



Technical Paper and Observations: DASH Fall 2023 Wave

Significant Changes to the Fall 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 Fall 2023 survey from Spring 2023. Some of the more significant highlights are shown below:

- Expanded and refined OOH viewing battery (QL1-4_N)
 - Added genre viewed and time viewed questions
 - Clarified that OOH viewing is on a TV set (not a device)
- Added local television programming breakdown (Q22F1_N)
- Inadvertently deleted the question establishing subscription to basic streaming audio accounts (Q37) in both waves of the 2023 study. Q37 will be reinstated in 2024.

Significant Changes in Results Since the 2022 Study

We have conducted a comparison on all common variables in the 2022 and 2023 studies, and this file is available on request. The largest changes in data are related to streaming audio as a consequence of deleting the basic streaming screen. 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.

To assess the overall level of change, we look at what might be expected by sampling error alone. Two standard errors would be on average approximately 2.6%. If we assume that the DASH study has the properties of a high response rate probability sample, we would expect to see 5% of the 19,726 data comparisons exceed that threshold¹. The YOY comparison file referenced above shows 7.9% of data comparisons exceed the threshold. Of course, that figure includes all changes from all causes, including sample error and changes in the instrument and in the ecosystem. Therefore, we conclude that 7.9% is reasonable and a basic indicator of sample quality.

- When reviewing the sorted file containing the absolute value of changes, we also noted some other large differences reflect missing values either this year or last year, as many streaming services added or dropped tier offerings. Thus the observed change in streaming tiers was largely structural.
- Also of note, we are starting to see a decline in the rapid growth of Broadband Only. Regardless of which definition is used (Household Edit or Set Based Edit – see below or the

¹ We recognize, of course, that many things can drive a change year on year, especially real change, but thought the exercise worthwhile to see if there was a logical level of change overall.



file “DASH Fall 2023 Edits” for definitions of each), we saw a 2-3 point increase in BBO from midyear 2022 to Spring 2023. We are seeing little or no growth from Spring to Fall 2023.

- Definitions of Pay TV: Some licensees have asked to create a Pay TV definition that includes vMVPD access to linear television. This variable has been created and is called PayTVv.

Sample Characteristics

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

Study Target Population: General Population Age 18+

Sample Units: 16,086

Completed Units: 10,504

Expected Eligibility Rate: 100%

Observed Eligibility Rate: 100%

Individual Margin of Error: ± 1.31 percentage points (pp)

Individual Design Effect: 1.88

Household Margin of Error: ± 1.30 percentage points (pp)

Household Design Effect: 1.86

Survey Field Period: March 15, 2023 – June 30, 2023; September 18, 2023 – November 13, 2023

Overall Median Duration (minutes): 20

Phone Median Duration (minutes): 39

Web Median Duration (minutes): 21

Face to Face (minutes): 17

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.

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). The 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 sequence of rules below. As cited above, many in the industry have argued that BBO households with access to linear through a vMVPD should be classified as Pay. Consequently, under each of the following edits, we will also identify what the distribution would be under this PayTVv classification.

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 (~1% for FY 2023) are classified as Over the Air.

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

Pay	55%
BBO	30%
Over the Air	15%

This data suggests a 2-point growth in BBO households since Summer 2022, but little to no growth from Spring to Fall 2023.

When we classify BBO households with vMVPD access as PayTVv, the resulting distributions are:

Pay (incl. TVv)	64%
BBO	20%
Over the Air	15%

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, Over the Air (OTA) households are assigned in exactly the same manner as described in the Household Based edit. 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 vMVPDs 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. 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 Based 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 Broadband Only (BBO), whether or not the household has access to streaming services (SVOD and AVOD).
5. Respondents that did not select any service for receiving programming (~1% in FY 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 Full Year 2023 among TV Households is shown below:

Pay	48%
BBO	36%
Over The Air	16%

This suggests a 3-point increase in BBO since Summer 2022 using this method, but little to no growth from Spring 2023 to Fall 2023.

When we classify BBO households with vMVPD access as PayTVv, the resulting distributions are:

Pay (incl. TVv)	60%
BBO	24%
Over the Air	16%

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 Q11 to ensure they have been properly classified.