

TV DECONSTRUCTED: INSIDE HISPANIC TV VIEWING

September 2025

The ARF DASH TV Universe Study captures in detail how American households connect to and consume TV across platforms and devices. Hispanic Heritage Month and the release of the first wave of DASH 2025 offer a timely opportunity to look into the TV habits of Hispanics, a segment that now represents more than 15% of US households.

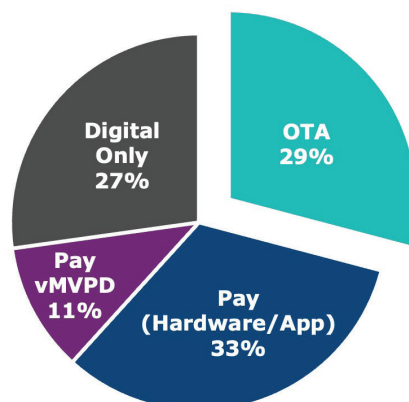
Hispanic households watch more TV genres and co-view more frequently

The composition and family orientation of Hispanic households are reflected in their TV usage. Larger and younger than the US average, Hispanics families are more likely to have children (29% vs. 21% US), and nearly half have three or more members (46% vs. 36% US). Hispanic households watch a broader range of TV genres, with 32% indicating that they typically watch 10 or more genres compared to 28% overall US, and Hispanics lean more toward family-friendly formats such as Children's/Cartoons, Game Show, and Reality TV. And TV viewing is a little less likely to be solitary: 50% of Hispanic respondents (vs. 47% overall US) report having watched TV with another household member yesterday.

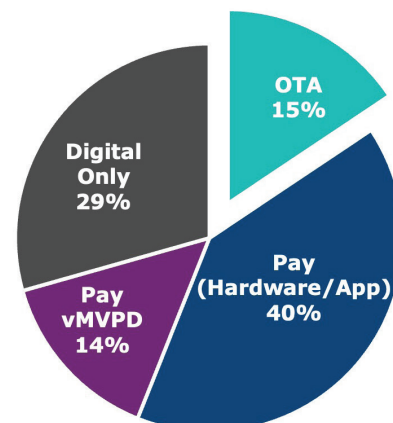
Over-the-Air reception is significant in Spanish-dominant homes

In TV reception, Hispanic households display similar trends to overall US population. The split appears when language enters the frame. Within the DASH reception framework, Spanish-dominant households are almost twice as likely to be OTA (29%) than non-Spanish-dominant households (15%). Households classified as OTA (Over-the-Air) have at least one antenna attached to a television set and do not have Pay TV access. English-dominant Hispanic households track near the market baseline. The implication is straightforward: local Spanish-language channels are a critical touchpoint for this audience.

Spanish-Dominant Homes



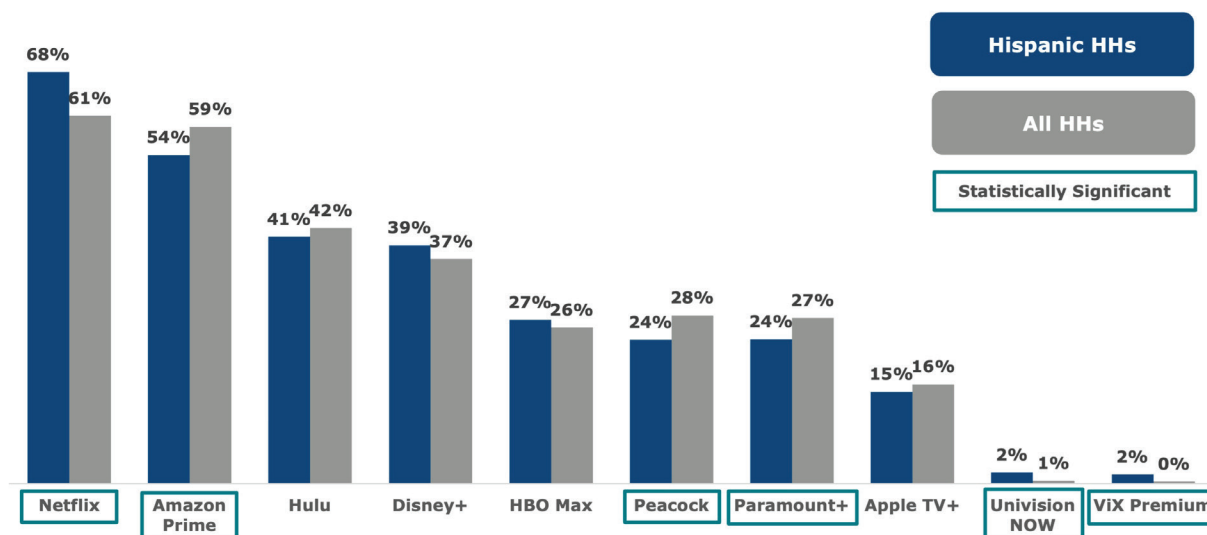
Non-Spanish Dominant Homes



Netflix has a higher penetration in Hispanic households than in the US as a whole

Netflix is the only major paid streaming service not explicitly Spanish-focused with above-average penetration in Hispanic households: 68% compared to 61% overall US. Spanish-language services such as Univision NOW and ViX Premium also index higher, while Amazon Prime, Peacock, and Paramount+ under-index for Hispanic households.

Thanks to a sizable Spanish-language library, Netflix enjoys a strong presence even in Spanish-dominant homes.



Hispanic households display distinct shopping patterns

DASH records past week and past month shopping activity, both online and in-person, at 18 major retailers with retail media networks. Hispanic consumers over-index in the Pharmacy and Everyday Essentials category (CVS, Dollar Tree, Walgreens), as well as Apparel and Beauty (Macy's, Ulta). Hispanic households under-index in Home Improvement (Lowe's, Tractor Supply, and Home Depot). For marketers, these differences can inform category targeting and retail media alignment with TV.

"We worked closely with the ANA's AIMM initiative and our own Technical Committee to ensure that DASH captures ethnicity, country of origin and disabilities comprehensively and accurately."

Paul Donato, Chief Research Officer, ARF

The observations in this short report just scratch the surface of the insights available in DASH. What is immediately clear, however, is that strategies that pair Spanish-language inventory with high-reach streaming will extend reach across both bilingual and Spanish-dominant segments. Layering category insights from retail behavior can further sharpen audience fit and drive measurable outcomes.

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.

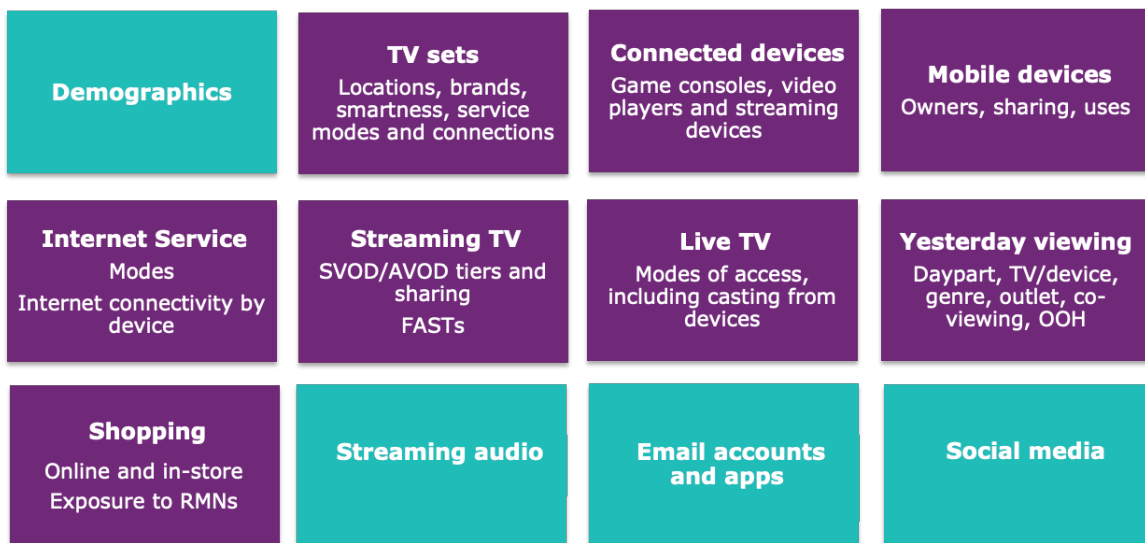
The ARF DASH TV Universe Study produces a comprehensive picture of the US consumer television landscape. DASH produces reliable universe estimates, usage measures and modeling signals that help users understand the differences in behavior across platforms, devices and modes.

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.

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, including media planning, sales and activation.

DASH is conducted online, face-to-face and by phone against a national probability sample of more than 10,000 U.S. adults over two waves a year. The panel also includes a longitudinal sub-sample of adults who took the DASH survey in previous, consecutive years, which enables in-depth analysis of switching.

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. This chart summarizes the data capture:



DASH has completed an MRC accreditation audit with results expected this Fall. 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.