

TV DECONSTRUCTED: ADULTS 50+ IN A CONVERGED TV LANDSCAPE

April 2026

As the Upfronts approach, Adults 18-49 remains the traditional foundation of media planning. Increasingly, however, advertisers are placing greater emphasis on households headed by adults 50+, driven in part by their high discretionary income.

The 50+ segment has long been associated with linear television, shaping how it is valued and transacted in the Upfront marketplace. But as the TV ecosystem evolves, so too does the way 50+ households access TV content.

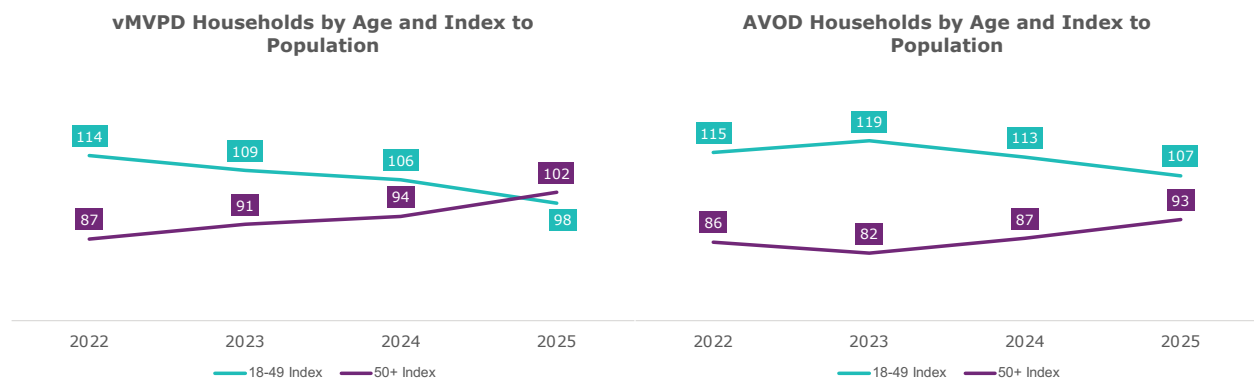
Data from the ARF’s DASH TV Universe Study makes clear that the key question for advertisers is not whether 50+ households are linear or streaming – most are both – but how their patterns of access have shifted, and how those shifts compare to their younger counterparts.

Streaming Adoption Among 50+ Is Accelerating

Over the past several years, households headed by adults 50+ have meaningfully increased their adoption of streaming, including services that deliver linear content.

Use of virtual MVPDs (vMVPDs), which stream linear programming, illustrates this shift most clearly. Over the past four years, the index of vMVPD adoption among 50+ households – reflecting their relative representation among all vMVPD households – rose from a below-average 87 in 2022 to a slightly above-average 102 in 2025, surpassing that of 18-49 households.

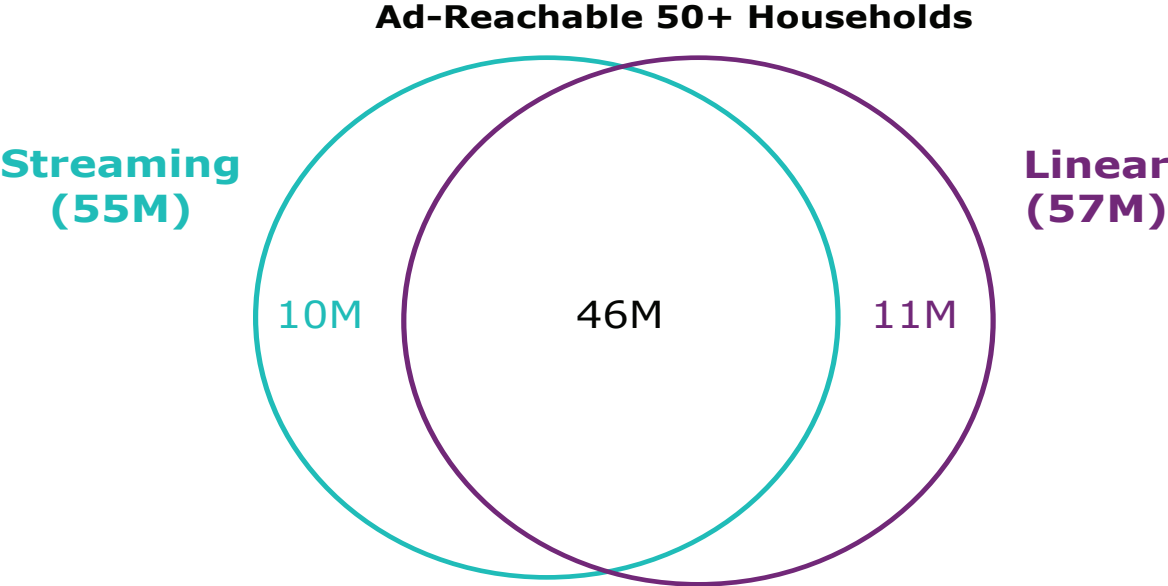
A similar pattern is seen in ad-supported subscription streaming (AVODs). While 50+ households have not yet surpassed younger households in this category, 50+ adoption has increased steadily since 2022, narrowing the gap over time. While longitudinal data for FAST services is less robust, directional trends suggest a similar pattern of adoption.



Across all three environments, the trend is consistent: 50+ households are not only participating in streaming, but achieving levels of adoption that rival younger households.

Ad Reachability: Where Incremental 50+ Reach Lives

Understanding reach among 50+ households requires looking beyond platform labels to the full ad-reachable universe, which includes linear-only, streaming-only and hybrid households where both coexist.



It’s true that a segment of 50+ households (11 million, 16%) have stuck with linear TV and resisted ad-supported streaming. That group is strongly overrepresented in the population (index 150). Not surprisingly, too, a far greater share of younger households have gone all-in on streaming than 50+ households.

Index to Total Population	50+ Households	18-49 Households
Both Linear + Streaming	114	85
Streaming Only	55	146
Linear Only	150	49

But the surprise is in the overlap. Nearly 46 million 50+ households – about 70% – are reachable with linear *and* streaming ads. These “hybrid” households are actually overrepresented in the population (index 114). In comparison, households headed by 18-49 year-olds are actually underrepresented (index 85).

Closing the Gap Between Adults 18-49 and 50+

Both 18-49 and 50+ households are moving toward greater streaming adoption and cross-platform access. The difference is primarily one of timing. While younger households entered the streaming ecosystem earlier and remain more device-centric, 50+ viewers are now in a phase of active adoption, particularly in hybrid environments that combine linear and streaming delivery.

The result is a narrowing gap between the two groups. Households headed by adults 50+ now index above younger households in vMVPD adoption, with subscription on-demand streaming quickly catching up. They also over-index where linear and streaming coexist – making it clear that 50+ reach is concentrated across both, not within either.

For Upfront planning, the implication is clear: households headed by adults 50+ cannot be effectively reached through a single channel. Effective reach requires presence in both linear and streaming, with incremental scale driven by how the two work together across the ad-reachable universe. The DASH TV Universe Study provides the foundation for this understanding, enabling advertisers to plan against the full scope of how households connect to television today.

About DASH

The DASH TV Universe Study produces a comprehensive picture of the US consumer television landscape.

Accredited by the Media Rating Council, the ARF DASH TV Universe Study records, in granular detail, how American households connect to and consume TV across platforms, services and devices. A nationally projectable study conducted annually since 2021 in partnership with NORC at the University of Chicago, DASH produces reliable measures and modeling signals with applications in advertising, sales, measurement and strategy.

DASH data is released to licensees twice a year in rolling, 12-month waves. Historical data is also available for trending. Visit thearf.org/DASH or contact us at DASH@thearf.org to learn more.