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WHAT THE INDUSTRY READS FIRST

Big Data, Big Problems?: VAB, Nielsen Squabble Over Big Data + Panel

The **Video Advertising Bureau** raised concerns about the accuracy and consistency of **Nielsen's** Big Data + Panel measurement. After analyzing its first full quarter of use as a national currency, the organization found audience variance that it says could undermine guarantees in the advertising marketplace. However, Nielsen disputed VAB's conclusions and pushed back against the methodology behind the analysis.

VAB's [report](#), titled "4Q Currency Chasm: Instability & Unpredictability Decimate the Demos," examined four weeks of audience data from Sept. 15-Oct. 12. It compared hour-by-hour differences between Big Data + Panel and panel-only measurement across 33 broadcast and cable networks, which included channels with live sports, news, Spanish-language programming and entertainment. The study flagged instances where Big Data + Panel metrics diverged from panel-only data by 20%, 50% or more, give or take, with particular attention paid to six demographics: households, P2+, P18-34, P18-49, P25-54 and P55+.

Among those 33 networks, households had 18% of their total hours showing more than a 20% audience variance. That number increased to 24% for P2+ and spiked higher for the P25-54, P18-49 and P18-34 groups at 45%, 51% and 58%, respectively. Approximately 2% of household hours and 3% for viewers P2+ had a difference of 50% or more.

The demo with the highest percentage of hours with 50% variance was P18-34 (29%).

VAB also analyzed 30 **NFL** games from seven networks to see whether volatility would shrink for more predictable programming. However, depending on the demo, it determined that 16-40% of hours with games had a double-digit disparity between Big Data + Panel and panel-only audience figures.

"Variation is expected in a well-functioning currency dataset, typically hovering just above or just below the double-digit mark," VAB President/CEO **Sean Cunningham** told **CFX**. "There can certainly be exceptions and aberrations, but the red flags are when one encounters a continual degree of systemic variation—typically coupled with irrational spikes of severe variation."

VAB's findings contrast with the excitement some felt when Big Data + Panel was introduced in the fall. **ESPN** SVP, Research **Flora Kelly** and **Fox** President, Insights and Analytics **Mike Mulvihill** have been complimentary of the methodology and Nielsen's efforts to track television audiences more accurately by combining data from set-top boxes, smart TVs and panel data. But Nielsen contends that VAB's report presents an incomplete picture.

Although VAB analyzed live, hour-by-hour data, it didn't include out-of-home viewership and digital in TV ratings—nor did it use the live + same day benchmarks often used by networks. VAB didn't disclose which specific networks it used, and some of the smaller networks Nielsen measures may not be fully



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represented in time-period data without program-level findings.

"This report is seriously flawed and manipulated," a Nielsen spokesperson said in a statement to CFX. "From what we have seen, the VAB incorrectly pulled our data and the bureau does not know how to do a proper ratings analysis. For example, they pulled data for live sports without accounting for the same games airing in different time zones across the US. The VAB is wasting the time and money of its members."

While Nielsen receiving criticism is nothing new, Cunningham wants to see the ratings firm follow through on optimizing its measurement practices in order to be a stable and trusted currency. "[Nielsen should] fix a process that tries to bend the Big Data back to match the panel results," he said. "Instead, let the 45MM big data homes be the driver of the data set, versus depending on Panel-Only data to drive 80% of BD+P audience measurement."

GOP SENATORS PROPOSE BILL FOR LEFTOVER BEAD FUNDING

Republican Senators *Roger Wicker* (R-MS) and *Shelley Moore Capito* (R-WV) introduced the Supporting U.S. Critical Connectivity and Economic Strategy and Security (SUCCESS) for BEAD Act, which would authorize states to use their leftover BEAD funding, an estimated \$20-22 billion total across all 56 eligible entities, for specific projects that support the state's deployment plan beyond last-mile broadband construction. Eligible uses of remaining funds under the bill would include mobile wireless infrastructure, submarine cables, wholesale fiber lines and workforce development programs, although data centers would be explicitly prohibited as a use of funds. Priority would be given to projects that improve infrastructure in rural areas, enhance public safety or national security, strengthen network resiliency and cybersecurity, support federal or military facilities, reduce network latency or advance AI technology. **FBA** President/CEO *Gary Bolton* applauded the bill as it "supports resilient, future-ready networks and reinforces the domestic workforce and supply chains needed to deploy them." **USTelecom** President/CEO *Jonathan Spalter* called the SUCCESS for BEAD Act a "timely, pragmatic proposal that helps ensure every non-deployment federal BEAD dollar delivers the greatest possible benefit for the American people."

TIKTOK U.S. JV CLOSE DATE SET

Chinese company **ByteDance** signed an agreement to form a JV that will operate **TikTok U.S.** The deal is expected to close on

Jan. 22. A trio of investors—**Oracle**, **Silver Lake** and **MGX**—will collectively control 45% of the new company, while ByteDance will retain 19.9%. The other third will be held by affiliates of existing ByteDance investors. The deal allows the popular social media app to clear regulatory hurdles and continue to operate in the U.S.

CHARTER'S WORKFORCE PROGRAMS LEVELING UP

Charter released new stats showing how its workforce initiatives are leading to career growth for its employees. For example, Charter's tuition-free Education Benefit program allows employees to continue their education at no upfront cost. Thirteen percent of the operator's current workforce has either enrolled in or completed courses through the program, which is a partnership with skilling company **Guild**, with nearly 2/3 of participants being in frontline, customer-facing roles. Participating employees have earned promotions at a 20% higher rate than those not using the program and are 19% more likely to stay at the company. The program also covers up to \$10,000 per year for degrees outside of the tuition-free catalog. Additionally, employees can enroll in self-progression paths for specific job families, such as Field Technicians and Construction Coordinators, receiving a \$500 bonus and 10% raises as they complete each level of coursework. More than 70% of Field Operations employees are now at the top progression level for their job family, up from 60% last year.

ESPN'S DTC MARKETING ENTERS NEW PHASE

The Worldwide Leader in Sports launched a new marketing campaign promoting its DTC streaming service. The campaign, titled "Always in Season," includes new creative spotlighting a sampling of the 47,000 yearly live sporting events on **ESPN** platforms. The new marketing push also includes collabs with Best Buy, Vizio, Uber and others.

FIBER FRENZY

Comcast expanded the Xfinity network to Hopewell and Maurice River townships in Cumberland County, New Jersey, connecting nearly 350 rural homes and businesses in the area. – **Charter** brought Spectrum services online in the North Carolina counties of Stanly, Cleveland, Catawba, Richmond

and Scotland. All together, the expansion connects more than 7,000 homes and businesses.

CARRIAGE

V10 Entertainment will launch an “America’s Funniest Home Videos” FAST Channel on **The Roku Channel, Prime Video, Pluto TV, Plex, Samsung TV Plus, Vizio WatchFree+ and Peacock** early next year. The channel will offer episodes from across the show’s decades-long run, including episodes hosted by *Bob Saget* and *Tom Bergeron*.

PROGRAMMING

South African action series “The Nowhere Man” is making its U.S. debut on Starz on Jan. 16. The six-episode program will air weekly. – Disney revealed the date for its upcoming “The Muppet Show” revival special: Feb. 4, streaming on Disney+, with a

linear airing also set for ABC. – The very weird adult animated series “Haha, You Clowns” has been renewed for Seasons 2 and 3 on Adult Swim. The first season will air its finale on Sunday at 11:45pm. – “Critical Incident,” an HBO documentary that revisits the 2010 death of an undocumented Mexican immigrant while in custody at the border, premieres on Dec. 29 at 9pm.

PEOPLE

David Leavy, who moved back to parent company **Warner Bros. Discovery** in May after a two-year tenure as **CNN COO**, is leaving WBD at the end of 2025. Leavy first joined a pre-merger Discovery in 2000 and was a longtime adviser to WBD CEO *David Zaslav*, including as Chief Corporate Affairs Officer at WBD. “As the company goes through its next iteration of structure and strategy, and after 25 years at this wonderful organization, it feels like the right time to do the same,” Leavy wrote in a note to staff obtained by the trades. “I leave filled with immense gratitude, pride and joy.”



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Quotable

“Everything that I know from Kansas providers is that while the maps themselves have been improved, providers still face an arduous and outdated challenging process that makes it difficult to update the maps with the most recently available data. The circumstance is particularly concerning given that NTIA makes use of the FCC data in adjusting the eligibility locations for services under broadband. So I would encourage you to [make]... improvements in the ability for those in Kansas and across the country to make changes to the maps based upon actuality and the reality of what we provide in service to Kansans.”

- Sen. Jerry Moran (R-KS) on the FCC’s broadband data collection during Senate Commerce’s FCC hearing



Up Ahead

JAN. 6-9: CES 2026, Las Vegas

JAN. 29: Comcast 4Q25 Earnings Call

JAN. 30: Charter 4Q25 Earnings Call

JAN. 30: NTCA AI Summit

FEB. 1-3: IAB Annual Leadership Meeting, Palm Springs, California

FEB. 4-5: INCOMPAS Policy Summit, D.C.

FEB. 16-18: NCTC Winter Educational Conference, Las Vegas



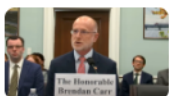
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Wednesday’s FCC oversight hearing had no shortage of fireworks as lawmakers grilled Chairman Brendan Carr on a series of subjects. One of Carr’s responses, however, could carry long-term implications for the agency moving forward.

“The FCC is not formally an independent agency,” said Carr.

Read more here:

<https://lnkd.in/ekEQJrBJ>



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