# Technical Paper and Observations: Mid-Year 2026

## August 2026

**Significant Changes to the Spring 2026 Survey**

The document ARF DASH Wave On Wave Survey Changes_2021-Spring 2026 in the release folder contains a summary of all changes to the DASH survey since the inception of the program in 2021, including the changes from Fall 2025 to Spring 2026.

Some of the more significant changes to the Spring 2026 survey are shown below. Note that, as always, the Technical Committee reviewed and approved these changes prior to implementation.

1. Q6 (Pay TV) was restructured. In previous surveys, the question first asked if the respondent had television reception by cable, satellite or telco and then branched to the specific branded services within each. We found that respondents who were actually telco or satellite were writing in their providers in the cable section. In the Spring 2026 survey, we updated Q6A, Q6B, and Q6C to the new Pay TV question as tested in the recontact survey conducted this past Fall. Recognizing that no specific provider falls into more than one category of service, we eliminated the cable/telecom/satellite "waterfall" and replaced it with two lists of service providers: larger and smaller. The smaller providers were isolated to prevent respondents from missing them "below the fold." We implemented Alpha and Reverse ordering on each. This change appears to have had no negative impact on the MVPD results.

2. Subscription price ranges were added to Q8 (vMVPDs) to address potential respondent confusion with the base services of three large vMVPD providers: Hulu + Live (Hulu), YouTube TV (YouTube) and DirecTV Stream (DirecTV). This change lowered the penetration estimates on those three services individually; did not significantly change estimates on the other services; and reduced the estimate of vMVPDs in total by 2.1 points.

3. Granularity of device-level viewing of streaming and live television (Q19 and Q20) was reduced from the individual device to "any" applied to the six categories of video-capable home devices: TV, desktop, laptop, tablet, smartphone and game console. This change relieved respondents of the tedious burden of recalling viewing on individual devices without breaking trend. We saw a slight reduction (less than one point) in viewing streaming and live television services on devices.

4. The list of FAST services in Q7A was split into branded FAST services and OEM services "that come pre-loaded on your television set or other device you or someone in your household uses." The goal was to address undercounting of OEM services, which respondents are generally less aware they are watching than the branded stand-alone services. The change likely explains some of the growth in FASTs we are finding.

**Significant Edits Introduced Since the 2025 Study**

Two new edits were introduced in the Mid-Year 2026 study.

1. Reclassification of some MVPD subscribers: The first edit was tested during our recontact study motivated by a clear overstatement of respondents claiming television reception via Comcast and Spectrum (and other MVPDs). The edit to our cable classification converts respondents claiming cable TV reception to internet-only access if they did not mention the MVPD as the source of programming on any television in Q11 and did not indicate any MVPD hardware in Q6D. The result had no negative impact on the overall Pay estimate but has brought the major MVPDs significantly closer to their published subscriber counts, as shown below. Since the original MVPD data was not edited for trending, the more accurate television access subscriber counts can be calculated by filtering on Any Cable = 1.

| MVPDs (MM Subs) | DASH SP 25 | SP 26 (No edit) | MVPD 25 Reported | SP 26 (Edit) | Report Source |
|---|---|---|---|---|---|
| **Optimum** | 2.6 | 3.1 | 1.7 | 2.4 | Earnings Report |
| **Comcast/Xfinity** | 17.4 | 15.1 | 11.5 | 11.8 | Earnings Report |
| **Cox** | 2.1 | 2.9 | 2.7 | 2.1 | Earnings Report |
| **Spectrum** | 14.1 | 17.8 | 12.6 | 13.1 | External |

2. Classification of Q11 Non-Respondents: Each year approximately 10% of respondents do not answer Q11 – how they receive programming on each television. They are now classified as OTA if they watched only broadcast or local yesterday (8.1% of Q11 non-responders); as Pay if they watched any cable yesterday (60.5%); and as Digital Only (31.4%) if they did not fall into either of the previous categories and had a free or subscription streaming service or a smart TV.

**Significant Changes in Results Since the 2025 Study**

Broadly speaking, the most significant changes from Fall 2025 to Spring 2026 resulted from the changes 2, 3 and 4 to the questionnaire cited above:

- Change #2, adding price ranges to the vMVPDs, reduced the overstatement of YouTubeTV, DirecTV Stream and Hulu + Live, which in turn reduced the estimate of households with one or more vMVPDs by 3 percentage points[1]. Of note, DASH can make historical data for trending available by rebasing YouTube TV, DirecTV Stream, Hulu + Live and therefore Pay on Q11 (mode of reception on each television set). The levels of these measures in prior studies would thus be more comparable to the Mid-Year 2026 levels. Also, if your estimate of vMVPD has been based on the Q11 definition, we suggest you continue to base it on Q11 for Mid-Year 2026 as the change referenced above was just implemented in the Spring 2026 wave.

- Change #3, replacement of the device-by-loop with "any" options by device type for viewing streaming and live television services, resulted in higher device viewing for almost all services.

- Change #4, splitting FAST services into branded stand-alones and OEMs, may be partly responsible for increasing the penetration levels of OEM FASTs, which have traditionally been undercounted.

**Sample Profile**

A detailed description of the Mid-Year 2026 sample, its demographic characteristics and the study methodology can be found in the *DASH Mid-Year 2026 Project Methods and Transparency Report*. Some of the highlights follow:

Study Target Population: General Population Age 18+
Sample Units: 16,306
Completed Units: 10,463
Expected Eligibility Rate: 100%
Observed Eligibility Rate: 100%
Persons Margin of Error: ±1.28 percentage points
Persons Design Effect: 1.77
Household Margin of Error: ±1.26 percentage points
Household Design Effect: 1.72
Survey Field Period: September 5, 2025 – December 6, 2025;
March 12, 2026 – June 2, 2026

Spring 2026 Durations
Overall Median (minutes): 22
Phone Median (minutes): 53
Web Median (minutes): 22
Face to Face (minutes): 22

[1] The total is effectively vMVPD penetration. The decline in the measure "Pay via vMVPD" in our reception framework, is 2.1 points.

The response rates for the Mid-Year 2026 study and for the prior three full years are shown below:

| DASH Study Period | Mid-Year 2026 | Full Year 2025 | Full Year 2024 | Full Year 2023 |
|---|---|---|---|---|
| Response Rate | 17.5% | 15.4% | 16.1% | 13.2% |

## Weighting and Projection Methodology

The Mid-Year 2026 study is weighted to the 2024 American Community Survey (ACS) estimates, where the total U.S. population is 132.7 million households and 259.0 million Persons 18+.

Prior year projections were based on the CPS ASEC survey household population (134.8 million households in 2025)[2]. The CPS ASEC surveys measure the civilian population and generally supports Bureau of Labor Statistics estimates.

There has been significant misunderstanding about what group quarters are included in prior DASH studies. CPS weighting did not include institutional group quarters (prisons, nursing homes, hospitals or juvenile facilities), but did include a very narrow band of non-institutional group quarters (defined as nine of more individuals unrelated to the householder living together). CPS weighting did not include military barracks or college dormitories.

The ACS survey is more often used for demographics, which change less often than labor characteristics, which the CPS is generally used for. As you will see below, the ACS provides us with more data for weighting Spanish spoken in the household in future studies.

## Spanish Dominance

Previously, we have reported two granular language variables: (1) Other Language spoken in the home and (2) in homes where Spanish is spoken, Language Spoken Most Often – Only Spanish, Mostly Spanish, Spanish and English Equally, Mostly English and Only English. Of note, if the survey is conducted in Spanish, Other Language is presumed to be affirmative and the Most Often question is asked of that respondent.

With the Mid-Year 2026 release, we will be reporting two new variables for the first time: Spanish Capable and Spanish Dominant. Both are designed to support measurement companies that measure Spanish language television and the

[2] With the exception of weighting to Spanish Dominant language in the household. The CPS does not ask language in the household except for specific one-off updates and so in prior releases, the ACS language data was used.

channels themselves. For the channels, these variables indicate which households could watch Spanish language television.

Spanish Capable is defined as (1) those taking the survey in Spanish (meaning language other than English spoken in the home) and (2) those taking the survey in English who speak Only Spanish, Mostly Spanish or Spanish and English Equally at home. This estimate is 40.4% among Hispanic households.

Spanish Dominant is defined as those who spoke Only Spanish, Mostly Spanish or Spanish and English Equally in the home independent of the language the survey was taken in. This estimate is 38.8% among Hispanic households.

Of note, in the Mid-Year 2026 release, Spanish Dominant will be weighted to the ACS 2024 (most recent) estimate of 2.88% among total U.S. households, as it has been in prior releases. We will be conducting weighting research using three ACS definitions of Spanish Dominant shown below to determine if one of these definitions weighted as a separate control within Hispanic households improves the mean squared error (MSE) of the estimates. These ACS variables are also published in this Mid-Year 2026 release if users want to explore the broader characteristics of these different definitions.

| **Hispanic Households** *Using ACS Measures of Spanish and English Proficiency and Nativity and Current DASH Weighting Method* | **% Distribution (Mid-Year 2026)** | | |
|---|---|---|---|
| | **Unweighted** | **Weighted** | **ACS** |
| **Spanish Dominant** (including Speak ENG "Not at all" and "Not well") | 9.3 | 18.9 | 15.8 |
| **Spanish Dominant** (as above and adding Speak ENG "Well") | 19.6 | 24.9 | 25.8 |
| **Spanish Dominant** (as above and adding Speak ENG "Very well" if Nativity = Foreign-Born) | 30.3 | 33.2 | 36.0 |

It is important to realize that weighting the Hispanic sample to the most liberal definitions of Spanish Dominant may dilute the Hispanic sample by giving more weight to more acculturated Hispanics.

**Sampling Error**

The ARF has constructed a standard-error estimator based on a bootstrap methodology. The tool provides an empirically estimated standard error through the web dashboard for any estimate selected. For binary variables, the reported standard error applies to both values. For non-binary variables, the reported standard error applies to the average value of the variable. Also of note, starting with the Spring 2025 release, we applied an asterisk to estimates in the web dashboard when the sample size in the denominator was less than 30. The n=30

cut-off was chosen because that's the point at which Fisher's T begins to take on large-sample characteristics. That said, users are strongly encouraged to consider the reported (bootstrapped) standard error when assessing data reliability.

**Sources of Error**

Survey research is subject to multiple sources of error, most prominently sampling error and non-response bias. As indicated above, our Mid-Year 2026 study had an average margin of error (MOE) of 1.28 for persons estimates and 1.26 for household estimates. One margin of error is associated with confidence at the 95% level.

Non-response bias is often difficult to measure. However, NORC conducts a significant face-to-face recruitment of initial non-responders to standard solicitations. Approximately 19% of the Mid-Year 2026 sample (1,958 out of 10,463) is made up of these initial non-responders. We have conducted analyses of the differences between initial responders and non-responders in prior releases and will continue to do so with this release. The differences are driven largely by demographics, which may be addressed by weighting.

Non-responders are more likely to be Hispanic or African American and are also more likely to be linear viewers.

Additional sources of error include respondents' misinterpretation of questions; cognitive bias in respondents' interpretation of questions, such as telescoping, social desirability and central tendency; and CATI interviewers' misrepresentation of questions in phone interviews.

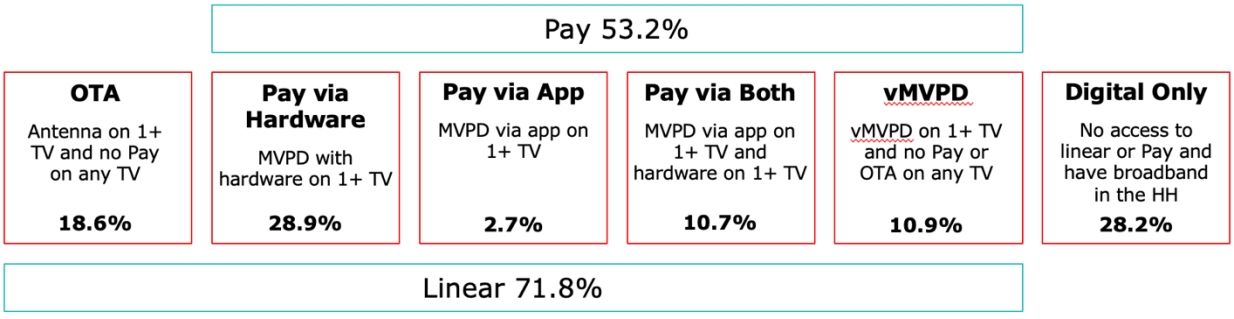
**Classifying Modes of Reception**

The DASH classification of reception has not changed since Spring 2025 except for the edits described on page 2 of this document. The algorithm is described below:

- A respondent household that identifies an MVPD (cable, telco or satellite) and responds yes to either hardware or app for that MVPD on at least one set (Q11) is classified as Pay via Hardware, Pay via App or Pay via Both. This classification applies regardless of whether the respondent has an antenna or vMVPDs on any other set. As indicated in the #1 MVPD edit described on page 2, some respondents initially classified as MVPD for television reception are edited to MVPD for internet only if there is no indication that the MVPD provides programming on any television set (Q11) and hardware is not indicated in Q6D.

- If no mode of Pay TV reception is indicated for any television set, but Pay TV is indicated in Q6, households answering yes to Q6D (has hardware) are classified as Pay via Hardware and households answering no or don't know are classified as Pay via App.
- Households that do not meet the prior criteria but do have access to linear through a vMVPD are categorized as vMVPD and are included in both the Linear and Pay aggregations, as shown in the schema below.
- Respondent households that do not identify reception through an MVPD (Pay via Hardware, Pay via App or Pay via Both) on any set and do not receive linear television through an antenna or a vMVPD on any set, but do have a streaming service (Q7), FAST (Q7A), or streaming device (Q9), are classified as Digital Only.
- The remaining households that have an antenna on one or more television sets and do not have reception through an MVPD on any television set are classified as Over the Air (OTA). This classification applies regardless of whether the respondent has a vMVPD on another set.
- Respondent households that did not select any service for receiving programming (generally ~1%) are classified as OTA if they watched only broadcast channels yesterday and are classified as Pay if they watched cable channels yesterday, regardless of whether they watched broadcast.

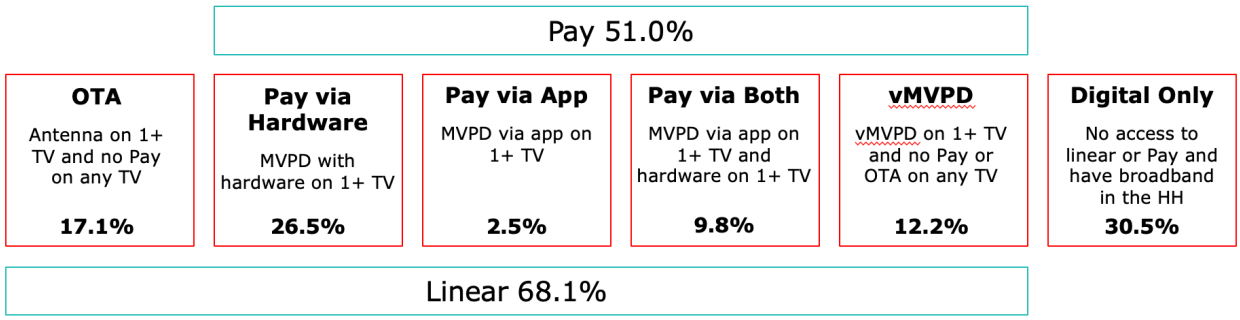
**The Mid-Year 2026 Reception Framework (TV Households – 121.5 Million[3])**




TV Households are defined as households that have and have used at least one TV set in the last six months. TV HHs represent 91.6% of all U.S. households.

[3] Household estimates based on 2024 ACS households

**The Mid-Year 2026 Reception Framework (All Households – 132.7 million)**




Of note, 1.5% of all households have no access to TV or video.

We have presented the MY 2026 measures for the ARF's MECE reception framework, but it's worth reiterating that DASH produces granular measures to enable licensees to populate their own frameworks.

We hope the release is useful to you. As always, please let us know if you have questions, comments or suggestions.