

The CTV Power Couple



Quantifying the “Better Together” Effect

OMNICOM MEDIA **ROKU**



The truth about browsing on streaming TV

WHAT WE KNOW

Browsing is the norm

Nearly half of all streaming TV sessions begin with browsing before settling on what to watch

Gen Z are the power browsers

Gen Z outpaces Gen X with double the content browsing time

Browsing is ingrained

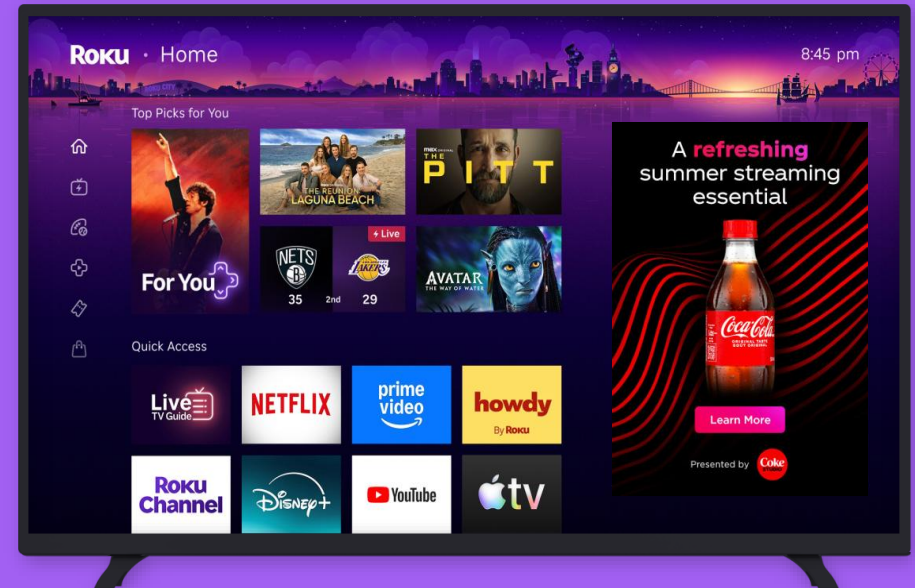
48% of streamers browse even when they know what they want to watch

Our Questions



Q1

What is the value of browsing moments on streaming TV?



Q2

What role, if any, do home screen ads play in the media mix?

The Method

Recruitment

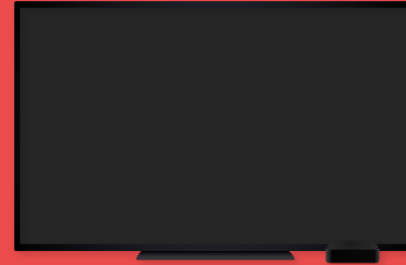
Recruited nationally representative at-home panel who watch Streaming TV weekly (A18+)

Total # of streamers: n= 900
Measured exposures: n=2,138



Experience

Streamers watched TV as they typically would on their Connected TV device, watching two TV shows based on interests. They received either test or control ads based on randomization



Brands Tested



Auto



Entertainment



Food & Beverage

Ad Formats Tested

Frequency of exposure to test ad within a single day = 2 within each group
 Total ad load representative of Streaming TV

	Exposure 1	Exposure 2
Video Ads Only		
Home Screen Ads Only		
Both (Video, then Home Screen)	+	
Both (Home Screen, then Video)	+	

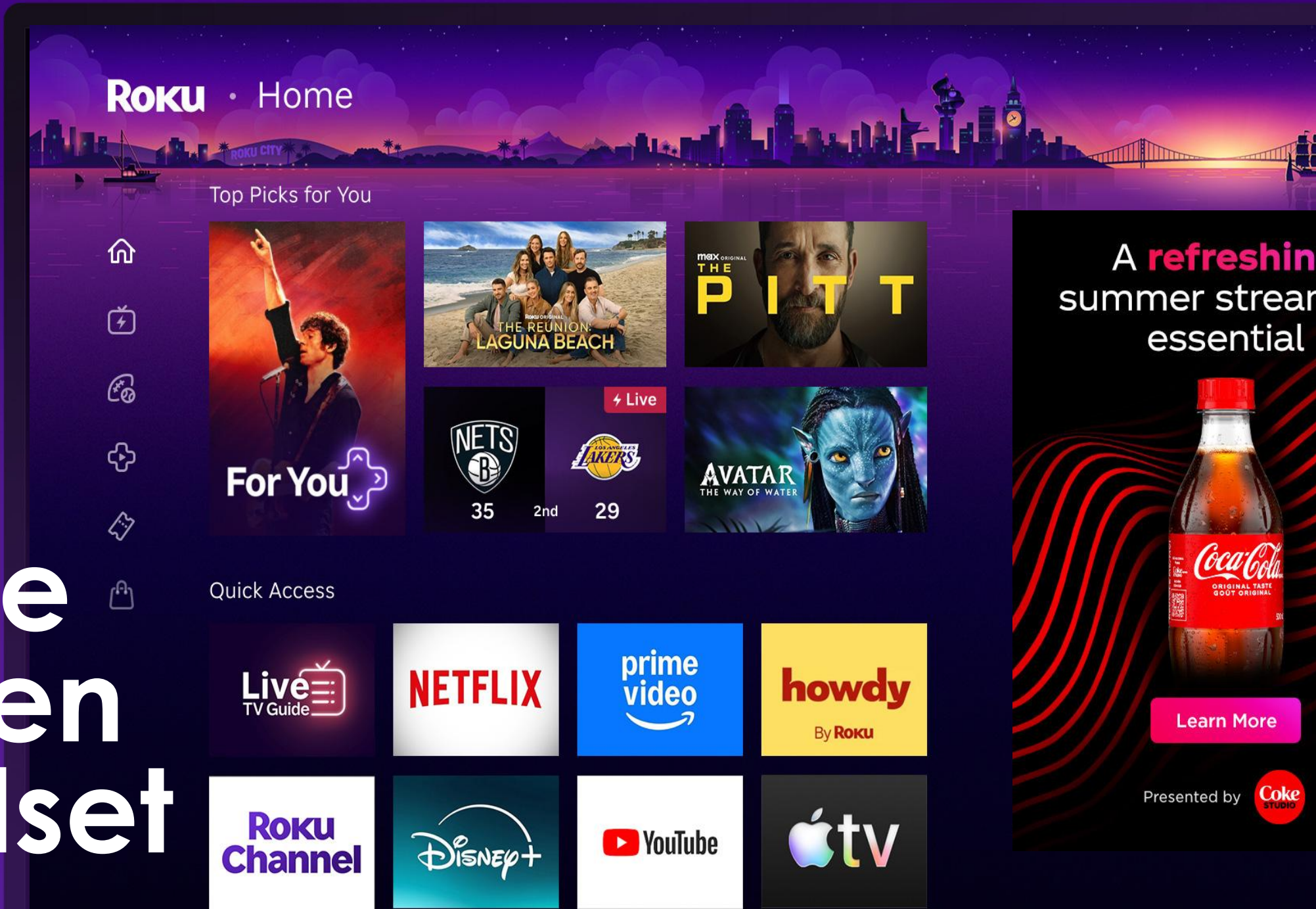
Video
 Home Screen
 Both

Brand KPI Measurement

Brand lift survey to measure impact on brand KPIs, including awareness, perceptions and purchase intent



The Home Screen Mindset



A **refreshing** summer stream essential



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With Gen Z leading the charge, streamers are open to hearing from brands while browsing

Openness to home screen ads

By generation // %'very' or 'somewhat open'



The home screen isn't just for actively trying to find what to watch

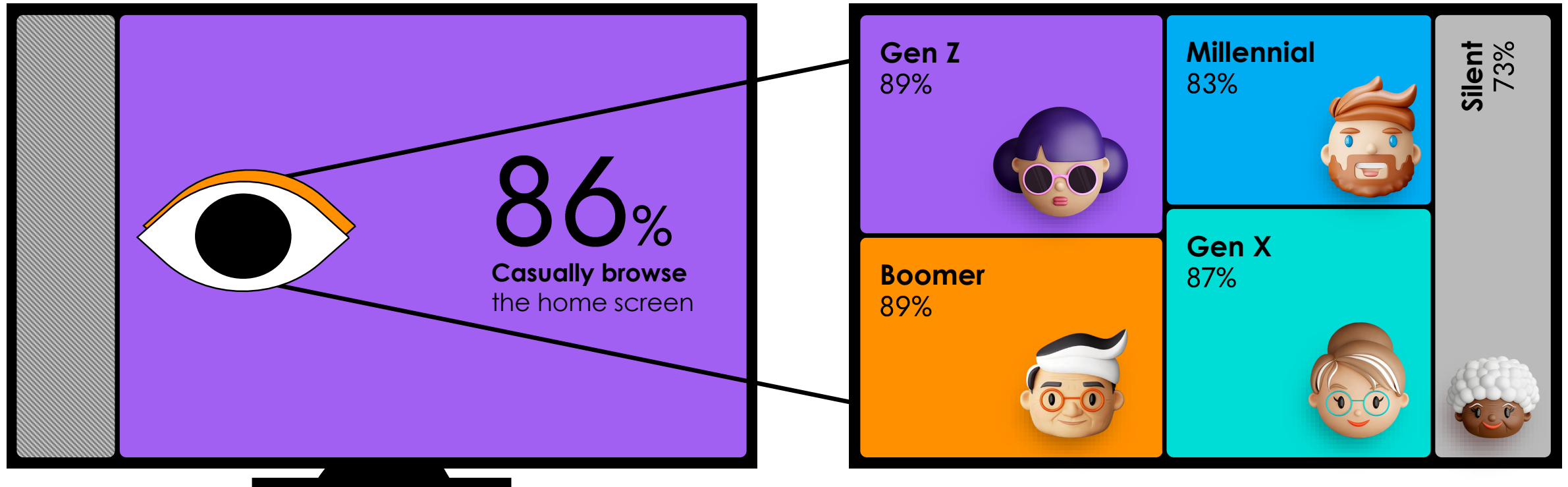
Nearly all streamers spend time on the home screen in more casual discovery mode

Home screen usage

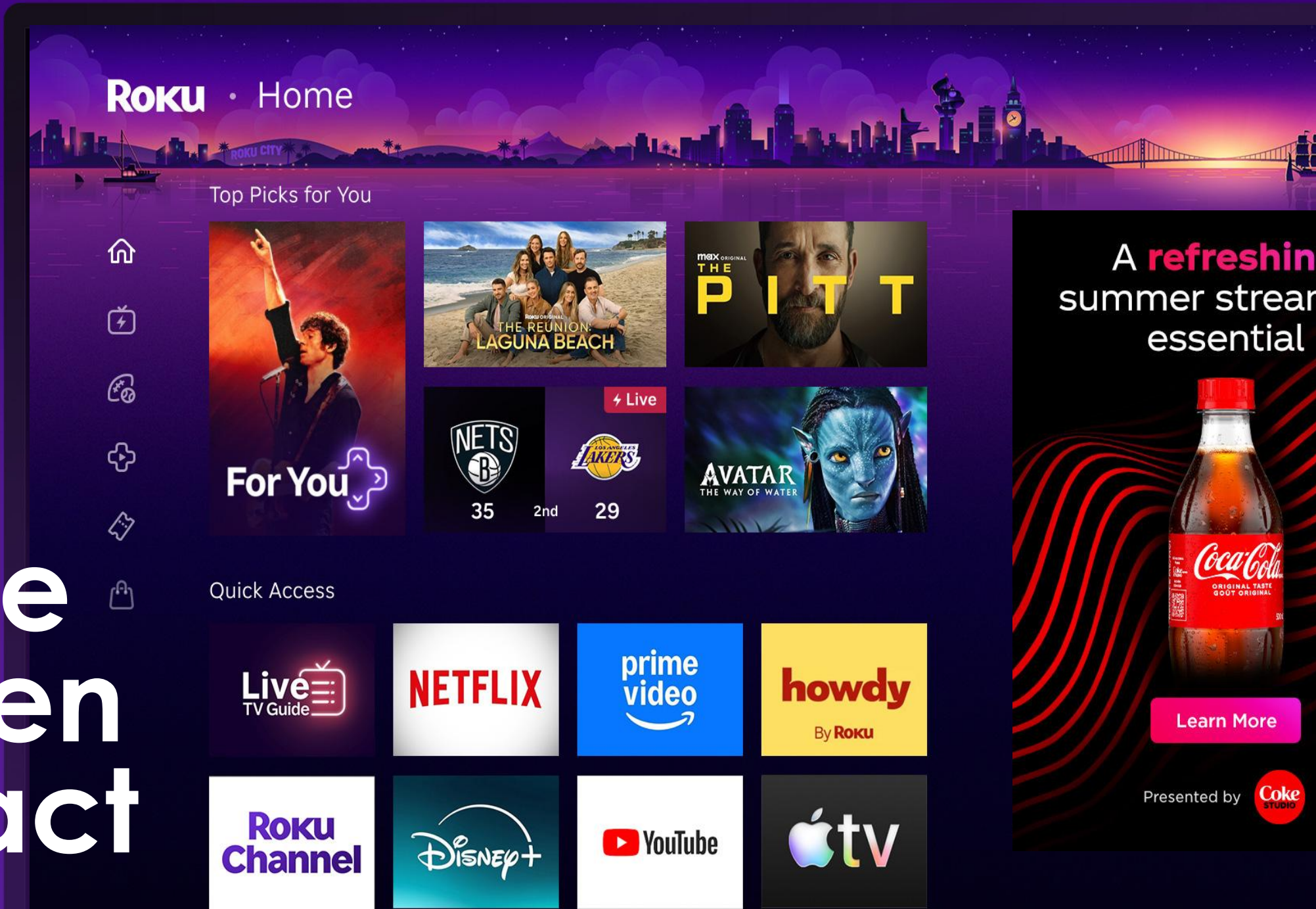
All TV streamers // % 'always' or 'sometimes'

Casually browse the home screen

By Generation // % 'always' or 'sometimes'



The Home Screen Impact



A **refreshing** summer stream essential



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Home screen ads
pull levers across
the branding funnel

Immediate relevancy for media & entertainment brands means home screen ads drive search



Impact of home screen ads only

Media & entertainment brand // Delta (Exposed – Control)

Search Intent

Control



New brands can capitalize on the home screen to drive purchase intent

Reach streamers with new products when they are in the discovery mindset



Impact of home screen ads only

New to market brand // Delta (Exposed – Control)

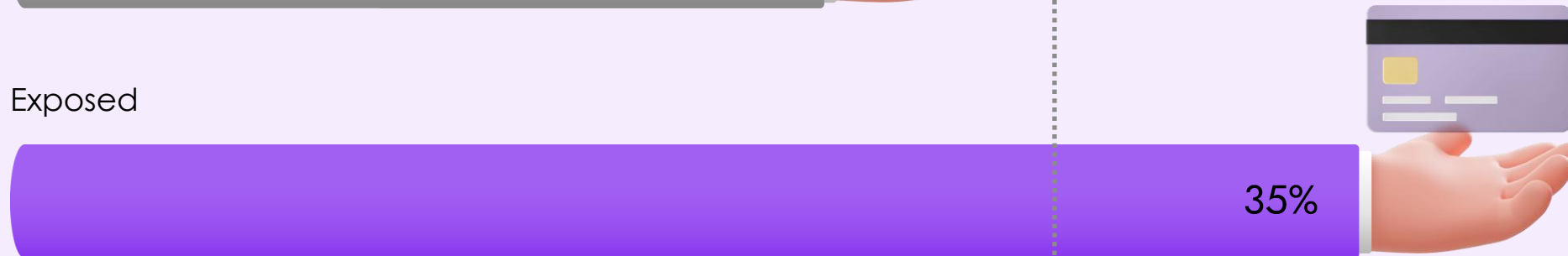
Purchase Intent

Control



+11pts[▲]
Difference

Exposed



Home screen ads spark rediscovery for well-established brands

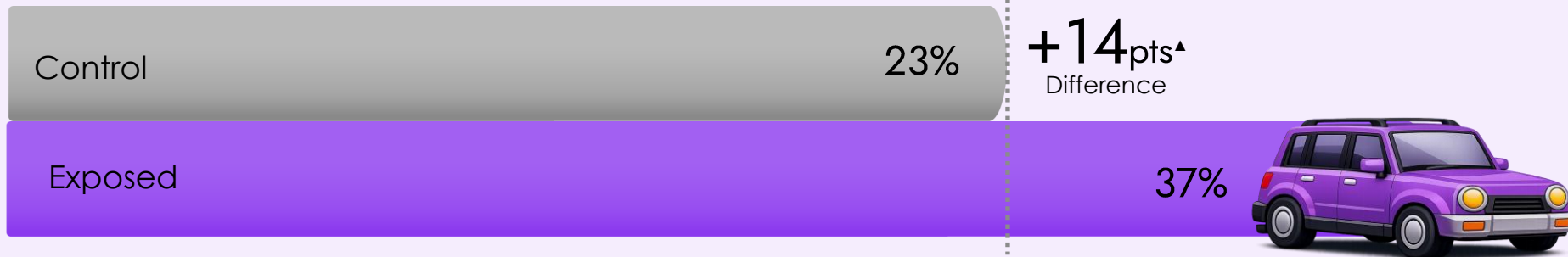
Decline in familiarity signals renewed interest – streamers recognize that while they know the brand, there's more to discover



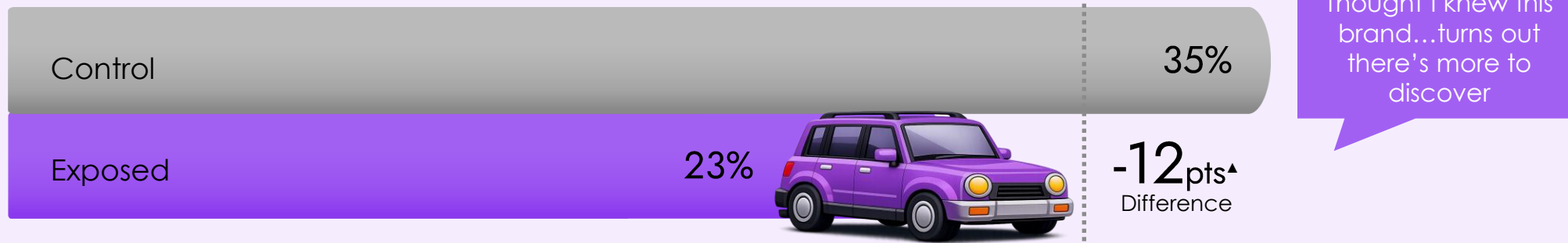
Impact of home screen ads only

Well established brand // Delta (Exposed – Control)

Aided Ad Recall

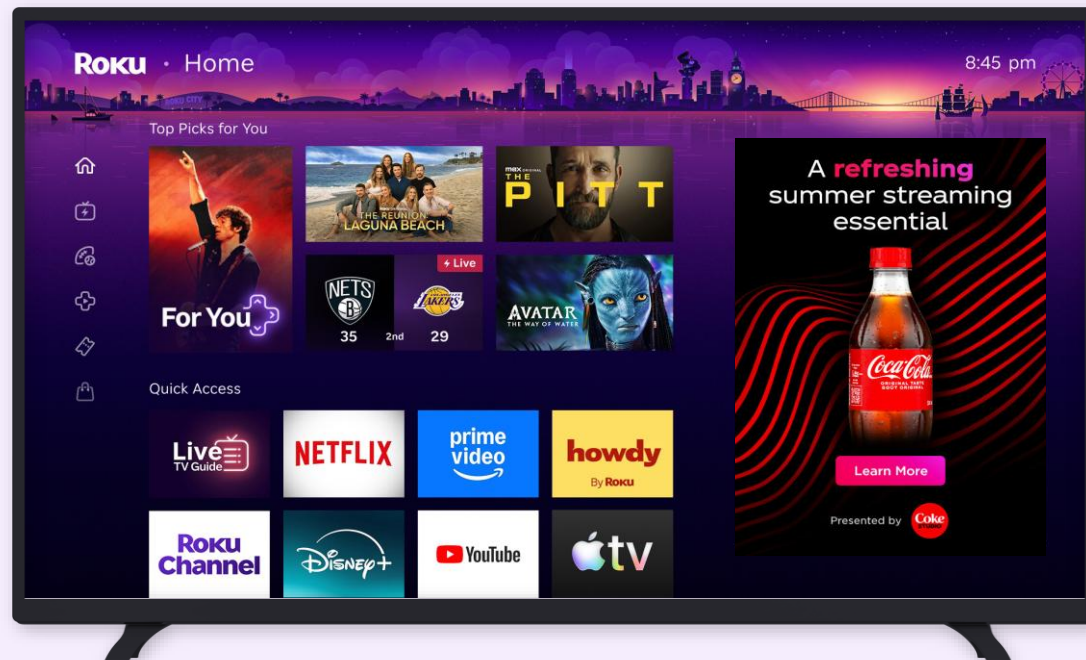


Brand Familiarity



Wait, have we met?

Unexpected ads bring unexpected results for established brands



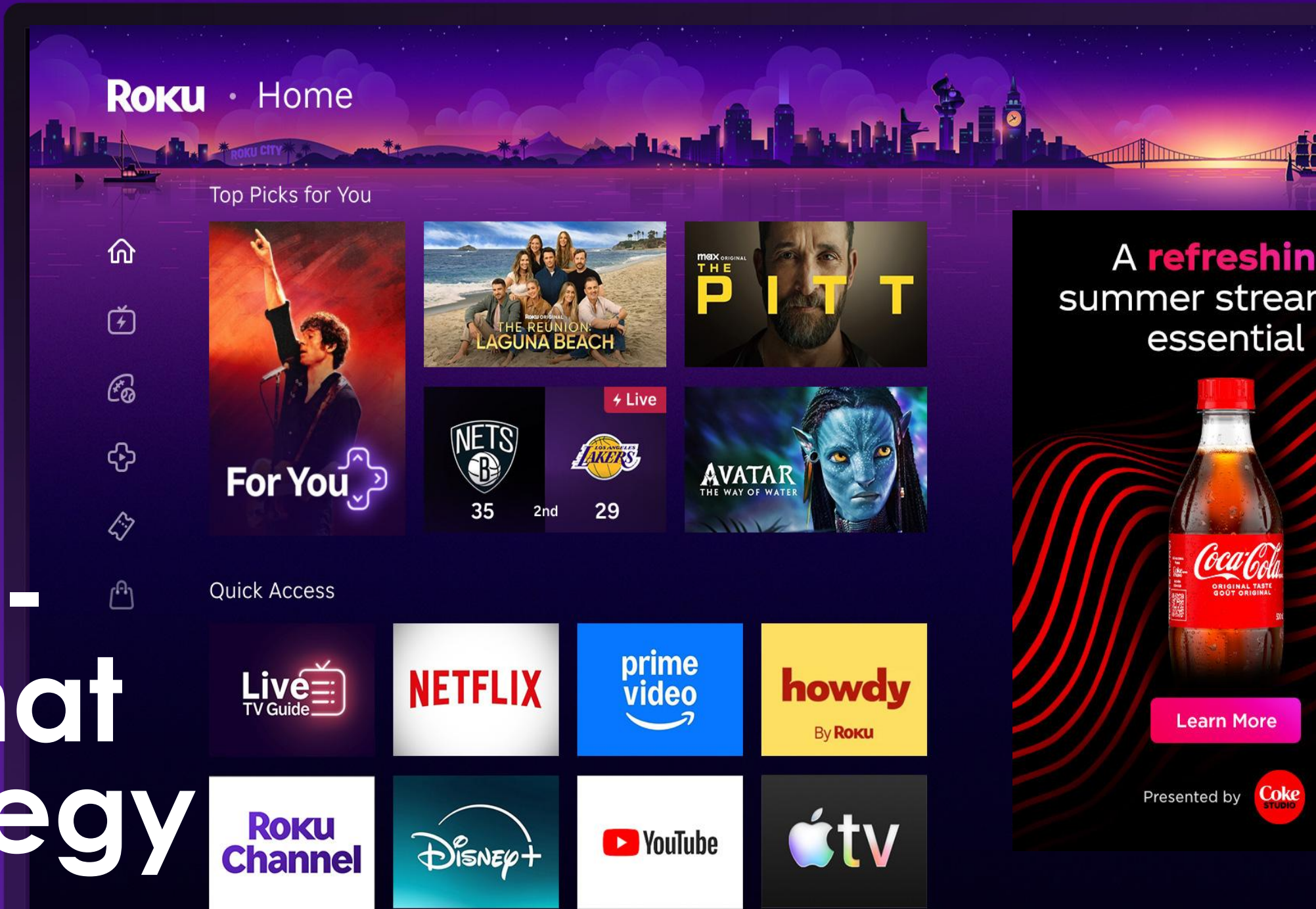
Established brands can leverage home screen ads to cut through category clutter by delivering unexpected ad experiences

When familiar brands show up in unfamiliar ways, they spark genuine curiosity, drive stronger recall while disrupting the stale perceptions that cause ad blindness

The result?

Media that doesn't just get noticed, but **actively differentiates the brand** in the minds of the consumers

The Multi-Format Strategy



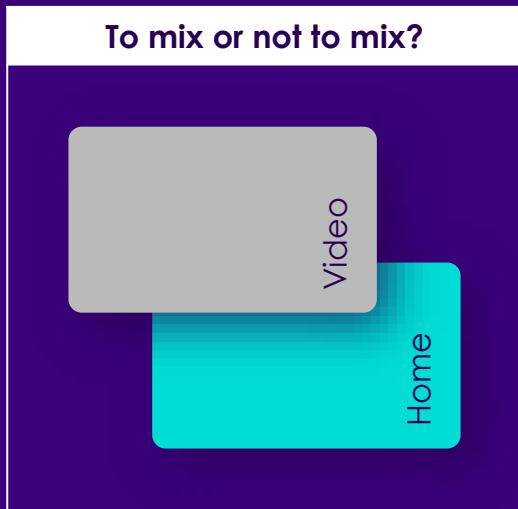
A refreshing summer stream essential

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Presented by

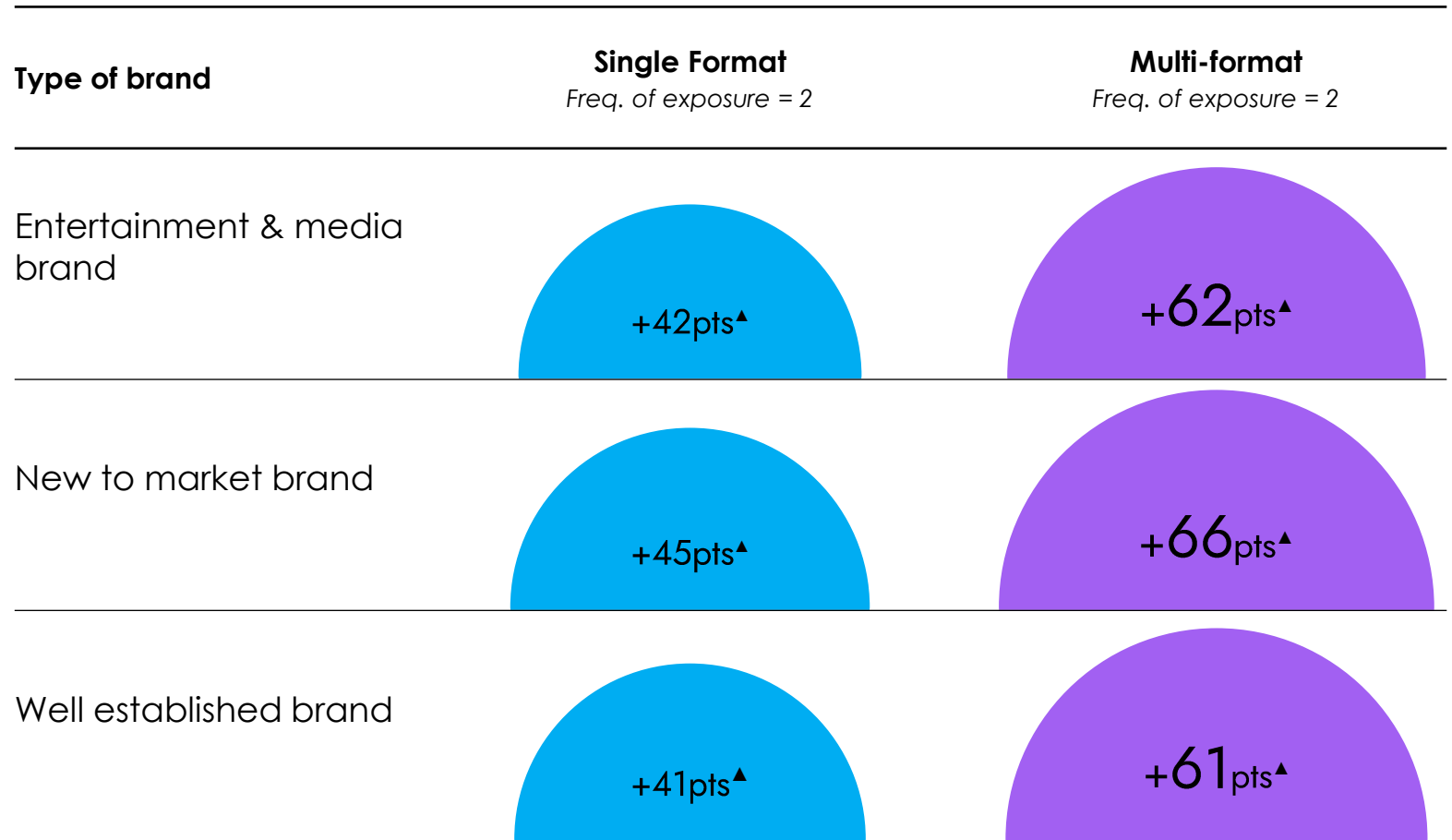
Synergy 101: A multi-format strategy creates a “double take” effect

Even with the same frequency, exposure to the brand across multiple formats is much more memorable



Impact on aided ad recall

Format strategy by type of brand // Delta (Exposed – Control)



Entertainment & media brand – Single Format: Exposed n=204, Control n=230; Multi-Format: Exposed n=100, Control n=100

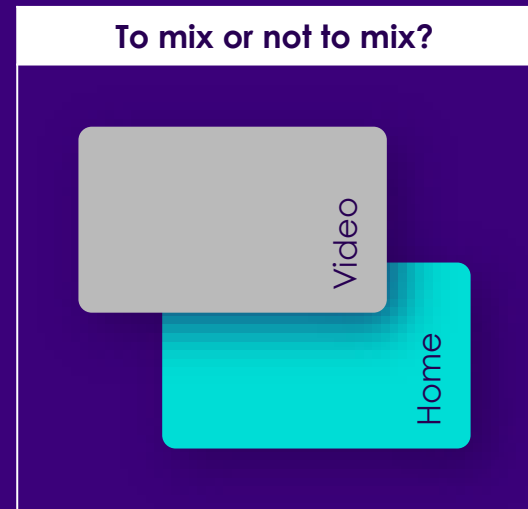
New to market brand - Single Format: Exposed n=201, Control n=190; Multi-Format: Exposed n=100, Control n=100

Well established brand - Single Format: Exposed n=193, Control n=183; Multi-Format: Exposed n=100, Control n=100

▲ = Statistically significant difference between control and exposed at >= 90% confidence

Q: Which of the following do you recall seeing an ad for during your experience? Select one for each option

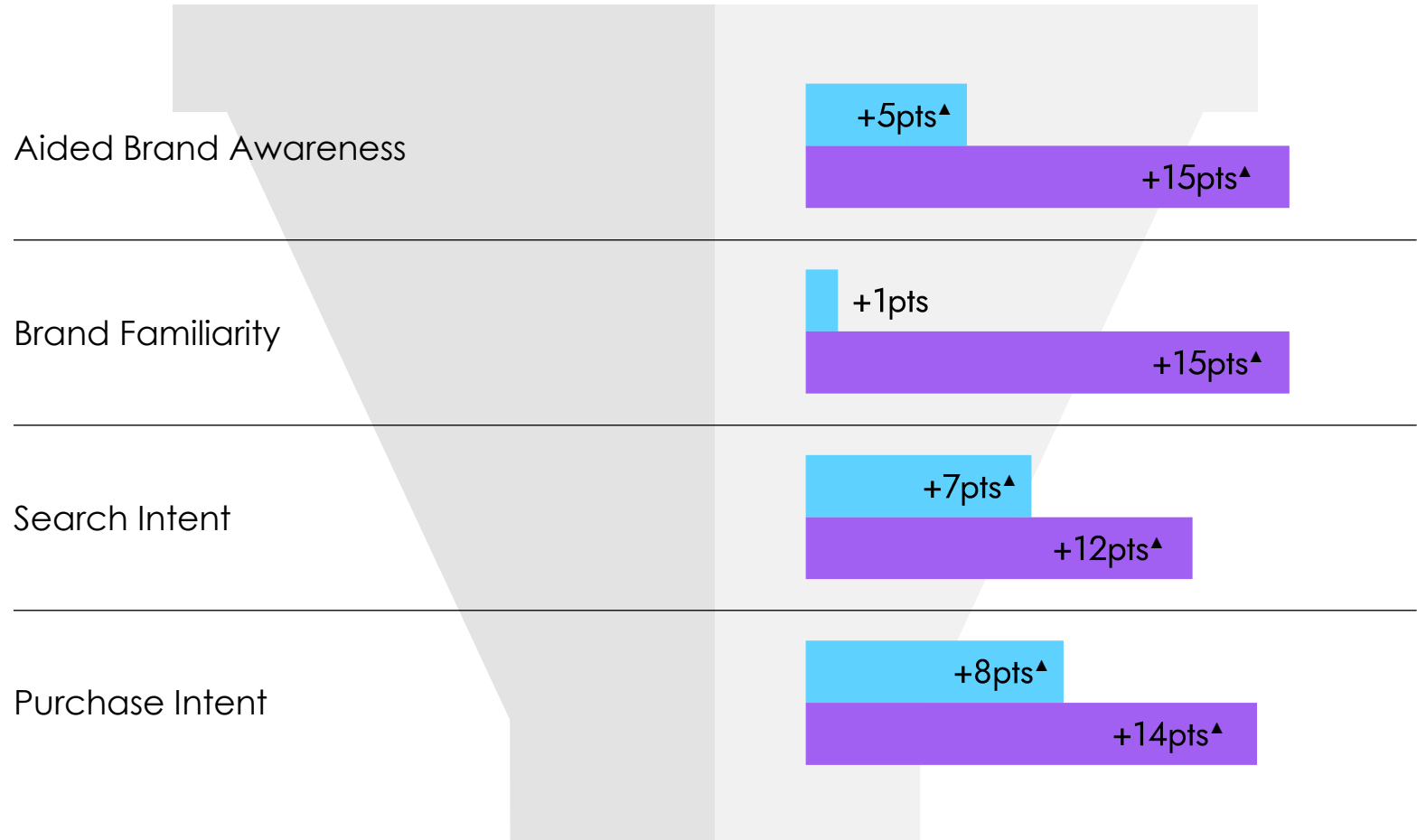
That “double take” effect has a downstream impact across the funnel



Impact on full funnel metrics

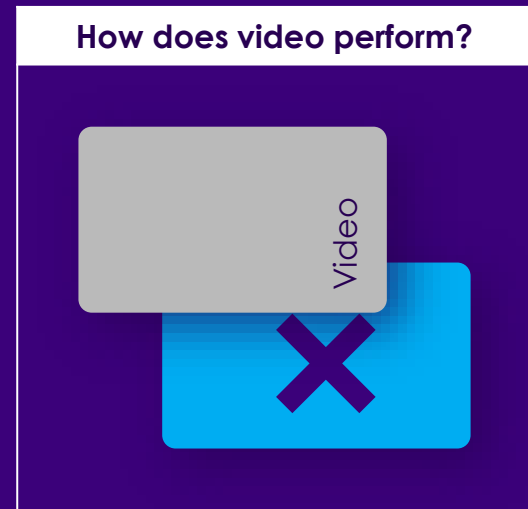
Format strategy // Delta (Exposed – Control)

● Single Format (freq. of exposure = 2) ● Multi-Format (freq. of exposure = 2)



Single format: Exposed n=604; Control n=599; Multi-Format: Exposed n=300; Control n=300
[▲]= Statistically significant difference between control and exposed at >= 90% confidence
 Q: Which of the following do you recall seeing an ad for during your experience? Select one for each option
 Q: How do you feel about the following? If you don't know the brand, you may select 'Neutral'. Select one for each option
 Q: How likely are you to look up information about the following? Select one for each option
 Q: The next time you're ____, how likely are you to [consider/choose] the following? Select one for each option

While video is a proven awareness generator...



Impact on awareness metrics

Video ads only (freq. of exposure = 2) // Delta (Exposed – Control)



Video Only: Exposed n=300; Control n=300

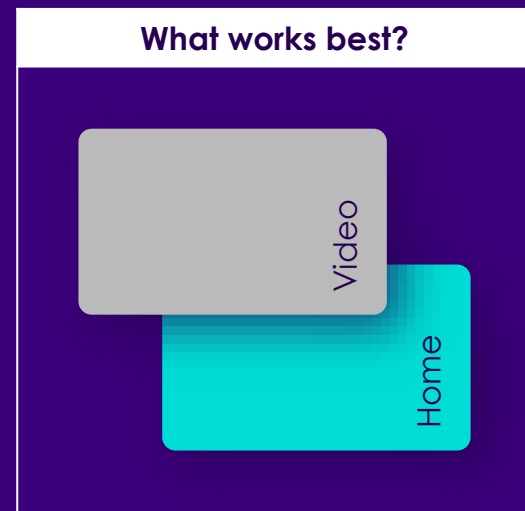
▲ = Statistically significant difference between control and exposed at >= 90% confidence

Q: Did you see any ads during your experience today? If yes, type the name of the brand below. If not, leave it blank.

Q: Which of the following do you recall seeing an ad for during your experience? Select one for each option

Q: How familiar are you with the following? Select one for each option

...Pairing video & home screen ads together amplifies middle and bottom funnel metrics

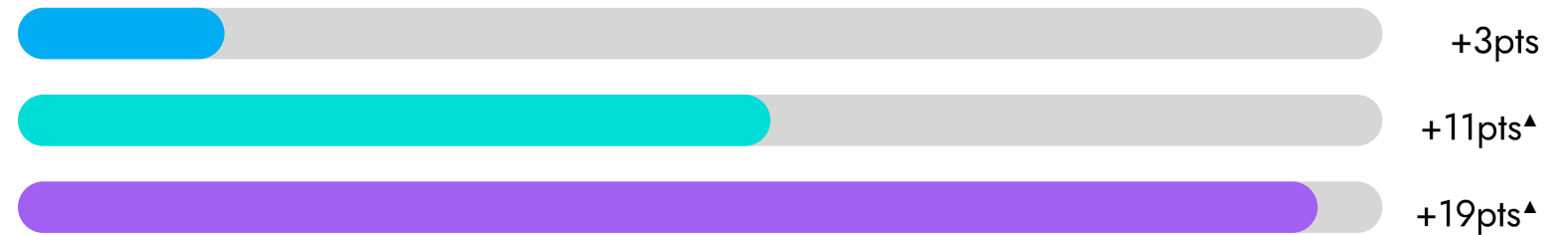


Impact on persuasion metrics

Ad mix // Delta (Exposed – Control)

- Home screen only (freq. of exposure = 2)
- Video only (freq. of exposure = 2)
- Home screen + video (freq. of exposure = 2)

Brand Favorability



Search Intent



Home screen only: Exposed n=299; Control n=304; Video Only: Exposed n=300; Control n=300; Home screen + video: Exposed n=300; Control n=300

▲ = Statistically significant difference between control and exposed at >= 90% confidence

Q: How do you feel about the following? If you don't know the brand, you may select 'Neutral'. Select one for each option

Q: How likely are you to look up information about the following? Select one for each option

Combining formats makes every media dollar work harder

A combined approach lowers the cost to impact by nearly 40% while driving stronger results

Cost efficiency – search intent

Cost to impact per person

\$0.39

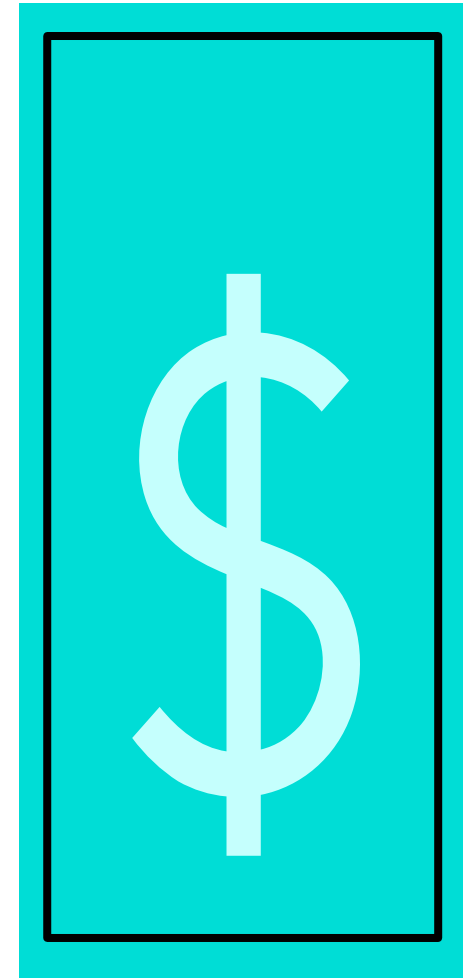
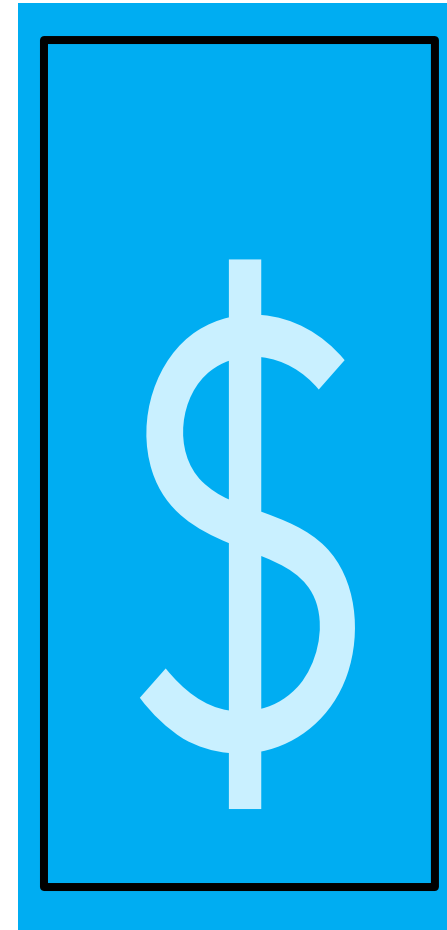
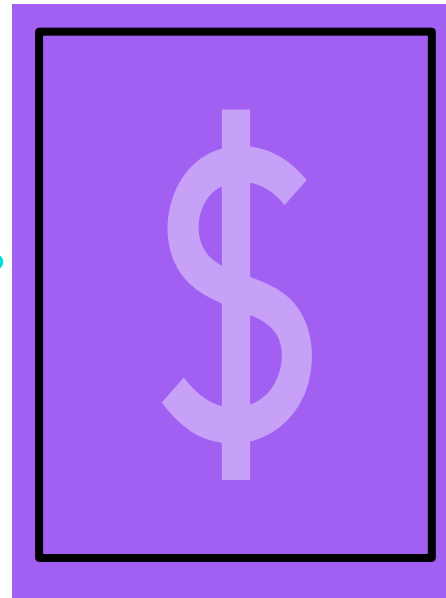
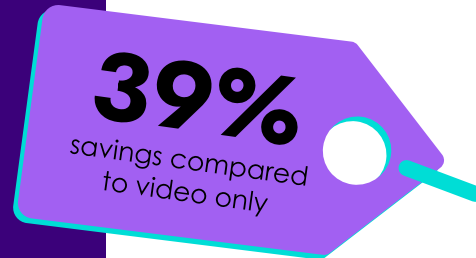
Home screen only

\$0.41

Video only

\$0.25

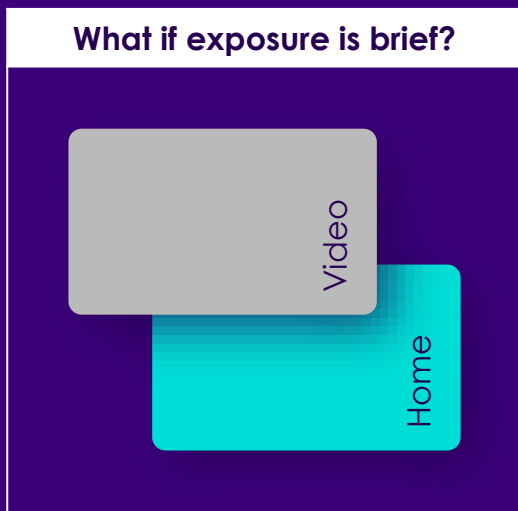
Home screen + video



Video Only: Exposed n=300; Control n=300; Home screen + video: Exposed n=300; Control n=300
▲ = Statistically significant difference between control and exposed at >= 90% confidence
Q: How likely are you to look up information about the following? Select one for each option

Long browsing times aren't required for immediate impact

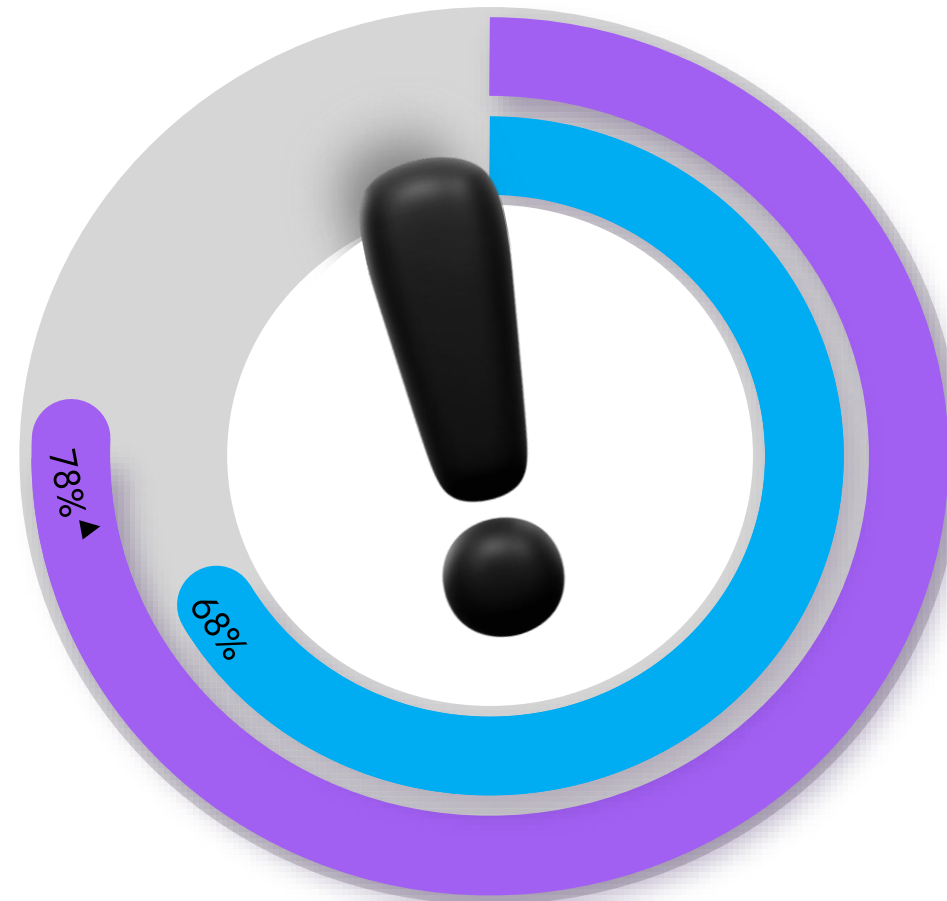
When paired with video, even brief home screen exposure can make ads more noticeable



Ad perceptions by time spent

Among streamers who spent minimal time on the home screen (≤ 5 sec)

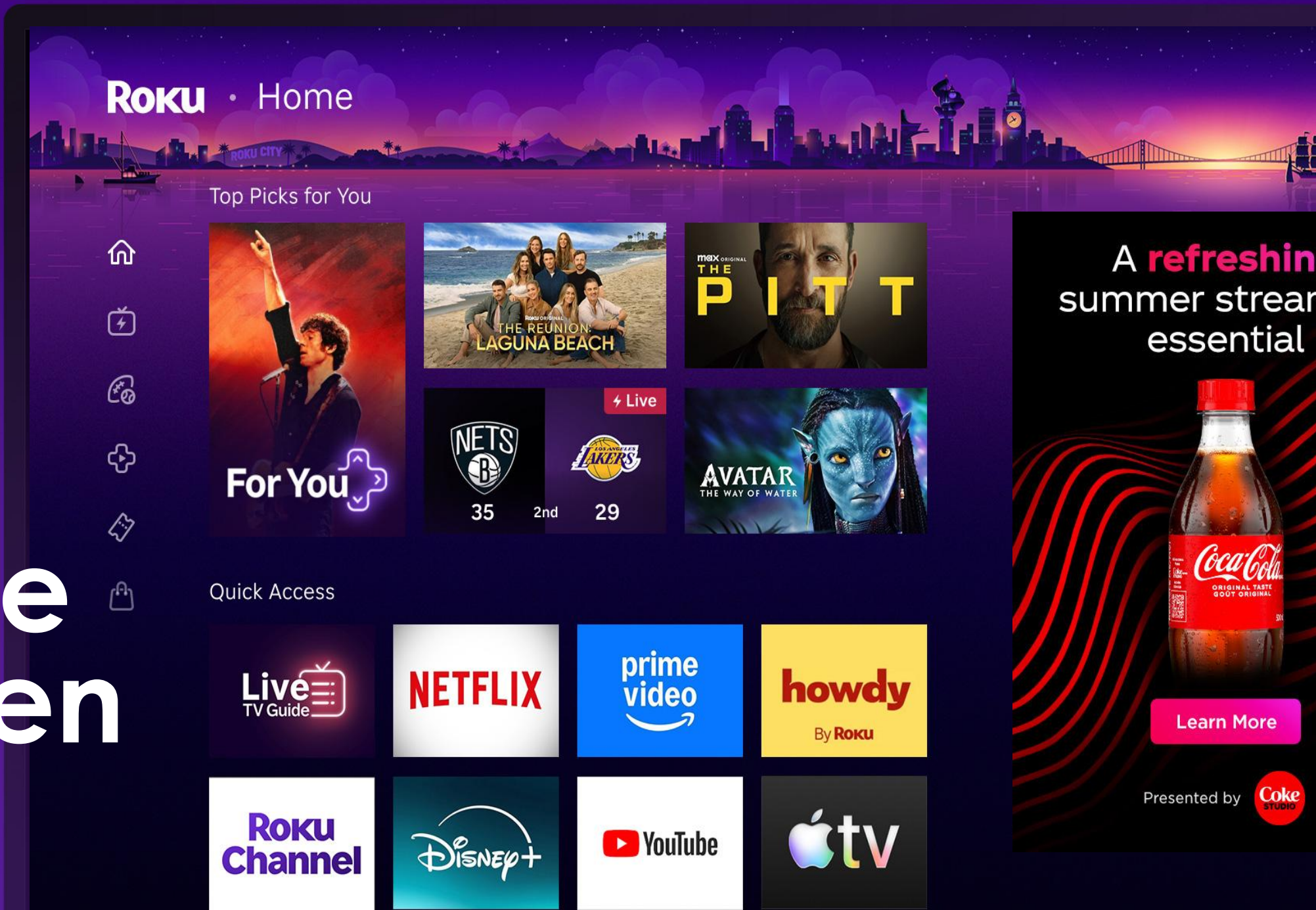
- Home screen only (freq. of exposure = 2)
- Home screen + video (freq. of exposure = 2)



Noticed the home screen ad

Home screen only (≤ 5 sec) n=102; Home screen + video (≤ 5 sec) n=104
▲ = Statistically significant difference between groups at $\geq 90\%$ confidence
Q: Do you remember seeing this ad? Select one

The Home Screen How



A **refreshing** summer stream essential



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Consider using the home screen to share “new news” or offer streamers utility

For TV streamers, the main reasons to notice a home screen ad were novelty and utility

What makes streamers notice home screen ads: Top 2

All TV Streamers // % would make me notice a home screen ad

“_____ would make me notice a home screen ad”

91%

Tells me something useful



86%

Shows me something new

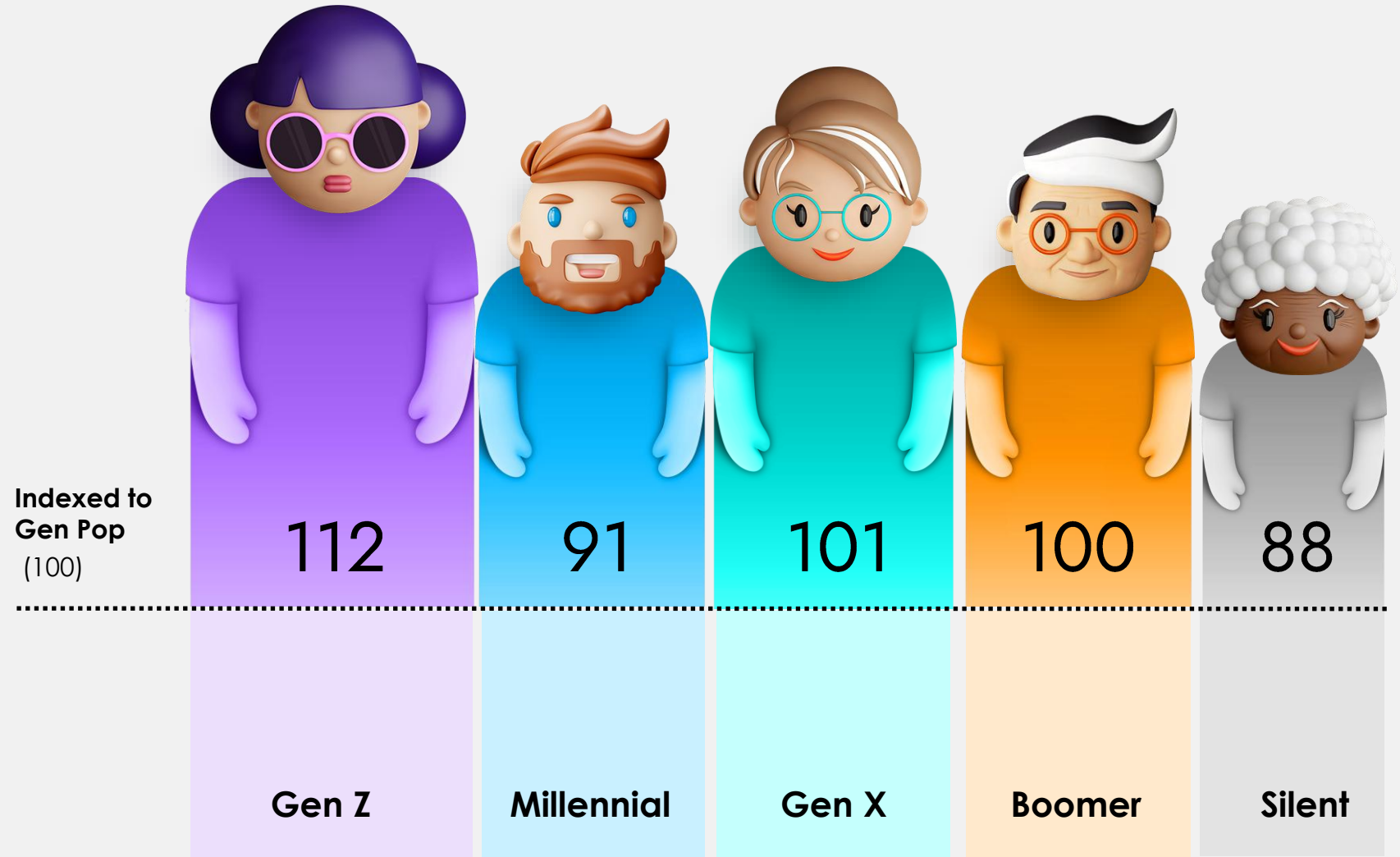


The home screen is a launchpad for new products, especially with Gen Z

Gen Z are most likely to notice the home screen ad when new products are offered

What makes streamers notice home screen ads: New Products

By generation // % would make me notice a home screen ad

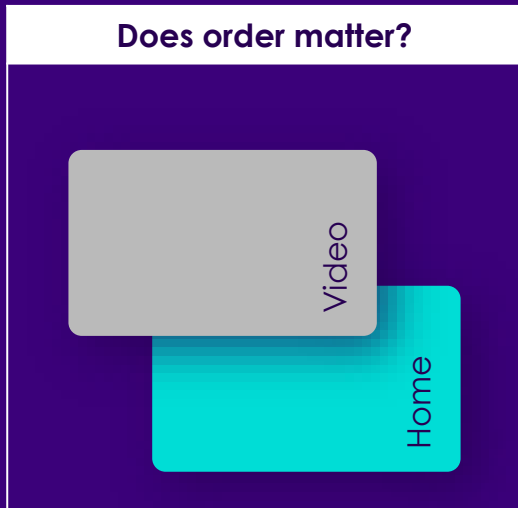


Total n=900
Q: Which of the following would make you notice a home screen ad? Select one for each option

Sequencing amplifies: aim to serve home screen ads prior to video

Impact on full funnel metrics

Impact of sequencing: **home screen ad, followed by video ad** compared to **video ad, followed by home screen ad** // Freq. of exposure = 2 in both groups



	Well established brand	Entertainment & media brand	New to market brand
Aided Brand Awareness	2x	—	—
Brand Familiarity	—	2.5x	—
Brand Favorability	—	1.8x	—
Search Intent	—	—	2.4x
Purchase Intent	—	—	6x

Well established brand: Home screen ad, followed by video ad: n=157; Video ad, followed by home screen ad: n=155
 Entertainment & media brand: Home screen ad, followed by video ad: n=156; Video ad, followed by home screen ad: n=153
 New to market brand: Home screen ad, followed by video ad: n=164; Video ad, followed by home screen ad: n=153
 Q: Which of the following would make you notice a home screen ad?
 Q: Which of the following do you recall seeing an ad for during your experience? Select one for each option
 Q: How do you feel about the following? If you don't know the brand, you may select 'Neutral'. Select one for each option
 Q: How likely are you to look up information about the following? Select one for each option
 Q: The next time you're ___, how likely are you to [consider/choose] the following? Select one for each option

Implications

Reinforce through variation

Consider combining home screen and video as part of a coordinated, cross-touchpoint strategy. Seeing a brand in different contexts can interrupt familiarity just enough to prompt renewed attention

01

Home screen, the launch pad

The home screen is a strong entry point for new product launches, as browsers are not only in a discovery mindset, but younger generations are especially likely to take notice

02

Sequence for impact: browse, then view

Consider using home screen ads as a primer to video. Priming streamers before an immersive experience worked best across most brand metrics

03

Unlock efficiency at scale

A mixed format approach lowers cost per result while driving stronger performance, allowing brands to stretch budgets further and scale impact more efficiently

04

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Thank You