Technical Paper and Observations: DASH Spring 2023 Wave

Significant Changes to the Spring 2023 Survey

The document *DASH Wave On Wave Survey Changes_2021-2023* contains a complete summary of all changes to the DASH survey since the inception of the program in 2021, including the changes to the Spring 2023 survey from Fall 2022. Some of the more significant highlights are shown below:

- Added battery to respondent's TV daypart viewing at home section (Q22) to capture:
    - Specific device or TV set used to watch
    - Programming type (local TV, broadcast nets, cable news nets, cable entertainment nets, cable sports nets, streaming, on demand, previously recorded, UGC)
    - Specific outlets within types, and co-viewing for most watched dayparts

- Added Netflix and Disney+ to "hybrid" streamers to capture SVOD and AVOD tiers subscribed to for users of each service. Updated offers on the other five services, including discounted rate (bundle) options (Q7)

- Added question to capture HH usage of FASTs (response options - 12 services plus other) (Q7a)

Significant Changes in Results Since the 2022 Study

We have conducted a comparison on all common variables in the 2022 and 2023 studies, and the full Excel file is available on request. We found changes worth noting in three areas, described below.

- Q39 – Which audio streaming service have you used in the last 7 days?
    - This a screen was put into place yielding missing values instead of a small incidence of non-subscribing listeners.
- QG1 – Which of the following video genres do you typically watch?
    - Most genres declined and we have not identified any survey related cause.
- Q7 – Please choose the option that best describes how [you pay or your household pays] for [streaming service] and whether you see ads on it.
    - Significant differences seen in some data seem to reflect the growth of smaller services and the introduction of tiers by the established services.

If you are a heavy user of measures in these areas, the DASH team is happy to work with you on how best to interpret the data.

Sample Characteristics

A detailed description of the sample, demographic characteristics and methodology can be found in the *DASH Spring 2023 Project Methods Report* found in the Documentation folder. The following summarizes some of the highlights:

Study Target Population:	General Population Age 18+
Sample Units:	9,195
Completed Units:	6,219
Completion Rate:	68%
AAPOR Response Rate:	13%

Individual Margin of Error: ±1.7 percentage points (pp)
Individual Design Effect: 1.86
Household Margin of Error: ±1.71 percentage points (pp)
Household Design Effect: 1.88
Survey Field Period: March 15, 2023 – June 30, 2023
Median Duration (minutes): 20

Note: The ARF is constructing a standard error estimator based on the design effect. The tool, which will provide an approximate standard error, will be available within a few weeks of this release. We expect to provide an empirical estimator prior to the full year 2023 release.

Classifying Modes of Reception

One of the more controversial statistics in video measurement today is the estimate of homes that have access to video through broadband only (BBO). BBO homes generally watch less linear television and, in many cases, access only streaming TV (SVOD or AVOD). The classification of BBO homes is understandably important to broadcasters, streamers and advertisers.

Survey respondents cannot always tell you how they get TV, either because they do not know or because they are not clear on the different means of reception in use across their television sets and devices. DASH addresses this problem by collecting the information in a highly granular way, for each television set and device. The way this information is put together (*aka* edit rules) can impact the resulting estimates of reception classification (Pay, Over the Air or BBO). This rest of this document defines two reasonable reception edit rules, identifies the resulting differences, and discusses a research plan to explore the characteristics of each.

Household Based Edit Rule

The approach to reporting reception for households with at least one television set that was used in the last six months is based on the following sequence of rules:

1. A respondent household that identifies an MVPD (cable, telco or satellite) and responds yes or don't know to a question asking if there is a piece of hardware attached to at least one set or identifies the MVPD as the means of reception on at least one set, is classified as Pay. This classification applies regardless of whether the respondent has an antenna or vMVPDs on any other set.
2. A household not classified as Pay that has any streaming service or streaming device (for on-demand or live video streaming) and does not have an antenna on any set is classified as Broadband Only.
3. Among the remainder, households that have an antenna on one or more television sets and do not have reception through an MVPD on any television set are classified as Over the Air.
4. Respondent households that did not select any service for receiving programming (~3% in Spring 2023) are classified as Over the Air.

The resulting distribution for Spring 2023 among TV Households is shown below:

Pay	56%
BBO	30%
Over the Air	14%

This data suggests a 2-point growth in BBO households since the Summer of 2022.

Set Based Edit Rule

The approach to reporting reception for households with at least one television set that was used in the last six months is based on the following sequence of rules:

1. Initially, OTA households are assigned in exactly the same manner as described in the household edit section. This allows assignment for some homes that may not have answered for every set.
2. Then, a respondent household that identifies an MVPD (cable, telco or satellite) and responds yes or don't know to a question asking if there is a piece of hardware attached to at least one set, or that identifies the MVPD as the means of reception on at least one set, is classified as Pay. This classification applies regardless of whether the respondent has an antenna or vMVPD on any other set.

3. The remaining households that have an antenna on one or more television sets and do not have reception through an MVPD on any television set are classified as Over the Air (OTA). This classification applies regardless of whether the respondent has a vMVPD on another set or device and may assign households as OTA not previously classified as OTA in step 1 via the household edit.
4. A respondent household that does not identify reception through a MVPD on any set nor receives linear television through an antenna on any set, but does have access to the internet, is classified as BBO, whether or not the household has access to streaming services (SVOD or AVOD).
5. Respondents that did not select any service for receiving programming (~3% in Spring 2023) are classified as Over the Air.
6. The process is iterative, to ensure CASEIDs are not counted in more than one category nor left out of one.

The resulting distribution for Spring 2023 among TV Households is shown below:

Pay	49%
BBO	36%
Over The AIR	15%

This data suggests a 3-point increase in BBO since the Summer of 2022.

To investigate this important set of edits further, we will be conducting a recontact study of a sample of those who did not respond to question 11 to ensure they have been properly classified.