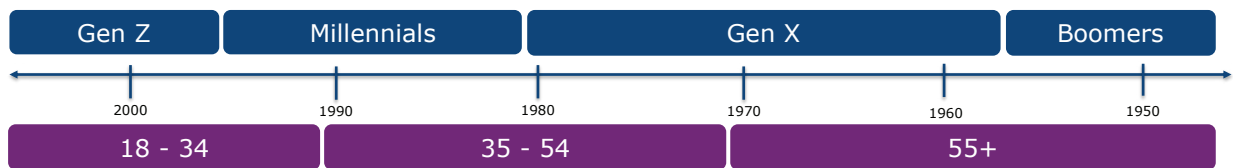


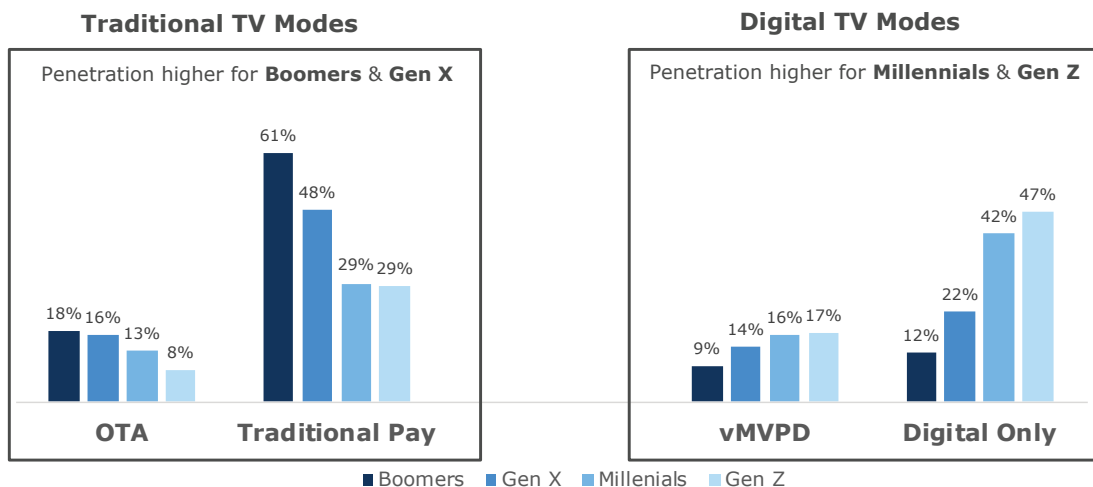
TV DECONSTRUCTED: GENERATIONAL TRENDS IN TV USAGE

June 2025

New data from the most recent full year DASH release sheds light on how Americans connect to and consume TV today and how that's changing across generations. Looking at American adults through a generational lens – as Boomers, Gen X, Millennials, and Gen Z – helps us see past traditional age splits (18-34, 35-54, and 55+) to understand more deeply the drivers behind what and how people watch.



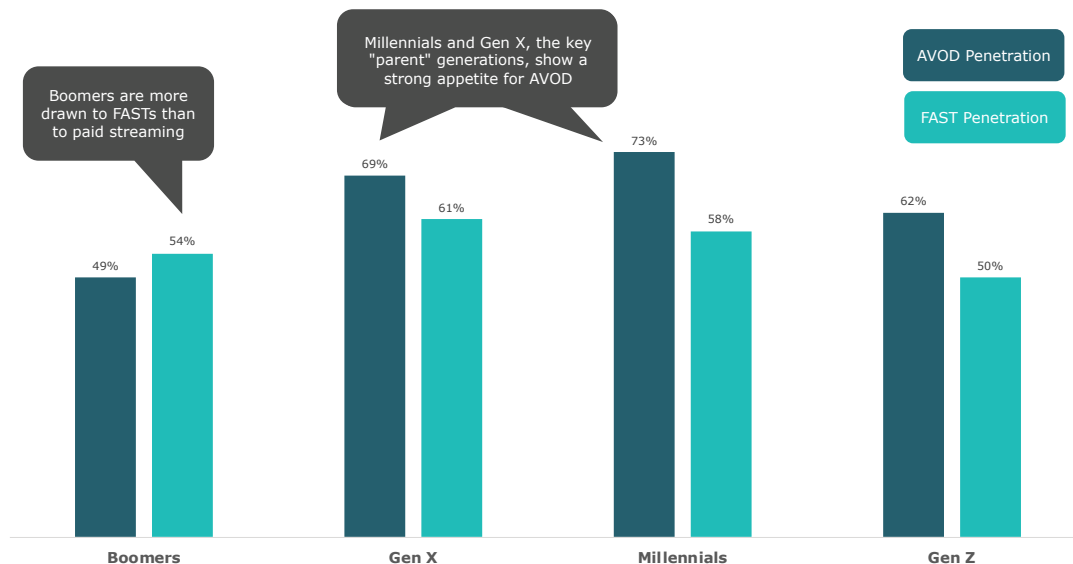
Generations are not just age brackets, but lifestyle cohorts shaped by the technologies they grew up with and the values they share. For example, while the moms and dads of Generation X are more likely to maintain a traditional Pay TV set-up, Millennials show a decisive preference for Digital-Only TV access over traditional MVPDs and Over-The-Air, even as they become parents themselves. This dynamic isn't simply about being younger. It reflects a generational desire for on-demand, customizable content. A conventional 35-54 age break lumps late Millennials in with Gen X, masking these important differences.



Streaming services offer another look at generational impact. Ad-supported subscription streaming (AVOD) is most popular among Millennials and Gen X, the primary “parent” generations, who are balancing household budgets against the increasingly diverse programming demands of their growing families. While a purely age-based view may suggest

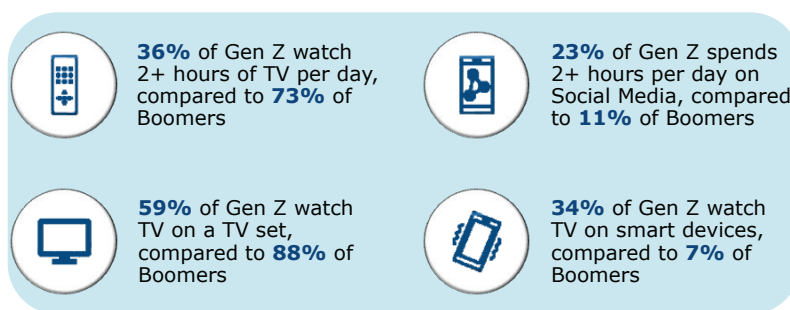
that younger viewers reject ads altogether, the generational lens shows otherwise: younger generations are open to ad-supported models when the value is clear. Media planners, take note: plans without AVOD will underdeliver core consumers in CPG, family entertainment, mainstream financial services and many other categories.

Meanwhile, Boomers are more engaged with FAST than paid streaming. FAST more closely resembles the channel-surfing experience Boomers are used to. In addition, many FAST channels feature programming that was current when Boomers were growing up, and it's free, like TV used to be.



Gen Z, now moving into early adulthood, show distinct, mobile-native behavior. The first to be born into streaming devices – not to mention remote work and school – Gen Z spend less time with TV than any other generation. Instead, they lean towards more fragmented consumption on smaller screens.

Only 59% of Gen Z use TV sets to watch television, compared to 88% of Boomers. While looking at a traditional 18-34 age group dilutes this effect, the generational lens highlights what makes Gen Z distinct – and helps explain where their behavior is heading next.



In short, younger generations aren't just choosing new platforms. Their emphasis on flexibility, convenience, and personalization is reshaping how TV fits into their lives. While older viewers remain loyal to more familiar viewing patterns, they're also starting to experiment with newer modes. In conjunction with the standard age breaks, a generational view offers advertisers a richer picture of the emotional, financial and behavioral shifts driving TV usage and consumption. Advertisers with that perspective are better equipped to leverage the present and anticipate the future.

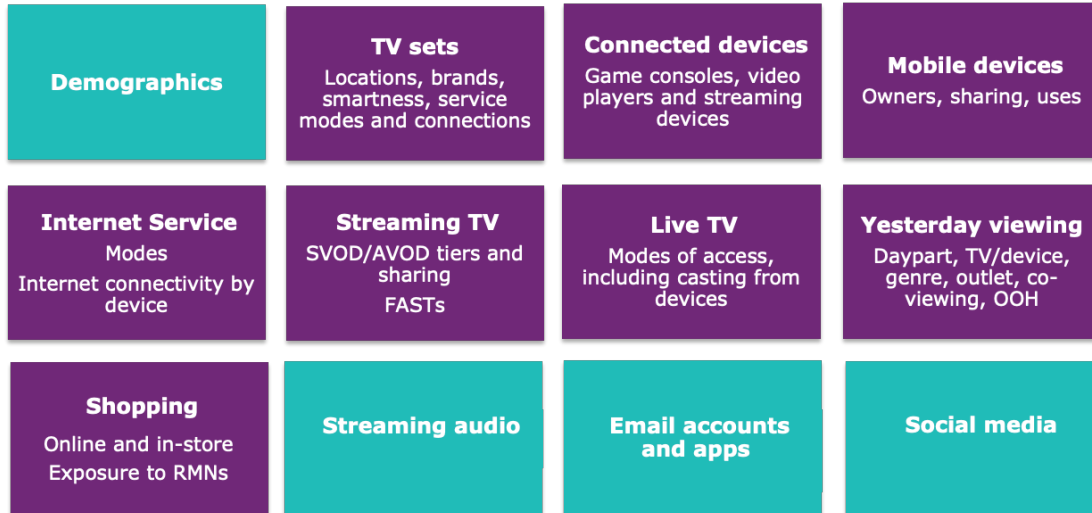
STUDY SUMMARY & METHODOLOGY

The digitization and fragmentation of television and the proliferation of connected TV sets, video-enabled mobile devices and streaming services have created an acute need for an unbiased standard in TV universe sizing. That standard is DASH.

The ARF DASH TV Universe Study produces a comprehensive picture of the US consumer television landscape. DASH records, in granular detail, how American households connect to and consume TV. DASH produces reliable universe estimates, usage measures and modeling signals that help users understand the differences in behavior across platforms, devices and modes. DASH is a syndicated study fielded annually, in two waves, in partnership with NORC at the University of Chicago, a premier polling firm, and supported by the technical expertise of its licensees. Pooling resources produces a higher quality and more widely accepted study.

The most recent full year study, DASH 2024, was conducted online, face-to-face and by phone against a national probability sample of 10,122 U.S. adults. The panel also included a longitudinal sub-sample of adults who took the DASH survey in both 2024 and 2023, which enables robust analysis of switching. We are pleased to report that the study methodology is proving robust, and the trends seen so far are logical.

Broad coverage and granularity make DASH a uniquely robust source of truth. For example, the study does not just count TV sets in each household but records, for each, the brand, room location, level of “smartness,” and means of access.



DASH was launched in 2021 to help major measurement companies calibrate their big data sets and model household demographics and persons’ viewing. But DASH now supports an array of use cases beyond measurement.

DASH is currently undergoing a full MRC accreditation audit with results expected in mid-2025. Study summaries, reports, technical papers, testimonials and press are available on the [DASH site](#). A more detailed description of the methodology and content of the study is available by emailing DASH@theARF.org.