



## **ARF Calls For Move Away From TV Households as Basis of TV Measurement**

*Says move to “TV-accessible households” is needed as ARF’s DASH universe study shows a significant and growing percentage of US homes now consume TV without owning a TV set*

**New York, NY (March 27, 2023)** – The Advertising Research Foundation today called for a “gradual migration” away from “TV households” to “TV-accessible (TVA) households” as the basis of TV measurement, to account for shifts in viewing dynamics driven by broadband access and mobile devices.

The group based its recommendation on data from its comprehensive TV universe study, DASH, the 2022 version of which was recently released. Developed in conjunction with NORC at the University of Chicago and a panel of industry experts, DASH is based on a survey of more than 10,000 adults conducted online, in-person and by phone. DASH uses a national probability sample to produce reliable, projectable results.

The traditional basis of measurement, TV Households, counts households with at least one television set. DASH 2022 shows that 5% of US households do not own a TV set, but the majority of those, roughly 4% of US households, have broadband access and consume TV on devices through streaming services and virtual MVPDs. Using TV-accessible (TVA) HHs as the basis of measurement includes this emerging segment of TV-set-less TV watchers.

The steep rise in penetration of broadband only (BBO) households, from 25% to 31% in the last year, and the ubiquity of mobile devices with high-quality screens suggest strongly that this segment will only grow. DASH shows that younger audiences are driving the growth: 14% of households headed by an 18- to 34-year-old have no TV set, and a whopping 39% of single 18- to 24-year-olds living alone access TV through devices only.

“This trend towards devices also holds true for audiences that do have a television set in the household – across age and marital status demographics,” said Paul Donato, Chief Research Officer at the ARF. “Forty-one percent of consumers with television sets reported watching professionally produced programming on a device the previous day. These dynamics highlight

the problems with cross-device measurement today. This finding in particular dilutes the ‘representativeness’ of ACR streams and makes calibration with a reference standard like DASH essential for effective measurement.”

The data set, which provides users a cohesive understanding of TV, device, media and ecommerce usage at both the individual and household levels, also found that:

- **Television set brands impact room placement and co-viewing, with implications for media measurement and delivery:** Television sets made by major brands are more likely to show up in the living room, media room and den, while less expensive television set brands are more likely to be placed in a bedroom. TV sets in living and media rooms are more likely to be co-viewed, while those in bedrooms are likely to have viewers from specific generations of the family. These location dynamics are important for brands to consider, especially as TV manufacturers build out FAST networks and sell their own ACR data for measurement.
- **“Portfolio” dynamics appear in Americans’ adoption of streaming TV services.** More than three-quarters of US TVA households now have portfolios of two or more streaming services, and fully half have four or more. Despite the proliferation of choices, Netflix remains a “core holding” in most portfolios. The rise in AVOD (ad-supported) services has added a new dimension. Counterintuitively for some, the more streaming services a household has, the more likely there is to be at least one AVOD service in the mix. The majority (65%) of households with fewer than three streaming services have remained exclusively SVOD. On the other end of the spectrum, 69% of households with five or more services have at least one AVOD service in their portfolios. Topline data from the first longitudinal DASH sample showed that 32% of households cut back on premium streaming services, while 39% added more to their portfolios. Thirty-six percent added ad-supported services. Data from the second longitudinal sample, in DASH 2023, will enable a more robust analysis of portfolio-building dynamics and switching, especially between SVOD and AVOD tiers.
- **Churn between Pay TV and broadband only (BBO) goes both ways, but BBO has the edge:** The DASH 2022 sample contained 3,141 respondents who also participated in the 2021 survey, enabling longitudinal observation of shifts in household subscriptions from a unified base. Analysis of this sample shows that 76% of households with pay TV in 2021 remained pay TV households in 2022, while 20% dropped pay and shifted to broadband only between 2021 and 2022. Conversely, 18% of the households that were BBO in 2021 picked up a pay TV subscription in 2022. While those percentages are close,

pay TV in 2021 had a much bigger base than broadband only. BBO penetration increased by a net 6 points, mostly from households that dropped pay TV.

Launched in 2021, DASH is conducted in two waves annually to produce a dynamic data map of how Americans use TV, digital devices and related technology. Several additional signals were added in 2022 to help demographic and viewer assignment, including frequency of viewing by genre, ad-supported and premium streaming subscription levels, and more granular measures for isolating vMVPDs. The ARF offers DASH licenses to both ARF members and non-members, with the aim of creating a cost-efficient, accurate and comprehensive standard for the benefit of the industry.

The evolution of DASH will be explored in a session entitled, “DASH: Building a New Standard in TV,” at the [ARF AUDIENCExSCIENCE](#) event on April 25.

For more information about DASH and licensing opportunities, visit: <https://thearf.org/dash/>.

### **About The ARF**

Founded more than 80 years ago, the ARF is dedicated to creating, curating, and sharing objective, industry-level advertising research to enable members to make a true impact on their advertising and build marketing leadership within their organizations. It has more than 400 members from leading brand advertisers, agencies, research firms and media-tech companies. For more information, visit [www.thearf.org](http://www.thearf.org).