

# ARF DASH<sup>↑</sup>

TV UNIVERSE STUDY



## SUMMARY

Connected TV has fragmented audiences, created new sources of streaming data and introduced massive complexity into media measurement, planning and sales. To knit the pieces together coherently, companies across the TV ecosystem need a reliable, cost-efficient standard for universe estimation and calibration. 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 reliable universe estimates, usage measures and modeling signals with applications in advertising, sales, audience measurement and programming strategy.

The full year DASH 2024 study was just released. Historical data from DASH 2021-2023 is also available to licensees now. Contact us at [DASH@thearf.org](mailto:DASH@thearf.org) to learn more.

## 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 experts from each DASH licensee works with the ARF and NORC to ensure excellence in coverage, design and methodology
- **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 highly specific universes of subscribers, hardware users, and reachable audiences; calibrate streaming viewership data; enhance identity graphs; strengthen sales presentations, and plan and activate advertising
- **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 has completed a pre-audit of DASH. The full accreditation audit began in late 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 Apple TV and Android boxes, Roku and Amazon Fire sticks, gaming consoles and digital tuners. DASH captures the internet and pay TV providers, FAST services and streaming TV subscriptions, by tier, used in each household. DASH itemizes person-level ownership and usage of video-capable mobile devices, enabling production of comprehensive device graphs that support 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. To put TV in a broader

context, DASH includes modules on ecommerce, streaming audio, social media, email and apps, as well as time spent with each major media type. And DASH provides detailed household and persons-level demographics, including language preference, sexual orientation and disability.

DASH 2024 includes a new module designed to identify and profile respondents who have interacted with 18 major retailers and their media networks (RMNs).

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.

## 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, available to licensees on request at no additional cost.

DASH 2024 includes a longitudinal sub-sample of more than 4,000 multi-year adult respondents for analysis of switching dynamics. In addition, DASH licensees can conduct recontact studies on respondents through NORC to append variables of interest.

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



## LICENSING THE DATA

The ARF offers licenses to DASH data in three tiers, starting at \$80,000 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 licensed at the Premium tier can be integrated with most advertising identity graphs to enable development of custom target audiences. For the benefit of all advertisers, Experian offers DASH-defined audience segments on a CPM basis 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](mailto:audiences@experian.com) for more.

To discuss the ways DASH can work for you, contact

**JIM MEYER**  
General Manager  
[jmeyer@thearf.org](mailto:jmeyer@thearf.org)

**PAUL DONATO**  
ARF Chief Research Officer  
[pdonato@thearf.org](mailto:pdonato@thearf.org)