

The Advertising Research Foundation Proposes New TV Connection Framework Amid Rapidly Evolving Landscape

Newly Released Report from the DASH TV Universe Study Highlights Changes in US TV Usage That Point to the Need to Sunset BBO

NEW YORK – NOVEMBER 25, 2024 - The [Advertising Research Foundation](#) (ARF) has proposed a new framework for classifying how U.S. households connect to TV. The new framework would replace the Pay/BBO/OTA scheme the TV industry has relied on for years. Data from the [DASH](#) TV Universe Study, including the first wave of DASH 2024, underscore the continued mainstreaming of streaming television, the “appification” of Pay TV and the erosion of Broadband Only (BBO) penetration as a useful definition of TV connection. The findings and the recommended framework, summarized in a newly released ARF [report](#), highlight shifts in U.S. television usage that create fresh opportunities for advertisers and media companies.

Latest Key Findings from DASH:

- The penetration of paid AVOD services has exploded over the past two years, from 17% in 2022 to 63% in Spring 2024
 - The two largest streaming services, Netflix and Amazon Prime, accounted for the vast majority of the most recent gain
 - SVOD penetration has fallen over the same time period, though not at the same rate
- Free ad-supported streaming TV (FAST) continues to grow
- vMVPD penetration is flattening out, but adoption has picked up among older (55+) households, suggesting that the technology is mainstreaming
- More than 40% of Pay TV households use apps to receive all or some of their TV signals, blurring and effectively outmoding the concept of BBO (Broadband Only)

“The latest trend data from DASH underscores the need for an updated view of how TV is defined and consumed,” said Paul Donato, Chief Research Officer at ARF. “As the lines between traditional pay and streaming services continue to blur, we’re moving toward a new paradigm that will more accurately represent how households connect to television.”

A New Framework for TV Connection

In response to these trends, ARF recommends a new classification system for U.S. TV households. This framework divides households into six segments based on what TV signals they receive. Four of these segments constitute the Pay TV universe, including traditional and virtual means of access, which represented 59% of TV-accessible households in Spring 2024. The other two segments capture households relying on Over-the-Air (OTA) and digital-only signals. Notably, the Pay TV segments and OTA comprise the Linear TV universe, which represented 74% of U.S. TV households in Spring 2024.

Established in 2021 and run annually in collaboration with NORC at the University of Chicago, the DASH study provides a dynamic and comprehensive view of how Americans connect to and consume TV across devices, platforms and services. DASH is conducted online, in-person, and by phone against a national

probability sample of more than 10,000 adults to produce reliable, projectable results for the media industry. DASH is overseen by a technical committee of measurement experts representing the licensees of the study. This committee refines the survey ahead of each wave to keep DASH on top of changes in the ecosystem.

The mission of the DASH program is to produce a reliable, accessible standard for TV universe estimation for providers across the industry. DASH measures assist in the calibration of streaming viewership data, enable more precise media planning and audience targeting, and generally illustrate in granular detail the ongoing transformation of the U.S. television landscape. DASH is currently undergoing a full Media Rating Council audit with the goal of accreditation. For more information on the study methodology and options for licensing the data, email DASH@theARF.org or visit the [DASH website](#).

About the Advertising Research Foundation

Founded in 1936, the [Advertising Research Foundation](#) (ARF) has emerged as the preeminent authority on unbiased quality in advertising, media, and marketing research. With over 400 member companies, the ARF's powerful knowledge, unified standards, and best practices have proven invaluable time and again. The ARF continues to drive continuous improvement in advertising and marketing practices by fostering collaboration and innovation, shaping the industry's future.

In today's rapidly changing technology landscape, the ARF remains committed to providing accurate information, setting industry standards, and promoting transparency. For more information on the ARF visit www.thearf.org and also visit us on [LinkedIn](#), [YouTube](#), [X \(Twitter\)](#), and [Facebook](#). For more information on DASH, visit www.thearf.org/dash.

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