



MEDIA IMPACT REPORT

New Year, New Nielsen

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/BRIEFING ROOM

New Year, New Nielsen

By **Mark Brown**, Executive Lead

The beginning of a new year is often a time for big changes. New year's resolutions, new exercise routines, new diets. For Nielsen Media Research, the start of 2025 brought about several significant changes.

First, on January 23, the Media Ratings Council (MRC) announced that it had granted full accreditation to Nielsen's hybrid Big Data + Panel ratings for person-level estimates. That makes Big Data + Panel ratings the first hybrid measurement service that is accredited as a national TV currency. The Big Data + Panel measurement service combines Nielsen's existing panel of meters in over 41,000 households with big data collected from over 45 million smart TVs and cable set-top boxes.

The hybrid service offers the best of both worlds. The big data set better captures the long-tail of fragmented TV viewing that can be missed in a panel with only 41,000 homes. It will also open the door for advertisers and media companies to trade on advanced audiences beyond the standard demographics that panel-only ratings are limited to. The panel provides an understanding of person-level viewership (Smart TVs and set-top boxes count screens, not viewers), it can balance some inherent audience bias in big data sets (younger, more affluent), and can better verify human viewership.

On the heels of the accreditation announcement, on February 3 both Nielsen and Paramount Global announced that they had come to terms and renewed their measurement contract. Paramount had been

off Nielsen since their previous contract expired on September 30, 2024. The four-month contract dispute was the lengthiest of its kind for a media company the size of Paramount, and the lack of Nielsen ratings heading into the 2025-2026 upfront season had some in the industry questioning if this would blow open the alternative currency marketplace.

While the extended period of Paramount transacting on VideoAmp data gave us a hint of what a multi-currency marketplace could look like, the resolution just months before the upfront and just after some tentpole events on flagship CBS (NFL AFC Championship game, The Grammys) shows that Paramount wasn't quite prepared to walk away from Nielsen. The new contract includes the Big Data + Panel data, which could be read as a vote of confidence from Paramount for the hybrid data model versus the big data only model of VideoAmp.

Ultimately, it is not the MRC or Nielsen that will decide how media buyers and sellers will transact their deals in this – and future – upfronts. Only buyers and sellers can agree on a common currency. At Rain the Growth Agency, we agree that the Big Data + Panel approach of Nielsen is the right direction for TV audience measurement, for all the "best of both worlds" reasons stated earlier. We also continue to work with and support all of the media measurement and currency alternatives to Nielsen, because the "new Nielsen" we are seeing today is a direct result of healthy marketplace competition from ComScore, iSpot, VideoAmp and others.



/UPDATES

AI is Eating Search; Here's How Brands Stay on the Menu

By [Stasia Fulginiti](#), Director, Paid Search + YouTube

For years, paid search has been the reliable workhorse of digital marketing—like a trusty old Honda Civic that always gets you where you need to go. But now, AI-powered search alternatives like Reddit Answers, Perplexity, and ChatGPT are revving their engines, ready to take search advertising on a wild new ride. These platforms are shaking up the status quo, changing how consumers seek and engage with information, and making marketers rethink their entire approach to search advertising. Buckle up, because things are about to get interesting.

Once upon a time, people Googled everything—"best coffee near me," "why does my dog ignore me but love strangers," and "how to 'per my last email' without getting fired." But now, AI-driven platforms are stepping in, delivering instant, conversational responses that cut through the noise. Instead of sifting through endless blue links, users get direct answers, which means fewer traditional search ad impressions and a new challenge for brands trying to get in front of potential customers.

For advertisers, this shift is both an existential crisis and an exciting opportunity. The old playbook—bid on keywords, optimize, profit—is evolving. Brands now need to rethink search marketing to thrive in an AI-first world.

What This Means for Brands

1. Search Traffic is Becoming More Fragmented

Google's monopoly on search? Yeah, that's starting to crack. AI-based assistants are changing user behavior, and search marketers need to take a page from social media's book—diversify or get left behind. Just like brands have adjusted to multi-platform ad strategies across Meta, TikTok, and YouTube - search advertisers must expand beyond Google and Bing to meet consumers where they are. The result? A more holistic, AI-integrated approach to performance marketing.

2. Conversational Ads Will Redefine Intent-Based Marketing

Imagine a world where ads feel less like ads and more like helpful, well-timed, relevant suggestions. AI-driven search engines will introduce a new kind of intent-based advertising—contextual, seamless, and (hopefully) less annoying. The challenge? Brands need to figure out how to fit naturally into these AI-driven conversations without coming off like a pushy car salesperson trying to make quota at the end of the month.

3. First-Party Data and Contextual Targeting Will Reign Supreme

Say goodbye to cookie-based tracking (we had a good run). AI search engines are pivoting to first-party data and contextual relevance, meaning brands must prioritize owning their audience relationships. Think: killer content strategies, direct engagement, and making your brand so trustworthy that AI can't help but reference you.

4. Optimizing for AI Visibility Becomes Critical

Ranking high on Google is cool, but have you tried getting referenced by an AI model? AI-powered search platforms pull from multiple sources, so structured data, authoritative content, and brand trust signals are your new best friends. If your brand isn't AI-friendly, it might as well be invisible.

5. New Cost Models Will Emerge

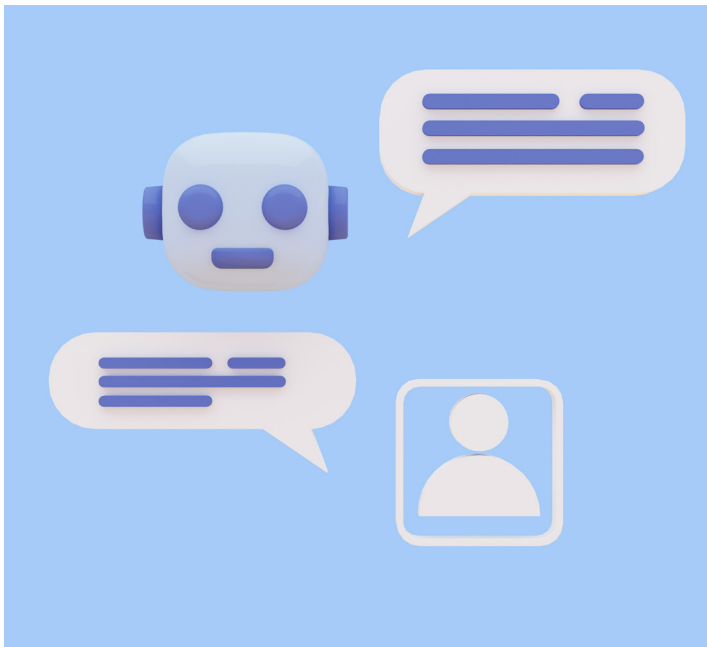
Cost-per-click? So last decade. The future may bring models like cost-per-conversation (CPCV) or cost-per-query (CPQ), where advertisers pay based on actual engagement rather than just eyeballs. There's also potential for revenue-sharing agreements, where brands pay to be featured in AI-curated answers. The playbook is still being written, but one thing's for sure—search ads are evolving fast.

Preparing for the AI Search Revolution

The search landscape is evolving at warp speed, and marketers who don't adapt risk getting left behind like a VHS tape in a Netflix world. Agility is key—experiment with AI-driven platforms, refine your content strategy to align with machine-learning models, and rethink performance metrics beyond traditional search KPIs.

At Rain the Growth Agency, we're not just watching this transformation—we're leading the charge. We're exploring emerging ad formats, multi-component match types, leveraging AI-powered analytics, and helping brands navigate this brave new world of performance marketing.

The future of search is unfolding before our eyes, and the smartest brands will embrace the change. So, the question is—are you ready to ride the AI wave or are you still stuck optimizing for Ask Jeeves?





/NOTEPAD

2025 Super Bowl Ad Trends

By [Kathleen Donohue](#), Associate Director, Communications Strategy

One of our favorite yearly traditions is diving into the Big Game's ads. This year had powerful, intriguing, and some just flat out weird spots by brands making a big investment in the largest live sports event of the year. Here are the trends we saw in this year's ads:

1. The Silver Lining

Ads featured more senior talent than previous years, with 41% of ads utilizing seniors, up from 37% in 2023.

2. Superficial Bowl

Brands steered clear of controversy in a fraught social/political environment, with 85% of ads opting for humor over more earnest messaging.

3. Now-stalgia

Multiple advertisers used a mix of nostalgia and newness to capture a broader range of viewers—i.e.,

Martha and Charli XCX for Uber Eats, Meg Ryan and Sydney Sweeney for Hellmann's.

4. We Moustache a Question

Why did two separate brands have facial hair flying off the faces of their celebs? Awkward. Fortunately, they rolled with it and activated to embrace it online.

5. Ads We Wanted to DEI For

Representation increased in multiple areas, with feminine expression, body type inclusivity and visual disability representation increasing significantly YoY. However, ethnic diversity decreased across creative.

6. AI in the Limelight

Rather than using AI technology to make ad creative, 2025 saw AI products in the forefront of ads from OpenAI, Google, Meta, GoDaddy—as well as Cirkul who highlighted the use of AI in everyday situations.

7. Stories Over Stars

Ads fueled by star power decreased from 77% in 2023, and 68% in 2024, to 54% in 2025. Instead, advertisers focused on storytelling over celebrity cameos to make their points.

8. Don't Call it a Comeback

Many major brands known for past Super Bowl ads returned after a multi-year hiatus, including Nike, Go Daddy, Taco Bell, Meta, Jeep, Stella Artois, Little Caesars and Lay's. We also saw a major drop in first-time advertisers in 2025.

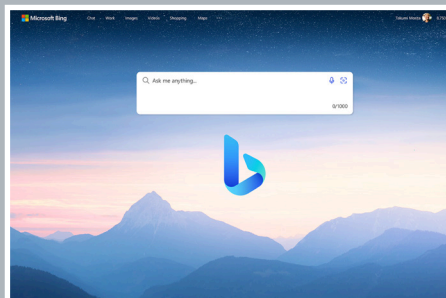
Sources: Ad Age, The Drum



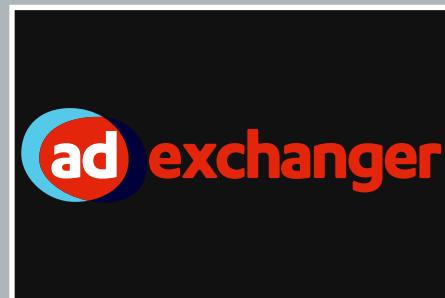
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