Technical Paper and Observations: Spring Wave 2025

September 2025

Significant Changes to the Spring 2025 Survey

The document *ARF DASH Wave On Wave Survey Changes_2021-Spring 2025* contains a summary of all changes to the DASH survey since the inception of the program in 2021, including the changes from Fall 2024 to Spring 2025.

Some of the more significant changes to the Spring 2025 survey are shown below:

- Simplified the sequence that places subscribers to hybrid streaming services into AVOD and SVOD tiers by adding an initial question to each hybrid streamer section to determine if respondents see ads on that service, rather than present each subscriber with the full list of subscription options
    - Respondents who answer "yes" are assigned to the AVOD tier of that service, and "no," to the SVOD tier
    - Respondents who answer "not sure" or skip the question online are presented a list of stand-alone subscription offers (both AVOD and SVOD), updated to market

- Broke the complex question on genre viewing (QG1) into two simple questions – what watched and how – and dropped frequency of viewing (occasionally and frequently)

- Parsed the UGC option in the television viewing battery into two discrete options to recognize that both professionally produced TV and user-generated content appear on YouTube and in social media channels

- Revamped the retail section to:
    - Align shopping time periods online and in-store with retail, not media, industry conventions (now past 7 days and past month vs. past 7 days and yesterday)
    - Gather in-store shopping data on all respondents, not just those who had shopped online
    - Add Dollar General and Tractor Supply to the retailers list

- Deleted question on birth gender in favor of stated gender

- Corrected the prompt for the second ISP question to rule out respondents whose ISP is their only MVPD. Note, however, that the revised sequence still ruled out respondents with no MVPD, an error that was corrected in Fall 2025

Significant Changes in Results Since the 2024 Study

A comparison of all common variables in the Spring 2025 and Full Year 2024 results is contained in the file DASH25Spring_YoY_WoW.

Broadly speaking, the most significant changes from Full Year 2024 to Spring 2025 resulted from two factors:

1. Respondents who said they did not shop a retailer online were classified as not having shopped in that retailer's physical stores either, though some obviously did
2. Shopping time periods online and in-store were changed from yesterday and P7D to P7D and past month to conform with retail, rather than media, industry conventions

A detailed description of the Spring 2025 sample, its demographic characteristics and the study methodology can be found in the *DASH Spring 2025 Project Methods and Transparency Report*. Some of the highlights follow:

> **Study Target Population:** General Population Age 18+
> **Sample Units:** 8,214
> **Completed Units:** 5,491
> **Expected Eligibility Rate:** 100%
> **Observed Eligibility Rate:** 100%
> **Margin of Error:** ±1.85 percentage points (pp)
> **Design Effect:** 1.95
> **Household Margin of Error:** ±1.80 percentage points (pp)
> **Household Design Effect:** 1.85
> **Survey Field Period:** April 17, 2025 – June 30, 2025
> **Overall Median Duration (minutes):** 22
> **Phone Median Duration (minutes):** 51
> **Web Median Duration (minutes):** 22
> **Face to Face Duration (minutes):** 22

The response rates for the Spring 2025 Wave and for the prior two full years are shown below:

DASH Study Period	Spring 2025 Wave	Full Year 2024	Full Year 2023
Response Rate	15.9%	16.1%	13.2%

Of note, the full impact of the Non-Response Follow-up process is generally realized in the Fall Wave. The process is expected to have a positive impact on Full Year response rates.

The ARF has constructed a standard-error estimator based on a bootstrap methodology. The tool provides an empirically estimated standard error through the web dashboard for any

estimate selected. For binary variables, the reported standard error applies to both values. For non-binary variables, the reported standard error applies to the average value of the variable. Also of note, beginning with this Spring 2025 release, we will apply an asterisk to estimates in the web dashboard when the sample size in the denominator is less than 30. A sample size of 30 was chosen because that is the point at which Fisher's T begins to take on large sample characteristics. That said, users are strongly encouraged to consider the reported (bootstrapped) standard error when assessing data reliability.

Sources of Error

Survey research is subject to multiple sources of error, most prominently sampling error and non-response bias. As indicated above, our Spring 2025 wave had an average margin of error (MOE) of 1.85 for persons estimates and 1.80 for household estimates. One measure of error is associated with confidence at the 95% level.

Non-response bias is often difficult to measure. However, NORC conducts a significant face-to-face recruitment of initial non-responders to standard solicitations. Approximately 10% of the Spring 2025 sample (567 out of 5,471) is made up of these initial non-responders. We have conducted analyses of the differences between initial responders and non-responders. The differences are driven largely by demographics, which may be addressed by weighting.

Non-responders are more likely to be Hispanic or African American and are also more likely to be linear-only viewers. Currently, as part of the weighting project, we are studying the degree to which weighting addresses non-response.

Additional sources of error include respondents' misinterpretation of questions; cognitive bias in the wording of questions, such as telescoping, social desirability and central tendency; and CATI interviewers' misrepresentation of questions in phone interviews.
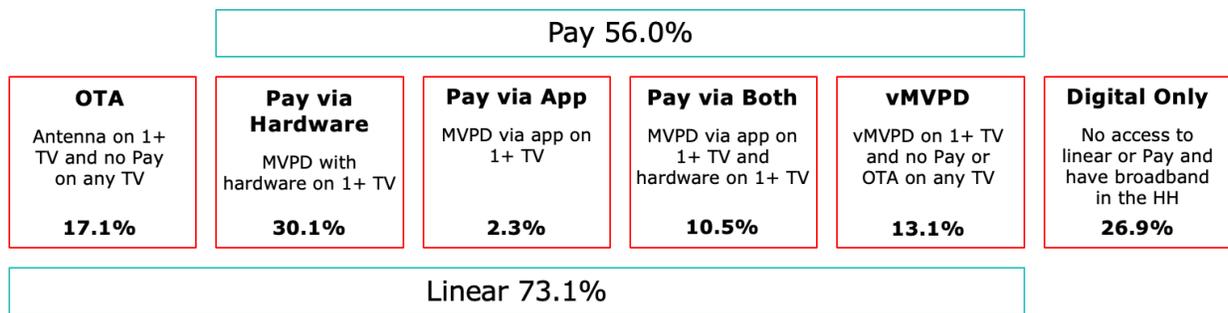
Classifying Modes of Reception

The unified reception edit rules for the Spring 2025 Wave, which are unchanged from 2024, appear below. (Note that the order of the third and fifth rules below was inadvertently reversed in the Full Year 2024 Technical Paper.)

- A respondent household that identifies an MVPD (cable, telco or satellite) and responds yes to either hardware or app for that MVPD on at least one set (Q11) is classified as Pay via Hardware, Pay via App or Pay via Both. This classification applies regardless of whether the respondent has an antenna or vMVPDs on any other set.
- If no mode of reception is indicated for any television, a household that answered yes to Q6D (has hardware) is classified as Pay via Hardware, and a household that said no or don't know is classified as Pay via App.
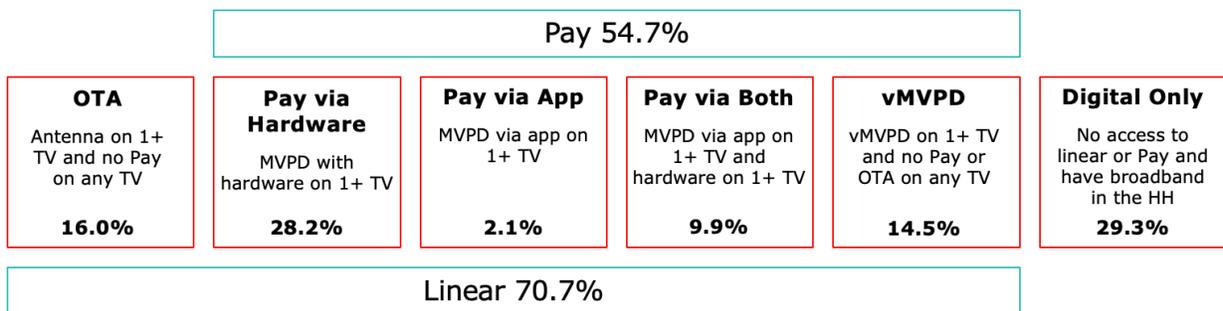
- Households that do not meet the prior criteria but do have access to linear through a vMVPD are categorized as vMVPD and are included in both the Linear and Pay aggregations, as shown in the schema below.
- A respondent household that does not identify reception through an MVPD (Pay via Hardware, Pay via App or Pay via Both) on any set and does not receive linear television through an antenna or a vMVPD on any set, but does have a streaming service (Q7), FAST (Q7A), or streaming device (Q9), is classified as Digital Only.
- 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 (OTA). This classification applies regardless of whether the respondent has a vMVPD on another set. Respondent households that did not select any service for receiving programming (~1% in Spring 2025) are also classified as OTA.

The Spring 2025 Reception Framework (TV Households – 126.2 Million Households[1])

Pay 56.0%					
OTA Antenna on 1+ TV and no Pay on any TV	**Pay via Hardware** MVPD with hardware on 1+ TV	**Pay via App** MVPD via app on 1+ TV	**Pay via Both** MVPD via app on 1+ TV and hardware on 1+ TV	**vMVPD** vMVPD on 1+ TV and no Pay or OTA on any TV	**Digital Only** No access to linear or Pay and have broadband in the HH
17.1%	**30.1%**	**2.3%**	**10.5%**	**13.1%**	**26.9%**

Linear 73.1%

TV Households are defined as households that have and have used at least one TV set in the last 6 months. TV HHs represent 92.6% of all U.S. households.

The Spring 2025 Reception Framework (TV Accessible Households – 134.8 Million Households)

Pay 54.7%					
OTA Antenna on 1+ TV and no Pay on any TV	**Pay via Hardware** MVPD with hardware on 1+ TV	**Pay via App** MVPD via app on 1+ TV	**Pay via Both** MVPD via app on 1+ TV and hardware on 1+ TV	**vMVPD** vMVPD on 1+ TV and no Pay or OTA on any TV	**Digital Only** No access to linear or Pay and have broadband in the HH
16.0%	**28.2%**	**2.1%**	**9.9%**	**14.5%**	**29.3%**

Linear 70.7%

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[1] Household estimates based on February 2025 CPS total U.S. households. ACS projections are 4.3 million households lower.

TV Accessible (TVA) HHs comprises all HHs that access TV services, whether or not they own a TV set. The ARF has recommended that the industry adopt TVA HHs as the "denominator" in TV measurement. TVA HHs, which represent 98.9% of all US households, include the significant number of households (mostly young) that access TV only with mobile devices.