

AI TRUST & REVIEW

TOTAL TRUST	33%
TOTAL REVIEW	55%
INDIA TRUST	47%
INDIA REVIEW	50%
UK TRUST	35%
UK REVIEW	56%
US TRUST	34%
US REVIEW	51%
GERMANY TRUST	36%
GERMANY REVIEW	53%
FRANCE TRUST	21%
FRANCE REVIEW	63%
ITALY TRUST	25%
ITALY REVIEW	58%

AI INDUSTRY SPEND

AI CREATIVES	18000
US 1H SPEND	\$500,000,000
TOP SPEND YOY	2.6X
EUROPE SPEND YOY	2X
US AD GROWTH	16%

WORKFLOW ADOPTION

ANALYTICS	67.7%
CREATIVE	63.5%
MEDIA PLANNING	62.4%
FORECASTING	57.3%

MEASUREMENT PRIORITIES (2026 VS 2025)

ACCURACY 26	47%
ACCURACY 25	20%
EFFICIENCY 26	33%
EFFICIENCY 25	21%
TRANSPARENCY 26	31%
TRANSPARENCY 25	21%
SPEED 26	23%
SPEED 25	18%
EASE 26	22%
EASE 25	19%

GEO EFFECTIVENESS (BY COUNTRY)

TOTAL	50%
INDIA	61%
UK	55%
US	53%
GERMANY	50%
ITALY	42%
FRANCE	39%

MEASUREMENT CHALLENGES

US ACCURACY	56%
ROI CHALLENGE	28%
US ROI CHALLENGE	33%
RELIABLE ROI	15%
NO GEO	7%
GEO BUDGET +	

CONSUMER AI & TRUST

TIME SPENT
BRAND AT

Navigating the AI era:
Accuracy, outcomes, & shifting trends

2026 Annual Marketing Report

HALUCINATIONS
FAKE TITLES

MEDIA PLANNING ADOPTION (BY COUNTRY)

TOTAL
INDIA
UK
US
ITALY
GERMANY
FRANCE

DATA INFRASTRUCTURE

DAILY DATA
SAMPLE SIZE

From adoption to accuracy:

Global marketers in their AI era

Introduction

Marketing has never moved faster, and the stakes for getting it right have never been higher. AI now moves it all ahead even faster, shaping how brands plan, measure, and show up for consumers. But, speed alone won't win share.

Through each chapter in this report, we look at how AI has changed the industry, where marketers are investing, which channels are moving audiences [through the funnel](#), and why trust, in both the data and the message, matters more than ever. [From creators and social to linear TV and sports](#), explore what's driving growth and what it takes to keep pace.

Table of Contents

04 AI in advertising is the norm

06 Trust in AI is conditional on the measurement behind it

08 AI-powered media intelligence

10 Navigating the new consumer gatekeeper

16 Your next move

17 How Nielsen helps



AI in advertising is the norm

Nearly every marketer is actively incorporating artificial intelligence (AI) into their workflows. Nielsen's latest survey of 1,200 marketers across six countries found less than 2% report no AI use at all.¹

While a third of marketers around the world fully trust and act on AI-generated recommendations, the majority keep a "human in the loop." Either way, today's ad creatives aren't holding back on communicating their latest innovations in their campaigns.

In fact, AI mentions in advertising are now the norm. **Nearly 18,000 U.S. ad creatives mentioned or featured AI in just one month according to Nielsen Ad Intel.**² And six leading AI companies spent nearly half a billion dollars across channels in the market during the first half of 2026 alone—a 2.6x increase year-over-year.³ AI category spend across Europe has skyrocketed similarly: a 2x increase in the first half of 2026 alone compared to the full year of AI company spend in 2025.⁴

¹ Nielsen Annual Marketing Survey, 2026

² Nielsen Ad Intel AI, Feb 2025

³ Nielsen Ad Intel AI, 1H 2026, 1H 2025

⁴ Nielsen Ad Intel, 2025, 1H2026, France, Germany, Italy, U.K. combined

AI: The new normal in advertising

NEARLY

18K

creatives mentioning AI in just one month

2.6X

increase in top AI company ad spend year over year

2X

growth in AI company ad spend across Europe vs all of 2025, reached in just the first half of 2026

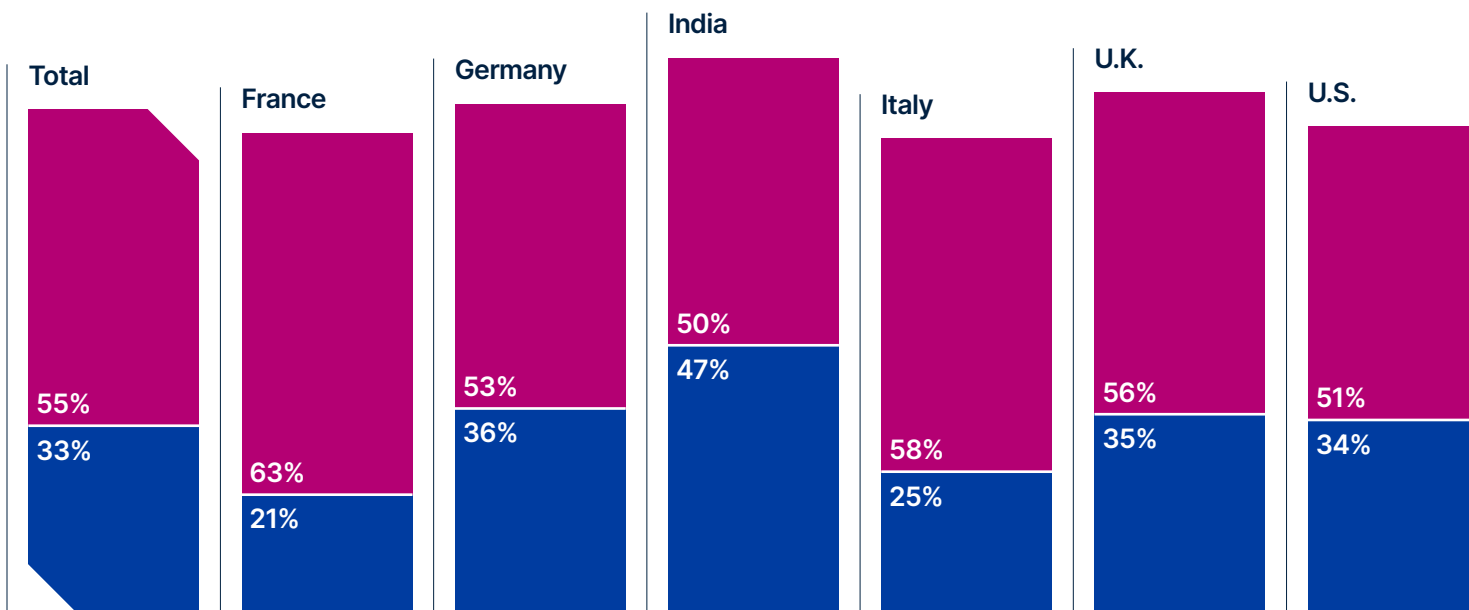
Source: Nielsen Ad Intel AI, 1H 2025, 1H 2026, U.S.; 2025 vs 1H 2026, France, Germany, Italy, U.K.

1 in 3

marketers fully trust AI-generated recommendations in their media planning, measurement, or creative decisions

Trust is high but conditional: Marketers want a human in the loop

■ Trust but require human review
■ Fully trust and act on them independently



Source: Nielsen Annual Marketing Survey, 2026

Trust in AI is conditional on the measurement behind it

For global marketers, AI workflows offer high impact solutions. But, as AI automates more decisions, marketers want proof that the systems behind those decisions are accurate.

AI is already part of nearly every marketer's day. Measurement and analytics lead the way, with almost 68% of marketers using AI there. More than three in five use it for creative production, media planning, and optimization. And 57% leverage AI for predictive forecasting. Only 1.6% of marketers aren't using AI in today's workflow.⁵

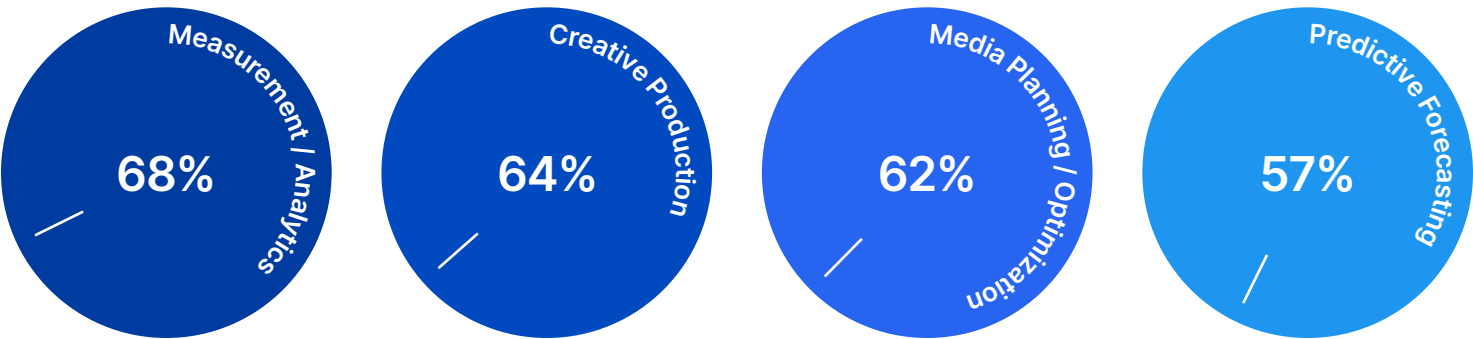
Adoption runs high in the U.S., where more than 7 out of 10 marketers are leveraging AI for measurement and analytics in particular, outpacing the average across six global markets. AI's swift and near universal implementation is solving for multiple pain points like the need for efficiency, ease of use, and speed in measurement tools.⁶

Now, the focus on accuracy is non-negotiable.

⁵ Nielsen Annual Marketing Survey, 2026
⁶ Nielsen Annual Marketing Survey, 2026



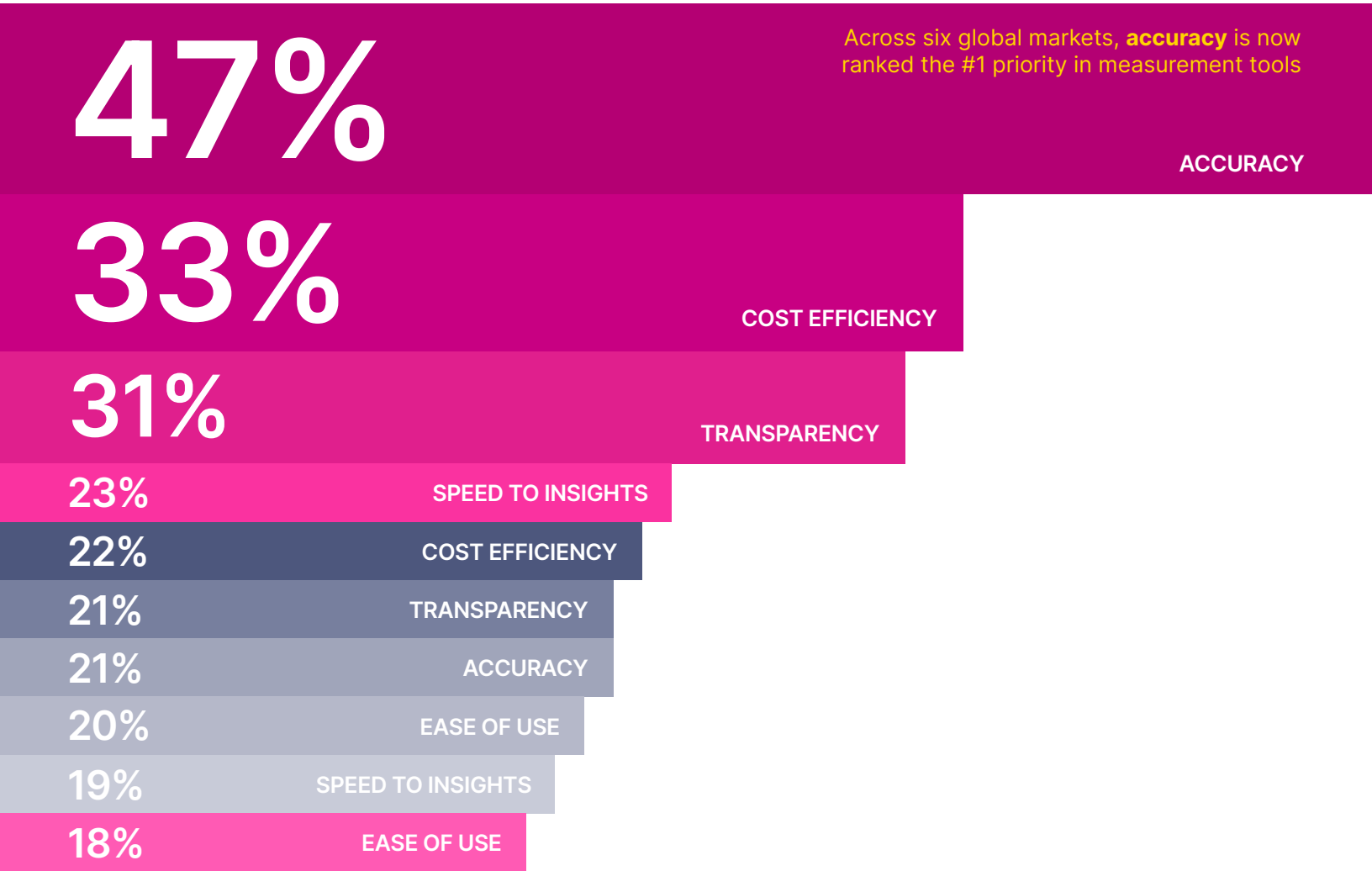
AI adoption across marketing workflows



Source: Nielsen Annual Marketing Survey, 2026

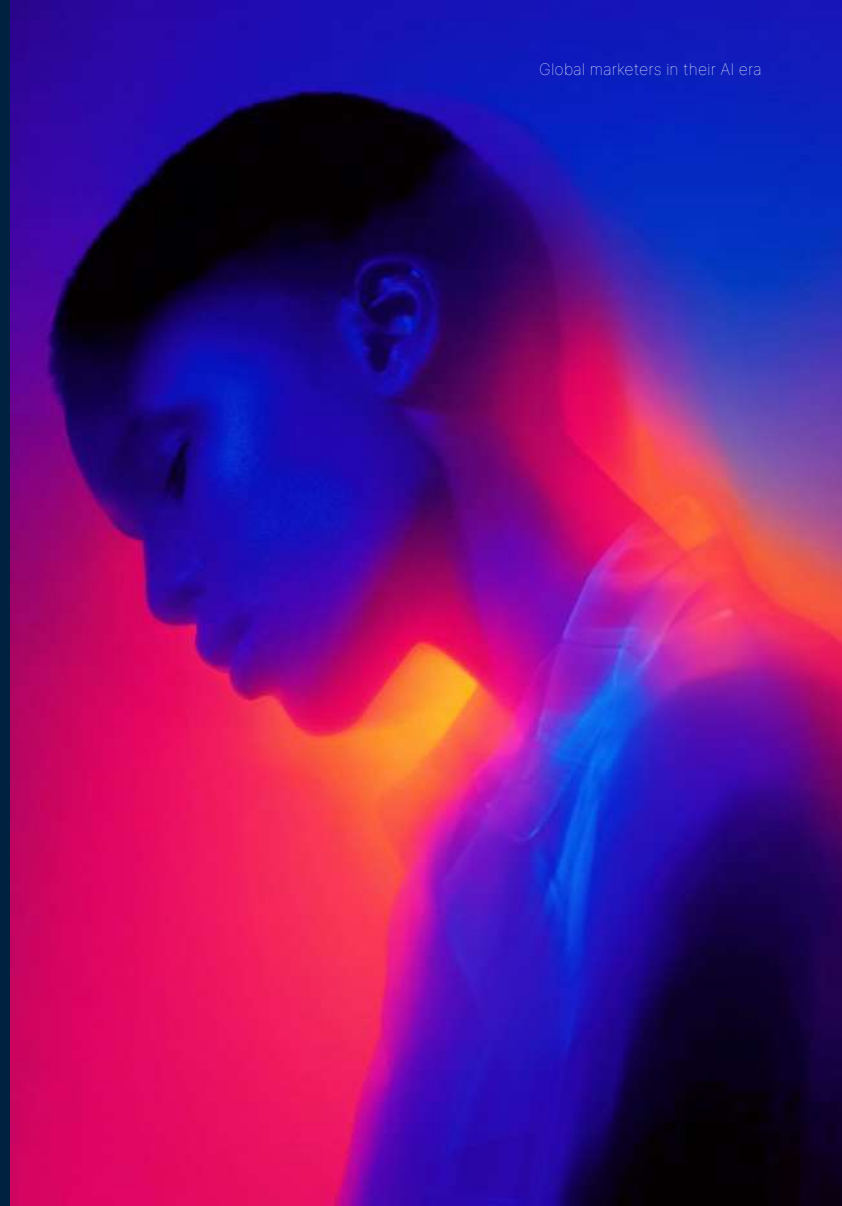
Shifts in priorities year over year

2026 2025



Source: Nielsen Annual Marketing Survey, 2026

AI-powered media intelligence



At 56%, U.S. marketers lead in prioritizing accuracy in measurement technologies.⁷ With U.S. ad spend in the first half of 2026 already outpacing the year prior by 16%, much is at stake.⁸

For international marketers, that same demand for accuracy in AI-powered measurement tools is extending into competitive intelligence. Rather than relying on volumetrics alone, Nielsen's new EMEA offering, Messaging Share of Voice (mSOV), pairs AI-driven creative categorization with ad spend data to reveal which creative themes are dominating by region, media type, and competitor.

⁷ Nielsen Annual Marketing Survey, 2026

⁸ Nielsen Ad Intel AI, 1H 2025, 1H 2026

Case Study

The power of media intelligence and AI to solve competitive blindspots | Nielsen Messaging Share of Voice (mSOV)

70% of financial services marketers leverage AI solutions in measurement and analytics, slightly outpacing marketers overall.⁹

⁹ Nielsen Annual Marketing Survey, 2026

THE CHALLENGE

55%

of financial services marketers are focused on sales lift and ROI in the year ahead¹¹

Gain a precise understanding of how competitors communicate the value proposition to key audiences of over **2K+ creatives from traditional and digital banking providers**. Can Nielsen deliver data-backed strategic positioning recommendations for the Client's Brand?

¹¹ Nielsen Annual Marketing Survey, 2026

THE SOLUTION

+12%

increase YoY in ad spend focused on Client Brand's leading competitive theme

Through AI-driven categorization, **mSOV** transformed qualitative messaging into analytical data detailing rising B2C investments, promo pricing focus and increasing competitive thematic pressure vs the prior year.

Source: Nielsen Ad Intel, January-July 2025, January-July 2024; Nielsen Messaging Share of Voice, EMEA

THE ASK

\$50M

in category ad spend under review across 6 media channels¹⁰

Uncover media spend pressure, channel splits across competitors, decode campaign target audiences, and **identify messaging themes and market shifts**.

¹⁰ Nielsen Ad Intel, France, Germany, Italy, UK



Navigating the new consumer gatekeeper



AI isn't just disrupting marketers' approach to work. Large Language Models (LLMs) have become commonplace among consumers as they discover, trust, and purchase brands. Nielsen Media Impact trends show a **47% increase in time spent with some of the top consumer-facing AI models during the first half of 2026**.¹²

In addition to new ad formats and agentic tools emerging on many of these platforms, the responses themselves hold value for marketers. Which product gets recommended during consumers' interactions and the information that influences its answers makes AI a powerful gatekeeper for brand building and purchase intent.

These consumer trends have quickly made marketer expertise on Answer Engine Optimization (AEO), Generative Engine Optimization (GEO), and other AI disciplines essential. In fact, 53% of U.S. marketers surveyed viewed GEO, or brands buying in to be discovered by LLMs and AI agents, as an effective marketing channel.¹³ Half of consumers report turning to AI for brand or product recommendations regularly.¹⁴

¹² Nielsen Media Impact, January 2026, June 2026

¹³ Nielsen Annual Marketing Survey, 2026

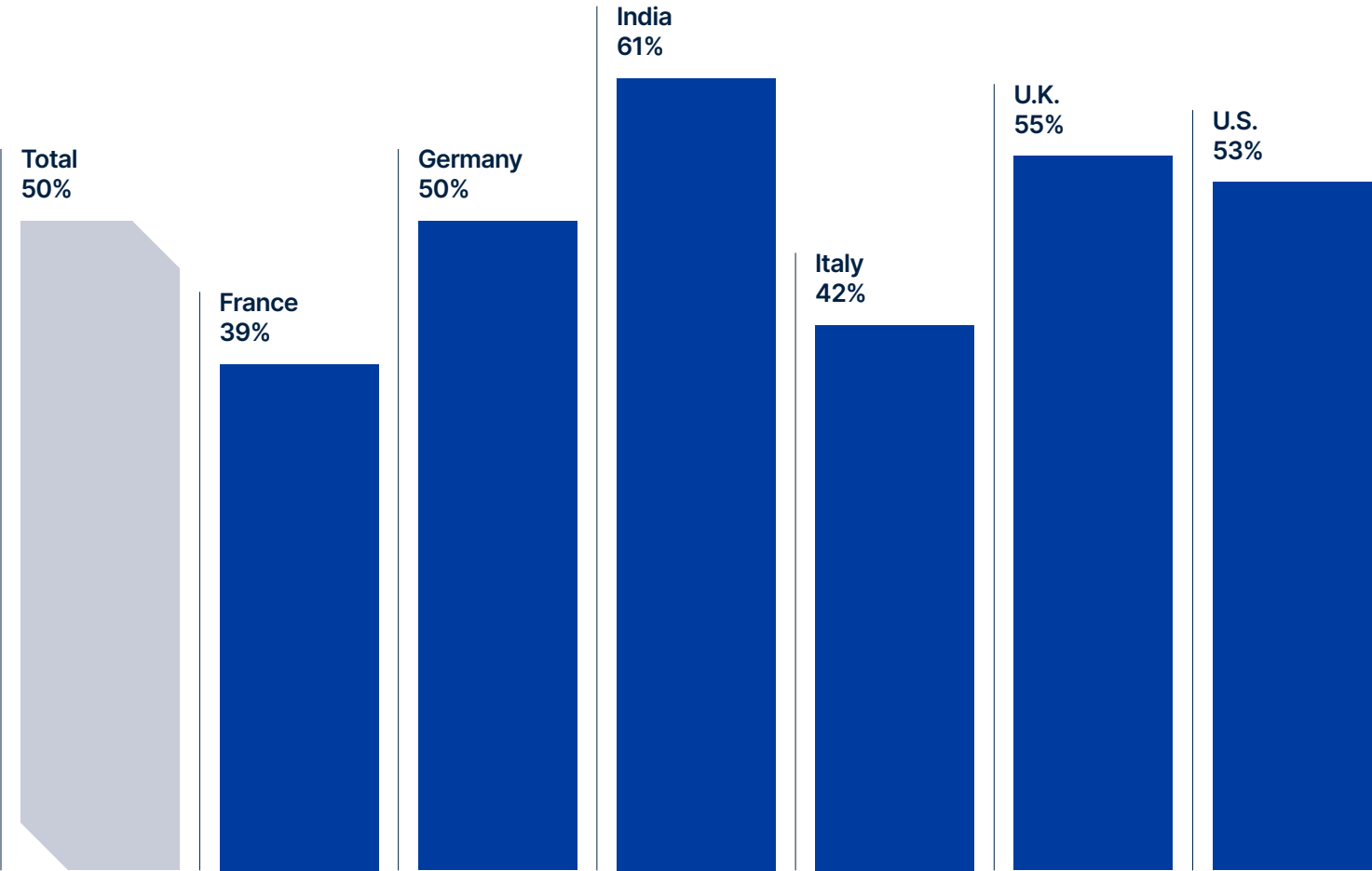
¹⁴ Nielsen Media Attitudes Study, 2026

50%

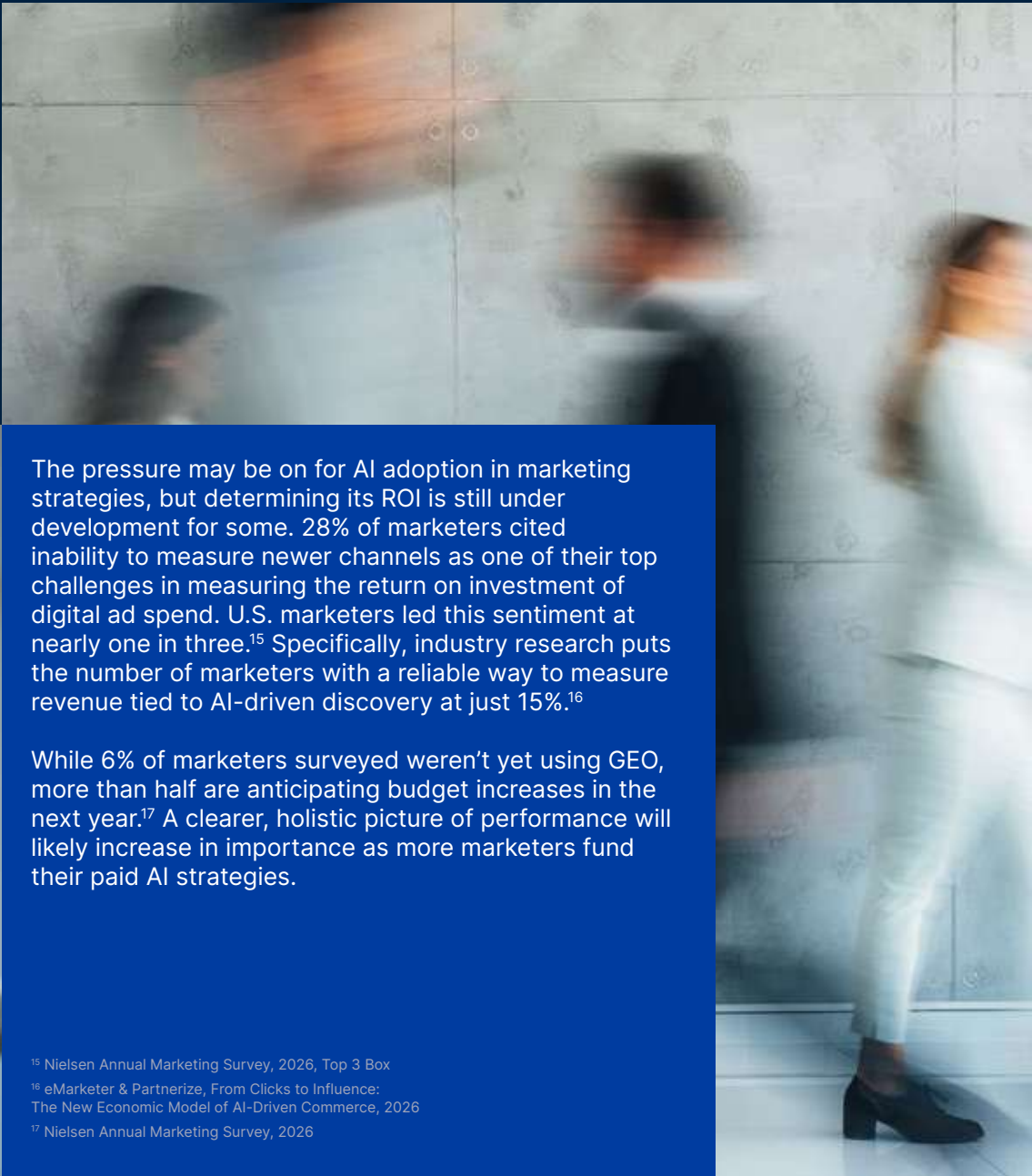
of U.S. consumers turn to AI for brand or product recommendations at least once a month.

Source: Nielsen Media Attitudes Study, 2026

Generative Engine Optimization (GEO) perceived effectiveness



Source: Nielsen Annual Marketing Survey, 2026



The pressure may be on for AI adoption in marketing strategies, but determining its ROI is still under development for some. 28% of marketers cited inability to measure newer channels as one of their top challenges in measuring the return on investment of digital ad spend. U.S. marketers led this sentiment at nearly one in three.¹⁵ Specifically, industry research puts the number of marketers with a reliable way to measure revenue tied to AI-driven discovery at just 15%.¹⁶

While 6% of marketers surveyed weren't yet using GEO, more than half are anticipating budget increases in the next year.¹⁷ A clearer, holistic picture of performance will likely increase in importance as more marketers fund their paid AI strategies.

¹⁵ Nielsen Annual Marketing Survey, 2026, Top 3 Box
¹⁶ eMarketer & Partnerize, From Clicks to Influence: The New Economic Model of AI-Driven Commerce, 2026
¹⁷ Nielsen Annual Marketing Survey, 2026

GEO BUDGET SHIFT - TOTAL
50%+ INCREASE
0-49% INCREASE
NO CHANGE
0-49% DECREASE
50%+ DECREASE
NOT APPLICABLE

12.30%
5.60%

GEO BUDGET SHIFT - FRANCE
50%+ INCREASE
0-49% INCREASE
NO CHANGE
0-49% DECREASE
50%+ DECREASE
NOT APPLICABLE

1.50%
8.50%
39.00%
38.00%
9.00%
4.00%

GEO BUDGET SHIFT - GERMANY
50%+ INCREASE
0-49% INCREASE
NO CHANGE
0-49% DECREASE
50%+ DECREASE
NOT APPLICABLE

1.00%
6.00%
41.50%
34.50%
8.50%
8.50%

GEO BUDGET SHIFT - INDIA
50%+ INCREASE
0-49% INCREASE
NO CHANGE
0-49% DECREASE
50%+ DECREASE
NOT APPLICABLE

0%
4.00%
18.00%
54.50%
20.00%
3.50%



Anticipated Generative Engine Optimization (GEO) budget shifts over the next year



Source: Nielsen Annual Marketing Survey, 2026



CONSUMER AI ADOPTION	
US CONTENT DISCOVERY	52%
MEDIA PLANNING AI ADOPTION	
TOTAL	62%
INDIA	76%
UK	67%
US	67%
ITALY	58%
GERMANY	55%
FRANCE	53%
CONSUMER AI ADOPTION	
US CONTENT DISCOVERY	52%
MEDIA PLANNING AI ADOPTION	
TOTAL	62%
INDIA	76%
UK	67%
US	67%
ITALY	58%
GERMANY	55%
FRANCE	53%
CONSUMER AI ADOPTION	
US CONTENT DISCOVERY	52%
MEDIA PLANNING AI ADOPTION	
TOTAL	62%
INDIA	76%
UK	67%
US	67%
ITALY	58%
GERMANY	55%
FRANCE	53%

AI tools are being used for consumers' brand discovery and recommendations, and are also increasingly key to audiences' **content discovery** as well. 52% of U.S. consumers reported using AI for finding content at least once a month or more, outpacing brand discovery and recommendation activity.¹⁸

Research suggests that while AI usage may be up, consumer trust is still hard to earn. **75% of people reported verifying the results that AI provides because they don't trust them.**¹⁹ **Gracenote's content intelligence**, ranging from descriptive metadata to contextual themes to schedule data, provides the foundation on which AI accuracy and performance relies. Their analysis of recommendations and details from a leading LLM without this kind of foundation revealed that the AI tool hallucinated 100% of the information for over 500 program titles.²⁰

On average, 62% of marketers are leveraging AI for media planning and optimization.²¹ Looking for contextual targeting opportunities without the right foundation behind recommendations can undermine budget investments.

¹⁸ Nielsen Media Attitudes Study, 2026

¹⁹ 2026 Gracenote generative AI usage survey

²⁰ Plot holes in AI: Why ungrounded LLMs can't fix content discovery, Gracenote, 2026

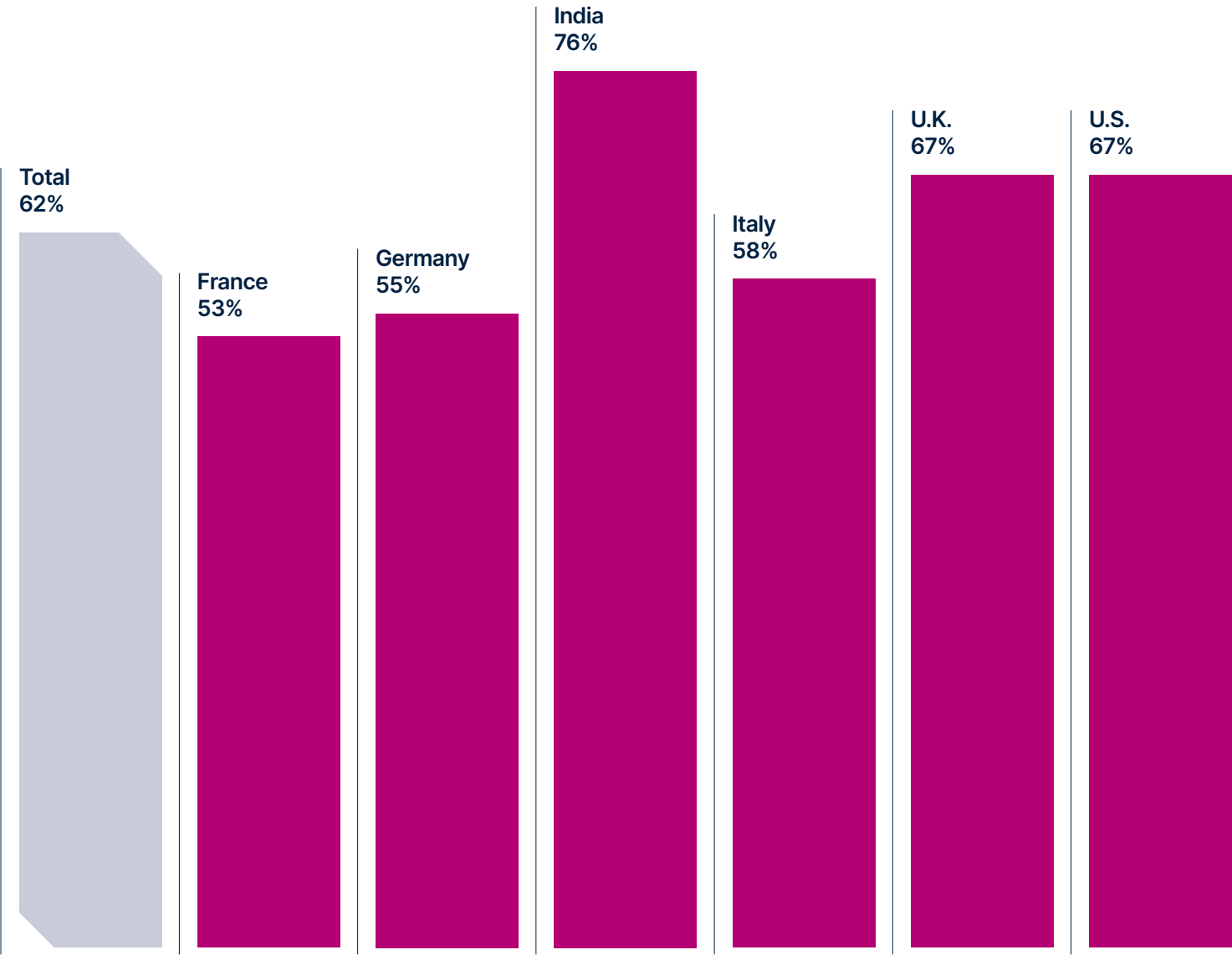
²¹ Nielsen Annual Marketing Survey, 2026

52%

of U.S. consumers use AI for content discovery once a month or more, outpacing brand discovery AI activity.

Source: Nielsen Media Attitudes Study, 2026

Marketer’s AI adoption in media planning



Source: Nielsen Media Attitudes Study, 2026

Your next move

Accuracy is now your best advantage. AI can speed up every decision, but only verified data at the foundation makes those decisions trustworthy. Pressure test your AI workflow and the sources it relies on.

Audit your brand assets for AI visibility.

Half of marketers call AI optimization like GEO an effective paid channel. Generative chatbots and agentic shopping tools are upending the traditional funnel as the new gatekeepers for brand authority and consumer trust. Determine whether AI can see, buy from, or recommend your brand.

Make every AI recommendation show its work.

Only 15% of marketers can connect their AI-discovery spend to ROI. Lean on trusted media intelligence as foundational in every AI decision and require any AI-generated plan to name its data sources before budget moves.

How Nielsen helps

Nielsen delivers over 100 terabytes of data to clients every day. That reliability in datasets is essential as marketers and their AI tools determine where and how to show up. **Nielsen Ad Intel AI** gives conversational, forward-looking competitive recommendations across nearly every channel and market. **Gracenote** content intelligence supplies the verified program data AI tools depend on. And **Nielsen ONE Ads & Outcomes** turns independently verified campaign performance data into actionable intelligence.

Ready to make your next move?

Let's talk

About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future.

Nielsen operates around the world in more than 55 countries. Learn more at www.nielsen.com and connect with us on social media ([X](#), [LinkedIn](#), [YouTube](#), [Facebook](#) and [Instagram](#)).

BUILDING AND GROWING BRANDS IN THE AI ERA
REGULAR ADDITIONAL REVENUE FROM CONSUMERS

WHAT MARKETERS ARE
BRAND AWARENESS
CUSTOMER ACQUISITION
REVENUE GROWTH
CUSTOMER ADVOCACY
COMPETITOR ANALYSIS

45%
34%
29%
25%
24%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

75%
16%
9%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

21%
11%
1%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

21%
11%
1%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

11%
10%
9%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

8%
7%
7%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

6%
6%
6%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

5%
5%
5%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

10%
10%
10%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

10%
10%
10%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

10%
10%
10%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

10%
10%
10%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

10%
10%
10%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

10%
10%
10%

BUDGET CUT LOCK (NEW)
BUDGET INCREASE
FLAT / NO CHANGE
BUDGET DECREASE

10%
10%
10%

Navigating the AI era:
Accuracy, outcomes, & shifting trends

2026 Annual Marketing Report

Brand awareness, bottom line:

Strategic focus and how to measure a win

TESTING GROUND FOR PRODUCT LAUNCHES
PRIMARY DRIVER OF SALES

IMPORTANCE OF RETAIL MEDIA NETWORKS NEXT YEAR
MORE IMPORTANT (TOTAL)
SAME IMPORTANCE (TOTAL)
LESS IMPORTANT (TOTAL)

CHALLENGES IN MEASURING DIGITAL ROI
INCOMPARABLE DATA
TOO MUCH DATA
INADEQUATE MEASUREMENT TOOLS
TOO MANY VENDORS AND TOOLS
INABILITY TO MEASURE NEWER CHANNELS
UNCLEAR MARKETING KPIS
TOO MUCH EMPHASIS ON SHORT TERM
NOT ENOUGH DATA

CONSUMER REPRESENTATION & BRAND VALUES
IDENTITY MISREPRESENTATION IN ADS

Introduction

In today's **AI-powered industry**, brand leaders face the complex task of driving awareness and proving tangible business impact with consumers over more—and more disjointed—media channels than ever. This chapter explores how global marketers are balancing upper-funnel growth with performance-driven return on investment, navigating budget shifts with **audience trends**, and leveraging cross-channel intelligence to maximize campaign outcomes.

Table of Contents

04 Building and growing
brands in the AI era

10 Bridging the gap in a
fragmented media landscape

14 Brand visibility essentials & ROI

18 Brand safety's new—
and old—blind spots

20 Case Study
Visibility, precision and outcomes
with Nielsen Media Intelligence

24 Your next move

25 How Nielsen helps

Building and growing brands in the AI era

The use of artificial intelligence has redefined the work of global marketers. AI is also heavily influencing consumer behavior. 50% of U.S. consumers are using AI to discover brands or evaluate products on a regular basis.¹ And the industry is preparing to navigate another year of dynamic shifts.

With audiences spread across more screens, multitasking, and increasingly influenced by AI, global brand leaders are battling for market share, driving focus on competitive edges. Brand awareness and customer acquisition have emerged as the defining priorities for marketers heading into 2027.²

But which strategies are being deployed to achieve these goals? What are the metrics that matter to prove value? And what does Nielsen's media intelligence tell us about the most effective practices to convert consumers?

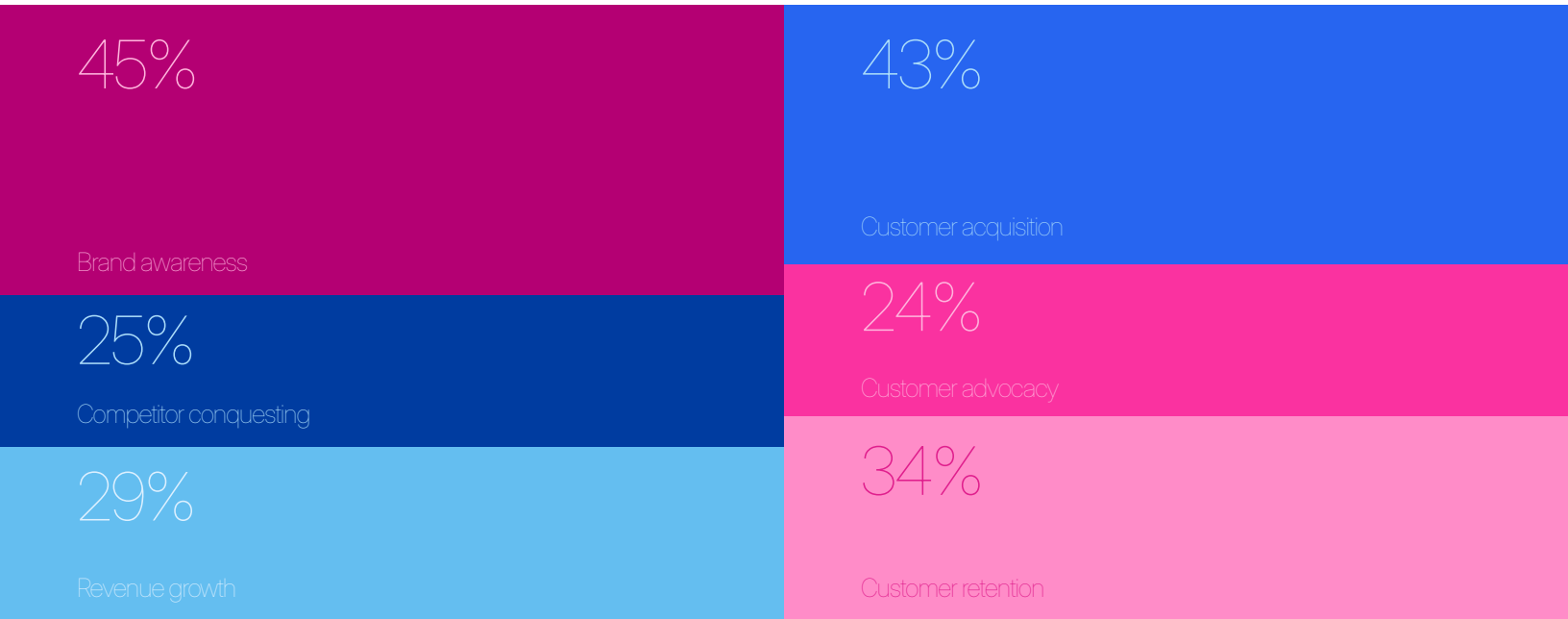


¹ Nielsen Media Attitudes Study, 2026

² Nielsen Annual Marketing Survey, 2026

What marketers are focused on

Top 2 metrics for measuring success across 6 markets



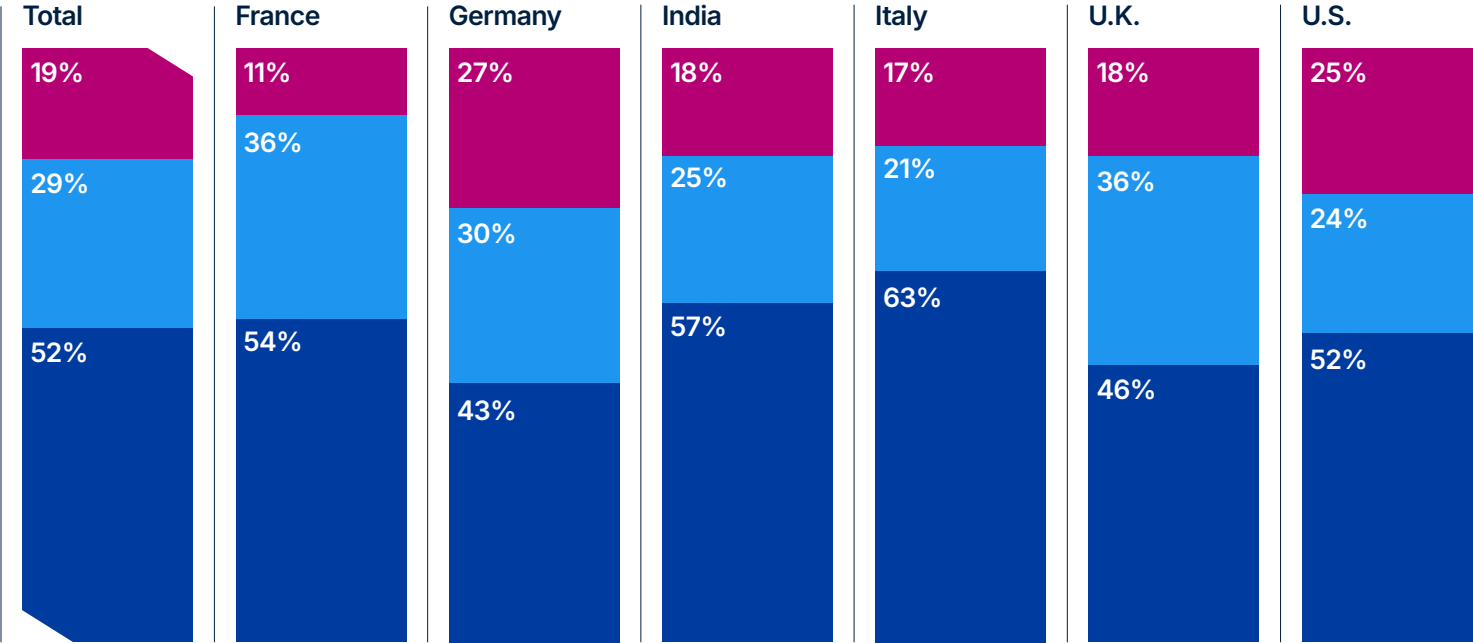
Source: Nielsen Annual Marketing Survey, 2026, France, Germany, India, Italy, U.K., U.S.

Priority outcomes over the next year

Attention & Engagement

Brand Lift Metrics

Sales Lift & ROI



Source: Nielsen Annual Marketing Survey, 2026

Building brand visibility and unlocking new customer growth, rather than simply protecting existing revenue, are key considerations across markets. Achieving those goals takes investment. On average, global marketers are optimistic on budget increases —except in the U.S.³

U.S. brand leaders are heading into 2027 with a bit more caution. Anticipated reductions in the market went from 2% to 14% in one year.⁴

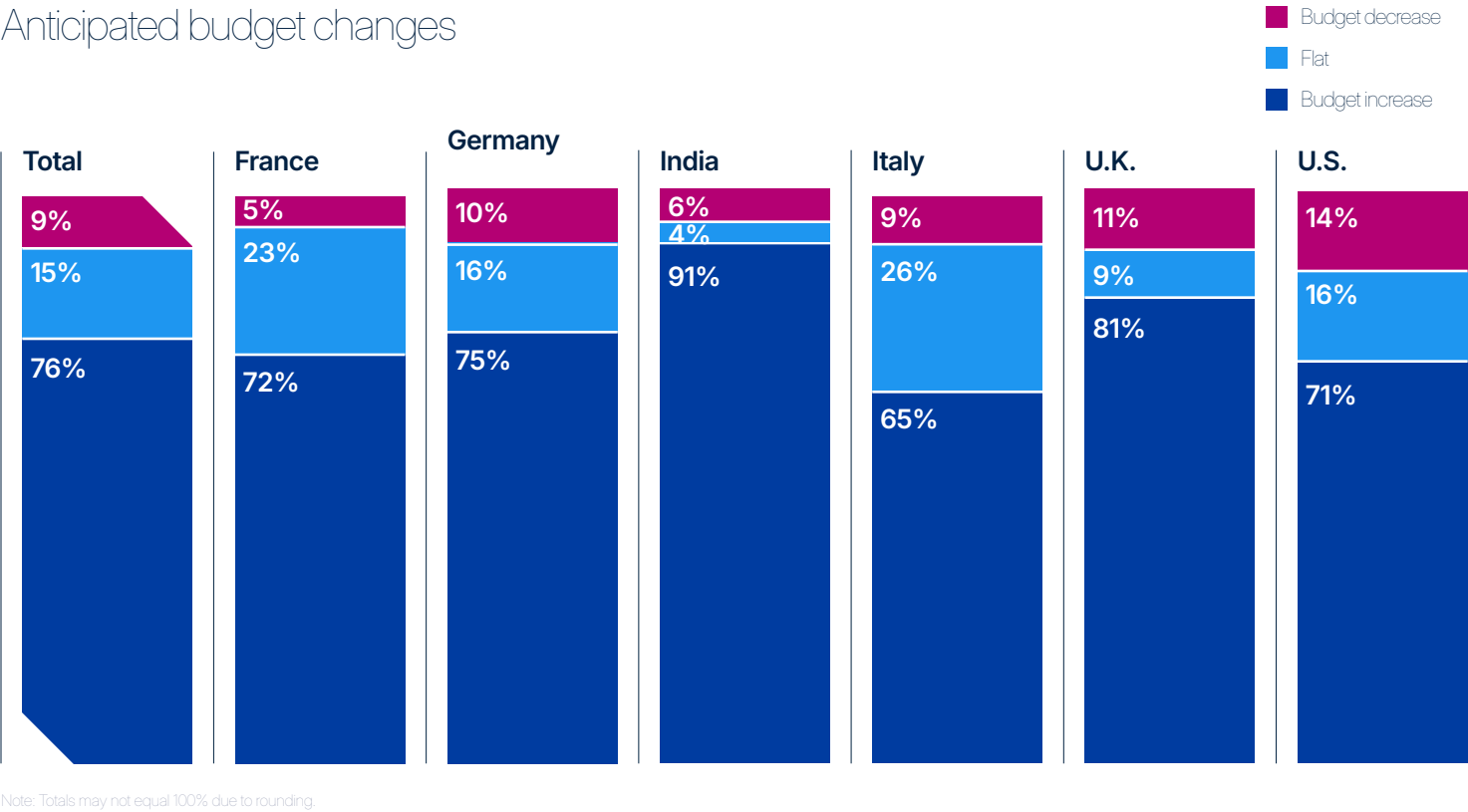
India leads in optimism and Nielsen insights show that the right channel mix is helping brands gain ground: A recent case study there found cross-screen media plans using digital and TV added between 20% and 40% incremental reach.



³ Nielsen Annual Marketing Survey, 2026

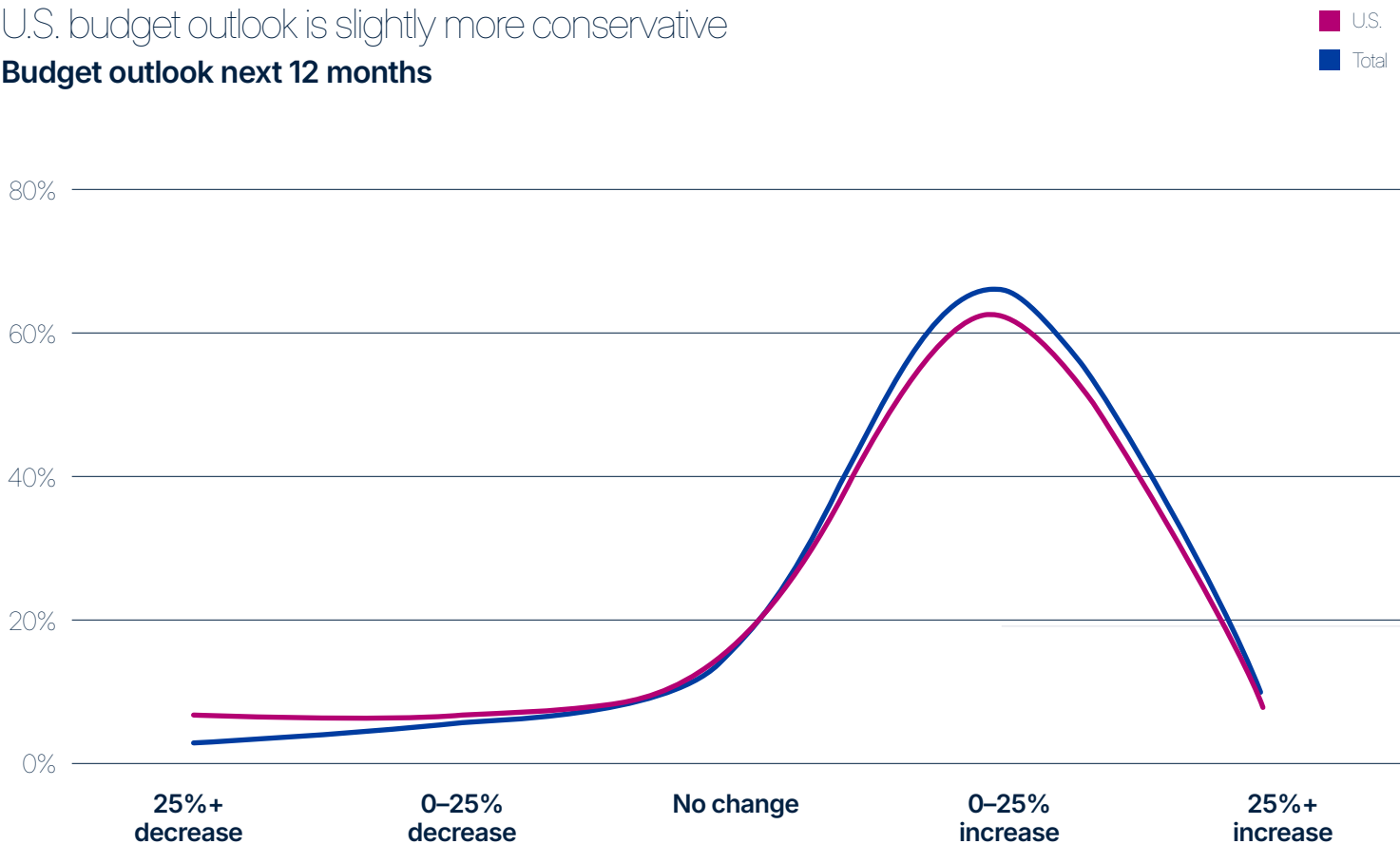
⁴ Nielsen Annual Marketing Survey, 2026

Anticipated budget changes



U.S. budget outlook is slightly more conservative

Budget outlook next 12 months



Source: Nielsen Annual Marketing Survey, 2026



PERIOD: JANUARY-AUGUST 2026

CABLE SPEND	FY2025 ≈ \$2B	YTD2026 ≈ \$3B
OVERALL SPEND	FY2025 ≈ \$57B	YTD2026 ≈ \$58B
ADVERTISING SPEND	FY2025 ≈ \$6B	YTD2026 ≈ \$9B
PRINT PAPERS SPEND	FY2025 ≈ \$11B	YTD2026 ≈ \$17B
TV SPEND	FY2025 ≈ \$13B	YTD2026 ≈ \$15B
VIDEO SPEND	FY2025 ≈ \$20B	YTD2026 ≈ \$31B
EMAIL SPEND	FY2025 ≈ \$35B	YTD2026 ≈ \$32B
SEARCH SPEND	FY2025 ≈ \$50B	YTD2026 ≈ \$31B
TOTAL SPEND	FY2025 ≈ \$162B	YTD2026 ≈ \$119B
TELEVISION SPEND	FY2025 ≈ \$209B	YTD2026 ≈ \$188B

ANTICIPATED INCREASES IN BUDGET BY CHANNEL

CROSS-COUNTRY MARKETING BUDGET GROWTH

EMAIL

FRANCE 8% | GERMANY 11% | INDIA 5%

ITALY 13% | U.K. 10% | U.S. 8%

SEARCH

FRANCE 9% | GERMANY 11% | INDIA 5%

ITALY 13% | U.K. 10% | U.S. 8%

MOBILE

FRANCE 6% | GERMANY 11% | INDIA 5%

ITALY 13% | U.K. 10% | U.S. 8%

VIDEO, ONLINE/MOBILE

FRANCE 6% | GERMANY 11% | INDIA 5%

ITALY 13% | U.K. 10% | U.S. 8%

STREAMING AUDIO

FRANCE 8% | GERMANY 11% | INDIA 5%

ITALY 13% | U.K. 10% | U.S. 8%

PODCASTS

FRANCE 9% | GERMANY 11% | INDIA 5%

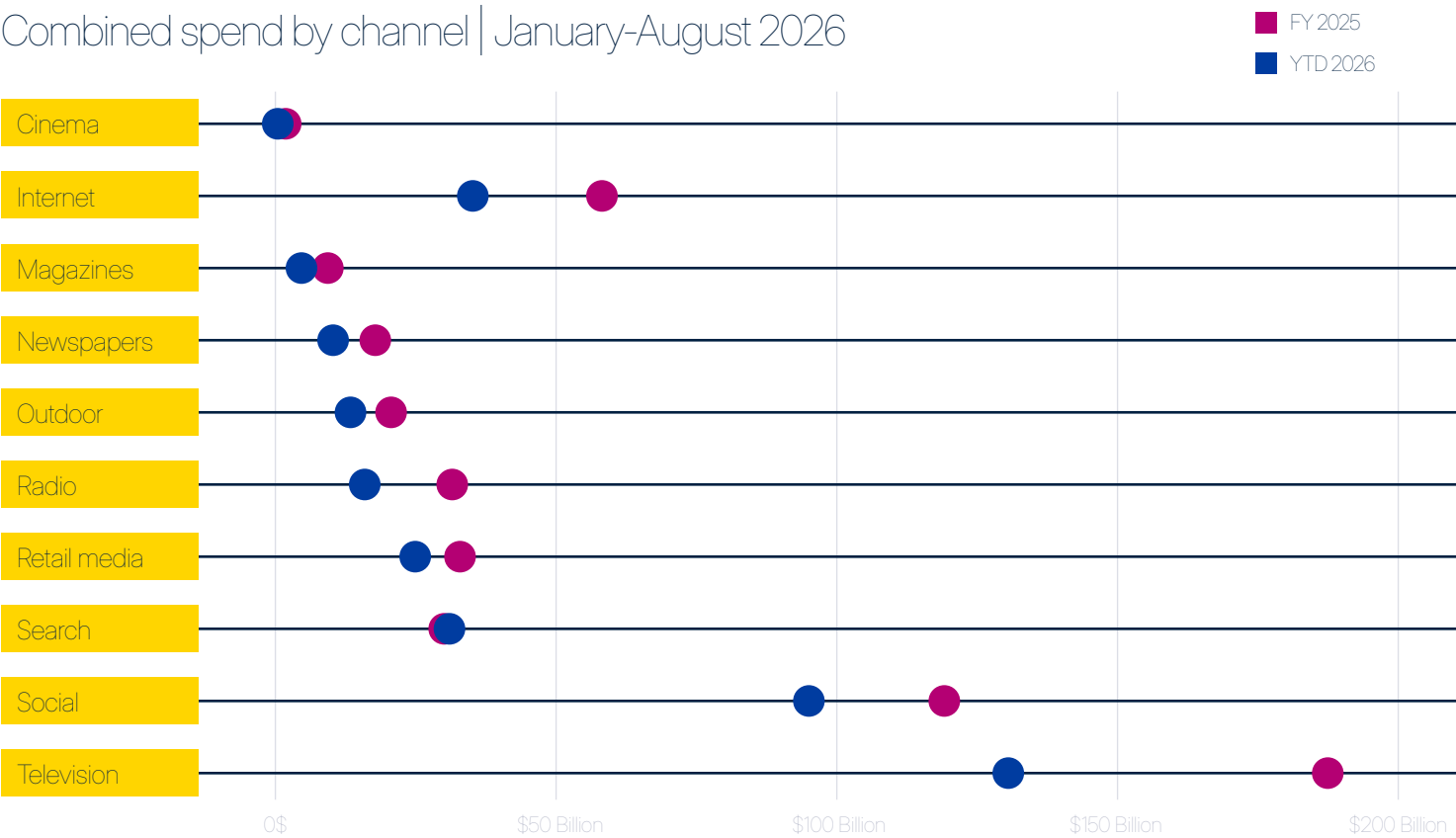
ITALY 13% | U.K. 10% | U.S. 8%

Across four of EMEAs major markets, marketers spent more than \$220 billion on advertising last year.⁵ Today nine in ten expect their budgets to hold or grow.⁶ But even with more dollars, those budgets have to stretch further, over more channels. For global players, that means more nuance and unique preferences to consider by market.

⁵ Nielsen Ad Intel, France, Germany, Italy, UK, 2025

⁶ Nielsen Annual Marketing Survey, 2026

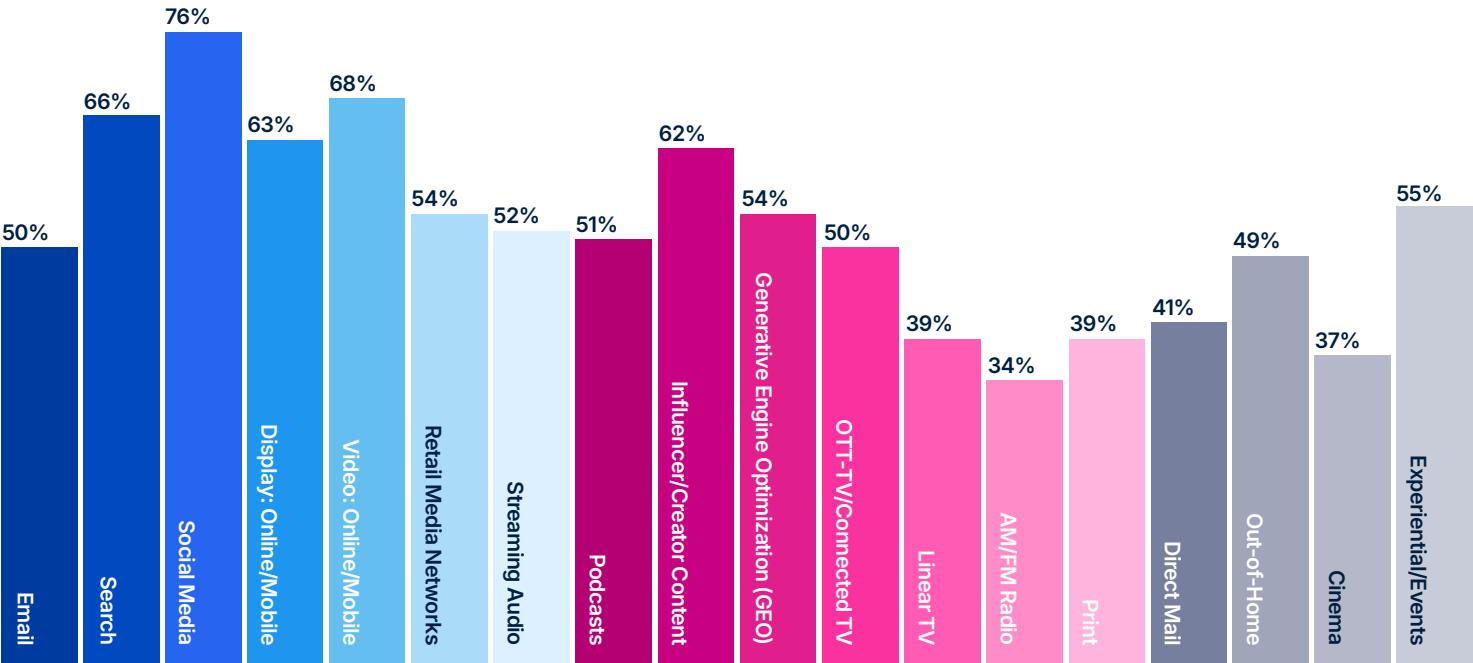




Source: Nielsen Ad Intel, France, Germany, Italy, U.K., U.S., January-August 2026

Anticipated increases in budget by channel

Share of marketers expecting to increase budget by channel



Nielsen Annual Marketing Survey, 2026

Want to explore Nielsen’s competitive advertising intelligence?

Let’s Talk

Bridging the gap in a fragmented media landscape

Driving performance with consumers requires winning attention and building awareness. 72% of marketers report either being evenly split in their strategies or favoring performance marketing.⁷ And a recent Nielsen analysis found full-funnel activation drives stronger returns. Campaigns that integrated upper and lower funnel tactics outperformed those focused solely on awareness with a **1.5x greater sales lift**.⁸

Full-funnel measurement is the dominant strategy for half of today's marketers. But a clean signal between brand exposure and buying behavior can still be a challenge. Grounded in sales lift results from hundreds of previously measured campaigns, Nielsen's media intelligence is **closing the gap** for marketers seeking a holistic view of campaign outcomes.

BRAND & PERFORMANCE STRATEGY

SOLELY BRAND-BUILDING FOCUS	11%
EVEN SPLIT: BRAND & PERFORMANCE	18%
MOSTLY BRAND, LIGHT PERFORMANCE	39%
MOSTLY PERFORMANCE, LIGHT BRAND	16%
SOLELY PERFORMANCE MARKETING	14%

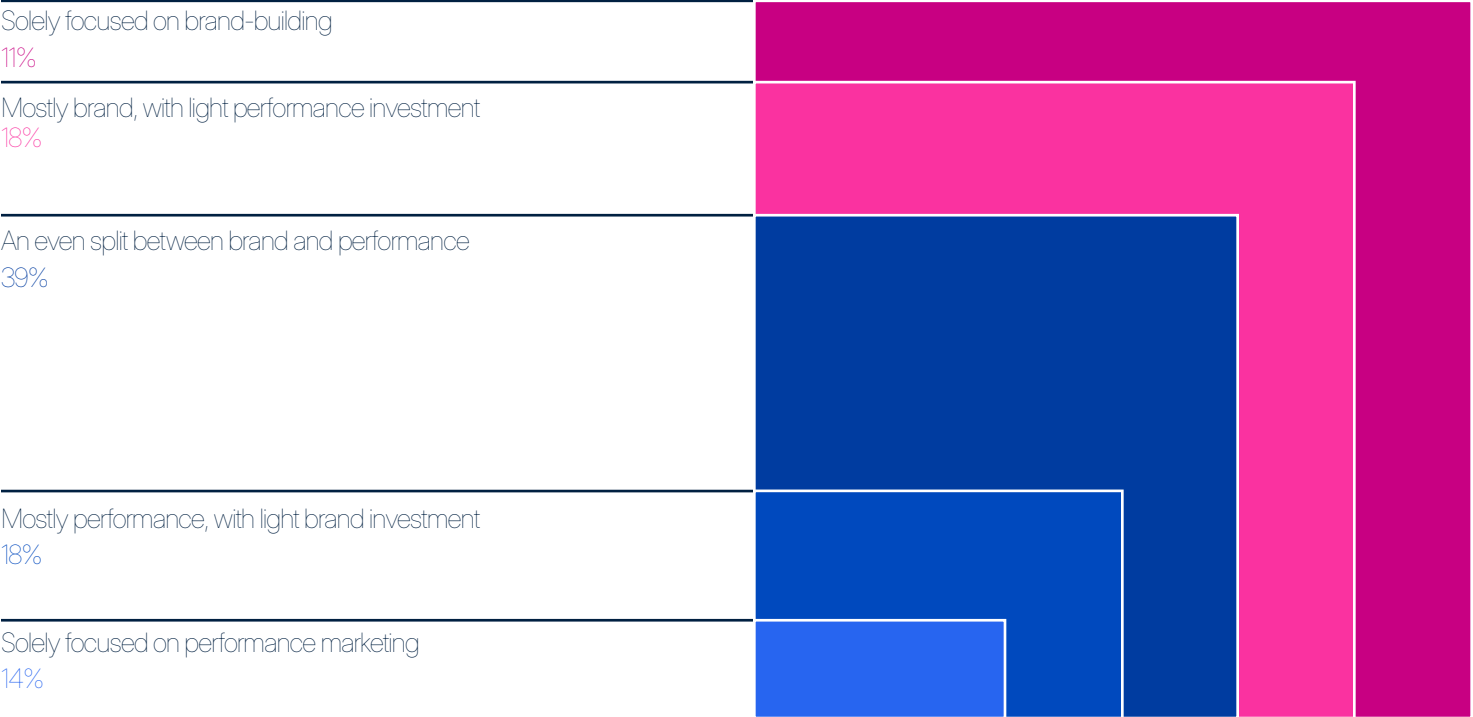
BRAND & PERFORMANCE MEASUREMENT

SEPARATE BRAND & PERFORMANCE BUDGETS	44%
SEPARATE SHORT- & LONG-TERM KPIS	43%
HYBRID / FULL-FUNNEL MEASUREMENT	49%
BUDGET REALLOCATION BY CAMPAIGN PERFORMANCE	47%

⁷ Nielsen Annual Marketing Survey, 2026

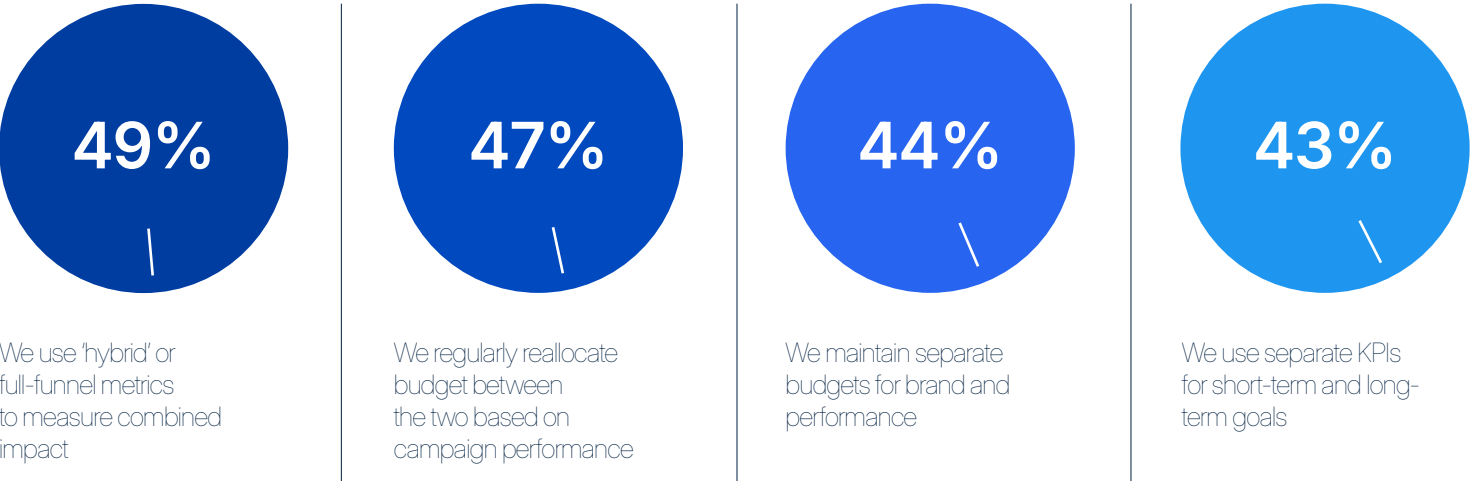
⁸ Proving Advertising Works: From Exposure to Sales Impact, 2026

Most marketers are running brand and performance together

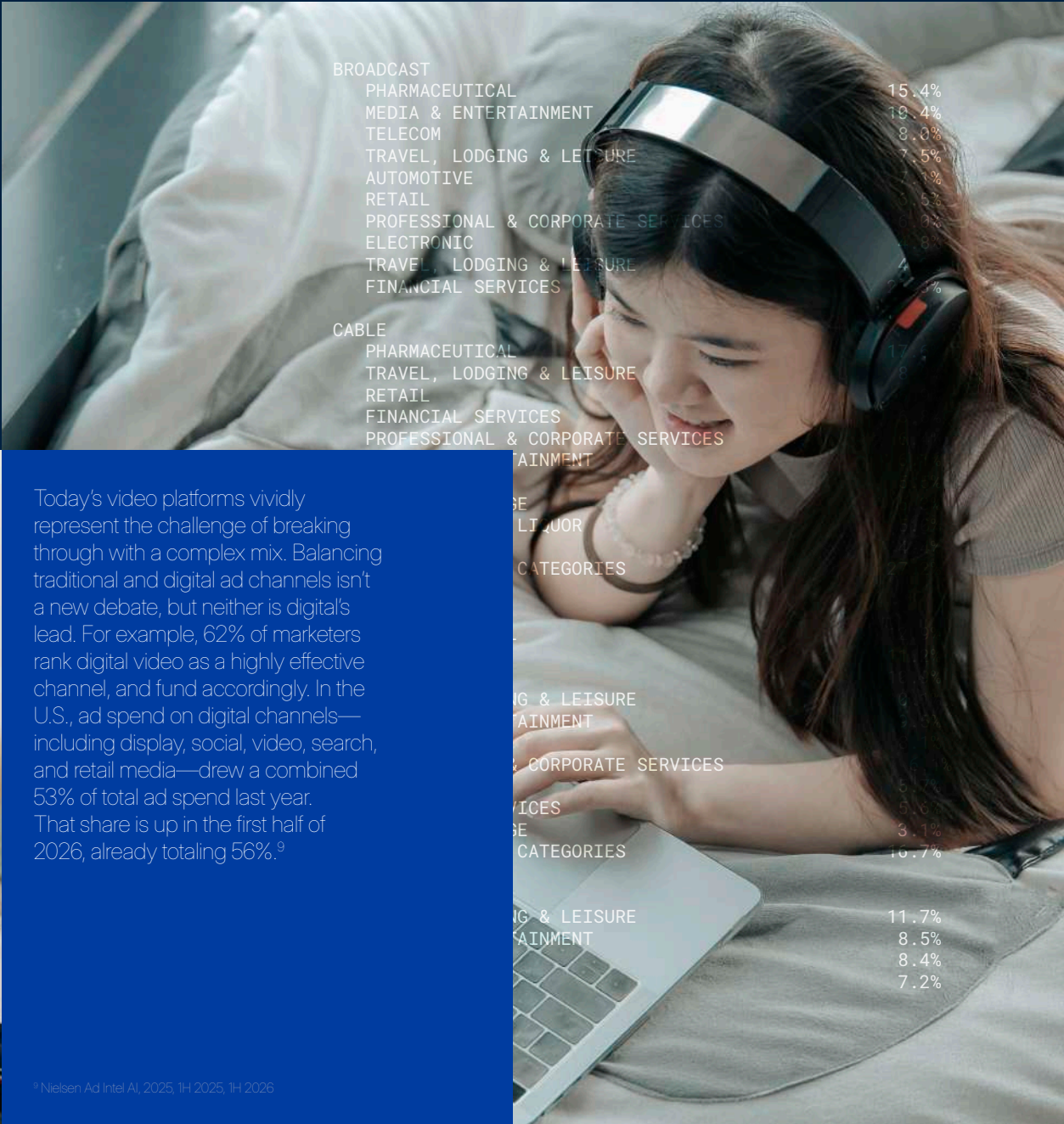


Source: Nielsen Annual Marketing Survey, 2026

Strategies for measuring brand and performance



Source: Nielsen Annual Marketing Survey, 2026



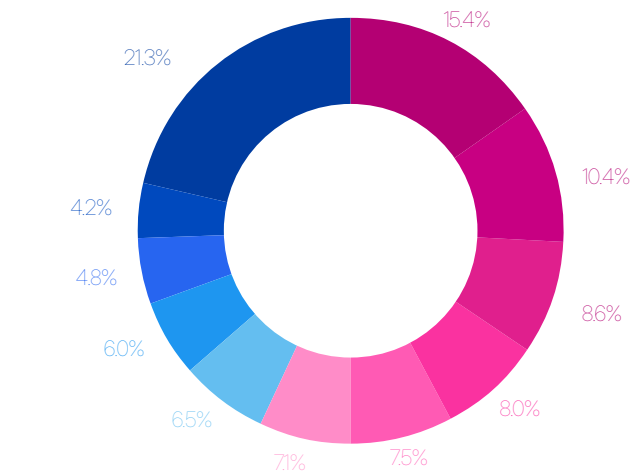
PROFESSIONAL & CORPORATE SERVICES	4.1%
PHARMACEUTICAL	6.6%
ELECTRONIC	6.5%
TELECOM	6.3%
FOOD & BEVERAGE	5.3%
FINANCIAL SERVICES	4.9%
ALL REMAINING CATEGORIES	27.1%

Share of U.S. video spend by channel | Q2 2026

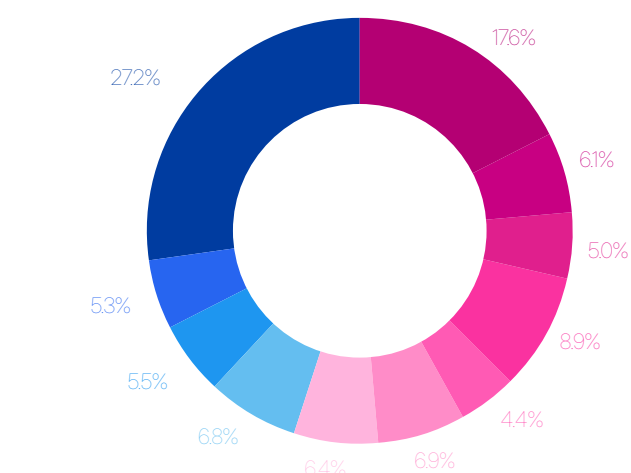
% of total national ad spend by category

- Pharmaceutical
- Media & Entertainment
- Telecom
- Travel, Lodging & Leisure
- Automotive
- Retail
- Professional & Corporate Services
- Electronic
- Financial Services
- Insurance
- Food & Beverage
- Beer, Wine, & Liquor
- All Remaining Categories

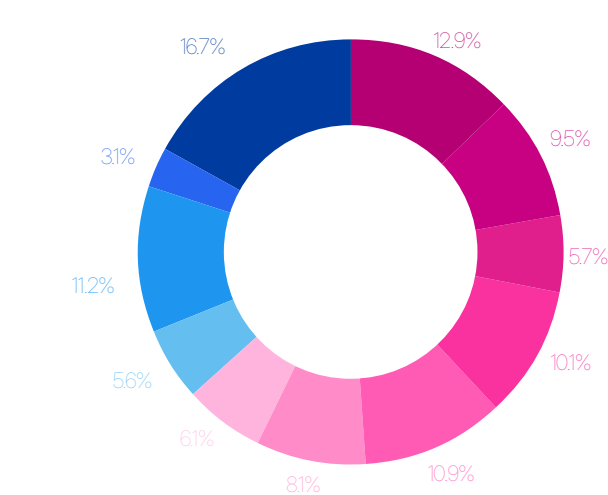
BROADCAST



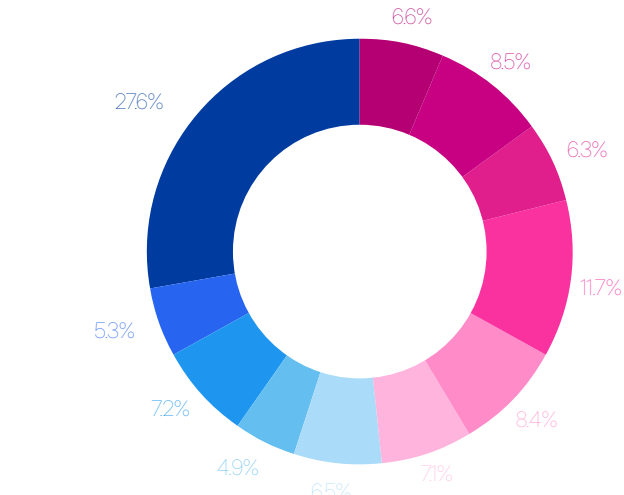
CABLE



STREAMING



DIGITAL VIDEO



Source: Nielsen Ad Intel, Q2 2026

Brand visibility essentials and ROI

While nearly one in three retail dollars goes to video, 59% of global marketers surveyed agreed Retail Media Networks (RMNs) are leveraged to boost visibility.¹⁰

Last year, four markets throughout EMEA placed over \$18.6 billion dollars in retail media, according to Nielsen Ad Intel.¹¹ 51% of global marketers expect retail media networks to become more important to their media strategy in the next year with over 40% expecting the same level of importance.¹² U.S. ad spend with leading RMNs reached nearly \$9 billion in the first half of 2026 alone.¹³

Nielsen's outcomes analysis of over 100 RMN campaigns shows top-of-funnel indicators like awareness and association consistently moved most among consumers. Return on RMN investment depends as much on what advertisers put in the creative as on the placement itself. Independent of where an ad ran, creative choices can influence lift multipliers of up to 3x.¹⁴



TOTAL	
MORE	51%
SAME	44%
LESS	3%
NOT APPLICABLE	2%
FRANCE	
MORE	33%
SAME	58%
LESS	6%
NOT APPLICABLE	4%
GERMANY	
MORE	44%
SAME	50%
LESS	5%
NOT APPLICABLE	2%
INDIA	
MORE	76%
SAME	22%
LESS	2%
NOT APPLICABLE	2%
ITALY	
MORE	42%
SAME	55%
LESS	3%
NOT APPLICABLE	2%
U.K.	
MORE	52%
SAME	38%
LESS	8%
NOT APPLICABLE	1%
U.S.	
MORE	54%
SAME	43%
LESS	3%
NOT APPLICABLE	2%

¹⁰ Nielsen Ad Intel, Q2 2026; Nielsen Annual Marketing Survey, 2026

¹¹ Nielsen Ad Intel, 2025, France, Italy, Germany, UK

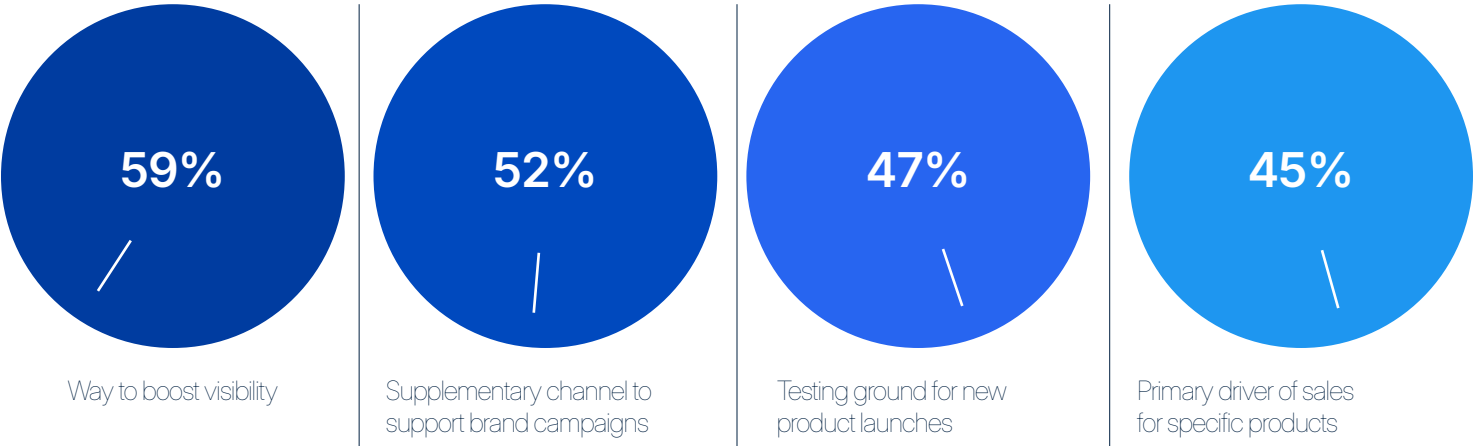
¹² Nielsen Annual Marketing Survey, 2026

¹³ Nielsen Ad Intel AI, 1H 2026

¹⁴ Outcomes Custom Analysis, 2026

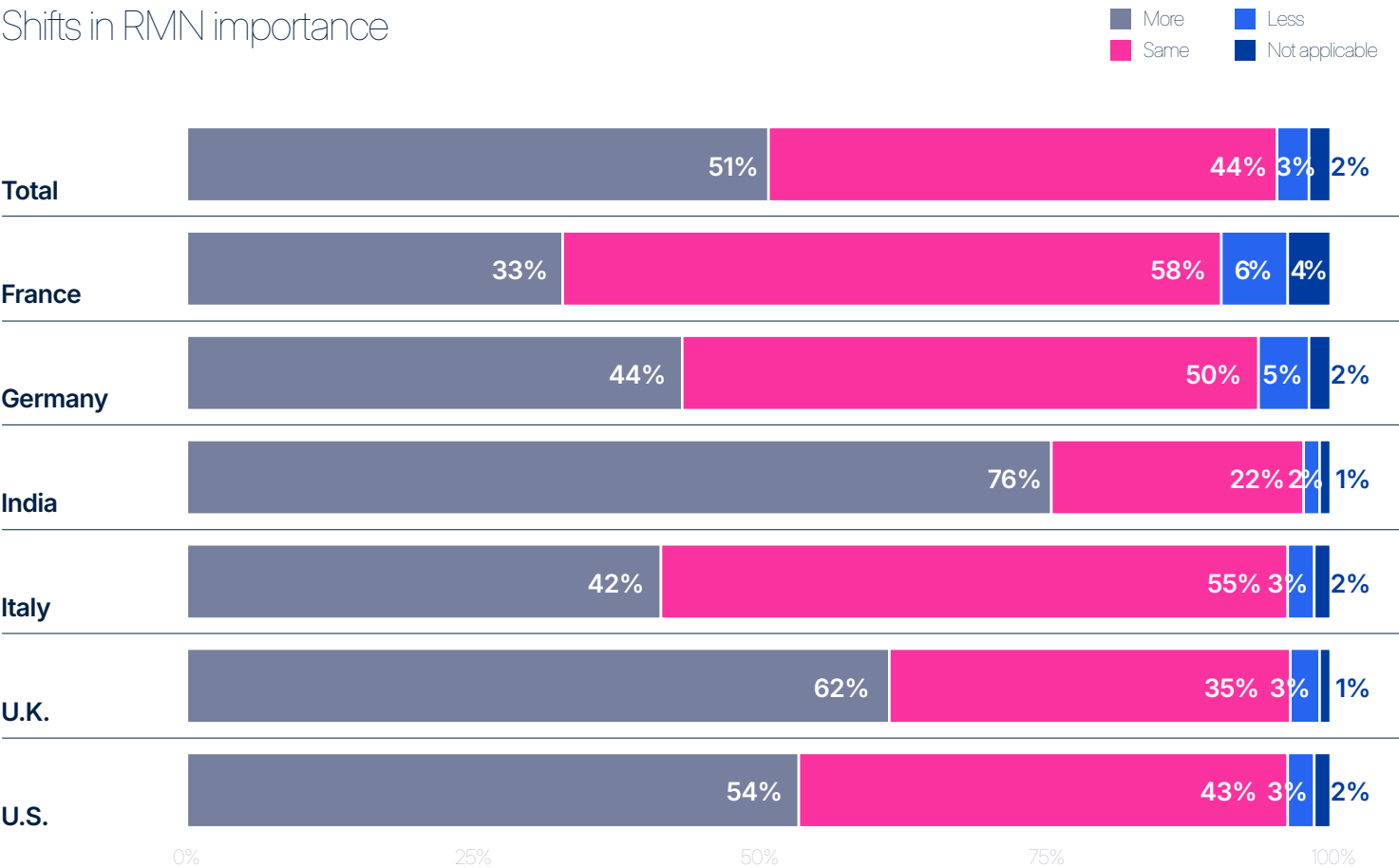
The role of retail media

Retail Media Network (RMNs) serve as highly effective visibility boosters and supplementary channels.

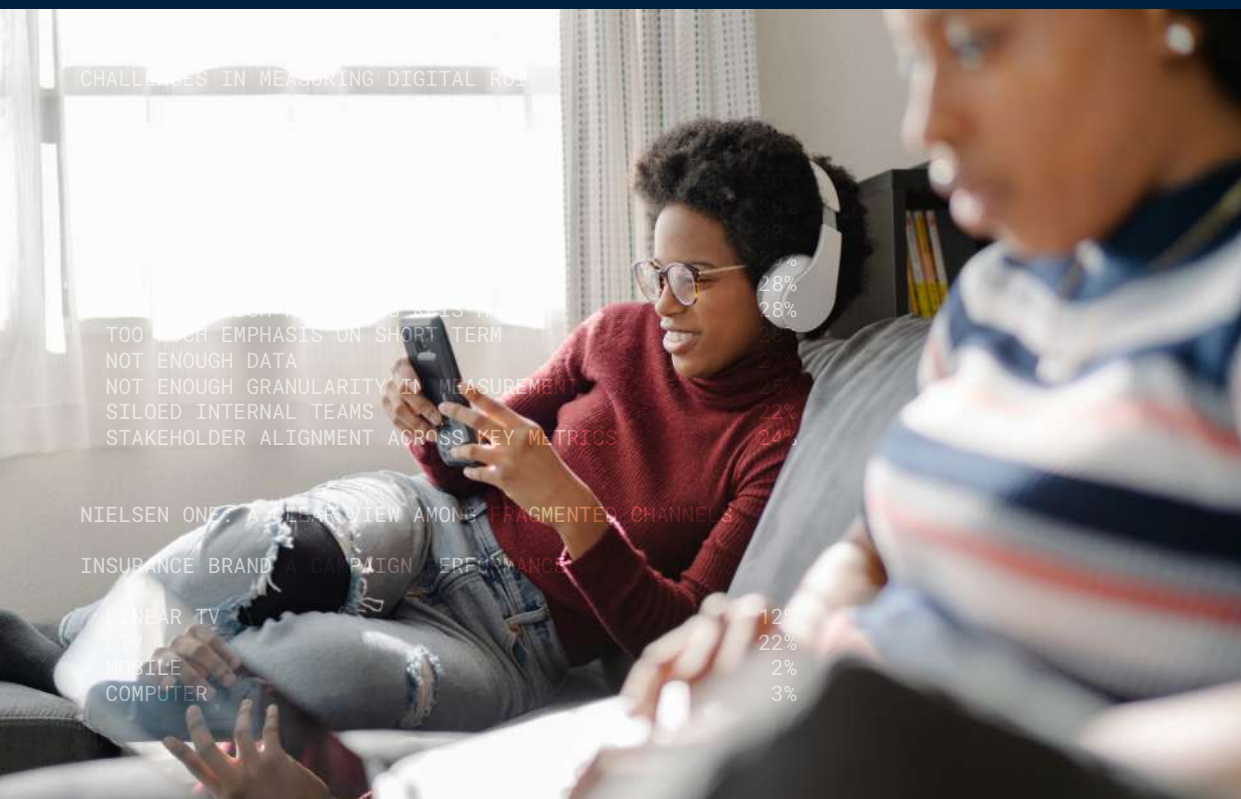


Source: Nielsen Annual Marketing Survey, 2026

Shifts in RMN importance



Source: Nielsen Annual Marketing Survey, 2026



The preference for digital is clear. That doesn't automatically make proving ROI easier.

On the path to building winning strategies, nearly one in three marketers named mismatched metrics or too much data as their leading challenges in understanding ROI.¹⁵ Incongruent datasets as a challenge jumped 10 points year-over-year among U.S. marketers where 75% are leveraging AI solutions in measurement and analytics.¹⁶

Step one in understanding any outcome is bringing these disparate datasets together into media intelligence that marketers can act on.

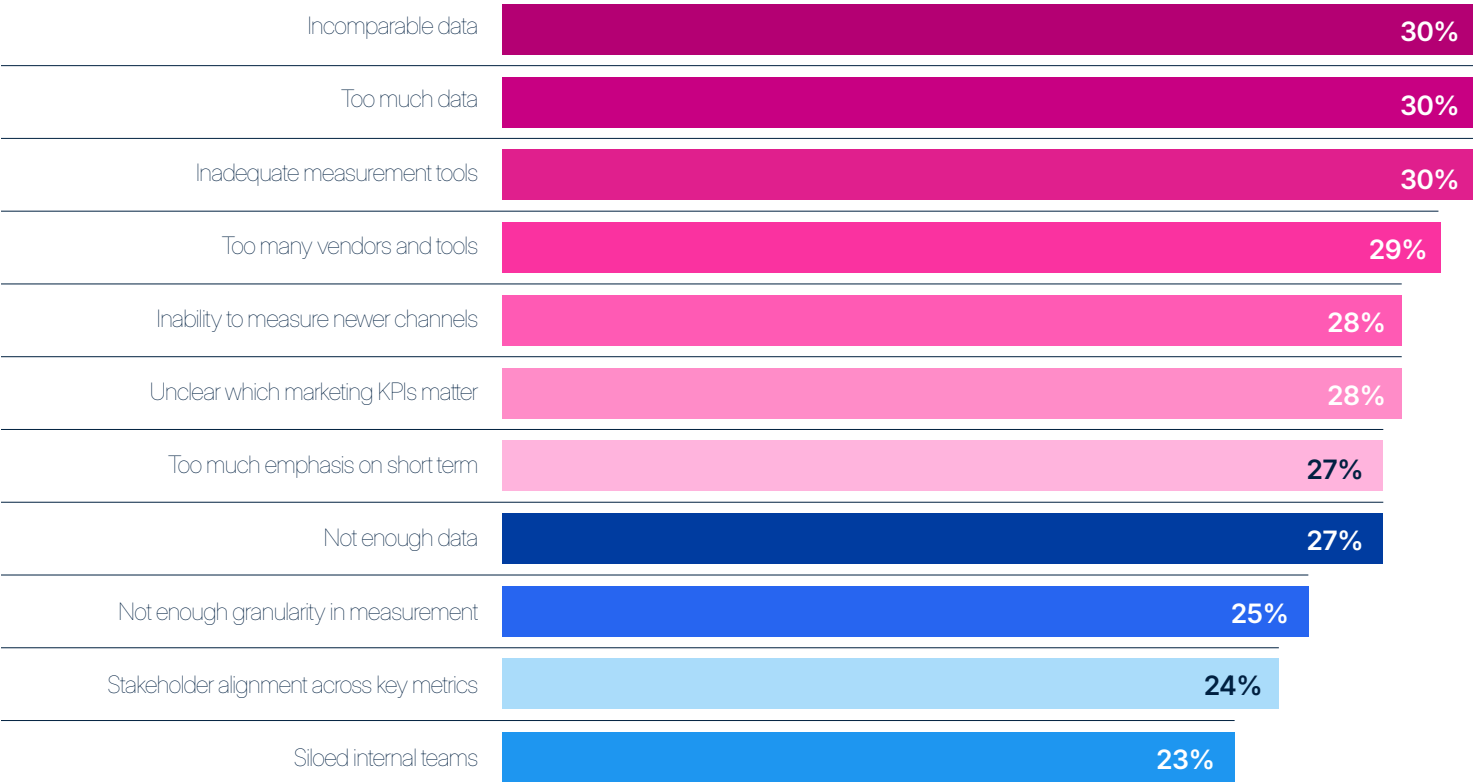
In a recent insurance provider's campaign measurement in [Nielsen ONE](#), teams could remove duplication from key channels and understand where incremental reach or excessive frequency influenced performance. In this case, CTV delivered the largest share of unique reach at 22%. This audience also overlapped with nearly every channel in the analysis, including 10% with Linear TV.¹⁷

¹⁵ Nielsen Annual Marketing Survey, 2026, Top 3 Box

¹⁶ Nielsen Annual Marketing Survey, 2026

¹⁷ Nielsen ONE Ads Cross-Platform Deduplication Reach, Q3 2026

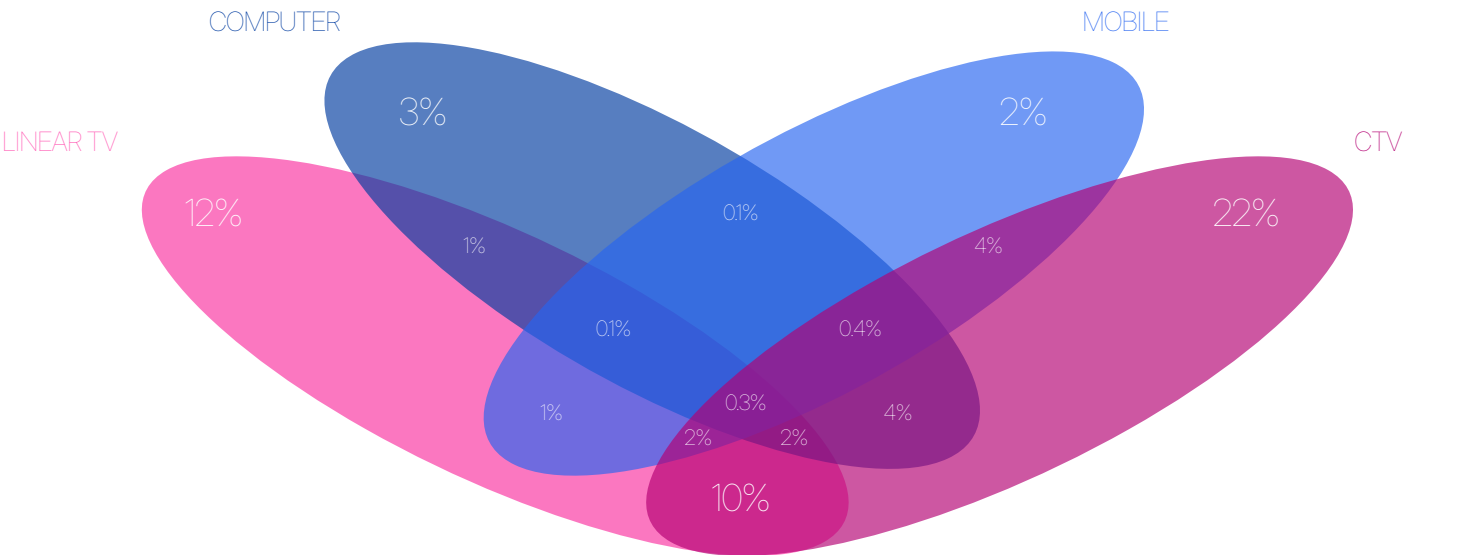
Challenges in measuring digital ROI



Source: Nielsen Annual Marketing Survey, 2026, Top 3 Box

Nielsen ONE: A clear view among fragmented channels

Insurance Brand A: % of unique audience reached by channel



Source: Nielsen ONE Ads Deduplicated Reach, Q3 2026

Brand safety's new—and old—blind spots

Brand lift metrics are a priority. However, many of today's essential brand-building activities rely heavily on factors outside a traditional marketing team's control. Brand safety now means managing what AI says about your brand, in addition to where your brand's ads run. And a persistent challenge compounds this new one: cultural fluency.

As marketers are drawn to AI for its speed and scale, outsourcing the voice and context of brand messaging carries risk. Overall, 44% of consumers say they often feel their identity group is misrepresented in ads. That number spikes as nuance is added to identity. For example, 51% of people with disabilities and 67% of Black Americans feel advertising often misrepresents them.¹⁸ Falling out of step with how these audiences see themselves can carry hefty consequences. The automated ecosystems built to protect brands can just as easily misfire on growth audiences worth reaching.

BRAND LIFT METRICS

TOTAL	29%
FRANCE	36%
GERMANY	30%
INDIA	25%
ITALY	21%
U.K.	36%
U.S.	24%

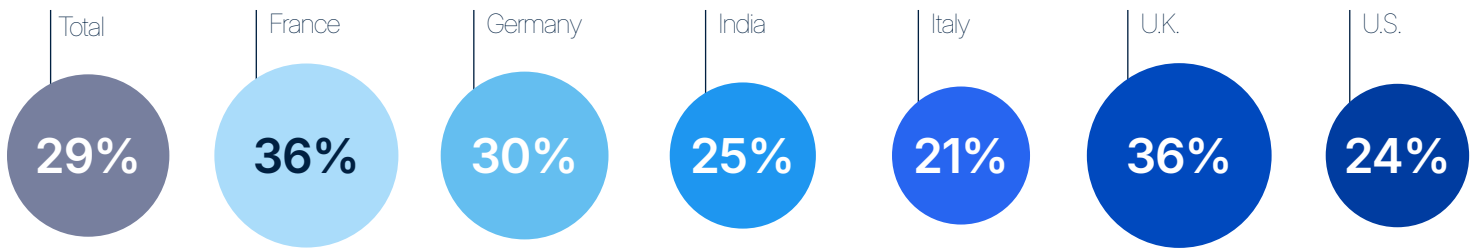
BRAND VALUES & CONSUMER BEHAVIOR

IDENTITY MISREPRESENTATION	44%
BRAND BOYCOTT OVER IDENTITY	63%
WOMEN'S SPORTS FANS SWITCHING BRANDS	60%
SOCIAL ISSUES INFLUENCE PURCHASES	51%

¹⁸ Nielsen Attitudes on Representation Study, 2025

Marketers are trying to move the needle on brand outcomes

% of marketers focused on brand lift metrics



Source: Nielsen Annual Marketing Survey, 2026

Brand values, actions, and campaign messaging matter to consumers

44% of consumers say they often feel their identity group is misrepresented in ads.

63% of consumers will stop buying from a brand if they perceive it as devaluing their identity group.

60% of women's sports fans have switched brands over a company's values or actions — nearly 15 points above sports fans overall.

51% of suburban consumers say a brand's stance on social issues is a major purchase factor.

Source: Nielsen Attitudes on Representation Study, 2025; Nielsen Advanced Audience Attitudes Study, 2025, U.S. audiences

CASE STUDY

Visibility, precision and outcomes with Nielsen Media Intelligence

In practice, marketers have more ground to cover, more data, and more platforms, but not nearly as many clear signals about what works with each consumer segment needed to achieve growth outcomes for their brands.

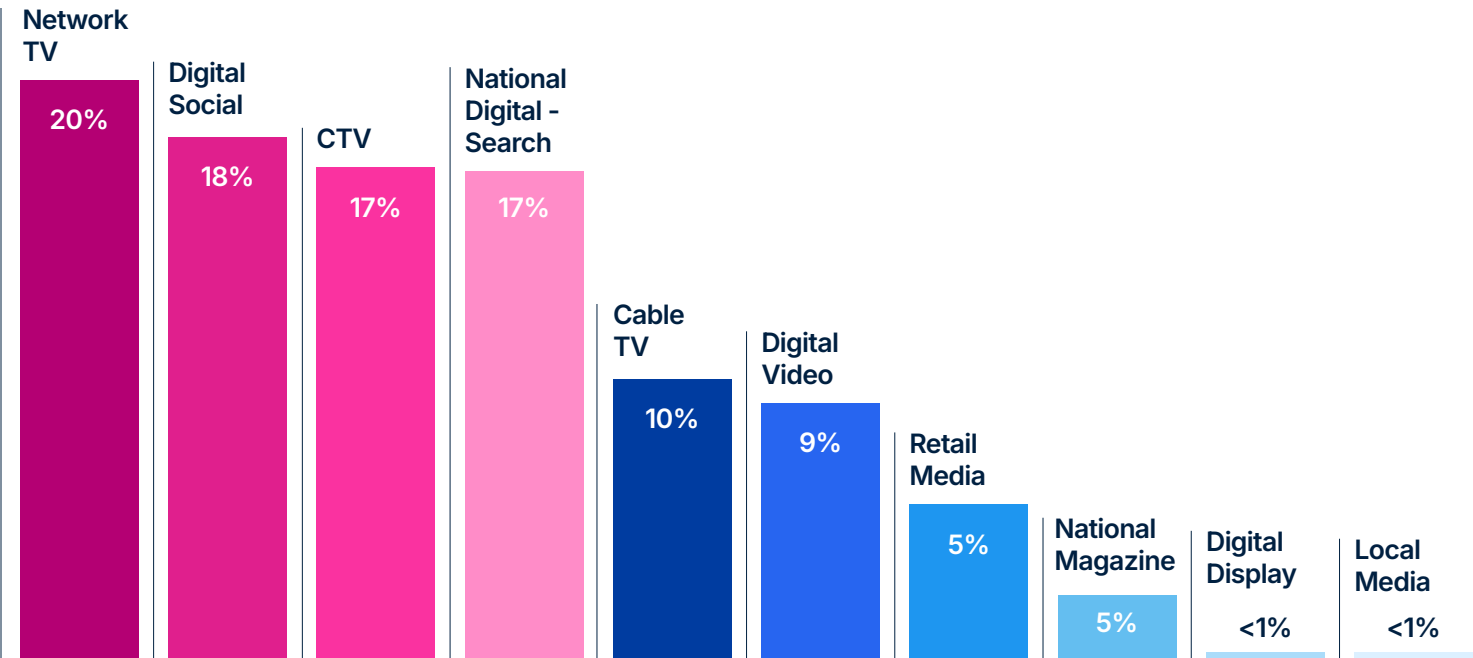
Global marketers are recalibrating their channel mix as budgets stretch and RMNs mature. In one recent example, a consumer goods brand's strategic media investment totaled over \$16 million in Q2 2026. Compared to Q2 2025, the brand swapped its top channel by ad spend from retail media to search—perceived as one of the most effective channels by brand leaders around the world. The 2026 shift moved dollars toward linear TV and social media.¹⁹

¹⁹ Nielsen Ad Intel, Q2 2025, Q2 2026, Nielsen Annual Marketing Survey, 2026

²⁰ Nielsen ONE Ads & Outcomes, Select Campaign Analysis, Q2 2026

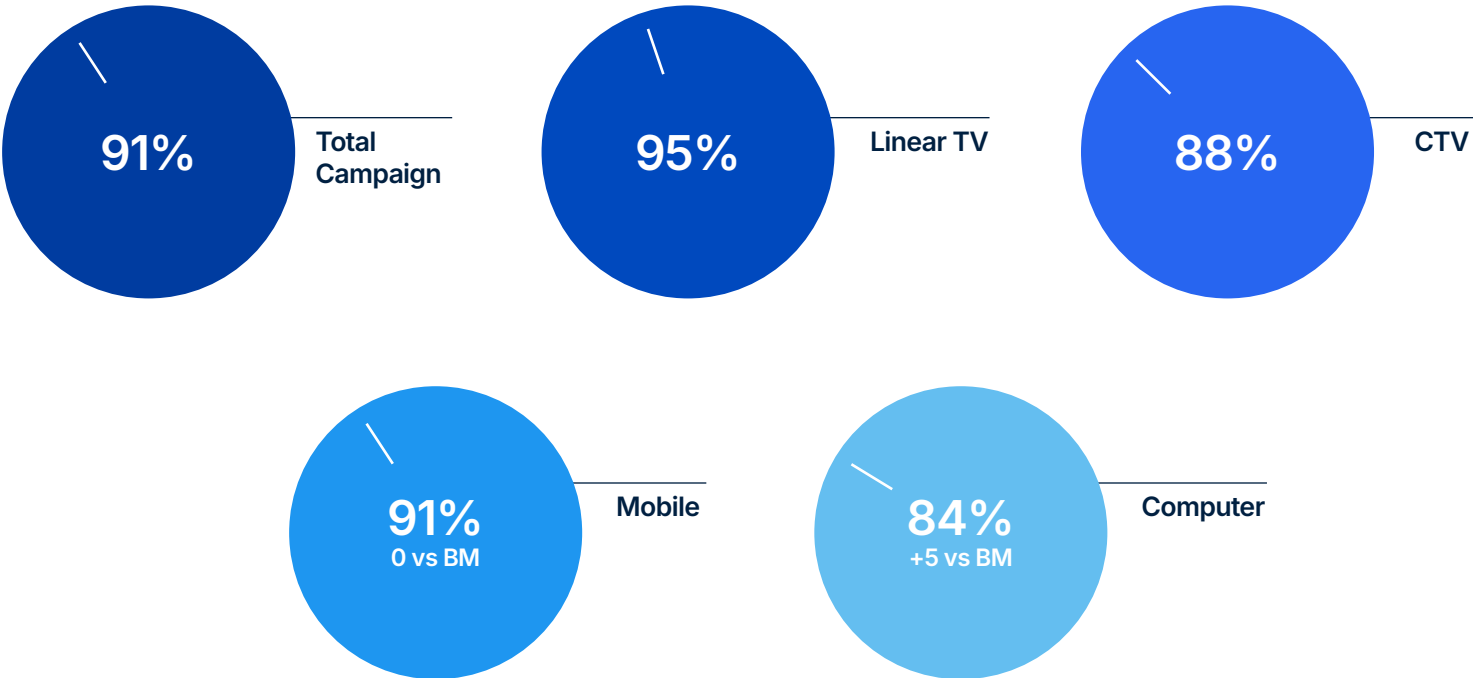


Nielsen Ad Intel: % Share of ad spend by channel for Consumer Goods Brand A | Q2 2026



Source: Nielsen Ad Intel AI, Q2 2026

Nielsen ONE Ads: Consumer Goods Brand on-target performance by channel



Source: Nielsen ONE Ads, Select Campaign Analysis, Q2 2026



That expanded investment not only translated into reach, but also delivered precision. The campaign during the investment period averaged a 91% on-target percentage and outperformed some digital platform benchmarks. Among consumers exposed to the campaign, ad recall and consideration jumped double digits. The campaign also strengthened brand advocates, raising recommendation by four points.²⁰

²⁰ Nielsen ONE Ads & Outcomes, Select Campaign Analysis, Q2 2026



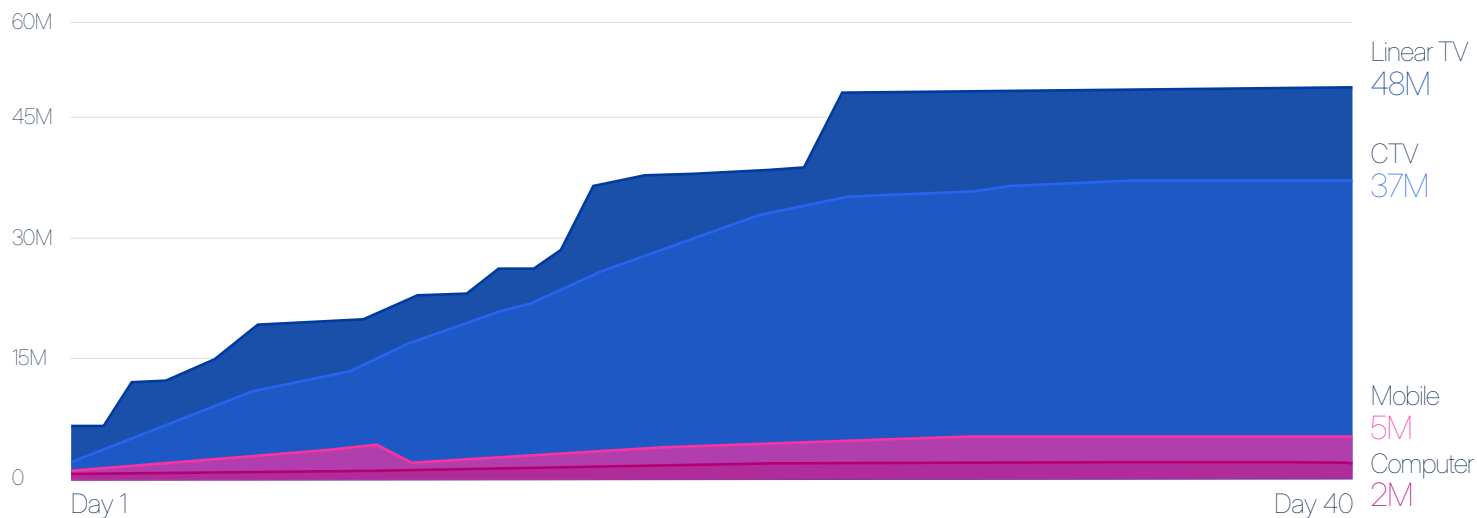
NIelsen ONE OUTCOMES:
BRAND & PERFORMANCE

DECISION	
RECOMMENDATION	+4 PTS
CONSIDERATION	
CONSIDERATION	+15 PTS
FAVORABILITY	+3 PTS
AWARENESS	
AD RECALL	+12 PTS
AIDED AWARENESS	+12 PTS

PRIORITY OUTCOMES
OVER THE NEXT YEAR

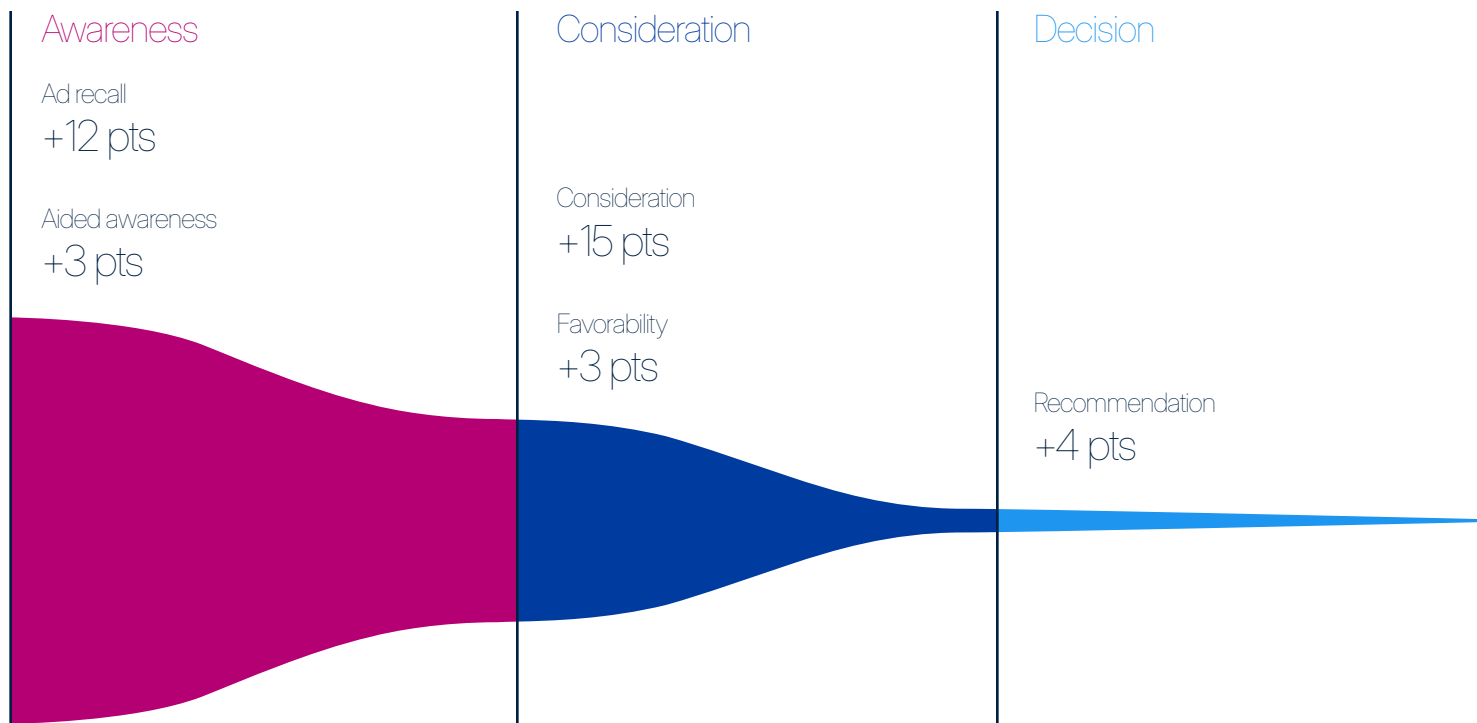
TOTAL	
ATTENTION & ENGAGEMENT	11%
BRAND LIFT METRICS	29%
SALES LIFT & ROI	52%
FRANCE	
ATTENTION & ENGAGEMENT	11%
BRAND LIFT METRICS	36%
SALES LIFT & ROI	54%
GERMANY	
ATTENTION & ENGAGEMENT	27%
BRAND LIFT METRICS	30%
SALES LIFT & ROI	43%
INDIA	
ATTENTION & ENGAGEMENT	18%
BRAND LIFT METRICS	25%

Precision across platforms: Unique audience timeline



Source: Nielsen ONE Ads, Select Campaign Analysis, Q2 2026

Nielsen ONE outcomes: Bridging the gap between brand and performance



Source: Nielsen ONE Outcomes, Select Campaign Analysis, Q2 2026

Your next move

Brand building and performance work together, but only if you can prove it. Campaigns that connected upper and lower funnel drove 1.5x the sales lift of awareness-only campaigns. End the "brand vs. performance" debate. Today's fragmentation requires both.

Get ahead of the 2027 budget conversation.

Anticipated budget reductions among U.S. marketers rose from 2% to 14% in one year, even with U.S. ad spend in the first half of 2026 pacing 16% ahead of the prior year. Bring full-funnel proof to your CFO before cuts are decided.

Refine reach duplication before you buy more.

Incongruent data as a challenge rose +10 points among U.S. marketers. A view of unique reach and overlap across channels empowers marketers to trim excess frequency, before buying more reach.

TODAY'S FRAGMENTED MEDIA LANDSCAPE (WEEKLY TIME SPENT)



18+ GROUP

TABLET	12:06
MOBILE	29:01
COMPUTER	7:24
RADIO	9:28
CONNECTED TV	20:20
LINEAR TV	24:36

18-34 GROUP

TABLET	11:44
MOBILE	29:15
COMPUTER	8:16
RADIO	9:36
CONNECTED TV	20:07
LINEAR TV	6:51

35-49 GROUP

TABLET	12:00
MOBILE	30:23
COMPUTER	8:03
RADIO	8:51
CONNECTED TV	21:10
LINEAR TV	13:21

50-64 GROUP

TABLET	11:20
MOBILE	29:26
COMPUTER	8:26
RADIO	11:21
CONNECTED TV	20:44
LINEAR TV	28:11

65+ GROUP

TABLET	12:47
MOBILE	27:07
COMPUTER	11:39
RADIO	11:11
CONNECTED TV	17:36
LINEAR TV	42:24

ANTICIPATED BUDGET INCREASES FOR VIDEO (GLOBAL AVERAGE)

DIGITAL VIDEO	6%
CONNECTED TV	9%
LINEAR TV	10%

SHARE OF VIDEO AD SPEND IN 2026

LINEAR TV	59%
DIGITAL VIDEO	26%
CTV & STREAMING	15%

TOTAL

LONG-FORM VIDEO	21%
SHORT-FORM VIDEO	29%
SOCIAL POSTS	21%

AGE 62-80

LONG-FORM VIDEO	7%
SHORT-FORM VIDEO	
SOCIAL POSTS	

AUTOMOTIVE

YES, DEDICATED AND GROWING	
YES, DEDICATED BUT FLAT	

2026 Annual Marketing Report

**Navigating the AI era:
Accuracy, outcomes, & shifting trends**

Trends to watch:

Where everyday attention is going

Introduction

Capturing consumer attention across algorithms, devices, and platforms requires strategies beyond simply tracking traditional channels and demographics. This chapter explores where everyday engagement is shifting—from evolving perceptions of “TV” and diverse co-viewing habits, to the rise of creator-driven loyalty and the new playbook for sports sponsorships. Discover the key trends redefining audience behavior and how brands can effectively connect with consumers.

Table of Contents

04 More channels than ever

06 “TV” isn’t just a device

07 The creator imperative

13 The watch party

15 A new sports playbook

21 Your next move

22 How Nielsen helps

More channels than ever

18+ GROUP [CITE: 1]

TABLET	12:00
MOBILE	28:01
COMPUTER	7:24
RADIO	9:28
CONNECTED TV	20:00
LINEAR TV	24:36

18-34 GROUP [CITE: 1]

TABLET	10:44
MOBILE	30:15
COMPUTER	6:16
RADIO	6:36
CONNECTED TV	20:07
LINEAR TV	6:51

35-49 GROUP [CITE: 1]

TABLET	12:00
MOBILE	30:23
COMPUTER	8:03
RADIO	8:51
CONNECTED TV	21:10
LINEAR TV	13:21

50-64 GROUP [CITE: 1]

TABLET	12:42
MOBILE	26:51
COMPUTER	8:26
RADIO	11:31
CONNECTED TV	20:44
LINEAR TV	28:11

65+ GROUP [CITE: 1]

TABLET	12:37
MOBILE	24:07
COMPUTER	6:39
RADIO	11:11
CONNECTED TV	17:36
LINEAR TV	42:21

Almost 40% of today's marketers are prioritizing attention and engagement outcomes in the year ahead. More than half are giving equal weight to reach and impressions as they are to attention and quality metrics and the need for this focus is clear.¹ Consumers' media engagement broadens the map of where and how brands have to show up.

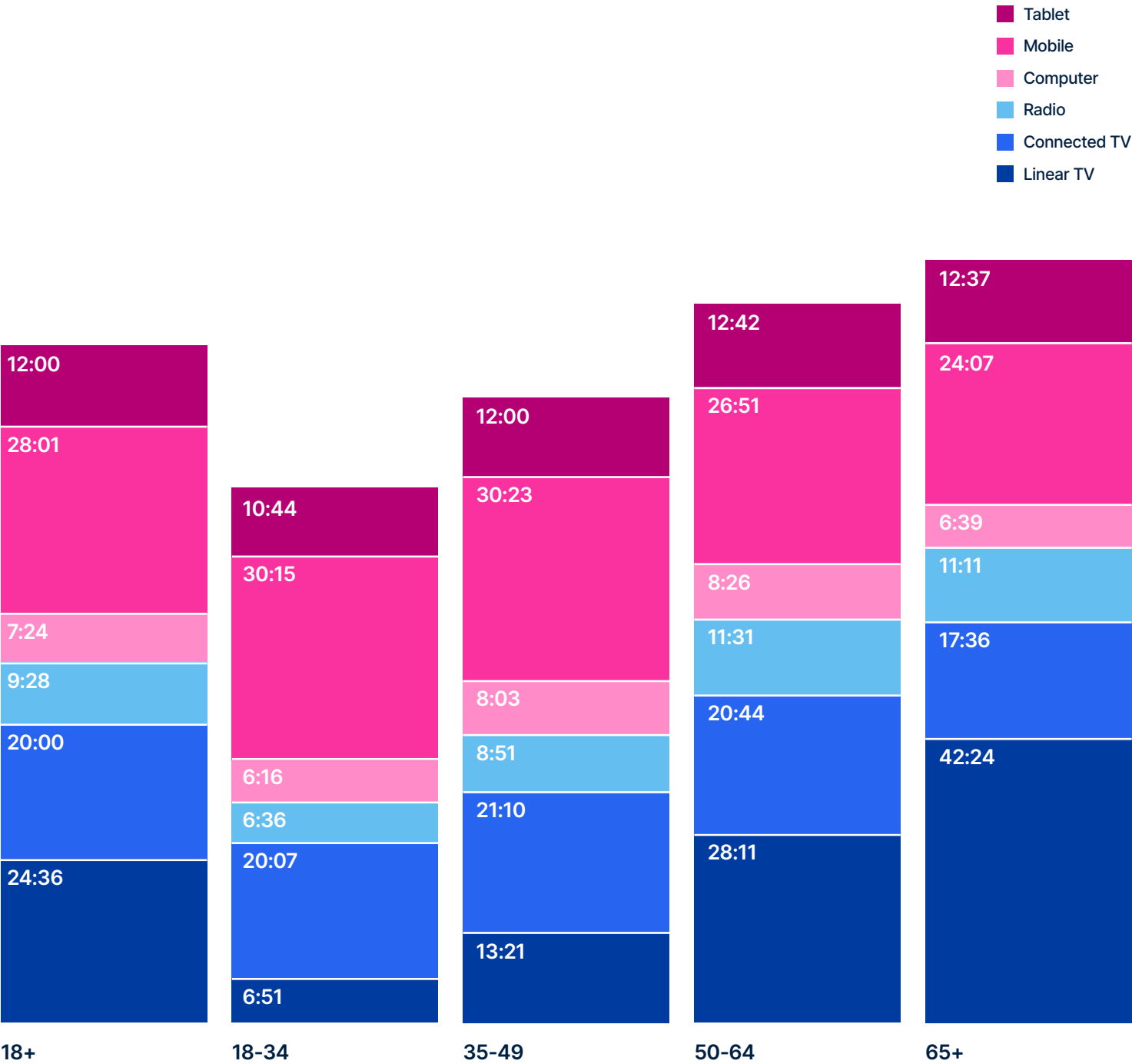
Traditional demographics provide one element of the story. Today's marketers have to account for identity, **fandom**, seasonality, and a host of other competing or influential factors in order to command attention.

Audiences and brand leaders face an increasingly complex lineup of algorithmic and mass media to choose from. A campaign can span **radio's reach**, CTV's frequency, mobile's personalization, and much more. What's changing among audience behavior that will further impact brands' strategies? How are today's biggest platforms used by marketers and consumers? These are a few of the consumer-driven trends for marketers to watch.

¹ Nielsen Annual Marketing Survey, 2026

Today's fragmented media landscape

Average weekly time spent among U.S. audiences in Q1 2026 (HH:MM)



Source: Nielsen Audience Insights, Q1 2026



ANTICIPATED BUDGET INCREASES FOR VIDEO (GLOBAL AVERAGE)	
DIGITAL VIDEO	6%
CONNECTED TV	9%
LINEAR TV	10%
SHARE OF VIDEO AD SPEND 1H 2026	
LINEAR TV	59%
DIGITAL VIDEO	26%
CTV & STREAMING	15%

“TV” isn’t just a device

41% of U.S. consumers view video content as “TV” no matter the platform.² And [ad investment](#) is following their lead. 29% of video [podcast viewers](#) complete a website purchase after seeing an ad, compared to 25% of podcast listeners.³ Adults spend over 2 billion minutes with leading vertical video micro-drama platforms built for smartphones.⁴ YouTube commands over [14% of viewing time](#) on the same TV set where broadcast and cable outlets average 12 to 13 minutes of ad time an hour.⁵

Today’s marketers have to accommodate [unique behaviors](#) on each platform and each consumer segment.

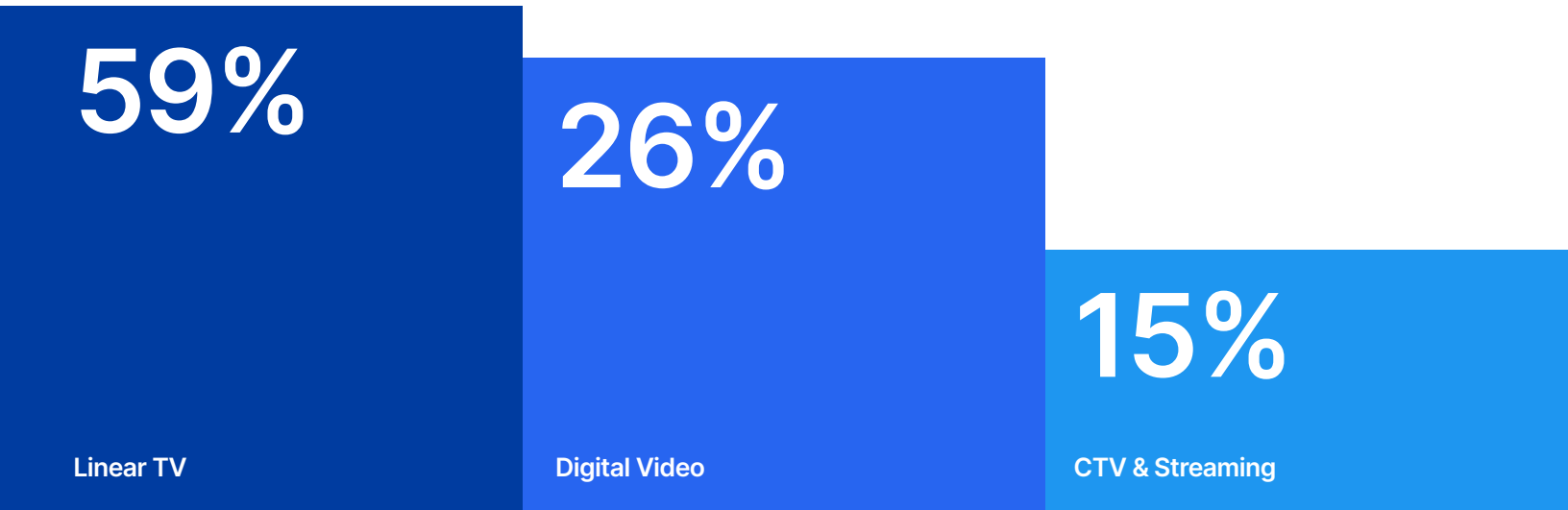
² Nielsen Scarborough USA+, 2026 Release 1

³ Nielsen Scarborough Podcast Buying Power, 2026

⁴ Nielsen Media Impact, Select vertical video micro-drama platforms, June 2026

⁵ Nielsen Big Data + Panel, 1H 2026

Share of video ad spend | 1H 2026



Source: Nielsen Ad Intel AI, U.S., 1H 2026

The creator imperative



Consumers aged 18-49 average over 30 hours a week on smartphones, and half of that time goes to social media.⁶ 75% of industry leaders agree on the channel's effectiveness and see creator content, specifically, as the leading opportunity. In fact, **nearly half of U.S. consumers agree their loyalty to a creator makes them more willing to consider or try a product the creator promotes, even if they weren't originally interested.**⁷

No matter the age group, U.S. consumers rate creator content as effective ways to drive them to purchase. The formats delivering the best results can vary. Short-form content resonates with every segment. By comparison, long-form content doesn't perform as well from the consumers' perspective. However, refining focus to **advanced audiences** reveals a preference for longer format content more than 10 points higher. For example, 37% of gamers and 31% of podcast listeners say long-form content from creators inspires a purchase.⁸

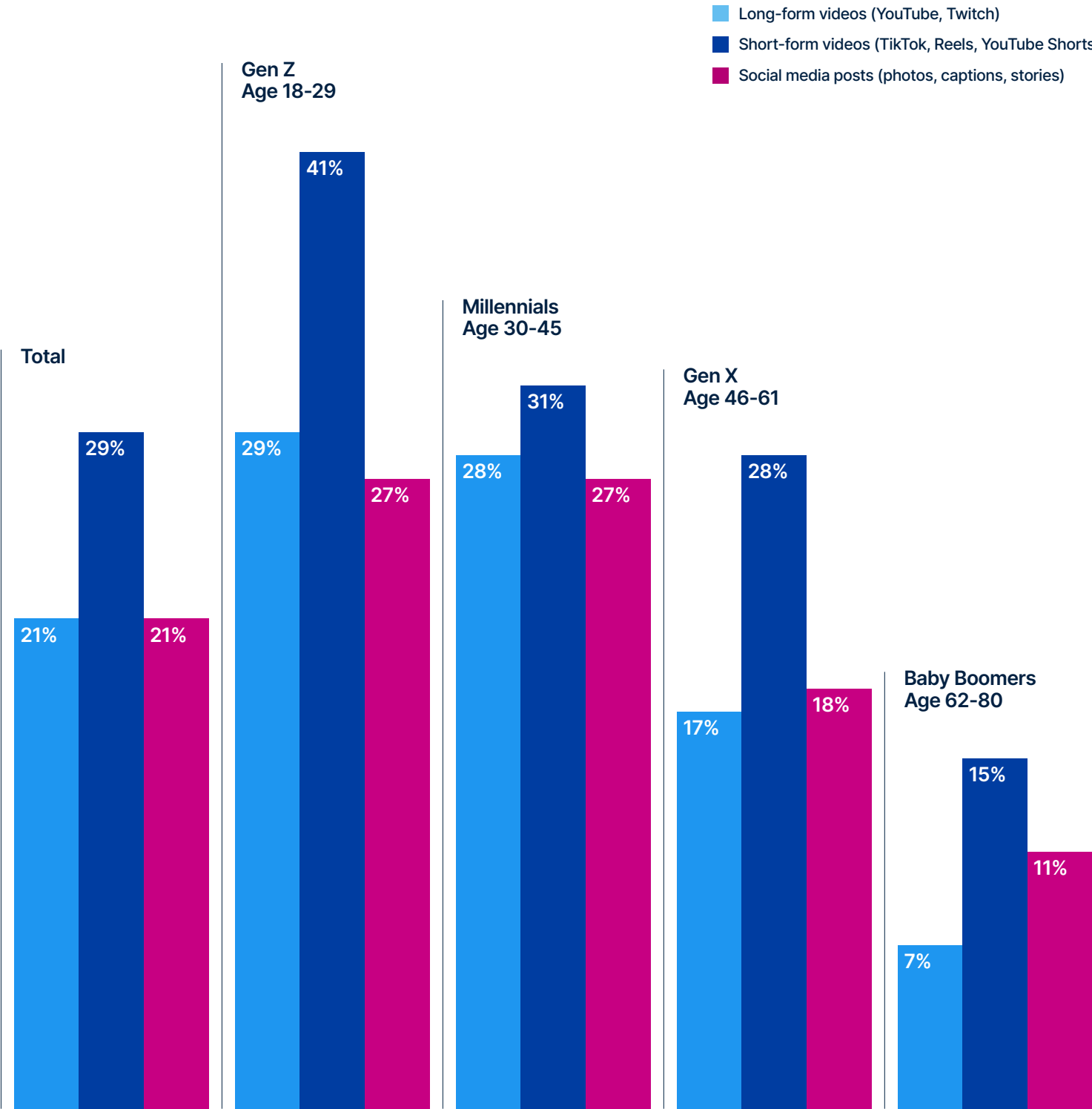
⁶ Nielsen Audience Insights, U.S., Q1 2026

⁷ Nielsen Media Attitudes Study, 2026

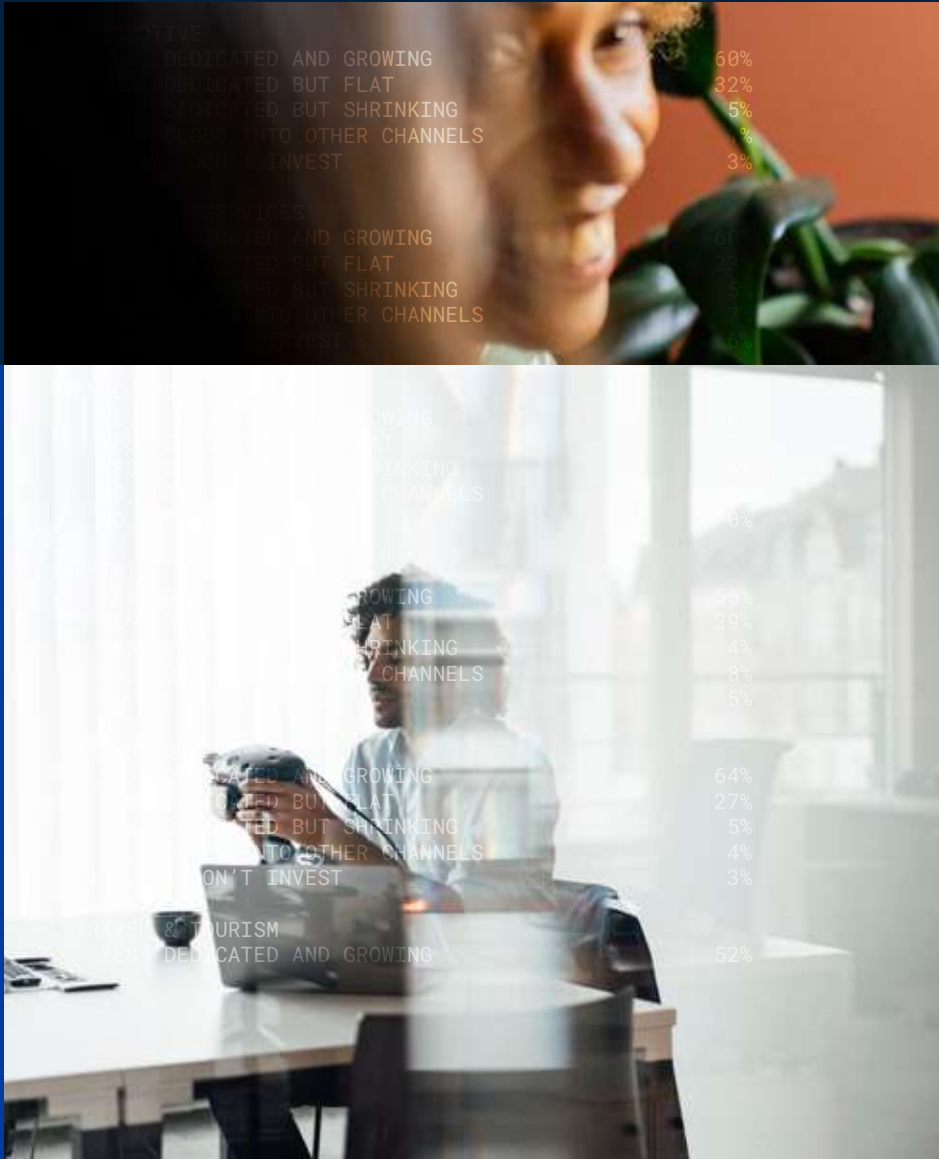
⁸ Nielsen Media Attitudes Study, 2026

Creator formats are effective to drive purchase

% agree content type makes them want to buy | U.S. audiences



Source: Nielsen Media Attitudes Study, 2026



As a result, the majority of global marketers aren't merely carrying a dedicated influencer line item. Their budgets for **creator partnerships** are growing. In fact, 62% expect creator budgets to grow, with 18% of marketers expecting growth of more than 50% compared to current spend.⁹ Travel and tourism advertisers in Europe, for example, have so far spent over \$6.7 billion in 2026.¹⁰ 59% of marketers in the category plan to grow their creator spend.¹¹

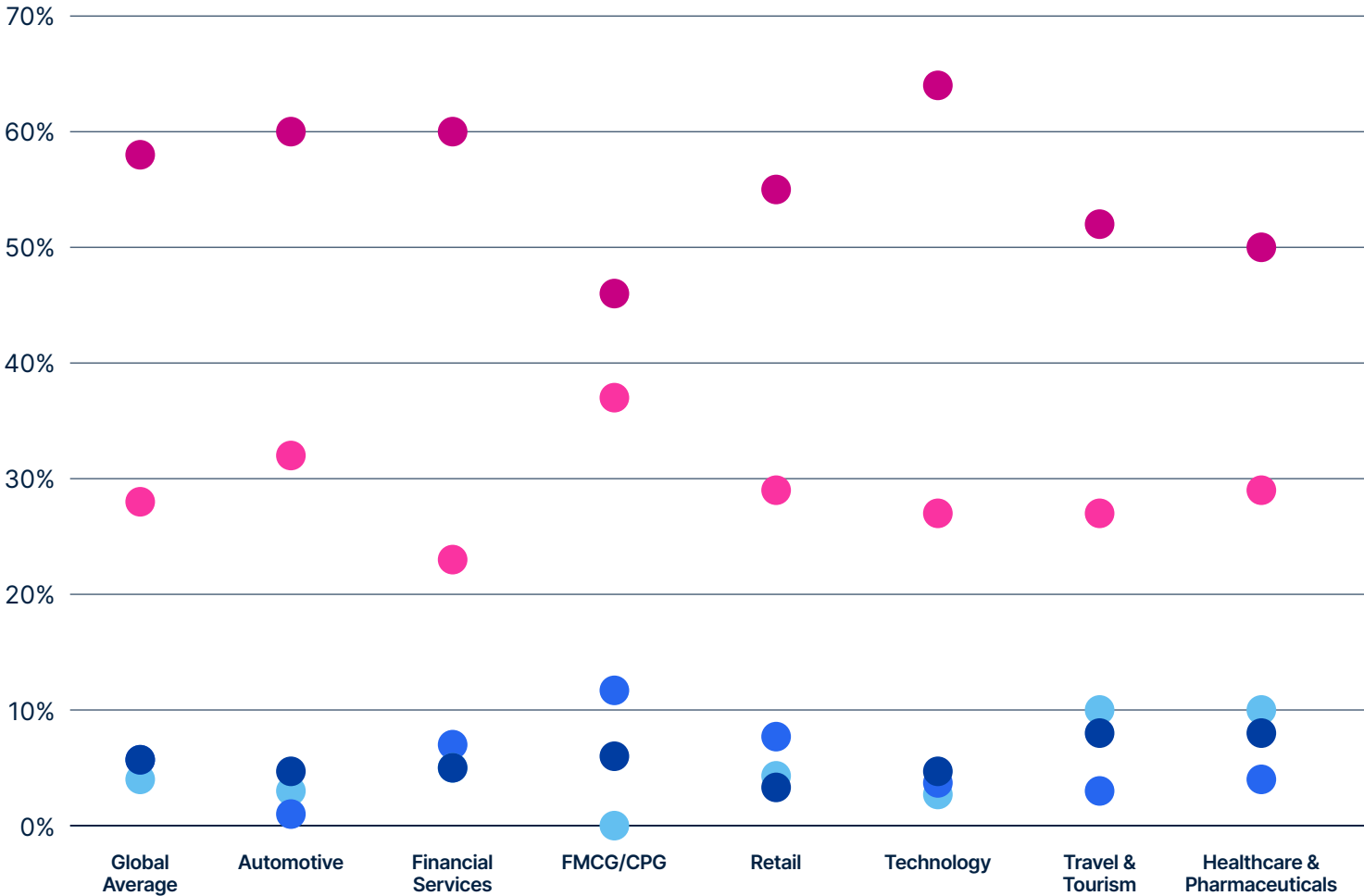
⁹ Nielsen Annual Marketing Survey, 2026
¹⁰ Nielsen Ad Intel, France, Germany, Italy, U.K., January-August 2026
¹¹ Nielsen Annual Marketing Survey, 2026

58%

of marketers have dedicated and growing budgets for creator partnerships

Dedicated budgets for creator/influencer marketing

- Yes, dedicated and growing
- Yes, dedicated but flat
- Yes, dedicated but shrinking
- No, folded into other channels
- No, we don't invest in creator/influencer marketing



Source: Nielsen Annual Marketing Survey, 2026



Over the course of one month, Nielsen Ad Intel data highlights significant advertiser investment in two leading creators' YouTube channels, each with over 60 million subscribers.¹² The analysis showed ad spend from over 350 different categories, hundreds of thousands in ad spend dollars, and tens of millions of gross impressions from the campaigns.¹³

With consumer preference for creators so high, advertisers are out for more than reach. Today, one in three global marketers are measuring the return on the investment of creator partnerships separately from traditional or digital campaigns.¹⁴

An example from Nielsen's Creator Lift measurement for a retailer's creator partnership showed **+10 point gains in brand affinity and recommendation intent**. The outcomes also confirmed creator partnerships can drive more than awareness: **purchase intent and recent purchases outperformed benchmarks** by eight points or more.¹⁵

¹² YouTube

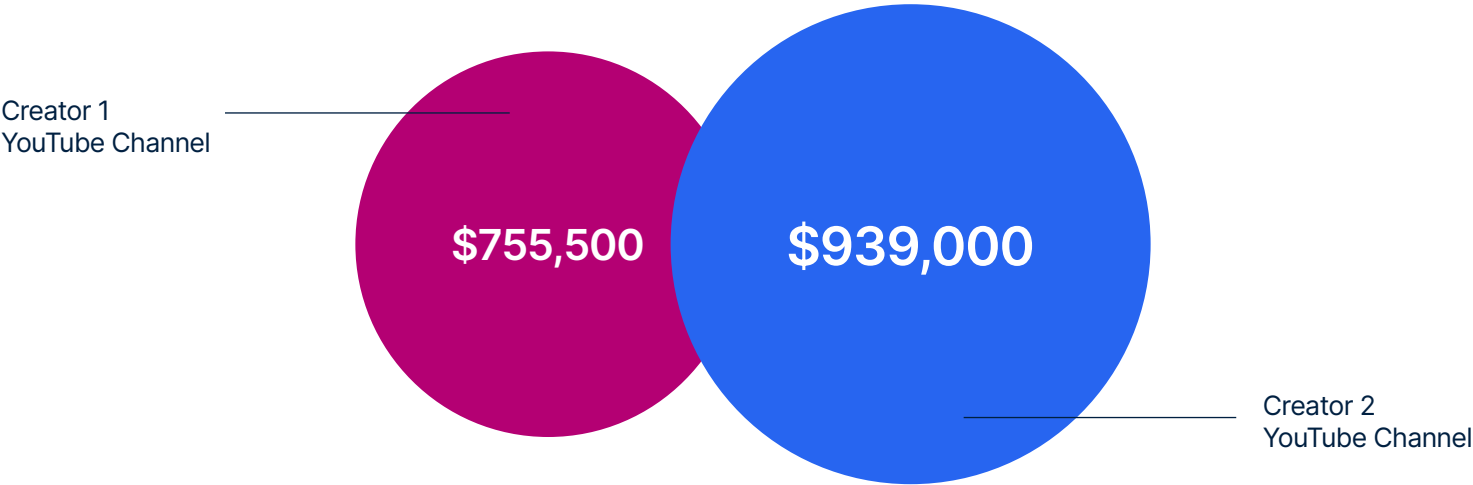
¹³ Nielsen Ad Intel, August 2026, Select Sports/Entertainment Creators

¹⁴ Nielsen Annual Marketing Survey, 2026

¹⁵ Nielsen Creator Lift Custom Analysis, 2026

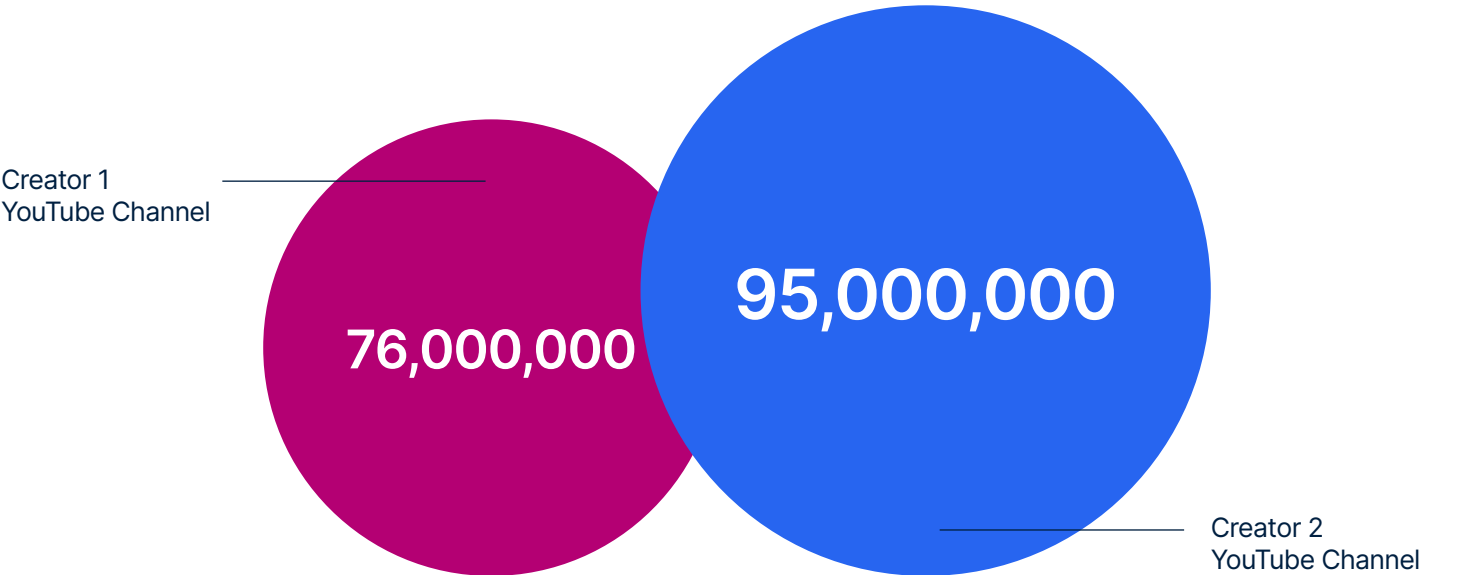
Spend and delivery with YouTube creators | August 2026

Creator channel ad spend



Source: Nielsen Ad Intel, August 2026

Creator channel ad impressions



Source: Nielsen Ad Intel, August 2026

The watch party

Today, “appointment viewing” can mean the latest **reality TV reunion**, a heated rivalry in a favorite sport, or a livestream from a popular creator. The platform where viewers discover their “must-see” content varies widely, but tuning in together is often the underlying theme. A Nielsen study on marquee live events revealed a **+4.19% lift in shared viewing**.

However, distinct co-viewing patterns can exist by audience profile and by platform.

Analysis of select broadcast dramas showed about one in four adults 18-49 viewed with a peer in the same age group. For those same programs and demos on **streaming**, co-viewing increased to more than one in three. For adults over age 50, that ratio flipped. About a third of audiences 50+ streamed content together while an average of 44% viewed on broadcast with someone in the same age group.

With the exception of one unscripted series, the cable programs in the dataset followed a similar preference for audiences 50+ co-viewing more frequently on linear. Adults 25-54, by contrast, averaged a co-viewing rate 10 points higher on streaming than on the programs’ cable run.¹⁶ Formulating nuanced strategies calls for precision in **audience targeting** and creative alignment to the distinct patterns of each platform.



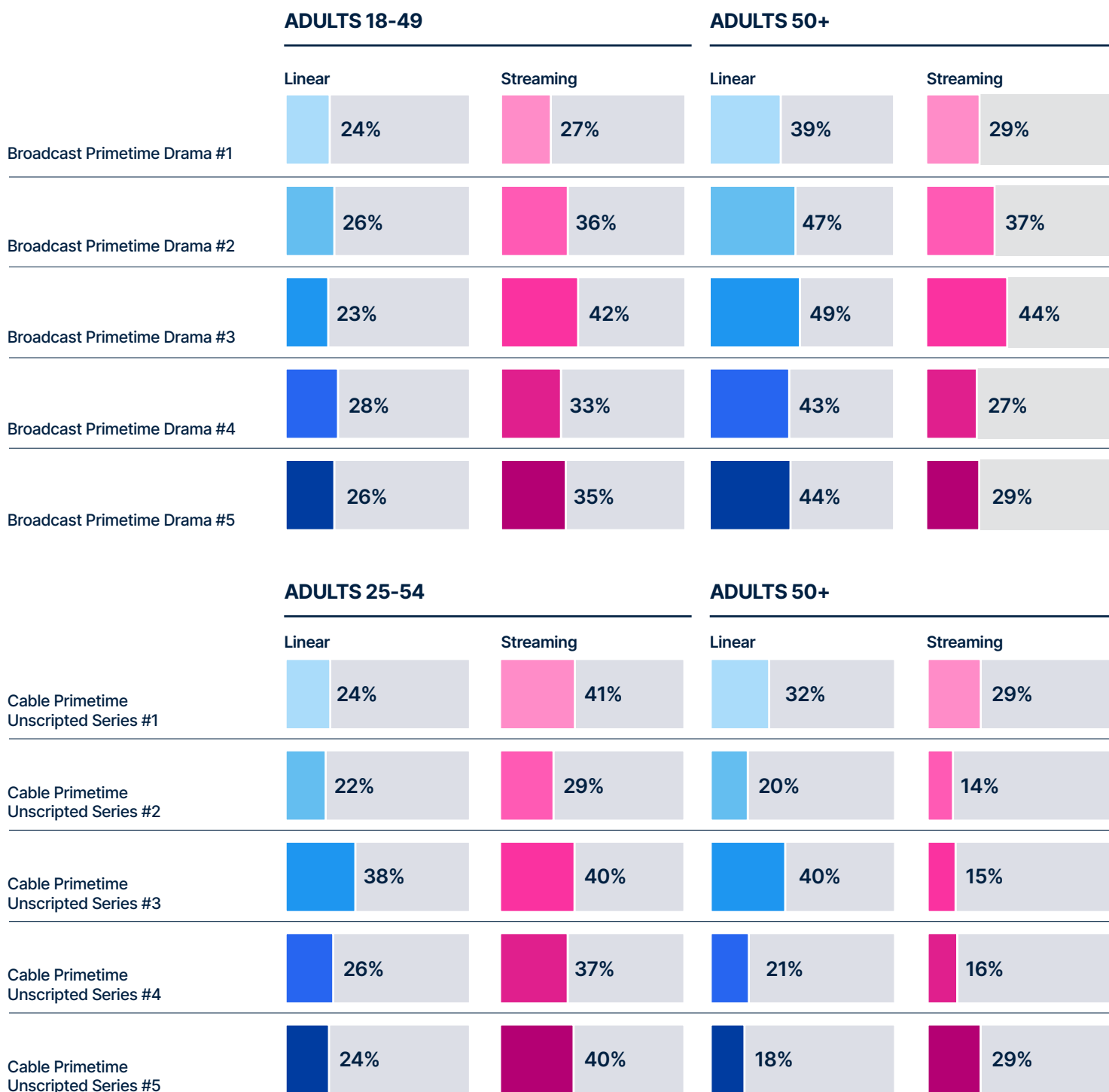
CO-VIEWING PATTERNS VARY BY AGE AND PLATFORM

ADULTS 18-49 (% VIEWING WITH A PEER)		
BROADCAST PRIME TIME DRAMA #1	(LINEAR)	23.9%
BROADCAST PRIME TIME DRAMA #1	(STREAMING)	27.0%
BROADCAST PRIME TIME DRAMA #2	(LINEAR)	26.4%
BROADCAST PRIME TIME DRAMA #2	(STREAMING)	36.2%
BROADCAST PRIME TIME DRAMA #3	(LINEAR)	23.1%
BROADCAST PRIME TIME DRAMA #3	(STREAMING)	41.8%
BROADCAST PRIME TIME DRAMA #4	(LINEAR)	28.4%
BROADCAST PRIME TIME DRAMA #4	(STREAMING)	32.5%
BROADCAST PRIME TIME DRAMA #5	(LINEAR)	26.4%
BROADCAST PRIME TIME DRAMA #5	(STREAMING)	35.1%

¹⁶ Nielsen National TV Panel Co-Viewing Analysis, consisting of demo pairs of the same age group. Six first-run telecast minimum for linear analysis.

Co-viewing patterns vary by age and platform

% of demographic group viewing with a peer



Source: Nielsen National TV Panel Co-Viewing Analysis, consisting of demo pairs of the same age group. Six first-run telecast minimum for linear analysis.

A new sports playbook



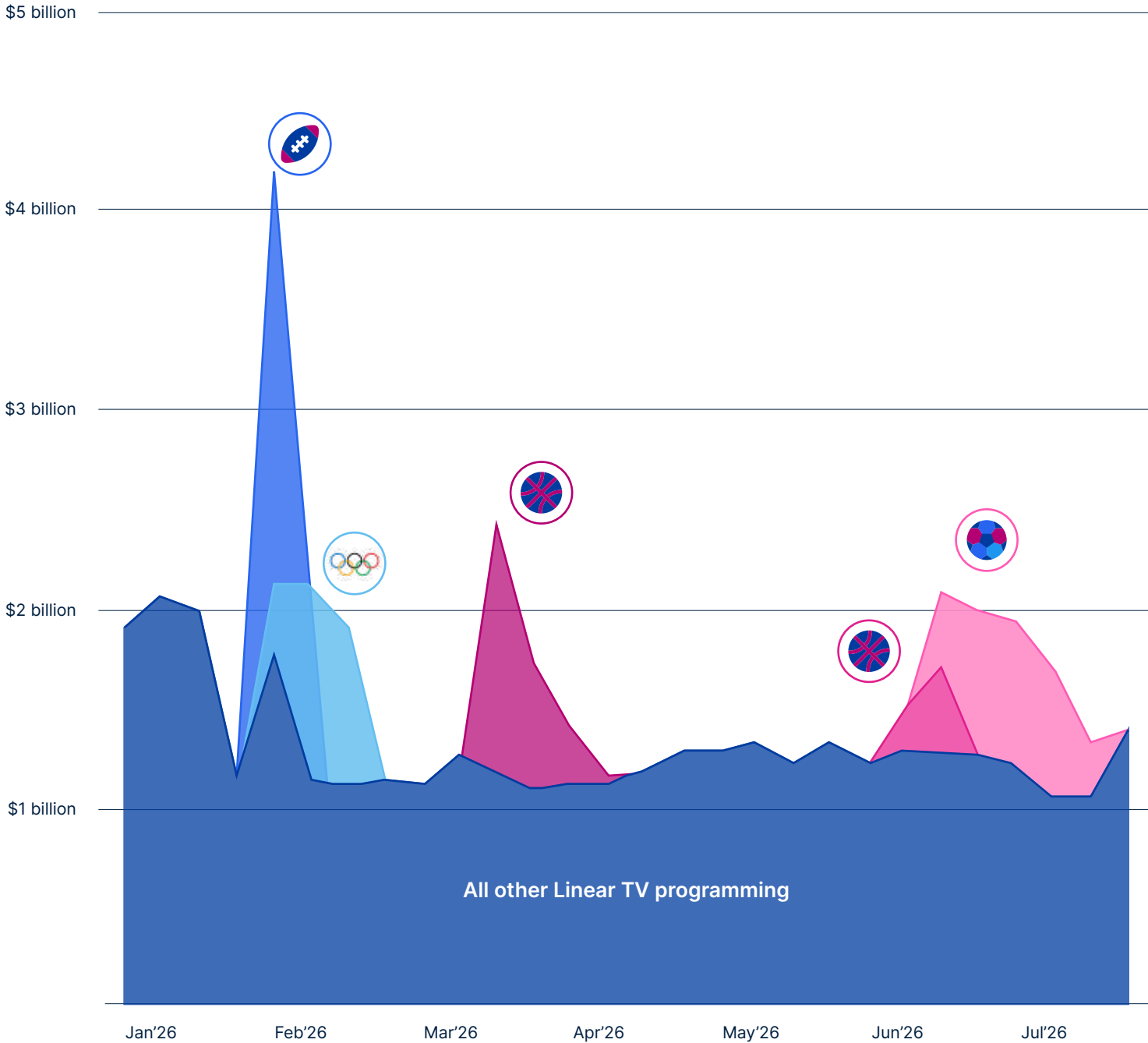
Looking ahead, nearly four in five marketers expect increases in their sports sponsorships.¹⁷ A calendar that includes global tournaments, especially in advance of an Olympic year, means big ways for brands to tap in. 57% of global brand leaders view sports as a primary driver of brand awareness and nearly two out of three see sponsorship as a way to reach specific fan segments.¹⁸ In the meantime, today's fans are engaging their favorite sports, athletes, and commentators year round. So sponsors have to show up there, too.

Winning in today's sports landscape requires intelligence on [fan segment behaviors](#), attitudes, and sentiments redefining sponsorship value.

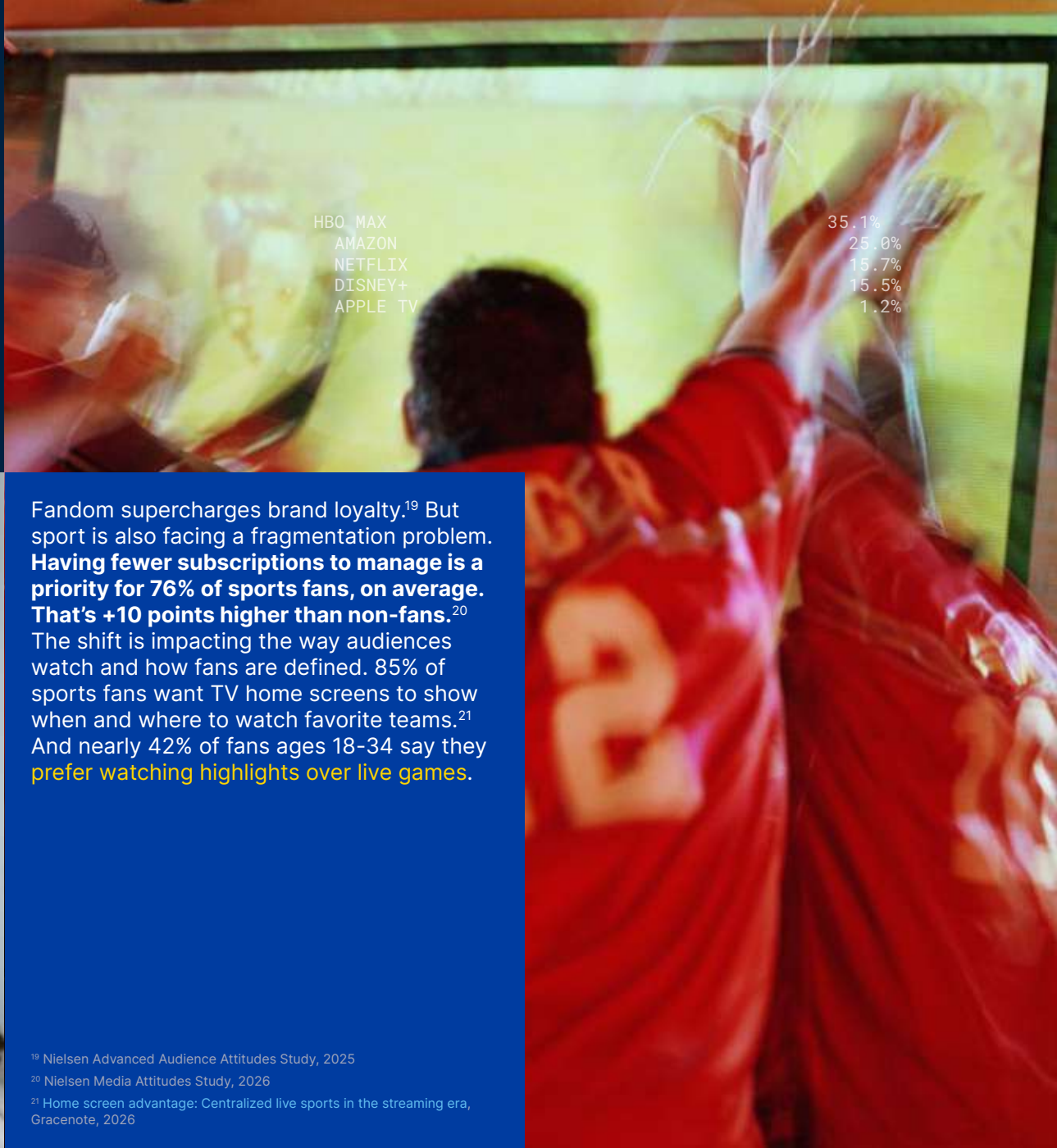
¹⁷ Nielsen Annual Marketing Survey, 2026

¹⁸ Nielsen Annual Marketing Survey, 2026

The sports calendar and linear ad spend spikes



Source: Nielsen Ad Intel, U.S., 2026



HBO MAX
AMAZON
NETFLIX
DISNEY+
APPLE TV

35.1%
25.0%
15.7%
15.5%
1.2%

Fandom supercharges brand loyalty.¹⁹ But sport is also facing a fragmentation problem. **Having fewer subscriptions to manage is a priority for 76% of sports fans, on average. That's +10 points higher than non-fans.**²⁰

The shift is impacting the way audiences watch and how fans are defined. 85% of sports fans want TV home screens to show when and where to watch favorite teams.²¹ And nearly 42% of fans ages 18-34 say they **prefer watching highlights over live games.**

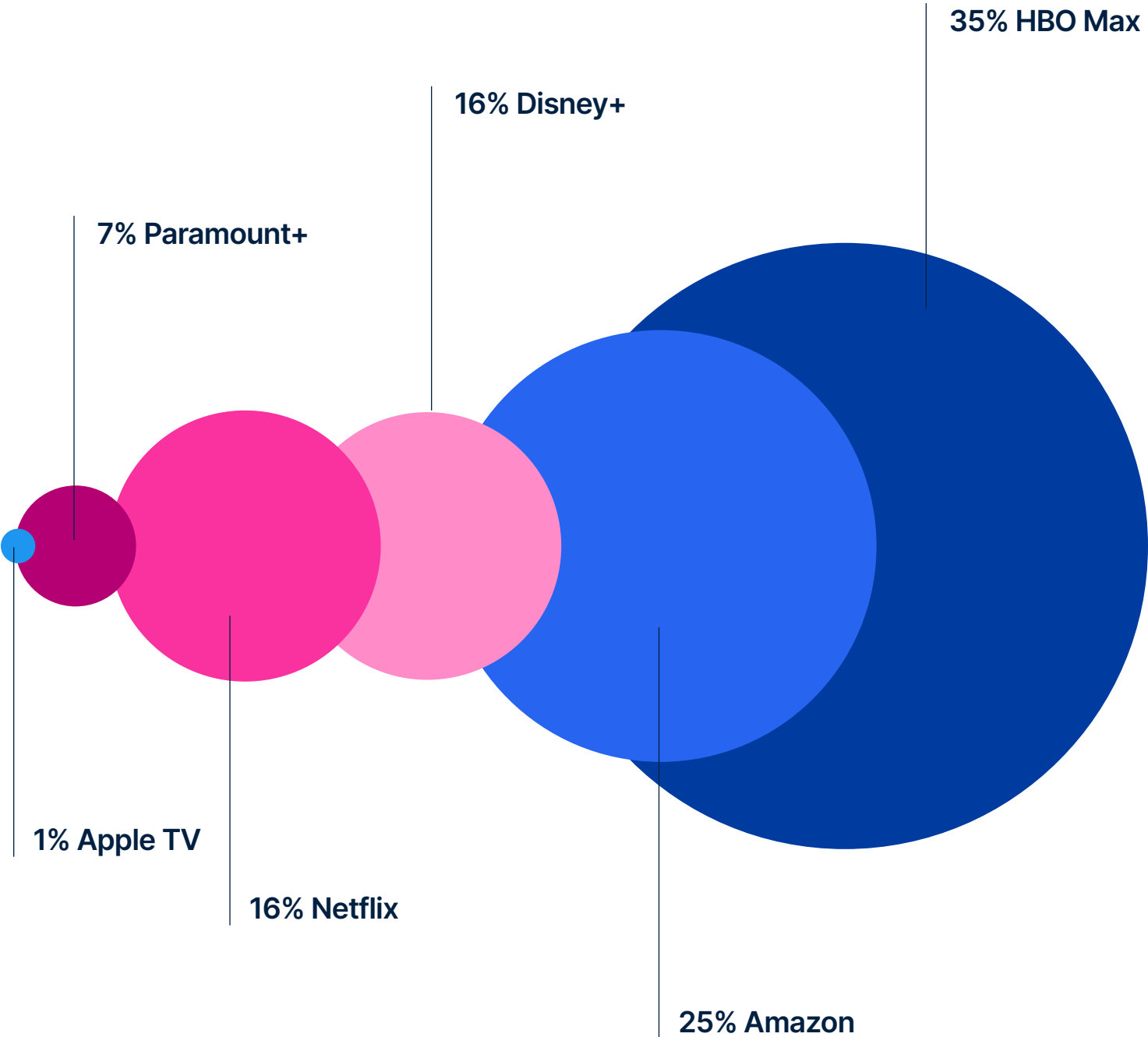
¹⁹ Nielsen Advanced Audience Attitudes Study, 2025

²⁰ Nielsen Media Attitudes Study, 2026

²¹ Home screen advantage: Centralized live sports in the streaming era, Gracenote, 2026

Sports programs by streaming platform

% of sports program titles distributed by provider



Source: Gracenote, Q3 2026
Read as: In Q3 2026, Amazon distributed 25% of the total sports programming titles offered by six streaming providers.

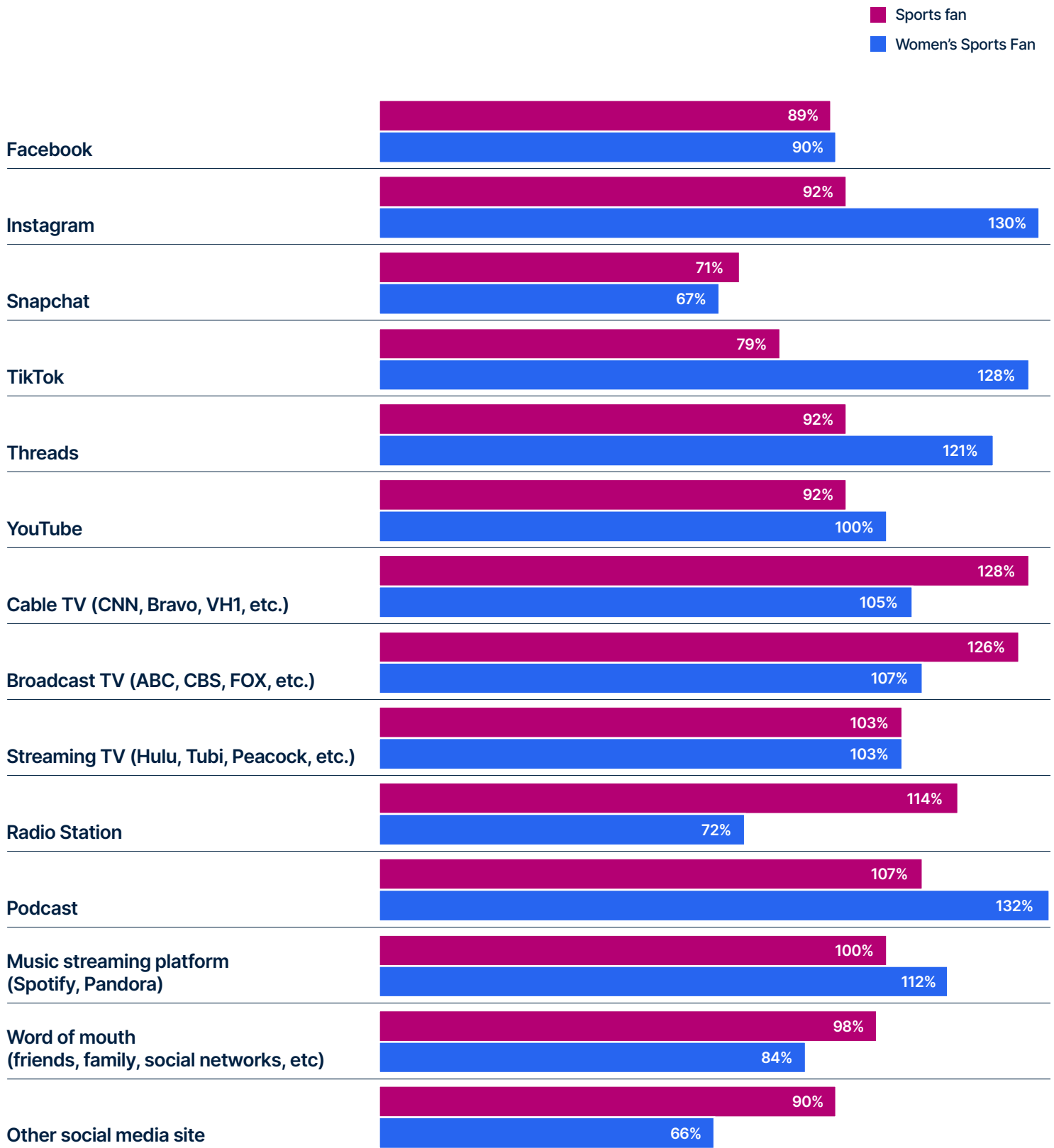
The shifts in how and where sports are consumed also influences effectiveness, depending on the audience segment sponsors want to engage. Overall, linear TV moves sports fans through the funnel more effectively than the general population.²²

However, segments within sports can show different preferences and 43% of marketers view sports as a testing ground for new audiences or markets.²³ **Women's sports** fandom provides a great example. This cohort frequently favors digital platforms for ads or recommendations that prompt them to purchase.²⁴ From podcasts to docuseries, reaching this segment has moved innovative sponsors to create inventory to meet fan demand. The results? Sponsorship valuations have seen double-digit growth for top women's leagues.²⁵

²² Nielsen Media Attitudes Study, 2026
²³ Nielsen Annual Marketing Survey, 2026
²⁴ Nielsen Media Attitudes Study, 2026
²⁵ Nielsen Sports, Sponsorship Media Valuation, 2024, 2025



Top ad/recommendation sources that prompt fans to purchase | Index vs U.S. consumers overall



Source: Nielsen Media Attitudes Study, 2026

Your next move

Attention is fragmented, social, and shared. Winning means knowing who is watching together or listening during daily commutes—and which fans you are paying to reach.

Plan creative around who is on the couch or the comment section.

Co-viewing patterns differ by age and platform. About one in three adults 18-49 are co-viewing broadcast originals on streaming platforms with a peer. The same age group devotes 30 hours a week to their smartphones. For adults 50+, 44% co-view on linear against about a third on streaming. Match creative tone and placement to those patterns.

Don't just sponsor the major sports moments; follow fan segments to opportunities with breadth and depth.

65% of marketers see sponsorship as a way to reach specific fan segments. As fandom is redefined, expertise in, and respect for, nuanced fan experiences is a gamechanger for brands adding value.

How Nielsen helps

Whether it's watch parties in the living room or live chats in digital communities, understanding how traditional and creator-led media complement strategies is key. **Nielsen Streaming Content Ratings** show co-viewing patterns, platform preferences, and which programs are taking the lead. **Nielsen Creator Lift** measures purchase intent and brand affinity lifts driven by creator content, separately from traditional digital spend. **Nielsen Sports Sponsorship Media Valuation** can quantify sponsorship ROI from emerging women's sports leagues to global tournaments. And **Nielsen Fan Insights** can align brand messaging with fan sentiment, cultural fluency, and segment behaviors to build lasting brand loyalty without intruding on the fan experience.

Ready to make your next move?

Let's talk

About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future.

Nielsen operates around the world in more than 55 countries. Learn more at www.nielsen.com and connect with us on social media ([X](#), [LinkedIn](#), [YouTube](#), [Facebook](#) and [Instagram](#)).