



Local Media  
Marketing Solutions

# Focus Matters!

TVB Analysis of Nielsen's  
Ad- Supported Gauge Pie:  
Q4 2025

# The Original Nielsen Gauge Report Was Lacking Key Advertiser Intelligence

Nielsen originally provided The Gauge report on total viewing, which included viewing with and without ads. By not isolating only those platforms that advertisers can place their message on, it excluded an essential piece of information needed by marketers to make informed advertising decisions.

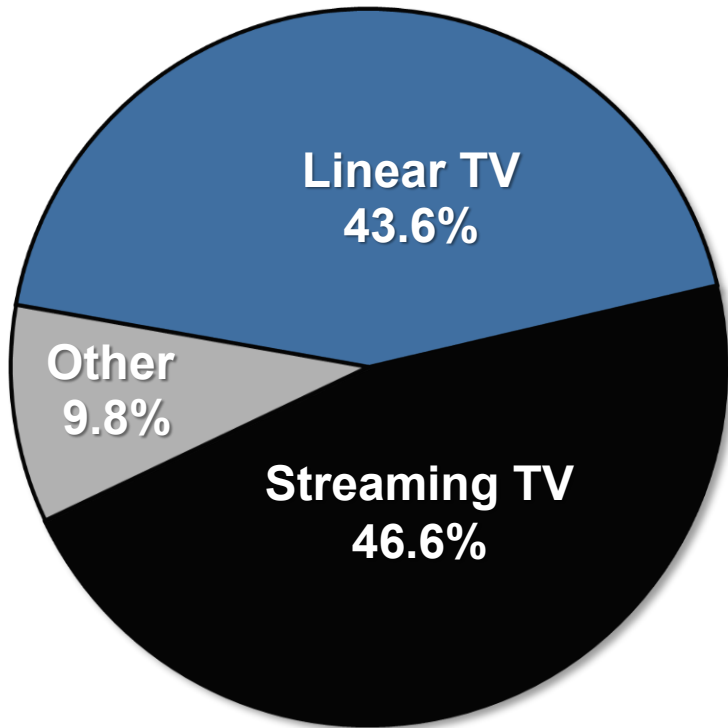
In response to industry requests to do so, in May 2025, Nielsen released an additional Gauge report, showing a pie of only ad-supported platforms for both linear and streaming, so, while the original Gauge report's base is of the total use of television (TUT), the ad-supported Gauge's base is of only those platforms measured that have advertising. **Nielsen will only be issuing this on a quarterly basis.**

**However, the regular Gauge Report comes out monthly. Using Nielsen Data TVB is providing an ad-supported Gauge on a monthly basis, as well as by quarter.**

# Nielsen's Original Gauge: Linear TV 44% of Total Pie

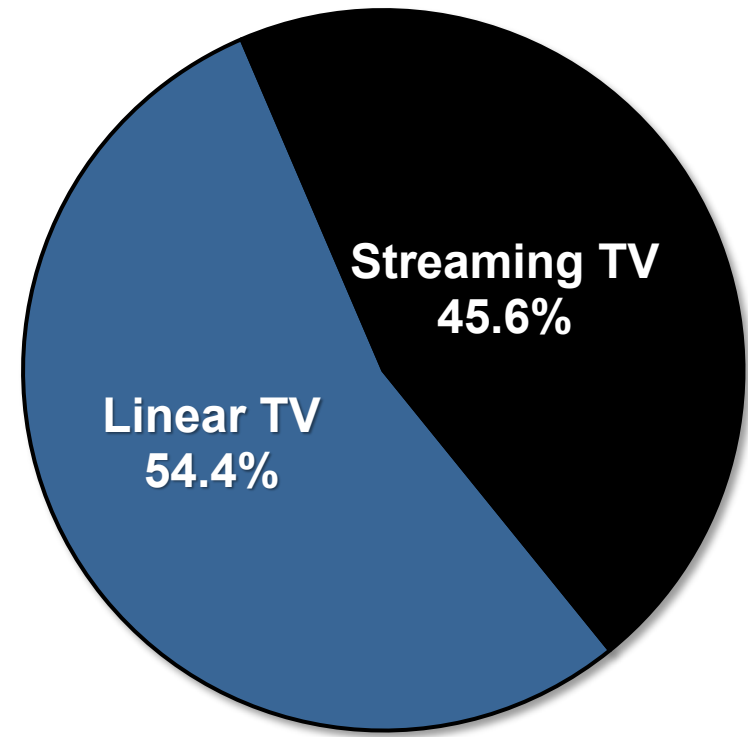
## Nielsen's Ad-Supported Gauge: Linear TV 54% of Total Ad-Supported Pie

**Nielsen's Original Gauge Report:  
All Viewing Platforms**



**Q4 2025  
Total Day of Platforms  
Persons 2+**

**Nielsen's Ad-Supported  
Gauge Report**

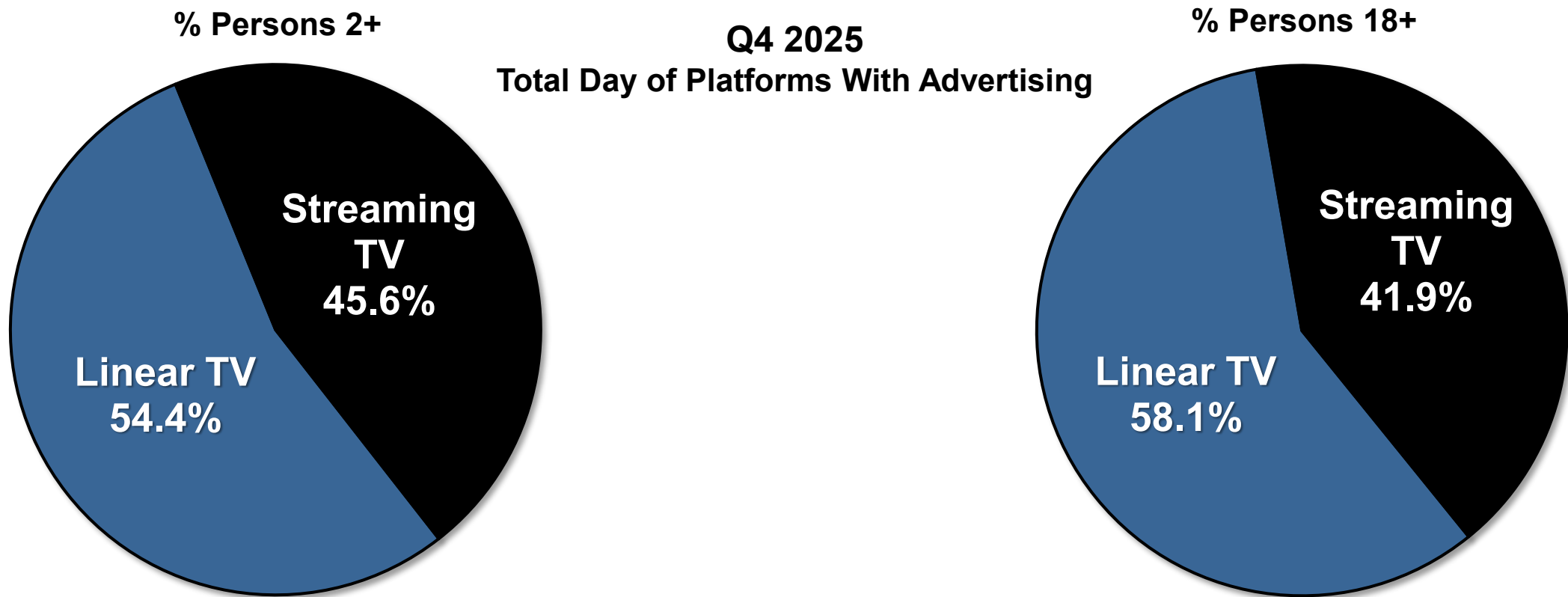


# However, Nielsen's Ad-Supported Gauge Report Only Focuses on Persons 2+

Both Nielsen's Original Gauge Report and Nielsen's new ad-supported Gauge report focuses only on persons 2+. In their press releases and data available to the public, they will continue to do so. However, local advertising's key categories do not focus on persons 2+.

TVB has done our own analysis of Nielsen's ad-supported Gauge pie using Nielsen NPower's Streaming Platform Ratings for adults 18+.

# When Looking at Adults 18+, Linear TV's Share is 58%; Using An Adult Demo Matters!



# Removing YouTube From The Streaming Total To Create A Long-Form (No UGC) Ad-Supported Pie

Nielsen includes all AVOD, including YouTube, in their ad-supported pie.

YouTube is ad-supported but it is predominantly short-form video and user-generated content (UGC). Linear content uses long-form video. Therefore, YouTube's inclusion is not an apples-to-apples comparison to linear.

Using Nielsen NPower's Streaming Platform Ratings, the ad-supported pie was redone to include only long-form content.

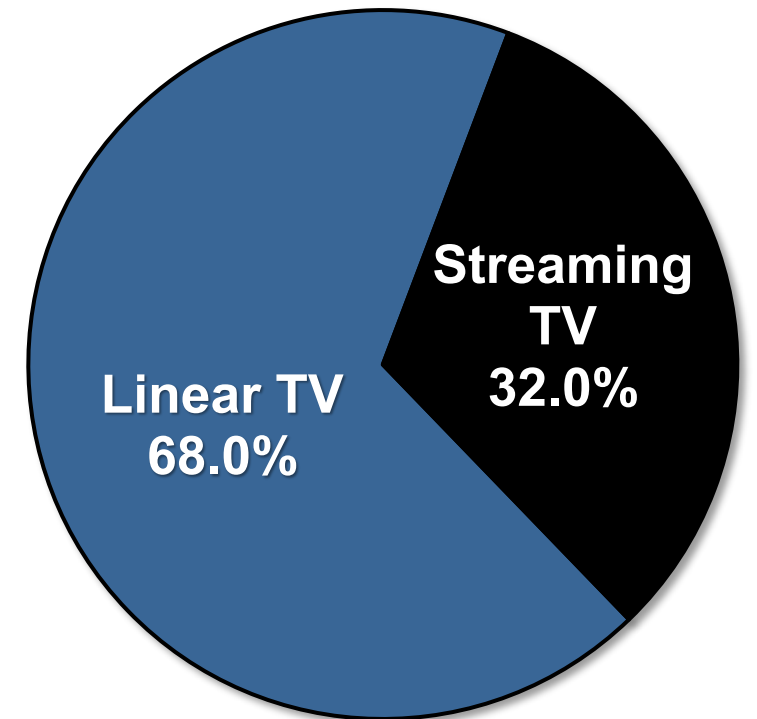
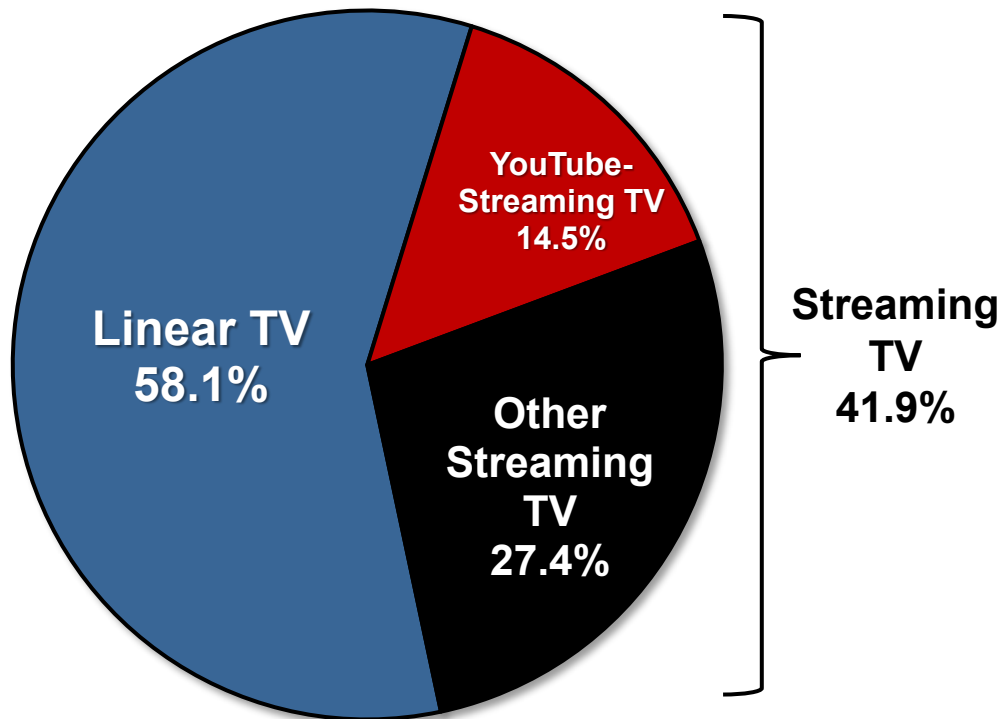
# When Looking at Ad-Supported Long-Form Content Only, Linear TV's Share is 68%!

Q4 2025

Total Day of Platforms With Advertising  
Persons 18+

Long-Form Content ONLY  
Without YouTube

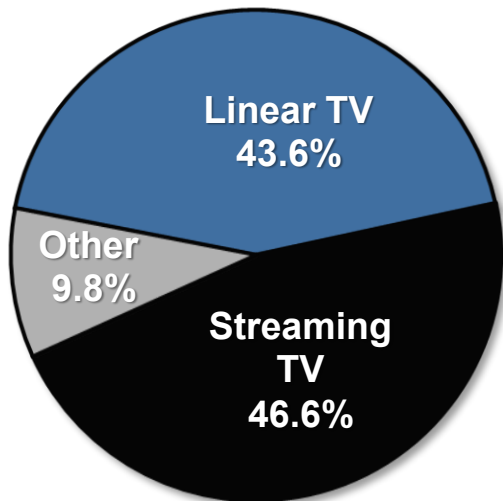
With YouTube



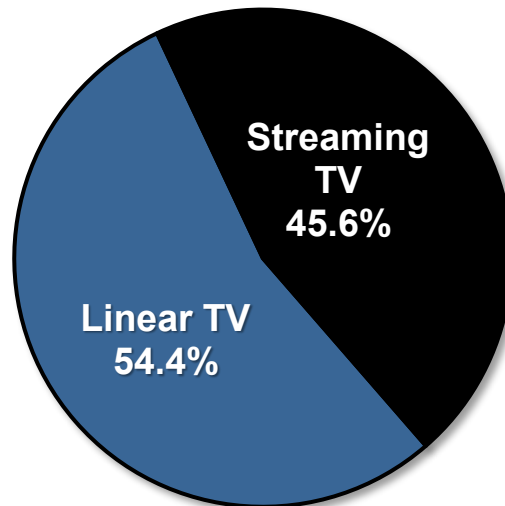
# Focus Matters!

## Q4 2025 Total Day of Platforms

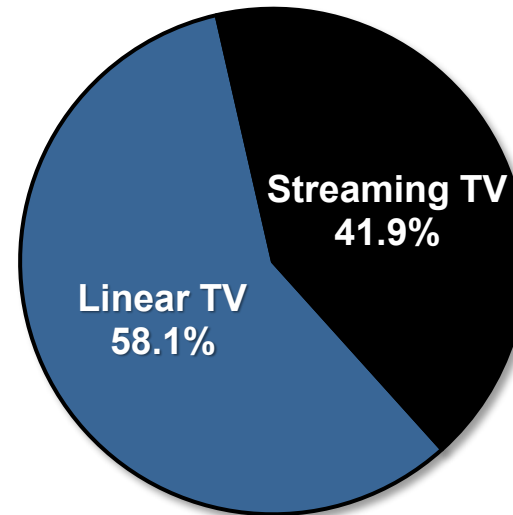
Original Gauge Report  
% Persons 2+



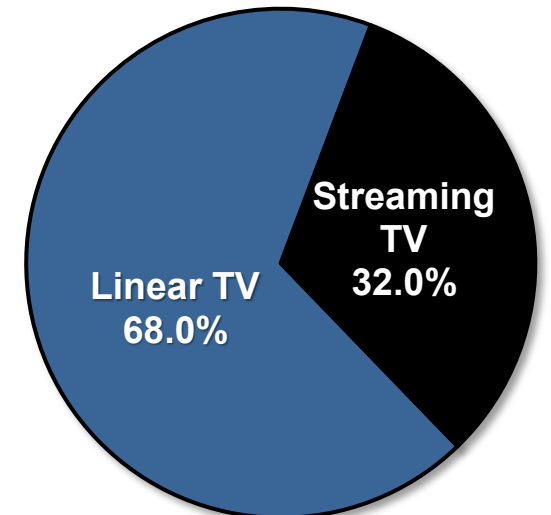
Ad-Supported Gauge  
% Persons 2+



Ad-Supported Gauge  
% Persons 18+



Ad-Supported Gauge  
Long-Form  
Content ONLY  
Without YouTube  
% Persons 18+



Source: Nielsen NPOWER Q4 2025 Persons 2+ & Persons 18+ Live+7. Total Day of All Viewing Platforms: Percent of Broadcast (Includes PBS), Cable, and Streaming to TUT Levels. Total Day of Ad-Supported Viewing Platforms: Percent of Broadcast (No PBS), Cable, and long-form ad-supported streaming divided by long-form ad-supported total. YouTube excluded from long-form ad-supported pie. MVPD/vMVPD category is included in Linear bucket.

**Thank you!**