage and maximize consideration and trial uplift.

PRIORITIZE HIGH-ATTENTION SMART TV MOMENTS

- Smart TV ads are most noticed during content selection and prime-time viewing (18:00–22:00).
- Concentrating exposure in these moments maximizes visibility and supports stronger brand impact in a lean-back viewing environment.

USE CTV AS THE LEAD CHANNEL FOR BENEFIT-DRIVEN STORYTELLING

- The large screen and high attention of Smart TV effectively communicate key functional benefits such as absorbency and baby mobility.
- Longer-form storytelling and benefit-focused visuals should be prioritized to reinforce premium positioning.

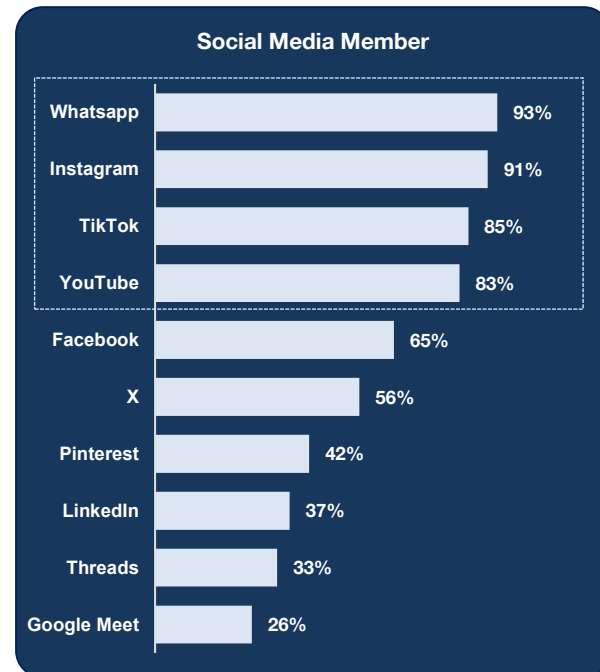
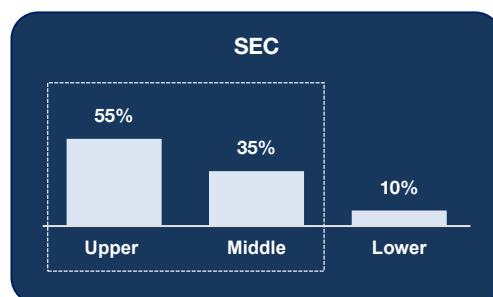
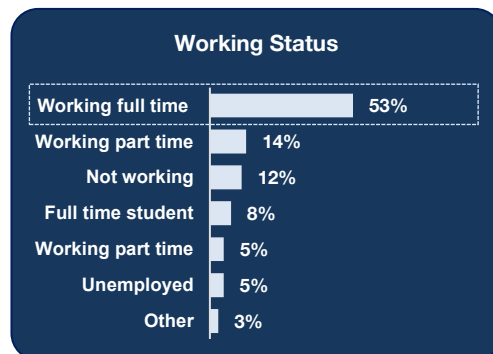
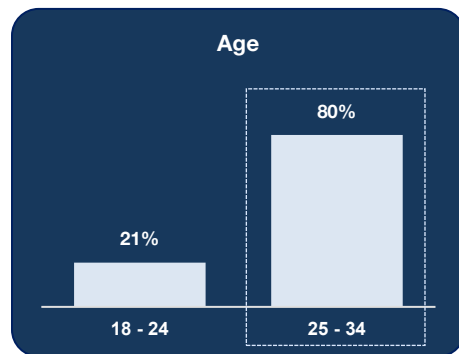
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APPENDIX

SECTION-05

APPENDIX A: RESPONDENT PROFILES

The sample (N=1,000) is moms with kids, mainly aged 25–34 and middle-upper SEC in Jabodebek, with most working full-time. They are also active social media users, led by WhatsApp, Instagram, TikTok, and YouTube.



APPENDIX B: SMART TV AD VISIBILITY IN P1M

- **Category Clutter is High:**

Smart TV ads are dominated by Food & Beverage (78%), Beauty/Personal Care (67%), and E-commerce (62%).

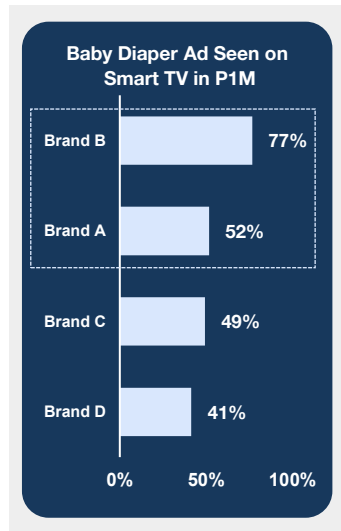
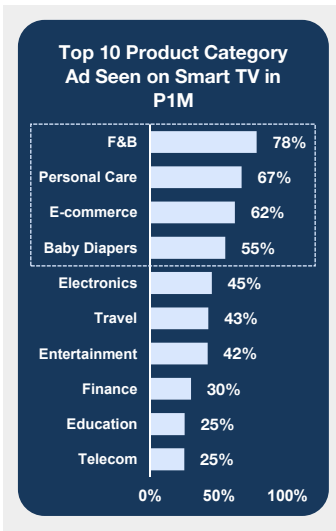
- **Diapers Remain Visible:**

Baby Diaper ads still rank high in this environment at 55%.

- **Competitive Standing:**

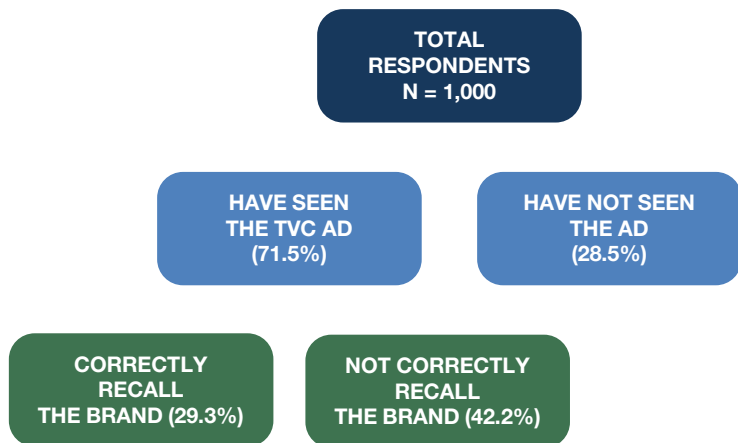
Within diapers, Brand B is most seen (77%), while Brand A is also strongly visible (52%), showing Brand A already has solid presence in a crowded space and a clear base to convert visibility into stronger brand preference.

Base: All respondents (N = 1000)



DIAPER ADS ARE COMPETING IN A CROWDED SMART TV ENVIRONMENT, AND BRAND A REMAINS STRONGLY VISIBLE WITHIN THE CATEGORY.

APPENDIX C: AD EXPOSURE GROUPING



Respondents were segmented based on their Smart TV ad exposure and their ability to correctly identify the baby diaper brand from the ad.

1.Exposed vs. Control Groups

- **Exposed:**
Respondents who have seen the TVC
- **Control:**
Respondents who have not seen the ad

2. Correct Brand Recall vs. Brand Slippage (among Exposed)

- **Correct Brand Recall:**
Recalled the baby diaper brand as the brand featured in the ad
- **Brand Slippage:**
Saw the ad but recalled the wrong brand

These groupings help measure by using ODD RATIO how strongly the Smart TV ad contributes to brand performance outcomes.

APPENDIX D: WHAT IS ODD RATIO?

Odds Ratio* (OR) is a statistical measure used to compare the odds of an event happening in one group versus another, such as Comparing outcomes between exposed vs. control.

1. What are “Odds”?

Odds express the likelihood of an event happening relative to it not happening.

$$Odds = \frac{P(Event)}{(1 - P(Event))}$$

Example: If 30% of people recall an ad, so the Odds is

$$Odds = \frac{0.3}{(1 - 0.3)} = \frac{0.3}{0.7} = 0.43$$

2. What Is the Odds Ratio (OR)?

The Odds Ratio compares two odds:

$$OR = \frac{Odds\ in\ Group\ A}{Odds\ in\ Group\ B}$$

Where:

Group A = exposed, treatment group, or segment of interest

Group B = control or comparison group

3. How to Interpret OR

- OR = 1 means no difference between groups
- OR > 1 means event is more likely in Group A
- OR < 1 means event is less likely in Group A

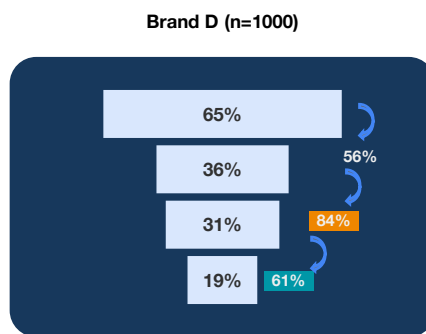
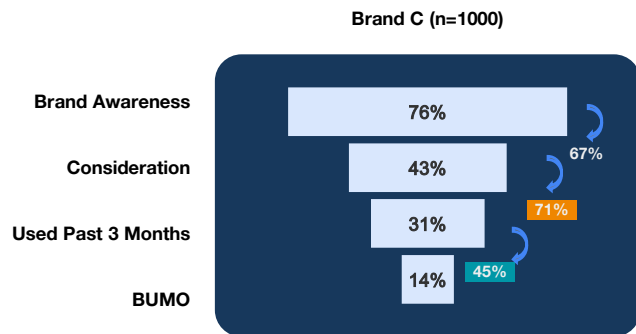
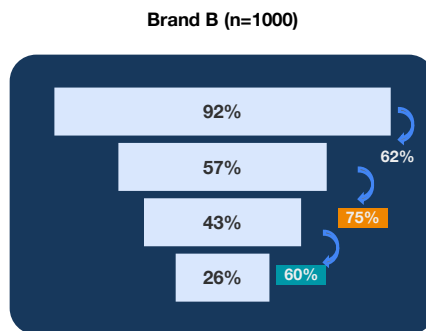
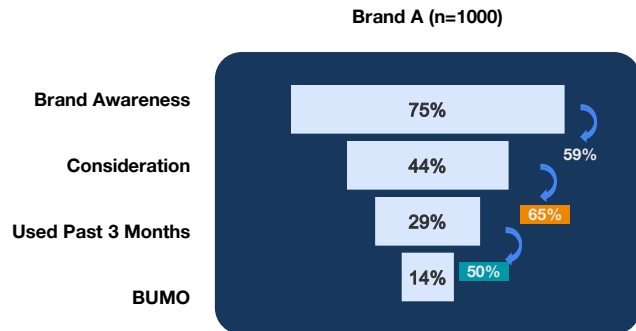
Example:

- Exposed group: 40% recall the brand
- Control group: 20% recall the brand
- OR is 2.68, meaning that People who saw the ad are 2.68× more likely to recall the brand correctly compared to those who didn't.

***Odds ratio analysis conducted by Dentsu using YouGov Data**

APPENDIX E: BRAND FUNNEL - DIAPER AWARENESS & USAGE

Brand A demonstrates strong upper-funnel performance, with high awareness (75%) and consideration (44%), supported by solid trial (65%). However, conversion into BUMO remains comparatively weaker, with retention at 50%.



In Comparison:

- **Brand B shows stronger mid- to lower-funnel efficiency**, achieving both high trial (75%) and retention (60%).
- Meanwhile, **Brand D delivers the strongest trial (84%) and retention (61%)**, despite lower awareness, indicating effective conversion among exposed users.

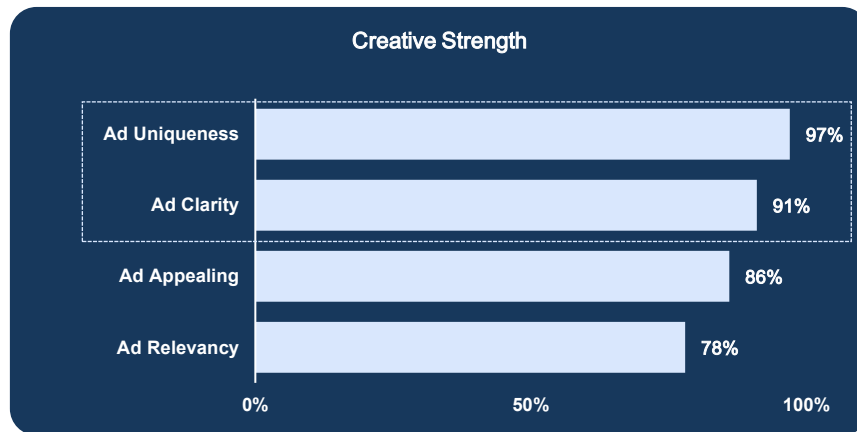
Trial Rate

Retention Rate

APPENDIX F: AD EVALUATION

- Across Smart TV viewers who recall the brand ad, creatives are seen as standout and easy to understand, with strong appeal and relevance.
- The key opportunity is to make the message feel even more personally relevant.
- Among those who correctly recall Smart TV ads, it clearly drives action, lifting the brand consideration (78%) and interest to learn more (83%) about the brand.

Base: Correctly recall the brand ad (N = 293)



INTEREST TO LEARN BRAND

78%

AD IMPACT TO CONSIDERATION

83%

GLOSSARY

- **Awareness:** Which brand of baby diaper are you aware of?
- **Consider:** Which brand of baby diaper do you consider to use for your kid?
- **P1Y usage:** Which brand of baby diaper have you used for your kids in the past 1 year?
- **BUMO:** Which brand of baby diaper do you use most often for your kid?
- **Frequency to notice ad on Smart TV:** How often do you notice ads on Smart TV?
- **Ad effectiveness:** How effective do you think Smart TV ads are?
- **Intrusive ad experience:** How intrusive do Smart TV ads feel to you?
- **Attentive level to ads in Smart TV:** How attentive are you when ads appear on Smart TV?
- **Exposed ad on Smart TV:** Have you seen this ad in your Smart TV before?
- **Recall to brand:** Which brand is this ad for?
- **Ad uniqueness:** How unique is this ad compared to others?
- **Ad clarity:** How clear is the message?
- **Ad relevancy:** How relevant is this ad to you?
- **Ad appealing:** How appealing is this ad?
- **Interest to learn the brand:** How interested are you to learn more about the Diaper after seeing this ad?
- **Ad impact to consideration:** How likely are you to consider using the Diaper after seeing this ad?