



TV DECONSTRUCTED: LATEST FINDINGS FROM THE DASH STUDY

Fall 2022

The ARF Universe Study of Device and Account Sharing ([DASH](#)) is a nationally projectable enumeration study of consumer behavior in TV and digital media. DASH records in granular detail how US households connect to and consume TV, use digital devices, and interact with and share streaming media and ecommerce accounts. Described as “scaffolding for understanding the TV universe,” DASH is designed to serve as an industry standard truth set for insight and data calibration.

Companies need that standard truth set now more than ever. The digitization of TV, proliferation of mobile devices and streaming services, and rapid shifts in consumer behavior have blurred measurement and attribution, in turn roiling advertising and programming. Big data streams from set-top boxes and smart TVs allow deep examination of viewership, but introduce the limitations and biases of each system to what is already a massively complex situation. Media and measurement providers use DASH data to estimate universes,

correct for biases and gaps in big data sets, and assign viewership, devices and accounts to households and individuals, among many clarifying [applications](#).

Fielded in partnership with NORC at the University of Chicago, a premier polling firm, DASH is a syndicated study supported by multiple licensees, many of them competitors. Pooling resources enables a study that is higher in quality and more widely acceptable than any conducted individually.

After a successful launch in 2021, DASH was renewed in 2022 and established as an annual study. We are pleased to report that the data gathered so far appears robust and the trends logical. We will be pursuing MRC accreditation.

The ARF releases an initial wave of DASH data in the Fall and the full year data in January. This report covers topline insights from the Fall 2022 release and includes year-over-year comparisons with 2021.

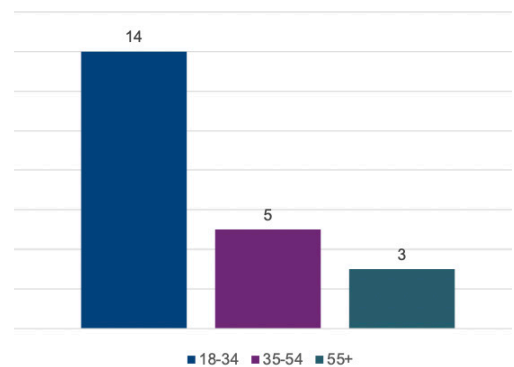
Findings

1. **TV Households Without a TV Set Are Rounding Errors No More**

More than 5% of U.S. households do not have a television set, but it’s not because most of them are “off the grid.” Far from it: 80% of these households have broadband, and more than 50% watch on their devices. This ascendant dynamic is driven by young adults (18-34) in one person households, who are twice as likely as older viewers not to own a television. Reception mode follows suit: 50% of TV set-less households are digital only (streaming), as opposed to just 14% of households with TV sets.

In light of these trends, the ARF is advocating for a gradual migration away from the concept of “television households,” which has historically represented households with at least one TV set, to “TV-accessible households,” as the basis of TV measurement.

% Households With No Television

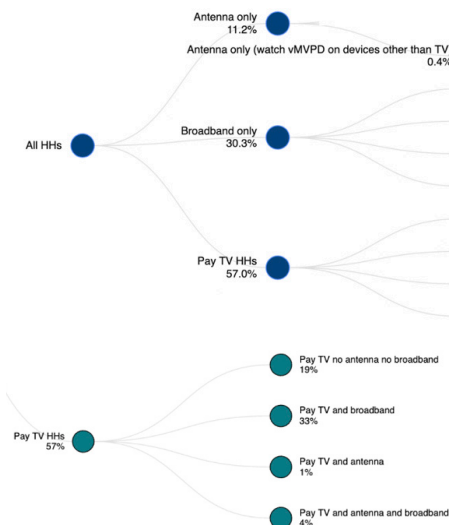


2. **Broadband Only Penetration Continues to Grow**

One of the most heavily debated issues in the industry today is the penetration of Broadband Only (BBO) homes. DASH data shows that BBO grew from 25% in Summer 2021 to 30% in Spring 2022 among TV accessible households, including those without a TV set. The corresponding BBO penetration figures in TV (set) households were 22% and 26%. Over the same period, Pay TV households declined from 61% to 57%.

3. **Virtual MVPDs Are Filling the Pay TV Gap**

Broadband Only households can get linear television through virtual MVPDs (vMVPDs), like YouTube TV and Hulu+Live, so many in the industry want the rating services to treat vMVPDs as just another form of Pay TV (like cable, satellite and fiber services). DASH data shows that adding vMVPDs would raise the Pay universe to 67% and lower BBO to 20% among all TV accessible households. Some in the industry represent this 20% to be the entire BBO universe, while others include households with vMVPDs in BBO.

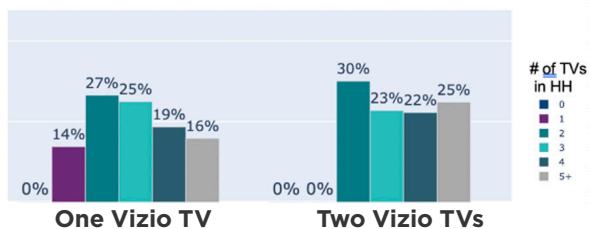


4. **TV Sets Are Increasingly “Unequal Access”**

Only 21% of Pay TV households have a set top box on every TV. The rest have at least one TV that accesses a different programming menu. For example, a third of Pay TV households have broadband connected to at least one TV, and 5% have an antenna on at least one set. Almost half of the Pay TV households with broadband (14% of 33%) have YouTube TV on at least one television, which gives those households access to two modes of linear viewing. All this “unequal access” within households creates measurement challenges that the DASH data can help resolve.

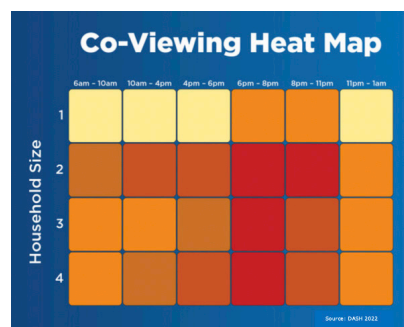
5. **Consumers Are Not Very Loyal to TV Set Brands**

Interestingly, TV brand loyalty (or lack thereof) creates another measurement challenge DASH helps address. Many of the new currencies use Vizio data. But projecting household viewing based on usage of Vizio smart TVs will not produce a complete picture: new DASH data shows that 86% of households with one Vizio TV have other TVs from other brands. Even in households with two Vizio TVs, other brands of TVs are present in 70% of cases. To make matters worse, not all the TVs in a smart TV household are smart. DASH delivers a highly granular picture of the universe of TV sets and connectivity, enabling measurement teams to calibrate viewership data to be more representative of total audience.



6. **The Electronic Hearth Glows Less Brightly**

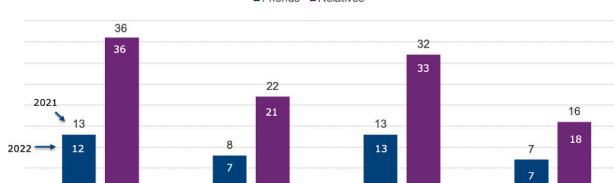
In a simpler time, families watched television together during primetime. DASH co-viewing data, depicted in the heat map to the right, shows that dynamic has given way. Primetime co-viewing is actually higher in two person households than in larger families. Today the kids are off watching their devices in their own spaces.



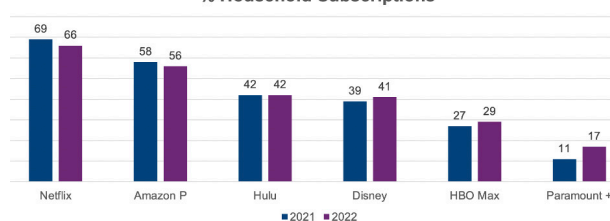
7. **The Dynamics of Streaming TV Accounts Held Pretty Stable in 2022, But Are About To Change**

The household penetration levels of the major subscription streaming services held mostly flat year over year, with the exception of Paramount+, which has jumped up to 17% from 11% behind “Yellowstone.” Disney and HBO Max have risen slightly, while the market leaders, Netflix and Amazon Prime, have declined concomitantly. In addition, Netflix and Disney remain the most shared services. But the rise of ad-supported options within streamers is likely to shift these dynamics. The full-year release of DASH 2022 in January will give licensees a comprehensive first look. The data will parse subscribers to the top five “hybrid” services across ad supported and premium (no ad) tiers. As Netflix, Disney and other SVOD services introduce ad-supported tiers, DASH will be updated to stay on top of this significant trend.

Percent of Subscribers Who Share With One or More Outside the HH



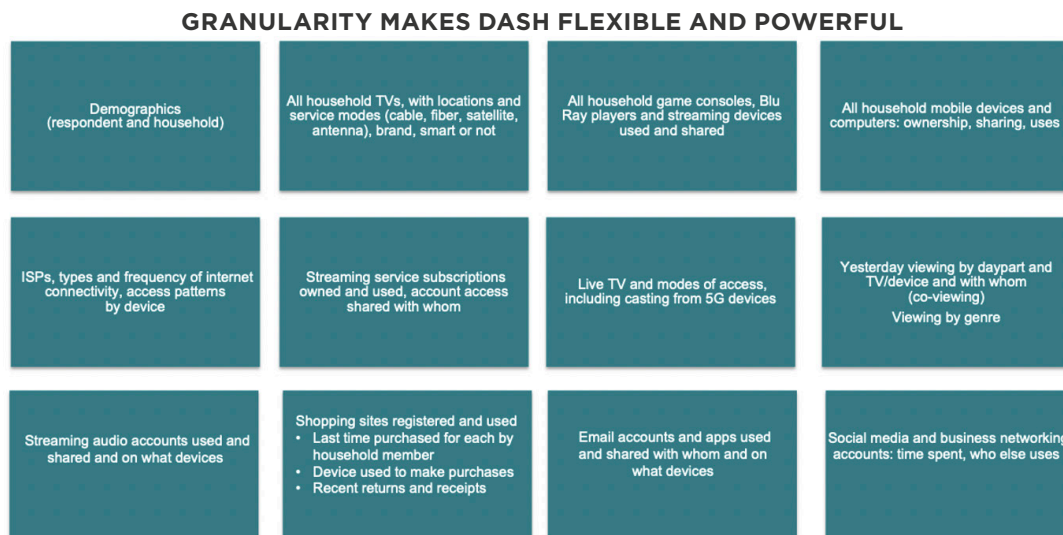
% Household Subscriptions



Design

DASH addresses the lack of unbiased standards in universe sizing. A highly granular, direct survey study, DASH mimics many of the signals that measurement and media companies collect electronically. This feature permits modeling of data not contained in those electronic big data sets. Take demographics, for example: DASH produces a far more reliable truth set than the unverified demographic data available from third parties.

The chart below illustrates the broad content of the study.



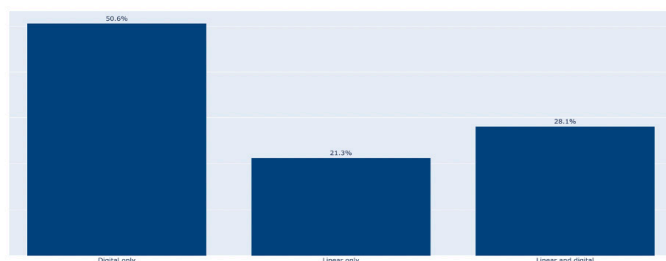
DASH is a rich source of signals for modelers and analysts. For example, for each TV set in the household, DASH identifies where it is, what brand it is, whether it's smart, how it's connected, and who watches what on it, with whom and when. DASH data can be used at its most basic level or rolled up into more complex or descriptive measures.

Importantly, DASH creates an opportunity to standardize measures of coverage bias across the industry. Many companies have access to a limited number of TV datasets — a typical combination would be data from Vizio and one MVPD — or to transactional data from a set of ecommerce sites, which generally does not include Amazon or Walmart. DASH is a comprehensive source — a full view of the universe — to help users understand the differences in behavior across these channels and make corrections for the limited coverage.

Methodology

The Fall 2022 release is based on a national probability sample of 6,177 persons, ages 18 and over. The full 2022 study, to be released in January, will have more than 10,000 respondents. DASH employs four modes of data collection, to achieve balanced representation and to allow for analysis of biases associated with each interviewing mode: online panel, online survey (not panel), face-to-face and phone (limited to non-internet households). A complete description of methods, as well as sample composition and response rate analysis, can be found [here](#).

Several new signals were added in 2022 to help with demo and viewer assignment, including frequency of viewing by genre, TV casting from 5G devices, and the breakdown of ad supported and premium streaming subscriptions for the five major “hybrid” offers. In addition, questions that identify vMVPD subscriptions and usage were improved.



Questions?

To learn more about the [DASH](#) study, visit the site or contact Paul Donato, Chief Research Officer (pdonato@thearf.org) or Jim Meyer, Commercial Director (jmeyer@thearf.org).