

TV DECONSTRUCTED: THE STATE OF CONNECTION IN 2026

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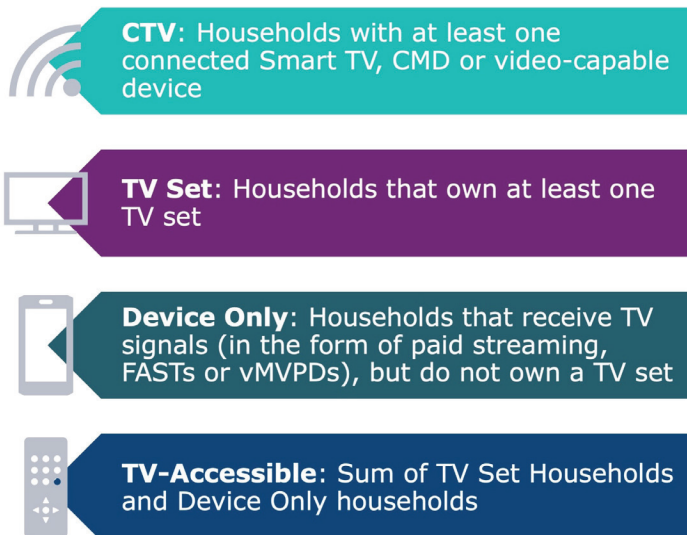
As viewing increasingly spans traditional TV sets, connected televisions and handheld devices, the industry needs a consistent framework to understand how U.S. households receive TV content. DASH addresses this need by providing a stable, authoritative view of TV connection across households over time.

At a high level, DASH shows that TV remains broadly accessible across U.S. households, even as the ways households connect continue to evolve. Nearly all households can receive television in some form. Rather than signaling decline, shifts in access modes reflect reconfiguration, with households moving across platforms and devices while remaining within the TV ecosystem.

HHs (M)	2025 HHs (M)	US Penetration	Chg. vs. 2024 (M)
Total US	134.8	100.0%	+2.7
CTV	114.6	85.0%	+2.1
TV (Set)	124.2	92.2%	+1.1
Device-Only	8.8	6.6%	+1.6
TV-Accessible	133.1	98.7%	+2.7

Shaded cells: Statistically significant difference in penetration from previous year

DASH organizes this complexity into four distinct but complementary TV universes. Streaming-capable or connected TV (CTV) households include any household with at least one Smart TV, connected media device or video-capable device. TV (Set) households are defined as those owning at least one television set. (This universe, typically referred to as TV Households, is the traditional basis of audience measurement). Device-only households receive TV content through streaming services, FAST channels or virtual MVPDs without owning a TV set. Together, these two groups form the TV-Accessible universe. These definitions provide a common language for describing how households connect to TV today.



The distinction between TV households and TV-Accessible households has become increasingly important. Traditional TV household measures omit a growing segment of the population, composed primarily of younger households, that consumes TV exclusively on devices. As this segment grows, relying solely on TV set ownership understates the true universe of TV-connected homes. For this reason, the ARF recommends TV-Accessible households as the most complete and future-proof measure of TV reach.

These universes matter because they underpin how advertising inventory is valued, how reach is assessed, and how distribution strategies are developed. DASH has expanded into a universe estimation system that supports a broad range of use cases across planning, sales and activation.

One of DASH's key strengths is its historical continuity. Looking across recent years, we can visualize the growth of the CTV and Device-Only segments since 2022. This longitudinal perspective allows changes to be interpreted in context rather than as isolated disruptions.

HHs (M)	2025	2024	2023	2022
Total US	134.8	132.1	131.3	131.1
CTV	114.6	112.5	110.4	109.6
TV (Set)	124.2	123.2	121.3	121.8
Device-Only	8.8	7.3	8.4	7.5
TV-Accessible	133.1	130.4	129.7	129.3

Shaded cells: Statistically significant difference in penetration from previous year

The takeaway is straightforward. Almost all U.S. households remain connected to TV in some form, connected access is now the norm, and meaningful change is best understood through consistent measurement over time. DASH provides that foundation, enabling the industry to move toward a shared understanding of connection in the modern TV landscape.