



SUMMARY

The digitization of television has resulted in fragmentation and massive complexity. The options available to TV consumers have exploded, while streaming viewership data from TV sets and services, along with first-party data from publishers and advertisers, has opened doors to new modes of measurement and audience delivery. To knit the pieces together coherently, companies in the age of connected TV need a reliable, cost-efficient calibration standard. That standard is DASH.

The ARF DASH TV Universe Study produces a comprehensive picture of the consumer television landscape. DASH records, in granular detail, how American households connect to and consume TV across platforms and devices. A nationally projectable study conducted annually, DASH produces measures and modeling signals with applications in media measurement, research, advertising and strategy.

STUDY ATTRIBUTES

Funded and managed by the ARF, DASH is conducted by NORC at the University of Chicago, a premier polling firm. DASH is:

- **Comprehensive:** A national probability sample of 10,000+ households ensures robust geodemographic coverage and projectability
- **Rigorous:** A team of measurement and research experts from the ARF, NORC and DASH licensees oversee the study and critically assess the results
- **Reliable:** Fielded and released in two waves each year, DASH is built on a core of survey questions that define the “scaffolding” of the industry

- **Up-to-date:** Revisions and new questions in each wave keep the study on pace with the market and responsive to the needs of its licensees
- **Useful:** DASH data can be used to estimate universes, correct for biases and gaps in viewership data, train models, enhance identity graphs, strengthen sales narratives and assign impressions, accounts and devices to households and individuals
- **Affordable:** DASH is syndicated: annual licenses to the data are available to ARF members and non-members alike for a fraction of the cost of the study itself

The MRC completed a pre-audit of DASH in 2023. The full audit for certification is planned for 2024.

DATA ELEMENTS

For every TV set in every respondent household, DASH records the brand, room location, age, “smartness” and modes of connection, including pay, broadband and antenna. DASH logs the connection devices on each TV set, including Android boxes, Roku and Fire sticks and gaming consoles. DASH captures the internet and pay TV providers, the vMVPD and FAST services and the streaming TV subscriptions, by tier, used in each household. DASH itemizes person-level ownership and usage of video-capable mobile devices, including smartphones, tablets and laptops, enabling production of a comprehensive device graph that supports householding. DASH collects measures of respondents’ viewing and co-viewing across dayparts, devices and services, to generate rich modeling signals, and captures viewing on out-of-home TV sets. DASH includes modules on ecommerce, streaming audio, social media, email and apps, to create a holistic view of respondents’ digital media usage. And DASH provides detailed household and persons-level demographics.

New questions added in 2023 delve more deeply into ad-supported streaming, in- and out-of-home viewing dynamics and signal casting from mobile devices.

DASH data can be cross-tabbed and assembled in myriad ways to create customized measures and views. In addition, each DASH data set includes more than 400 pre-defined, aggregate variables, including many industry-standard measures.

To learn more, visit thearf.org/dash or email DASH@thearf.org

METHODOLOGY

The ARF partners with NORC at the University of Chicago to test and refine the DASH survey and conduct the fieldwork. DASH employs a national probability sample of 10,000+ persons aged 18 and older. NORC's proprietary AmeriSpeak panel forms the backbone of the sample plan. Interviews are conducted online, in person and by phone. NORC panel registrations provide respondent and household demographics, and NORC's rigorous audit process ensures high-quality response data. DASH also

includes a supplemental survey of teens age 13-17, which licensees may choose to exclude from the data set.

As in 2022, DASH 2023 includes a longitudinal sub-sample of approximately 3,000 multi-year adult respondents for analysis of switching dynamics. In addition, DASH licensees can conduct recontact studies on DASH respondents through NORC to append variables of interest.

Extensive documentation on DASH methodology, response rates, sampling criteria and sample composition is available on request.

TIMING

DASH is conducted in Spring and Fall waves each year. Data from the Spring wave of DASH 2023 was released to licensees in September, and the full year data set in January. Full year data sets from DASH 2021 and 2022 are also available immediately.



LICENSING THE DATA

The ARF offers licenses to DASH data in three tiers, starting at \$75,000 a year:

- Basic offers access to summary-level data in a Tableau or web dashboard for strategic analyses, panel weighting, modeling household topographies and ad sales support
- Plus adds a non-matchable, anonymized respondent-

level database for custom segmentation, profiling and analysis

- Premium adds a privacy-compliant, respondent-level database that can be matched to the licensee's census-level viewership or subscriber database. Experian, the ARF's integration partner for this study, has developed a turn-key protocol and offers its service to Premium licensees.

ACTIVATING DASH IN MARKETING

DASH data can be integrated with most advertising identity graphs to enable development of custom target audiences. In addition, DASH-defined audience segments from Experian are available to all advertisers on a CPM basis for manual or programmatic activation at scale. Available on most major advertising platforms, these segments allow advertisers to align campaigns with the media usage habits of their target consumers. [Click here](#) or contact audiences@experian.com for more.

To discuss the ways DASH can work for you, contact

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