TV DECONSTRUCTED: NEW LIFE FOR LINEAR?

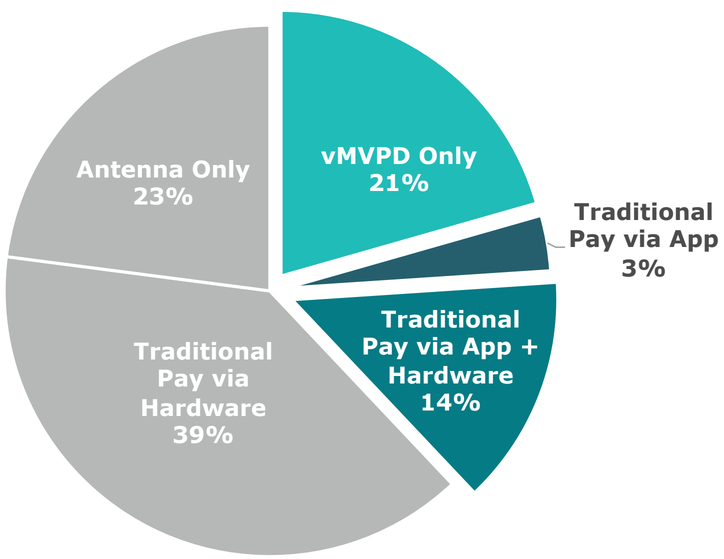
June 2026

The line between linear and streaming television is getting increasingly harder to draw. Previous TV Deconstructed reporting has shown that most households are now reachable through both linear and ad-supported streaming, making the overlap between the two a central part of the TV landscape.

Although linear television is still often associated with traditional delivery through cable, satellite or telecom hardware, households are increasingly accessing linear channels through virtual MVPDs and provider apps on connected TV sets. In practical terms, many households are still watching linear TV, but doing so via streaming.

DASH shows that nearly 40% of linear audiences now access linear TV through some form of streaming. That share is up 2 p.p. from last year, reinforcing that the change is not just conceptual. Linear access is being reconfigured around apps, connected devices and streaming-native services.

Modes of Linear Access



This dynamic raises a natural question for advertisers: Is streamed linear simply preserving the traditional linear audience, or is it helping linear reach a broader set of households?

Streaming is Changing the Demographics of Linear Households

Streamed linear is not simply transferring the legacy linear audience from a set-top box to an app. Households that access linear through vMVPDs or Pay TV apps are more likely to be larger, include children, earn more and do more co-viewing than traditional linear households that rely on antennas or hardware.

Index to Total Population	Streamed Linear (vMVPD, Pay via App, Pay via App + Hardware)	Traditional Linear (OTA, Pay via Hardware)
Household Income $85k+	110	97
Household Size 3+	108	84
Children in Household	105	80
Co-Viewed Yesterday	115	97

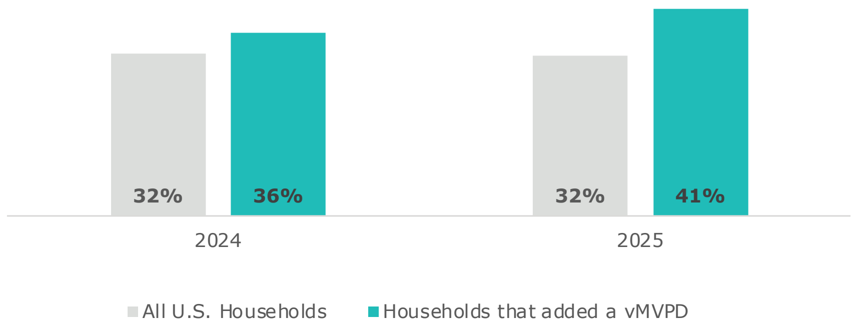
Streamed linear should not be understood as a lighter or less engaged-with version of linear. Both streamed linear and traditional linear households remain highly engaged with television overall. In fact, households with linear access, no matter how they get it, are more likely than the average U.S. household to watch substantial amounts of television and to watch across a wide variety of genres.

Streaming Begets More Streaming

At the same time, streamed linear households participate more broadly in the streaming ecosystem, indexing higher than the total population in their adoption of both paid and free streaming services. Longitudinal DASH data adds context: households moving into vMVPDs are also more likely than average to add a paid on-demand streaming service in the same year. For example, among U.S. households that added a vMVPD in 2025, 41% also added a paid on-demand streamer, such as Netflix, Disney+ or Max, compared with 32% of all U.S. households.

vMVPD Adopters Add Streaming

Share of longitudinal U.S. households that added a paid on-demand streamer



Adoption of vMVPDs is part of a broader household shift toward a hybrid viewing environment that includes live channels, paid on-demand streaming and free streaming options.

Linear in the Hybrid TV Household

In the increasingly hybrid world of TV, linear is no longer defined only by the cable box (or antenna), and streaming is no longer defined only by on-demand viewing. Households are combining the two to access live channels, expand viewing options and support the needs of multiple viewers in the home. In that sense, streamed linear is not a break from linear's past, but an enabler of its future.

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.