



RESEARCH INITIATIVES

2025/2026

RESEARCH REPORTS & RESOURCES (UPDATED)

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AI & FUTURE STATE

MAY 15, 2025:

THE ARF HANDBOOK FOR USING AI IN ADVERTISING RESEARCH (2025)

Report: This covers the integration of AI into marketing strategies, ethical considerations, future trends and practical case studies. This handbook is an essential guide for advertising research professionals looking to leverage any of the latest AI platforms while ensuring ethical and impactful outcomes.



JUNE 18, 2025:

THE PSYCHOLOGY OF GEN AI #1 – ALTERNATIVE EXPLANATIONS: CAN AI RETHINK ITS OWN REASONING



Report: ARF and MSI researchers prompted ChatGPT to first identify key trends from the ARF's 2024 Privacy Survey, then generate hypotheses to explain those trends. The LLMs were then asked to offer alternative explanations for each hypothesis, thus testing whether the models can criticize or rethink their own logic.



JULY 16, 2025:

THE PSYCHOLOGY OF GEN AI #2 – PG VS. R: THE PSYCHOLOGY OF PROMPTED THOUGHT



Article: Can sanitized AI tools truly capture the nuance required for advertising and brand research? Is a less restrained one more likely to produce skewed results? This comparative deep dive, from ARF and MSI explores how two popular large language models—ChatGPT-4o and Grok 3—respond when prompted with complex topics.



SEPTEMBER 3, 2025:

THE PSYCHOLOGY OF GEN AI #3- ACTING THE PART: CAN AI THINK LIKE A CFO?



Report: Building on Erving Goffman's (1959) concept of role performance, this experiment explores whether AI can simulate the strategic mindset of senior leaders by adopting role-specific scripts. The central question: Can generative AI embody a persona not just in tone, but in strategic judgment?



SEPTEMBER 12, 2025:

THE PSYCHOLOGY OF GEN AI #4 THE BIAS BENEATH THE AVERAGE: WHAT LOSS AVERSION MEANS FOR ADVERTISING RESEARCH

Report: This experiment reveals how models like ChatGPT not only replicate human cognitive biases, such as loss aversion, but also compress variability into uniform patterns. This raises concerns for advertising researchers who rely on authentic insights into consumer behavior.



NOVEMBER 17, 2025:

THE PSYCHOLOGY OF GEN AI #5 – FINDING NUANCE WITHIN THE BIAS: WHAT DEMOGRAPHICS AND PERSONALITY REVEAL ABOUT AI

Report: Large language models mirror human cognitive biases—but can those biases be guided? New ARF and MSI research reveals that while loss aversion remains deeply ingrained in AI responses, introducing persona information, such as demographics or personality traits, can increase variability and make outputs more nuanced.



OCTOBER 7, 2025:

HOW AI ANALYTICS AND SYNTHETIC DATA CAN REIMAGINE CONSUMER RESEARCH

Article: At the MSI/ARF Analytics & Forecasting conference, AI was framed not as a substitute for human research but as a force reshaping how consumers are represented and understood.





KNOWLEDGE AT HAND

LLMs: Benefits, Limitations and Dangers

May 2025

As AI becomes a core tool in marketing and advertising, its benefits limitations and risks—bias, misinformation and ethical dilemmas—are being widely discussed. In addition to reviewing and featuring those issues at our conferences, the ARF has conducted its own research to gain more insights on the benefits, limitations and the dangers of generative AI models.

This Knowledge at Hand report provides a summary of several ARF studies and their conclusions on the benefits and limitations of AI. In addition to the links provided in the references section, we recommend the [latest ARF AI Handbook](#) for more detail on the studies and the issues at hand.

Survey Design with AI Input: Our key question in this study was “Can LLMs like ChatGPT, Claude, and Gemini design effective and nuanced surveys for advertisers and agencies?” To answer this, we tested each model’s ability to develop a survey on attention metrics and traditional advertising KPIs. Models were first prompted to create a survey from scratch. Then they were provided with a 2021 survey as a template to improve performance. The evaluation focused on structure, question quality, adaptability and the ability to handle complex logic like conditional branching.

- We found that initially, ChatGPT and Gemini produced general outlines or asked simplistic questions while Claude was more structured and contextually responsive. Across models, outputs often required heavy reformatting (e.g., removing bullet points, converting to checkboxes) and repeated prompting to improve specificity.
- However, when given a prior survey as a template, all three AIs showed marked improvement—demonstrating an ability to adapt and refine content when contextual examples were provided.

As a result of this experiment, we find that AI can accelerate survey development, especially when working from examples. However, for complex surveys involving industry nuance or logic paths, human guidance is essential. Combining AI speed and researcher judgment delivers the best results. AI can assist in drafting and ideation but remains limited in fully automating high-quality survey design.

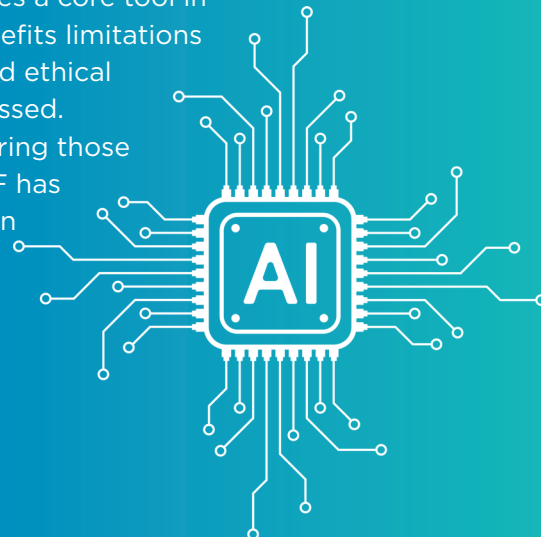
Sentiment Analysis: How accurately can LLMs conduct sentiment analysis compared to human coders? To find out, we tested four AI models—ChatGPT 4-o, Gemini, Claude 3.5 Sonnet and Copilot—on a random dataset of 50 Amazon product reviews. Three human coders first classified the reviews as

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MAY 16, 2025:

ARF KNOWLEDGE AT HAND: LLMS—BENEFITS, LIMITATIONS AND DANGERS

Knowledge at Hand: As AI becomes a core tool in marketing and advertising, its benefits limitations and risks—bias, misinformation and ethical dilemmas—are being widely discussed. In addition to reviewing and featuring those issues at our conferences, the ARF has conducted its own research to gain more insights on the benefits, limitations and the dangers of generative AI models.



DECEMBER 15, 2025:

ARF KNOWLEDGE AT HAND: AI-DRIVEN SEARCH AND SHOPPING: TRANSFORMING THE CONSUMER JOURNEY AND RETAIL MARKETING

Knowledge at Hand & CMO Brief: As AI-driven search and shopping become more influential, the implications for marketers and retailers are profound, demanding new approaches to trust, data accuracy, discoverability and optimization for agent-driven environments.



KNOWLEDGE AT HAND

AI-Driven Search and Shopping: Transforming the Consumer Journey and Retail Marketing

December 2025

Google still overwhelmingly dominates search. However, consumers are increasingly turning to AI tools at various stages of their shopping journeys, from discovery and research to product comparison and purchase.

These AI tools include universal assistants (like ChatGPT and Perplexity), retailer-native assistants (like Amazon's "Rufus" or Walmart's "Sparky") and third-party embedded assistants (such as Microsoft's "brand agents") (Marzano, 2025). Shoppers are using AI to cut through the clutter of information, narrow choices and build confidence in decisions. In fact, 77% of shoppers feel more confident in their purchase decisions with the help of AI (IAB & Talk Shoppe, 2025).

Generative artificial intelligence (GenAI) has transformed the consumer shopping journey for millions of users. However, it currently acts as a supplement to the process rather than a "end-all, be-all when it comes to buying" (Feger, 2025). This means traditional advertising and brand awareness still play a foundational role. If people are already aware of a brand, they're more likely to notice and trust it in AI-driven results as well (Feger, 2025). At the same time, as more decisions are guided by AI agents, traditional display ads may lose ground to more native, embedded recommendations and affiliate-style placements inside conversational interfaces.

Marketers must adapt to new formats where brand suggestions appear as helpful answers rather than obvious ads (Colburn & Giegerich, 2025). Ultimately, as AI's influence grows, marketers need to focus on the elements under their control, ensuring that their brand information is readily accessible, accurately presented and up to date everywhere online, because they will not always be able to control when, where or how AI algorithms surface their content (Feger, 2025; Silliman et al., 2025).

AI-Driven Search Usage Trends

GenAI search adoption is growing but remains supplementary. Nearly 80 million U.S. consumers have already tried using GenAI search engines, and that number will continue to grow (Sevilla, 2025). However, Google still overwhelmingly dominates search behavior. OpenAI's ChatGPT leads among GenAI-first platforms (with usage by roughly a quarter of U.S. adults), but Google's overall reach dwarfs all others. Over 90% of Americans across every demographic use Google, making it the single most important destination for search advertising spend (Mitchell-Wolf, 2025). In other words, brands cannot afford to deprioritize traditional SEO or search-

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SEPTEMBER 22, 2025 – JUNE 26, 2026

THE PHARMA COUNCIL FUTURE HEALTH SPOTLIGHT SERIES

“Podcasts & Spotlight Perspective Pieces: Podcast episodes 26 through 28 posted in 2025 related to Agentic AI in Health and Bias in Agentic Systems. Corresponding Spotlight Perspective Pieces and infographics published in 2025-2026.



Agentic AI			
BIAS IN AGENTIC AI	Episode #28 <i>Potential Bias in Using Agentic AI in Health Care</i>	Responsible AI is a Business Imperative	Maintaining Patient Safety During Every Phase of Agentic AI Usage
AGENTIC AI SYSTEMS	Episode #27 <i>Building Agentic AI in the Health Care Industry</i>	The Promise of AI and Agentic AI in Reimagining Pharmaceutical Research	Agentic AI Is Pioneering the Future for Healthcare and Pharmaceuticals
WHAT IS AGENTIC AI?	Episode #26: <i>Agentic AI – Part 1: What is it and – How Could it Change Health Care?</i>	Beyond the Algorithm: Why trust is the cornerstone of Agentic AI in pharma	Agentic AI is pioneering the future for healthcare and pharmaceuticals

JANUARY 6, 2026:

THE PSYCHOLOGY OF GEN A #6 – THE RULE WITHOUT THE FEELING: WHAT AI’S “MORAL REASONING” REVEALS ABOUT ITS LOGIC

Report: This sixth experiment in the Psychology of Gen AI series reveals that large language models apply a rigid, rule-driven logic when evaluating privacy scenarios—even when humans typically shift their reasoning based on framing, emotion and social context. This consistency offers value for certain analytic tasks but exposes limits for advertising research that depends on emotional nuance and context-sensitive consumer insight.



JANUARY 28, 2026:

THE PSYCHOLOGY OF GEN A #7A – SUBTLE SIGNALS, GENDERED OUTPUTS: BIAS IN GENERATIVE AI



Report: This experiment, the first phase of the seventh study in the Psychology of Gen AI series, examines whether gendered patterns can enter AI through subtle differences in how prompts are phrased. By systematically varying linguistic styles using psychologically grounded traits, the research shows that implicit, style-based, gender cues shape AI prompt construction more strongly than explicit, gender labels, with important implications for how bias may propagate upstream in AI-assisted marketing and research applications.



FEBRUARY 17, 2026:

THE PSYCHOLOGY OF GEN AI #7B – SUBTLE SIGNALS, GENDERED OUTPUTS PHASE 2: HOW GENDER CUES SHAPE AI PRODUCT RECOMMENDATIONS

Report: This second phase of the seventh study in the Psychology of Gen AI series examines how implicit and explicit gender signals affect AI-generated product recommendations, revealing systematic differences in categories, brand repetition, descriptive language and price information. The findings raise important questions for advertisers and researchers about bias, brand visibility and the growing cultural role of AI in shaping consumer norms.



APRIL 20, 2026:

THE PSYCHOLOGY OF GEN AI #8A – HOW AI DECIDES WHAT’S “BEST”: THE PSYCHOLOGY BEHIND LLM PRODUCT RECOMMENDATIONS



Report: This eighth experiment in the ongoing Psychology of Gen AI series is the first phase in a study that examines how large language models (LLMs), like ChatGPT and Claude, determine what qualifies as the “best” product—and reveals that their recommendations are far from neutral. The findings highlight important implications for brand visibility, competitive dynamics and how marketers should position their products in AI-driven environments.



MAY 26, 2026:

THE PSYCHOLOGY OF GEN AI #8B – HOW SMALL PROMPT CHANGES SHIFT AI PRODUCT RECOMMENDATIONS: DISCOVERING A BRAND'S NICHE



Report: This second phase of the eighth study in the Psychology of Gen AI series reveals that even small changes in prompt wording can significantly influence which brands appear—helping non-market dominant brands carve out visibility by aligning with specific product attributes rather than competing broadly for “best” status.



JUNE 18, 2026:

THE PSYCHOLOGY OF GEN AI #8C – WHEN AI RECOMMENDS YOUR BRAND, WHAT DOES IT SAY? HOW PROMPTS SHAPE THE STORIES AI TELLS ABOUT PRODUCTS

Report: This third phase of the eighth study on AI product recommendations examines how small changes in prompt wording alter the explanations AI systems generate around the same brand. Using ChatGPT descriptions of Arm & Hammer Advance White toothpaste across multiple, shopping-related prompts, the study reveals how AI recommendations construct different product narratives, emphasize different benefits and even introduce different caveats depending on the consumer's wording of their question.



JULY 30, 2026:

THE PSYCHOLOGY OF GEN AI #9 – THE HUMAN IN THE LOOP IS A THINKING ROLE, NOT A REVIEW STEP: WHAT AI-ASSISTED RESEARCH DESIGN REVEALS ABOUT JUDGMENT, SYNTHESIS AND METHODOLOGICAL RIGOR

Report: This ninth installment in the ARF and MSI's Psychology of Gen AI series explores how researchers and large language models can work together to develop rigorous research designs—and why human judgment remains indispensable throughout the process. By comparing multiple, AI-generated experimental designs and refining them through expert evaluation, the study demonstrates that AI is most valuable as a collaborator that expands possibilities, not as a replacement for methodological expertise.



AUGUST 6, 2026:

HOW MARKETERS ARE USING ARTIFICIAL INTELLIGENCE

Report: Drawing on two nationwide surveys of more than 200 U.S. advertisers and agencies, this ARF study explores where AI adoption stands today, which tools marketers rely on most, how organizations are validating AI outputs and the governance practices emerging as AI becomes central to marketing operations.



PRIVACY & IDENTITY RESOLUTION

JANUARY 16, 2026:

THE ARF 8TH ANNUAL PRIVACY SURVEY (2025)

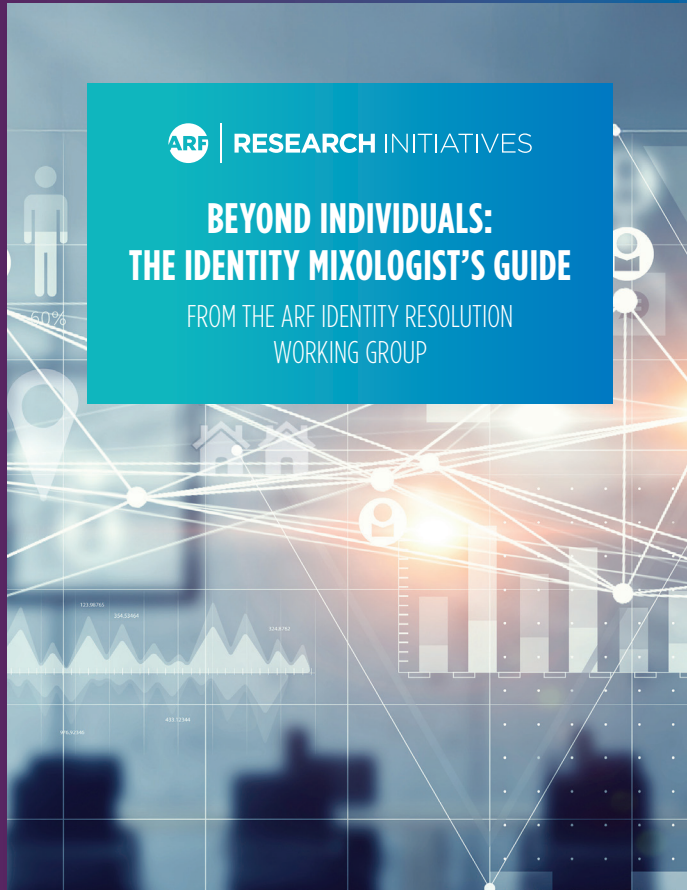
Report: The ARF's latest privacy study examines how 1,245 American consumers perceive digital privacy, data sharing, targeted advertising and artificial intelligence. The report tracks trends in privacy awareness, trust in institutions and brands, willingness to share different types of personal data and the growing role of AI—highlighting that while trust and AI adoption are rising, consumers remain highly concerned about data use and expect strong transparency and control.



MARCH 14, 2025:

BEYOND INDIVIDUALS: THE IDENTITY MIXOLOGIST'S GUIDE

Report: This guide from the [ARF Identity Resolution Working Group](#) of the ARF Cross-Platform Measurement Council explores the key considerations that need to be kept in mind when working with data sets with various units of analysis, such as households, geography and cohorts.



AUGUST 19, 2025:

DEALING WITH THE LOSS OF IDENTIFIERS: A MARKETERS GUIDE

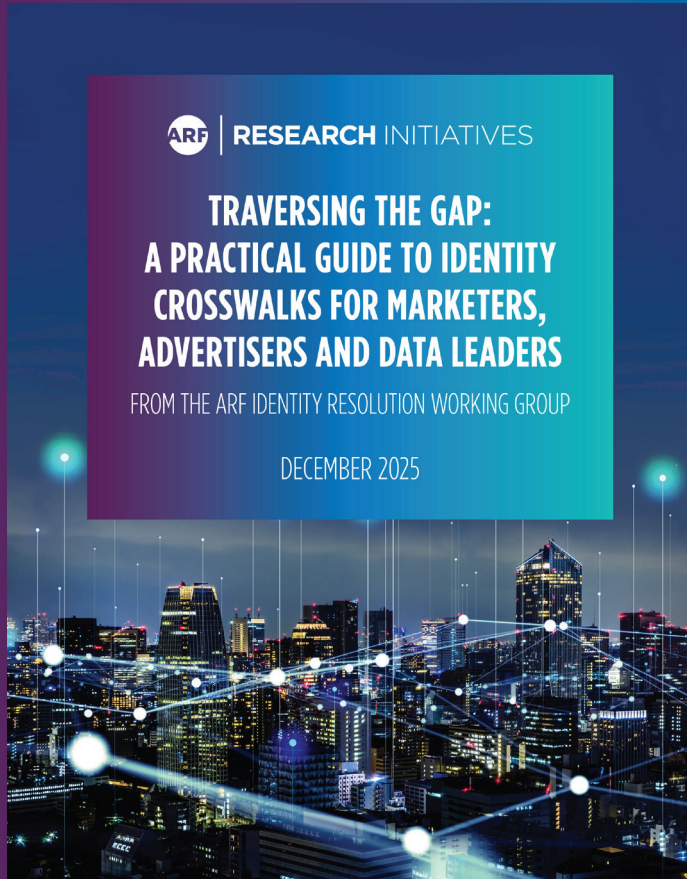
Report: This guide from the [ARF Analytics Council](#) explores how the transition to a privacy-first advertising ecosystem requires a multifaceted approach, as no single solution will fit every scenario. Different approaches will be needed for different use cases.



DECEMBER 15, 2025:

TRAVERSING THE GAP: A PRACTICAL GUIDE TO IDENTITY CROSSWALKS FOR MARKETERS, ADVERTISERS AND DATA LEADERS

Report: This white paper from the [Identity Resolution Working Group of the Cross-Platform Measurement Council](#) provides a brief practical introduction to crosswalks and how to implement them effectively.



JULY 27, 2026:

DELEGATED IDENTITY: RESOLVING THE IDENTITY GAP IN AN AI-MEDIATED ENVIRONMENT

Report: This latest paper by the Identity Resolution Working Group of the ARF Cross-Platform Measurement Council, introduces the concept of “Delegated Identity”—a framework designed to reconnect human intent with AI-driven actions in an increasingly AI-mediated marketplace. The report explores the emerging identity gap, evaluates industry readiness and outlines the challenges and opportunities facing marketers, identity providers and AI platforms.



ATTENTION

JULY 22, 2025:

ATTENTION AS A METRIC: PERSPECTIVES FROM ADVERTISERS AND AGENCIES

Report: A survey conducted among 100 advertisers and agencies on their use of attention metrics. The report explores the evolving role of attention metrics in advertising, examining their adoption, effectiveness and challenges across agencies and brand-side advertisers.





RESEARCH INITIATIVES

**THE BRAIN ON ADVERTISING:
WHY WE NOTICE, FEEL,
REMEMBER AND ACT ON ADS**

THE ARF COGNITION COUNCIL COGNITIVE
PROCESSES WORKING GROUP

MAY 2026



MAY 6, 2026:

THE BRAIN ON ADVERTISING: WHY WE NOTICE, FEEL, REMEMBER AND ACT ON ADS

Report: In this comprehensive guide to the cognitive processes that underlie responses to advertising, the Cognition Council brings together the latest academic and commercial research in neuroscience and psychology to explain how the brain responds to advertising. It highlights emerging approaches to measuring attention, emotion, memory and persuasion and explores how these cognitive processes interact to drive real-world outcomes.

JUNE 4, 2026:

ARF ATTENTION MEASUREMENT VALIDATION INITIATIVE PHASE 3

Report: What does “attention” really mean in today’s fragmented media landscape—and does more attention actually drive better results? In this report, phase three of the ARF Attention Measurement Validation Initiative, real-world campaign data reveals where attention metrics align, where they diverge and how they relate to brand lift. The findings challenge assumptions and offer a more nuanced view of how attention works across channels, platforms and outcomes.



RESEARCH INITIATIVES

ARF ATTENTION MEASUREMENT VALIDATION INITIATIVE PHASE 3

JUNE 2026



JULY 18, 2026:

GEN Z ATTENTION IN SHORT-FORM AND SOCIAL VIDEO: WHEN BRIEF EXPOSURE MATTERS

Report: This literature review examines what current research reveals about Gen Z's attention across social feeds, short-form video, creator content, streaming and emerging formats. As marketers invest more heavily in short-form and social video platforms, understanding how Gen Z allocates attention has become increasingly important. The evidence suggests that Gen Z attention is not necessarily shorter, but faster, more selective and highly dependent on platform context, creative execution and brand familiarity.

MEDIA USE & MEDIA PLANNING

JUNE 2025:

TV DECONSTRUCTED: GENERATIONAL TRENDS IN TV USAGE

Report: This [ARF DASH](#) report looks at American adults through a generational lens. Examining Boomers, Gen X, Millennials and Gen Z helps us see past traditional age splits (18-34, 35-54 and 55+) to understand more deeply the drivers behind what and how people watch.



ARF | RESEARCH INITIATIVES

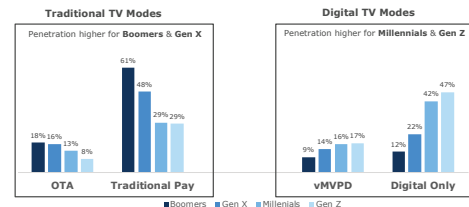
TV DECONSTRUCTED: GENERATIONAL TRENDS IN TV USAGE

June 2025

New data from the most recent full year DASH release sheds light on how Americans connect to and consume TV today and how that's changing across generations. Looking at American adults through a generational lens – as Boomers, Gen X, Millennials, and Gen Z – helps us see past traditional age splits (18-34, 35-54, and 55+) to understand more deeply the drivers behind what and how people watch.



Generations are not just age brackets, but lifestyle cohorts shaped by the technologies they grew up with and the values they share. For example, while the moms and dads of Generation X are more likely to maintain a traditional Pay TV set-up, Millennials show a decisive preference for Digital-Only TV access over traditional MVPDs and Over-The-Air, even as they become parents themselves. This dynamic isn't simply about being younger. It reflects a generational desire for on-demand, customizable content. A conventional 35-54 age break lumps late Millennials in with Gen X, masking these important differences.



Streaming services offer another look at generational impact. Ad-supported subscription streaming (AVOD) is most popular among Millennials and Gen X, the primary "parent" generations, who are balancing household budgets against the increasingly diverse programming demands of their growing families. While a purely age-based view may suggest

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RESEARCH INITIATIVES

TV DECONSTRUCTED: INSIDE HISPANIC TV VIEWING

September 2025

The ARF DASH TV Universe Study captures in detail how American households connect to and consume TV across platforms and devices. Hispanic Heritage Month and the release of the first wave of DASH 2025 offer a timely opportunity to look into the TV habits of Hispanics, a segment that now represents more than 15% of US households.

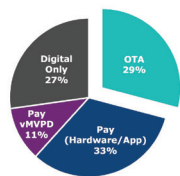
Hispanic households watch more TV genres and co-view more frequently

The composition and family orientation of Hispanic households are reflected in their TV usage. Larger and younger than the US average, Hispanics families are more likely to have children (29% vs. 21% US), and nearly half have three or more members (46% vs. 36% US). Hispanic households watch a broader range of TV genres, with 32% indicating that they typically watch 10 or more genres compared to 28% overall US, and Hispanics lean more toward family-friendly formats such as Children's/Cartoons, Game Show, and Reality TV. And TV viewing is a little less likely to be solitary: 50% of Hispanic respondents (vs. 47% overall US) report having watched TV with another household member yesterday.

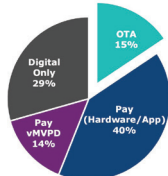
Over-the-Air reception is significant in Spanish-dominant homes

In TV reception, Hispanic households display similar trends to overall US population. The split appears when language enters the frame. Within the DASH reception framework, Spanish-dominant households are almost twice as likely to be OTA (29%) than non-Spanish-dominant households (15%). Households classified as OTA (Over-the-Air) have at least one antenna attached to a television set and do not have Pay TV access. English-dominant Hispanic households track near the market baseline. The implication is straightforward: local Spanish-language channels are a critical touchpoint for this audience.

Spanish-Dominant Homes



Non-Spanish Dominant Homes



SEPTEMBER 2025:

TV DECONSTRUCTED: INSIDE HISPANIC TV VIEWING

Report: This [ARF DASH](#) Report shows that Hispanic households watch more TV genres and co-view more frequently. The composition and family orientation of Hispanic households are reflected in their TV usage. Larger and younger than the U.S. average.



NOVEMBER 14, 2025:

THE FUTURE OF MEDIA PLANNING IN AN AI-POWERED, DATA-DRIVEN WORLD

Report: This report explores how AI, privacy-first strategies and outcome-based metrics are transforming the discipline of media planning. Designed for researchers and practitioners, the paper provides a roadmap for navigating audience fragmentation, evolving regulations and new measurement frontiers—while keeping business outcomes at the center of strategy.





JULY 22, 2025:

RETAIL MEDIA NETWORKS: NAVIGATING METRICS, CHALLENGES AND OPPORTUNITIES

Report: Leveraging first-party data, RMNs enable targeted, measurable campaigns across retailers' ecosystems, opening a unique blend of performance-driven and brand-building opportunities. Learn about this emerging channel, including the commonalities and differences in how they are being used between advertisers and agencies, in this deep dive into RMNs.

JUNE 18, 2025:

WOW, THE WIT AND WISDOM OF ERWIN EPHRON

eBook: This 2nd edition eBook tribute to Erwin Ephron, compiled by the ARF, revives over 150 of his iconic newsletters—each reinterpreted through a modern lens using AI. Known as the “father of recency theory,” Erwin championed simple truths in media and advertising, transforming industry paradigms. His timeless observations, from reach versus frequency to engagement confusion, remain strikingly relevant in today’s digital, data-heavy marketing landscape.





KNOWLEDGE AT HAND

Content Discovery in the Streaming Era

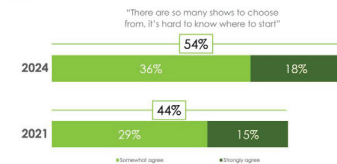
July 2025

Content discovery has become a critical issue in today's media landscape due to the sheer volume of content and fragmentation from the wide array of platforms available. Streaming services have added an unprecedented breadth of choice. As of early 2025, there were about 1.7 million TV shows, episodes and movies available across global SVOD platforms, far more than any person could watch in a lifetime (Gracenote, 2025). The explosion of Free Ad-Supported TV (FAST) options add to this complexity. Audiences can access more than 1,600 FAST channels, broadcasting over 178,000 programs (Gracenote, 2025). With so much content scattered across numerous apps and channels, viewers increasingly struggle to find something to watch or to locate the content they are interested in.

Despite excitement about the increasing quality and choice of content, most viewers continue to struggle with finding something appealing due to the overwhelming abundance of options (Hub Entertainment Research, 2024). In practical terms, content discovery now directly impacts business outcomes for media companies. If audiences feel lost or overwhelmed, they disengage. Nearly half of streaming subscribers (48%) report having canceled a service because they "couldn't find something to watch" (Jain, 2023). In fact, ease of finding content has become just as crucial as the price, when it comes to whether consumers keep or cancel subscriptions (Jain, 2023). Solving the discovery dilemma is essential for retaining audiences in an era of limitless choices and intense competition.

Consumer Content Discovery Challenges and Behaviors

THERE ARE TOO MANY SHOWS TO MANAGE



(Hub Entertainment, 2024)

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JULY 24, 2025:

ARF KNOWLEDGE AT HAND: CONTENT DISCOVERY IN THE STREAMING ERA

Knowledge at Hand & CMO Brief: This ARF Knowledge at Hand report explores how fragmentation, option fatigue and algorithmic shortcomings affect content discovery and what media organizations are doing to reduce discovery friction and retain (even grow) engagement.



SEPTEMBER 23, 2025:

ARF KNOWLEDGE AT HAND: WEARIN & WEAROUT: THE LATEST RESEARCH

Knowledge at Hand & CMO Brief: This ARF Knowledge at Hand report reviews the latest evidence and finds that while true creative wear out is less common than once assumed, it can occur under specific conditions such as heavy short-term frequency or when there is poor creative quality.



KNOWLEDGE AT HAND

Wearin and Wearout: The Latest Research

September 2025

The advertising terms wearin and wearout refer to the opposing effects of repeated ad exposure. Wearin describes the positive buildup of effectiveness as an ad is seen multiple times, whereas wearout refers to the negative decline in effectiveness when an ad is overexposed. These concepts are central to media planning and creative strategy because they inform how often an ad should run before its impact plateaus or turns negative. The classic two-factor theory holds that ad repetition first boosts effectiveness through wearin (helping the message register) but can eventually trigger wearout (boredom or irritation) (Burton et al., 2019a). Marketers worry about wearout because it impacts decisions on frequency, rotation and budgets. Too many exposures wastes spend or annoys audiences, while too few miss the benefits of reinforcement. Understanding this balance is key to maximizing ROI while avoiding audience fatigue.

Does Wearout Really Occur?

Wearout has long been a subject of debate, and recent research still cannot reach a consensus. Academic experiments continue to find that beyond a certain threshold, additional exposures can lead to diminishing returns or negative effects (e.g., Burton et al., 2019a). In addition, a long-term analysis of the famous “Got Milk?” campaign found its contributions to milk consumption eventually peaked and then turned negative after ~114 months on air, which supports campaign wear out over years (Capps & Strine, 2024).

There are also industry studies to support these findings. For example, Realeyes and TVision (2021) observed that high-performing TV ads (strong creative) began to wear out after about five exposures as measured by attention. After a few repeat viewings, attention scores dropped roughly 15 points between the 6th and 10th exposure. On the other hand, low-performing ads in that study actually improved their attention performance over the first six to 10 exposures, indicating a wearin period for weaker creative that needed time for viewers to warm up to it (Realeyes & TVision, 2021).

Likewise, a controlled CTV study by MAGNA's Media Trials unit in partnership with Nexsen, found that showing the exact same ad six times in one hour led to a spike in annoyance (+48% saying the ad was “annoying”) and a 16% drop in purchase intent compared to viewers who saw it fewer times (Magna Media Trials & Nexsen, 2023). These findings illustrate that in certain contexts, wear out effects (like increased irritation or reduced attention) are real.

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KNOWLEDGE AT HAND

Optimal Frequency in TV, CTV and Streaming

January 2026

Media planners today face the challenge of determining how often an advertisement should be shown to maximize impact without causing viewer fatigue. Recent research on television, connected TV (CTV) and streaming platforms suggests that there is no one-size-fits-all “magic number” for optimal ad frequency. Instead, the ideal frequency depends on multiple factors including: the platform or viewing environment, the timing and spacing of exposures, the creative and brand maturity and the target audience segment (MAGNA & Roku, 2023; The Trade Desk, 2023). The following report summarizes key findings from academic studies and industry reports on optimal frequency across linear TV, CTV and streaming. It highlights how frequency influences audience attention and brand outcomes and outlines best practices for frequency planning.

Optimal Frequency Levels and Ad Effectiveness

A consistent finding across studies is that moderate frequency often yields the best ad effectiveness. For example, an experimental study presented at the ARF's [2024 AUDIENCExSCIENCE](#) conference found that ad frequency around two exposures per 30-minute TV program was optimal, significantly boosting ad recognition and purchase intent compared to a single exposure (Flood & Varan, 2024). Capping exposures at two to three within a half-hour show delivered positive impacts on recognition and intent, implying diminishing returns beyond that point (Flood & Varan, 2024). Similarly, in a controlled, in-lab test of streaming TV content, FreeWheel found that capping frequency at two ads per episode allowed brands to use ad dollars efficiently without over-exposing viewers (Busch, n.d.). These results show that a small number of exposures (around two to three) in one viewing session can be beneficial, while excessive repetition in a short span risks negative outcomes.

At a weekly or campaign level, recommendations vary by source, but they reinforce moderation. The Trade Desk's research, for instance, notes that ideal weekly frequency can differ by channel, suggesting benchmarks like around six ad exposures per week for CTV (The Trade Desk, 2023). However, they emphasize that the ideal frequency is ultimately subjective and campaign-specific, depending on the product, creative, goals and ad environment. So, advertisers should optimize based on data rather than fixed rules (The Trade Desk, 2023). Industry data from Innovid showed that the average CTV campaign frequency has grown to about 7.4 impressions per viewer, up roughly 80% from two years prior (Innovid, 2024). While this suggests brands are

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JANUARY 12, 2026:

ARF KNOWLEDGE AT HAND: OPTIMAL FREQUENCY IN TV, CTV AND STREAMING

Knowledge at Hand & CMO Brief: These overview reports synthesizes academic and industry findings to help media planners strike the right balance between reinforcement and wearout in today's fragmented TV landscape.



FEBRUARY 2026:

TV DECONSTRUCTED: THE STATE OF CONNECTION IN 2026

Report: This ARF DASH report highlights how U.S. households received TV content in 2025.



ARF | RESEARCH INITIATIVES

TV DECONSTRUCTED: THE STATE OF CONNECTION IN 2026

February 2026

As viewing increasingly spans traditional TV sets, connected televisions and handheld devices, the industry needs a consistent framework to understand how U.S. households receive TV content. DASH addresses this need by providing a stable, authoritative view of TV connection across households over time.

At a high level, DASH shows that TV remains broadly accessible across U.S. households, even as the ways households connect continue to evolve. Nearly all households can receive television in some form. Rather than signaling decline, shifts in access modes reflect reconfiguration, with households moving across platforms and devices while remaining within the TV ecosystem.

HHs (M)	2025 HHs (M)	US Penetration	Chg. vs. 2024 (M)
Total US	134.8	100.0%	+2.7
CTV	114.6	85.0%	+2.1
TV (Set)	124.2	92.2%	+1.1
Device-Only	8.8	6.6%	+1.6
TV-Accessible	133.1	98.7%	+2.7

Shaded cells: Statistically significant difference in penetration from previous year

DASH organizes this complexity into four distinct but complementary TV universes. Streaming-capable or connected TV (CTV) households include any household with at least one Smart TV, connected media device or video-capable device. TV (Set) households are defined as those owning at least one television set. (This universe, typically referred to as TV Households, is the traditional basis of audience measurement). Device-only households receive TV content through streaming services, FAST channels or virtual MVPDs without owning a TV set. Together, these two groups form the TV-Accessible universe. These definitions provide a common language for describing how households connect to TV today.

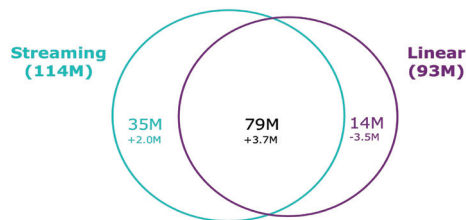
TV DECONSTRUCTED: UNDERSTANDING THE AD-REACHABLE UNIVERSE

February 2026

The rapid evolution of television since the pandemic has broadened the ways households can access ad-supported content, while making the size and shape of the reachable TV audience harder to see. Linear and streaming are often discussed as competing ecosystems, but in practice they overlap extensively. The ARF's DASH TV Universe Study provides a lens to define, size and understand the full ad-reachable universe across today's TV landscape.

The latest DASH data show that ad-based streaming now reaches approximately 114 million U.S. households. Of these, about 35 million are streaming-only and therefore uniquely reachable through streaming advertising. Linear television continues to play a distinct role, reaching roughly 14 million households that do not participate in streaming at all. Taken together, linear and ad-based streaming account for nearly 95 percent of U.S. households, reinforcing that TV remains a near-universal advertising medium.

Ad-Reachable Audiences 2025 (vs. 2024)



Overlap between linear and streaming is not static. Year-over-year analysis indicates that penetration of linear-only households declined by nearly three percentage points, while the share of households maintaining both linear and streaming increased. This pattern suggests that, for most households, streaming adoption is additive rather than substitutive. Linear services are being complemented, not immediately replaced, as viewing behavior evolves.

FEBRUARY 2026:

TV DECONSTRUCTED: UNDERSTANDING THE AD-REACHABLE UNIVERSE

Report: This ARF DASH report provides an overview of the full ad-reachable universe across today's TV landscape.



APRIL 2026:

TV DECONSTRUCTED: ADULTS 50+ IN A CONVERGED TV LANDSCAPE

Report: This ARF DASH report shares insights into the 50+ segment, who are a valuable target, driven in part by their high discretionary income.



ARF | RESEARCH INITIATIVES

TV DECONSTRUCTED: ADULTS 50+ IN A CONVERGED TV LANDSCAPE

April 2026

As the Upfronts approach, Adults 18-49 remains the traditional foundation of media planning. Increasingly, however, advertisers are placing greater emphasis on households headed by adults 50+, driven in part by their high discretionary income.

The 50+ segment has long been associated with linear television, shaping how it is valued and transacted in the Upfront marketplace. But as the TV ecosystem evolves, so too does the way 50+ households access TV content.

Data from the ARF's DASH TV Universe Study makes clear that the key question for advertisers is not whether 50+ households are linear or streaming – most are both – but how their patterns of access have shifted, and how those shifts compare to their younger counterparts.

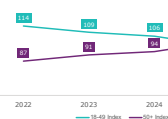
Streaming Adoption Among 50+ Is Accelerating

Over the past several years, households headed by adults 50+ have meaningfully increased their adoption of streaming, including services that deliver linear content.

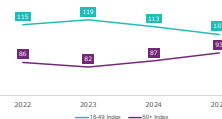
Use of virtual MVPDs (vMVPDs), which stream linear programming, illustrates this shift most clearly. Over the past four years, the index of vMVPD adoption among 50+ households – reflecting their relative representation among all vMVPD households – rose from a below-average 87 in 2022 to a slightly above-average 102 in 2025, surpassing that of 18-49 households.

A similar pattern is seen in ad-supported subscription streaming (AVODs). While 50+ households have not yet surpassed younger households in this category, 50+ adoption has increased steadily since 2022, narrowing the gap over time. While longitudinal data for FAST services is less robust, directional trends suggest a similar pattern of adoption.

vMVPD Households by Age and Index to Population



AVOD Households by Age and Index to Population



DASH TV UNIVERSE STUDY

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APRIL 2, 2026:

WHEN MEDIA BECOMES COMMERCE: MEASURING THE IMPACT OF SHOPPABLE ADVERTISING

WHEN MEDIA BECOMES COMMERCE: MEASURING THE IMPACT OF SHOPPABLE ADVERTISING

BY THE ARF ATTRIBUTION WORKING GROUP OF
THE CROSS-PLATFORM MEASUREMENT COUNCIL

APRIL 2026

Report: Retail Media Networks (RMNs) are central to modern advertising, but confidence in retail media measurement remains limited. This study, conducted to support the IAB and MRC standards initiative, examined 16 RMNs (including eight of the top ten by market share) through RFIs, and conducted follow-up interviews with seven of those networks to better understand their assets, capabilities and measurement practices. The report offers practical guidance for advertisers and marketers evaluating retail media investments.

MAY 10, 2026:

ARF KNOWLEDGE AT HAND: THE VALUE AND IMPACT OF SPORTS MARKETING

Knowledge at Hand & CMO Brief: These overview reports explore how different sports deliver distinct value for brands and why the most effective strategies go beyond media buys to create connected, cross-platform fan experiences that drive engagement and business results.



KNOWLEDGE AT HAND

The Value and Impact of Sports Marketing

May 2026



Live Sports Still Offers Scale and Engagement

Live sports can still draw large, attentive audiences in an increasingly fragmented marketplace. It has “never been more valuable” because it reaches large, diverse, upscale and passionate audiences while continuing to set ratings records, despite broader shifts in TV viewing (Coletti, 2024). More broadly, major sporting events function as cultural moments where brands can connect with engaged audiences, capture attention at scale and tap into the camaraderie and heightened emotional state that surrounds shared experiences (Jones, 2026). Sports increasingly serve as a “cultural anchor” for fragmented audiences, a point reinforced by the fact that sports programming accounted for almost 30% of ad-supported TV viewing in Q4 of 2025 (Hughes, 2026). Recent viewership across major sports properties underscores this value.

The Milano Cortina Winter Olympics delivered the strongest Winter Olympics audience in more than a decade, with 23.5 million U.S. viewers, showing how live sports can still deliver scale with streaming amplifying reach (Goldman, 2026). Super Bowl 60 averaged 124.9 million viewers, making it the second-most-watched program in U.S. history, while the NBA All-Star Game drew 8.8 million viewers, its highest audience in 15 years (Goldman, 2026).

March Madness is also becoming an increasingly important investment for advertisers seeking massive, live, sports audiences. The 2025 NCAA men’s tournament posted its highest viewership through the second round since 1993, while growth in the women’s tournament is creating access to both established and emerging audiences (Jones, 2026). The women’s tournament is especially important as interest in women’s sports accelerates, with ads during women’s sporting events generating 40% greater consumer engagement than the average, primetime TV ad, according to EDO (Jones, 2026).

In addition, the upcoming FIFA Club World Cup 26™ is expected to offer one of the largest global reach opportunities in sports. FIFA is reportedly projecting up to six

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TV DECONSTRUCTED: NEW LIFE FOR LINEAR?

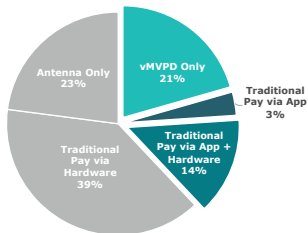
June 2026

The line between linear and streaming television is getting increasingly harder to draw. [Previous TV Deconstructed reporting](#) has shown that most households are now reachable through both linear and ad-supported streaming, making the overlap between the two a central part of the TV landscape.

Although linear television is still often associated with traditional delivery through cable, satellite or telecom hardware, households are increasingly accessing linear channels through virtual MVPDs and provider apps on connected TV sets. In practical terms, many households are still watching linear TV, but doing so via streaming.

DASH shows that nearly 40% of linear audiences now access linear TV through some form of streaming. That share is up 2 p.p. from last year, reinforcing that the change is not just conceptual. Linear access is being reconfigured around apps, connected devices and streaming-native services.

Modes of Linear Access



This dynamic raises a natural question for advertisers: Is streamed linear simply preserving the traditional linear audience, or is it helping linear reach a broader set of households?

JUNE 2026:

TV DECONSTRUCTED: NEW LIFE FOR LINEAR?

Report: This ARF DASH report provides the latest data on linear households, including modes of linear access, demographics and vMVPD adoption rates.



JUNE 9, 2026:

THE ARF RETAIL MEDIA NETWORK STANDARDIZATION PROJECT: CAPABILITIES, METRICS AND PRACTICAL GUIDELINES

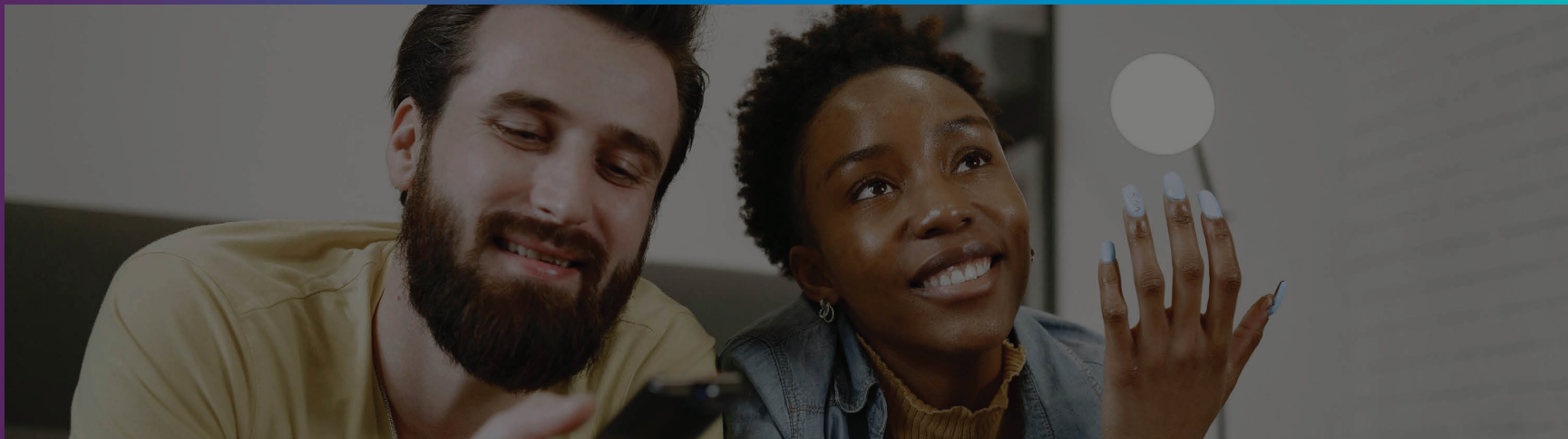
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AUGUST 24, 2026:

BEYOND FREQUENCY CAPS: RETHINKING ADVERTISING EFFECTIVENESS

Video Podcast: Drawing on attention research, psychology and neuroscience, members of the ARF Cognition Council discuss why impressions should not be treated as equivalent to attention, how repetition affects learning and memory, the balance between habituation and novelty, and the roles of culture and context in advertising effectiveness.



ADVERTISING, MARKETING & BRANDING STRATEGIES

JANUARY 16, 2025:

UNPACKING AD EFFECTIVENESS: THE ROLES OF MEDIA, CREATIVITY, BRANDING, TARGETING AND PREMIUM VS. UGC CONTENT

Report: The study confirms key findings from prior research, such as the importance of media platforms (with podcasts and TV excelling in recall), high-quality creative improving sentiment and targeted advertising enhancing engagement. It also supports the role of digital UGC in driving purchase intent due to its relatability.



RESEARCH INITIATIVES

**UNPACKING AD EFFECTIVENESS:
THE ROLES OF MEDIA, CREATIVITY,
BRANDING, TARGETING AND
PREMIUM VS. UGC CONTENT**

DECEMBER 23, 2025:

DEFYING GRAVITY: AN ANALYSIS OF LONG-TERM BRAND STRENGTH

Report: Based on two decades of Brand Asset Valuator (BAV) data and a complementary custom study, this [ARF Cognition Council](#) report examines why some brands maintain strength over long periods while most decline. The research identifies differentiation, consistency, cultural relevance and sustained visibility as critical drivers of long-term brand resilience in the face of market and consumer change.



JUNE 3, 2025:

CONSUMER BEHAVIOR IN TIMES OF UNCERTAINTY: INSIGHTS FOR BRAND STRATEGY

Report & Knowledge at Hand: For brands, volatility poses undeniable challenges but also potential opportunities. History shows that strong brands are capable of not only surviving upheaval but even thriving during crises. This report explores enduring behavioral patterns, recent shifts in consumer expectations and actionable strategies for marketers to sustain trust and relevance in volatile times.



KNOWLEDGE AT HAND

Consumer Behavior in Times of Uncertainty: Insights for Brand Strategy

June 2025

In an era marked by continuous disruptions—economic instability, political upheavals, global health crisis and environmental challenges—understanding consumer behavior during uncertain times is crucial for marketers. This Knowledge at Hand summarizes essential behavioral insights and offers actionable brand strategies drawn from historical patterns and recent shifts in consumer expectations. By recognizing the psychological roots of consumer uncertainty and adapting strategically with empathy, agility and authenticity, brands can navigate volatility effectively and build enduring trust and loyalty among their customers.

Understanding Consumer Uncertainty

Consumer uncertainty refers to a perceived ambiguity in one's environment—be it financial, health or social—that makes decisions feel riskier and less confident (Mitchell, 1999). In today's world, overlapping crises (economic instability, political conflict, global health threats, environmental challenges) have created a "constant backdrop" of volatility (Erdem, 2023). Experts note that uncertainty has effectively become a *new normal*, with consumers and businesses alike finding it difficult to plan ahead. Surveys indicate that two-thirds of consumers hold pessimistic expectations about economic conditions, prompting cautious spending habits and prioritization of essentials (Institute for Social Research, 2025; Dahlhoff, 2025). Consumers seek familiar and trusted brands for emotional reassurance (Edelman, 2020; Murphy et al., 2020), underscoring that uncertainty triggers psychological needs beyond mere economic considerations.

Psychologically, uncertainty leads to cognitive overload, prompting reliance on heuristics and familiar choices rather than detailed product comparisons (Murphy et al., 2020; Cutten & Cousins, 2021). Emotionally, heightened anxiety creates a yearning for stability and support. People want to feel that something solid is "on their side" when everything else feels shaky. Indeed, nearly half of consumers say that in periods of instability they actively look to brands for reassurance and hope—e.g., practical help to boost financial confidence, solutions to immediate problems or even a hopeful vision for the future (Oberlin et al., n.d.). Additionally, loss aversion—where potential losses weigh more heavily than gains—intensifies risk-averse behavior, prompting consumers to hold onto resources rather than spend (Kahneman et al., 2008). In essence, when the future is ambiguous, the default consumer instinct is caution: guard your wealth and health (Dahlhoff, 2025) and control what you can (household budgets, personal well-being) until the outlook improves.

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JUNE 16, 2025:

THE ARF METRICS SURVEY: A DEEP DIVE INTO THE PURPOSES OF METRICS ACROSS ADVERTISERS AND AGENCIES

Reports: The ARF Metrics Survey explores critical trends in advertising strategies, including budget allocation, metric usage and targeting solutions. Drawing on insights from agencies and brand-side advertisers, the findings reflect shared priorities, notable differences and challenges in evaluating and optimizing campaign performance.

The addendum report provides an in-depth analysis of how agencies and advertisers utilize key advertising metrics across various purposes, revealing shared priorities, differences in approach and emerging trends.

DECEMBER 3, 2025:

ARF KNOWLEDGE AT HAND: EXPLORING THE DRIVERS OF INFLUENCER IMPACT

Knowledge at Hand & CMO Brief: Influencer marketing continues to grow as brands increasingly rely on creators to deliver content that drives awareness, trust and purchase behavior. This ARF Knowledge at Hand report synthesizes findings across academic research, industry studies and ARF events to identify what truly drives influencer impact—and how marketers can optimize creator partnerships for effectiveness.



KNOWLEDGE AT HAND

Exploring the Drivers of Influencer Impact

November 2025



Image credit: Leonardo, 2025

As a result of positive outcomes—from increased awareness to purchases—influencer marketing has become an integral part of many media plans. Recent studies have confirmed the growing importance of influencer (or creator) marketing, primarily comprised of short videos on social media platforms, and they predict further growth. For example, most advertisers plan to increase the budget they allocate to it (WFA, 2025, WARC, 2025b).

The focus of this report is research that explores what drives influencer marketing success and how to optimize it. We have reviewed the growing body of research on factors driving influencer/creator marketing impact and their conclusions.

- The most important driver of influencer marketing success is that the creator is perceived as authentic by the target consumers. “Authenticity” is not always clearly defined, but several studies, as well as a recent event by the ARF Social Council, have explored the dimensions and drivers of perceived authenticity (e.g., Amini, 2025; Epstein et al., 2025; Ham et al., 2024; Manatt & Bhaskaran, 2024; Mulholland, 2025).

The research, detailed below under “Sources,” points to the following processes:

- If the creators’ revelations about their lifestyle, background and opinions match the viewers’ preferences, they are likely to be seen as relatable, likable and sincere (e.g., Amini, 2025; Mulholland, 2025). In addition, expertise, personal experience with the product, realistic demonstrations and synergy between the creator’s personality and the brand are seen as a sign of authenticity. If those criteria are met, a creator can be perceived as a trusted friend by viewers who then engage in parasocial interactions with the creator (e.g., Amini, 2025; Manatt & Bhaskaran, 2024).
- The research also suggests that being seen as physically attractive, stylish and “cool”—as well as having fame and notoriety—often prompt initial engagement with a creator video, but that perceived authenticity is necessary to generate parasocial interactions, trust and marketing impact (e.g., Farrell et al., 2021).

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CONSUMER & CULTURAL INSIGHTS

JANUARY 2, 2025 TO JULY 9, 2026:

CULTURAL EFFECTIVENESS COUNCIL'S CULTURECONNECT PODCAST SERIES

Episodes 32–44 explored inclusive marketing and cultural dynamics, highlighting how brands can better reach the “new American mainstream” (including women of color and Gen Z), avoid common marketing missteps and use empathy-driven strategies to expand audience understanding—alongside conversations on healthcare access and innovation, media’s role in patient outcomes, and the dynamic landscape of women in sports.

Episodes 45 to 50 examined the new luxury consumer, the 50 plus segment, Gen Alpha, the ad sales landscape, how research companies can become authentically inclusive arbiters of cultural truth and the marketing strategies for the World Cup 2026.



ANUARY 8, 2025 TO JUNE 11, 2026:

THE PHARMA COUNCIL FUTURE HEALTH SPOTLIGHT SERIES

Podcasts & Spotlight Perspective Pieces: Episode 25, related Spotlight Series Perspective piece and infographic, explored women's health, including how FemTech is posed to be a revolutionary force. Episode 29 investigated the way in which Americans interact with the healthcare industry is changing. Episode 30 focused on the influence of GLP-1s on health and wellness.²⁵



STATE OF ANALYTICS & INSIGHTS

JULY 30, 2025:

REPORT ON THE STATE OF ANALYTICS AND INSIGHTS DISCIPLINES IN 2024

Report: This is a report on the third in a series of benchmark surveys conducted by the ARF Organizational Insights Council on the evolving terrain of the analytics and insights profession. Drawing from interviews with over 400 professionals across ARF member companies, the study provides a deep dive into skill trends, structural shifts, AI adoption and sector-based investment in research and analytics.

