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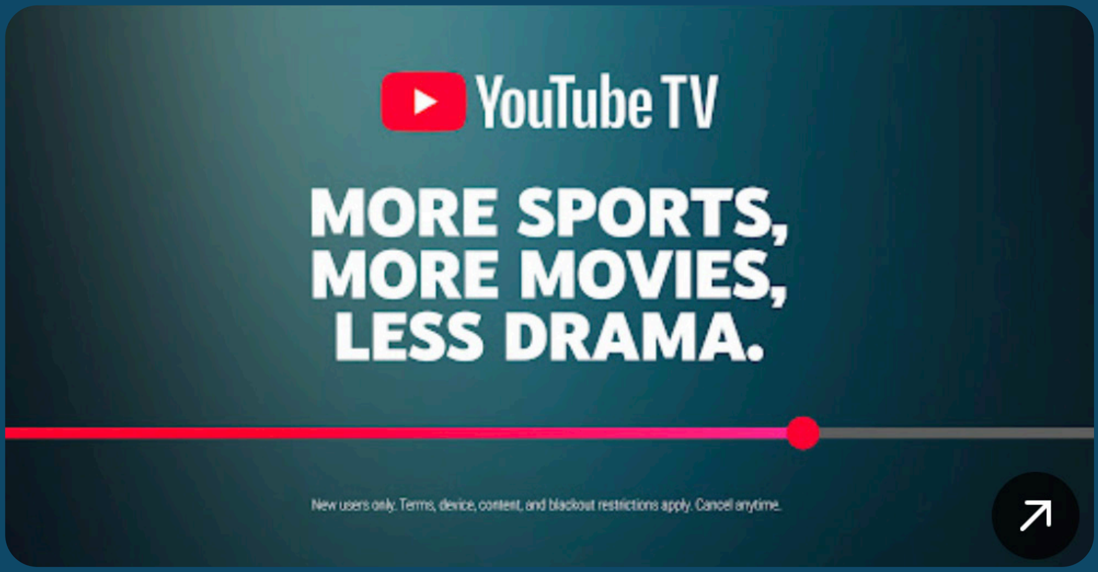

MEDIA IMPACT REPORT

Disney Goes Dark on YouTube

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Understanding the Impact of Nielsen's Methodology Switch

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Disney Pulls Properties from YouTube TV After Contract Dispute

By [Jacob Simonich,](#) Associate Director, Paid Search + YouTube

Update: Disney and Google reached an agreement on November 15 that restored access to ESPN, ABC and other channels to YouTube TV's 10 million subscribers. While details of the deal have not been made public, and likely won't be, ESPN has included access to their new ESPN Unlimited service. This has the potential to attract additional subscribers to YouTube TV, especially WWE wrestling fans as major events will be included in the Unlimited package. It is also speculated that YouTube TV will also offer new, more flexible plans in the future including a "sports and broadcast" package that could help mitigate higher costs to consumers that may result from the new Disney deal.

On October 31, Disney pulled all its channels from the YouTube TV platform after negotiation for a new content distribution deal broke down. Channels pulled included ABC, ESPN, Disney Channel, FX and Nat Geo. This dispute sent a major wave through the marketing world as access to major live sports and entertainment unexpectedly disappeared. Disney had appeared to be using the popularity of their networks to leverage higher fees from Google for the right to distribute the channels.

Regularly Scheduled Programming or a Permanent Power Shift?

This is not the first time Google has had a dispute with Disney or other media partners that also resulted in losing access to popular channels. In 2021, nearly 4 million YouTube TV customers lost access to the Disney-owned channels in the same fashion. After two days of negotiation, access to those channels was restored. This year, Disney had more leverage and less motive to cut a deal.

Disney now has a stronger distribution system with their own platforms and packages that overshadow Google's YouTube TV subscription. Disney+ currently boasts 128 million subscribers that gives anytime access to content from Disney, National Geographic and FX. Hulu has also been under Disney control since 2019 after Disney acquired 21st Century Fox. For sports, Disney has also created ESPN Unlimited, which gives users access to all ESPN Networks, including the SEC and ACC networks, ESPN+ and live events across all ESPN channels. In addition, Disney announced this week that it has closed a deal to purchase Fubo TV to merge with Hulu + Live TV.

As in 2021, both Disney and YouTube TV were very publicly pointing fingers. Google stated in a blog post on October 23 that Disney was forcing "costly economic terms that would raise the prices on YouTube TV customers". Disney instead pushed the blame onto Google saying that Google chose to deny their subscribers the content they value the most by refusing to pay fair rates for their channels.

What Does this Mean for Marketers?

A large gap was left in the live sports offering on YouTube TV, though there are other channels, like local and league networks, that filled the gap until a deal was made.

ESPN owns the rights to many major league and college events including NCAA Football, NFL Monday Night Football and NBA Basketball. These negotiations took place at a time when all three leagues were in full swing. YouTube TV however still has access to other channels, including Fox Sports, which also offers NFL and College Football, CBS Sports, NBC (which recently acquired rights to NBA games), Golf Channel and TNT, which offers NHL hockey.

Audience fragmentation is accelerating, especially in sports. Sports fragmentation is not new; however, and this conflict highlighted changes consumers may need to make at some point in choosing streaming providers. Many new streaming partners have entered the live sports game including Amazon purchasing streaming rights for NFL and NBA games and Netflix dipping their toes into sports content with WWE Wrestling, boxing and NFL games. However, this also strengthens Disney's advertising offerings as it consolidates apps and channels into single bundles.

What Should Brands Do Now?

Though this issue has now been resolved, this conflict leaves a lot for advertisers to think about, especially if a contract dispute occurs in the future.

Here's what advertisers can do if a similar issue happens again:

1. Continue to monitor the situation as negotiations develop and keep an eye on future media rights negotiations between other partners.
2. Monitor and audit any current reservation buys on YouTube TV or Connected TV (CTV) campaigns through different apps and properties for performance shifts.
3. Add adjustments to future plans to consider impacts from an extended break in relationships between publishers.

In summary, if you're running campaigns that rely on channel-based distribution (live streaming, network buys, sponsorships tied to specific networks), this Disney/YouTube TV fallout is a wake-up call. It highlights how distribution rights, platform stability, audience shifts, and cost pressures all converge—and how a dispute between big media companies can ripple directly into marketing performance. The dispute may dictate how future negotiations progress and if the power lies with content, or with brand loyalty to distributors. At Rain the Growth Agency, we have a feeling content will continue to be king.

/UPDATES

Understanding the Impact of Nielsen's Methodology Switch

By Mark Brown, Executive Lead

Nielsen's switch from a panel-based methodology to include "big data" sets is finally becoming a reality after years in the making. Nielsen has been reporting TV viewership data using both the "Panel Only" and "Big Data + Panel" methodologies for over a year now, but they will be sunsetting the "Panel Only" data at the end of the year. This methodology change has implications for all television advertisers, so Rain the Growth Agency did a deep dive into how impressions are varying with the new methodology, and how that might impact the video landscape in the year ahead.

Why is This Happening?

Nielsen held a monopoly for television viewership measurement for decades. Nielsen has relied on a panel of people meter devices (and before that, hand written diaries) in 42,000 households to represent about 125 million TV households in the U.S.

More recently, competition arose from companies like VideoAmp, Innovid, and ComScore. These competitors primarily use "big data" available from cable MVPD set-top boxes (STBs) and Connected TV (CTV) automatic content recognition (ACR) software. What makes it "big data" is that these data sets include millions of devices and households, not thousands.

In response, Nielsen developed a product that combines both panel data and big data to help alleviate the concerns around under-representation of both methodologies. It takes the existing panel and adds STB/ACR data from over 75 million devices (Smart TVs or STBs) in 45 million households. Nielsen has been testing this methodology for several years and announced that they would be sunsetting the panel-only data by the end of the year.

What Does the Data Show?

Rain the Growth Agency analyzed years of both data sets and compared the differences in impression counts between the soon to be obsolete "Panel Only" data and the new "Big Data + Panel" data. Here's what we found:

- Big Data + Panel impressions were consistently higher than the reported impressions in Panel

Only. For 2025 year-to-date, the Big Data + Panel shows over 1.5 million more persons 18+ watching linear TV than the panel only was reporting.

- The gaps between the methodologies have narrowed since the Big Data + Panel methodology launched. In some demographics, like persons 25-54, there's no difference between the methodologies' reported viewership in 2025, while others, like persons 50+, still show Big Data + Panel impressions to be about 5% higher than Panel Only.
- While the aggregate numbers are relatively close, there are big differences when you look at individual networks. The big broadcast networks ABC, CBS, NBC, FOX all saw their viewership increase with the new methodology. ABC and NBC each gained over a million viewers in the switch to Big Data + Panel reporting.
- The biggest gains came to relatively small networks, like CNN en Español who saw their audience grow 50% versus their panel only audience.
- Many of the largest gains were realized by Spanish-language networks, indicating that the previous panel only approach was undercounting Hispanic viewers.

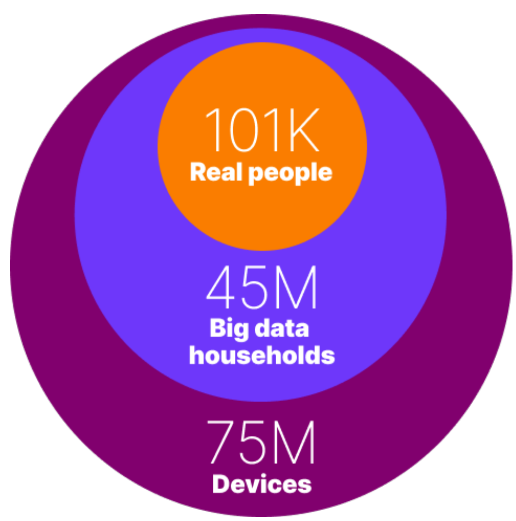
What are the Implications for Advertisers?

It is important to remember that a change in measurement is not the same thing as a change in viewership. The same is true of performance outcomes: website visits, phone calls, downloads, purchases, etc. The same number of viewers who saw an ad and took action because of that ad hasn't changed.

Impression data is used to calculate some important media metrics, and those will be impacted by the switch to Big Data + Panel measurement. Response rates—the percentage of viewers exposed that completed a desired action—will change in reverse proportion to the change in impressions. If a network or show's impressions increase with the methodology change, then the response rate will decline (and vice versa). The same is true with CPMs, since higher impressions at the same cost will lead to lower CPMs (and vice versa). Finally, for advertisers who rely on spike attribution methodologies, like Rain the Growth Agency's SignalLink product, there could be some changes in attribution when multiple ad instances occur near a spike in outcomes. The unit with the higher impression count receives the attribution for that spike, and it is conceivable that Big Data + Panel impressions could indicate a different winner in the tie-breaker scenarios.

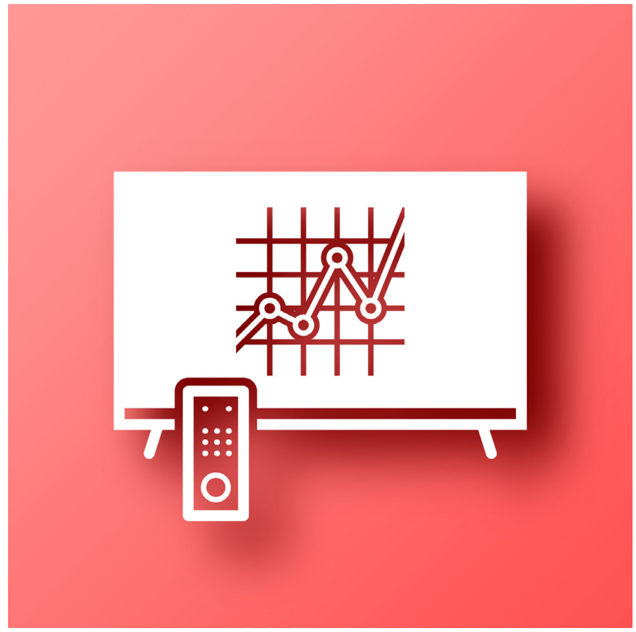
The implications for the marketplace remain to be seen, as adoption of Big Data + Panel impressions are just beginning.

1. One impact is that many networks will have an easier time making their guarantees to upfront advertisers with fewer audience deficiency units (ADUs) required to make up for underdelivery. Fewer ADUs mean more inventory available in the scatter market, creating more opportunities at lower costs.
2. While the Big Data + Panel impressions are higher in aggregate, some networks and dayparts are seeing lower impressions with the new methodology. So, while it may create favorable scatter opportunities for most networks, there will be some that will see greater underdelivery and require more ADUs to make upfront advertisers whole.
3. Finally, the methodology change requires that future upfront guarantees be based on Big Data + Panel impressions, when they were previously built on panel only impressions. This will muddy year-over-year rate of change analysis, with some CPM increases being offset by increased/decreased impressions due to the new methodology.



Source: Nielsen

We believe that Nielsen's shift to the Big Data + Panel methodology is the right move for the marketplace, even if it is a little overdue. Based on the comparative data that we analyzed, the new data stream is better suited to measure more diverse audiences and increasing viewership options those audiences have. As advertisers and agencies begin using this new currency, below is a list of what advertisers should think about to prepare for Nielsen's Big Data + Panel updates:



1. Understand the Timeline

- **Sept 1, 2025:** Big Data + Panel became the official currency for national TV transactions.
- **Jan 1, 2026:** Panel-only Automatic Content Measurement (ACM) will be removed from transactional systems. Historical data will still use panel-only for prior years, so mixed methodologies will exist.

2. Audit Current Campaigns

- Review **performance projections and pacing** under the old panel-only system and understand how the new methodology may change things.
- Identify campaigns that will **span Q4 2025 into Q1 2026,** as these will require methodology adjustments.
- **Understand impact on ROI, if any:** How will Big Data + Panel affect reach, frequency, and cost-efficiency metrics?
- **Historical Comparisons:** What normalization methods will be used to compare panel-only vs. hybrid data?

3. Prepare for Mixed Methodologies

- Expect shifts in **ratings and rankings**—sports and streaming-heavy programs may show significant gains.
- Historical trend reports may still rely on panel-only data for prior years, so confirm which data sets you are comparing.

/QUICK HITS

YouTube, Rising Prices, And The Shifting Balance Of CTV In 2026

[EMARKETER]

NBCUniversal To Launch New NBC Sports Network Next Monday, November 17

[NBCSports]

Women's Soccer, After Years Of Being Sidelined, Is Finally In The Big Leagues

[Marketing Brew]

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