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ARTICLE

Ten years of digital advertising by Brazilian Top of Mind brands: a longitudinal cartographic study (2016–2025)

Dez anos de publicidade digital nas marcas *Top of Mind* brasileiras: um estudo cartográfico longitudinal (2016–2025)

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ABSTRACT: *This article presents a longitudinal mapping of digital advertising by the ten leading brands of the 2014 Top of Mind Internet survey: Brastemp, Coca-Cola, Colgate, Fiat, Itaú, McDonald's, Samsung, Skol, TIM, and Visa, revisiting the corpus of a doctoral dissertation defended in 2016 to examine their transformations through 2025. Grounded in media ecology and in cartography as a methodological strategy, the investigation applies an updated analytical matrix of seven dimensions and 21 criteria, incorporating variables not included in the 2016 analytical matrix, such as those concerning artificial intelligence and platform ecosystems. The results reveal three cross-cutting movements: the specialization of the institutional portal, from center to node of the ecosystem; the bifurcation of AI, across vanguard, transition, and infrastructure for AI agents; and the reconfiguration of Top of Mind, suggesting a decoupling between technological sophistication and unaided brand recall. The article also proposes a fourth type of interactivity: user–AI agent interaction.*

Keywords: *digital advertising; media ecology; cartography; Top of Mind brands; generative artificial intelligence.*

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RESUMO: *Este artigo apresenta um mapeamento longitudinal da publicidade digital das dez marcas líderes da pesquisa Top of Mind Internet 2014: Brastemp, Coca-Cola, Colgate, Fiat, Itaú, McDonald's, Samsung, Skol, TIM e Visa, retomando o corpus de uma tese defendida em 2016 para examinar suas transformações até 2025. Ancorada na ecologia midiática e na cartografia como estratégia metodológica, a investigação aplica uma matriz de análise atualizada, com sete dimensões e 21 critérios, que incorpora variáveis não contempladas na matriz de 2016, como aquelas referentes à inteligência artificial e ao ecossistema de plataformas. Os resultados revelam três movimentos transversais: a especialização do portal institucional, de centro a nó do ecossistema; a bifurcação da IA, entre vanguarda, transição e infraestrutura agente; e a reconfiguração do Top of Mind, com indícios de descolamento entre sofisticação tecnológica e lembrança espontânea. Propõe-se, ainda, um quarto tipo de interatividade: utilizador–agente de inteligência artificial.*

Palavras-chave: *publicidade digital; ecologia midiática; cartografia; marcas Top of Mind; inteligência artificial generativa.*

INTRODUCTION

In 2016, the doctoral dissertation *Institutional portals on the web: an analysis of advertisements in the media ecosystem* (GHISLENI, 2016, free translation) mapped, systematically and longitudinally, digital advertising on the institutional portals of the brands most recalled by Brazilians online, from the emergence of commercial internet in Brazil, in 1994, to 2016. The corpus was defined by four criteria: portals registered with Registro.br, present online for more than fifteen years, cited among Top of Mind brands since 2007, and leaders in the 2014 Top of Mind Internet survey — a brand-recall study by the Datafolha Institute in partnership with UOL, using the most recent edition at the time of data collection. Ten brands emerged from this process: Brastemp, Coca-Cola, Colgate, Fiat, Itaú, McDonald's, Samsung, Skol, TIM and Visa.

The research identified four cartographic moments in these brands' digital trajectory:

- the transposition of traditional media to the online medium (banners from print media);
- creation specifically for the digital medium (animated GIFs);
- interaction with users (Web 2.0 and social media);
- transposition to mobile, the point at which the research ended.

This fourth moment was an ongoing trend and a limitation of the study: not all brands had completed the transition to responsive web design (GHISLENI, 2016).

A decade later, that horizon has become territory, and a new horizon has emerged in its place: generative artificial intelligence (AI) as a product, interlocutor and brand proposition. This article revisits the same corpus of ten brands — and the same portals — to map what happened between 2016 and 2025. The research question is: how did the digital advertising of the ten Brazilian Top of Mind brands transform between 2016 and 2025, and what does this transformation reveal about the media ecology of the contemporary digital advertising ecosystem? The central

finding that organizes the analysis is the change in the function of the institutional portal, which ceases to be the center of brands' digital ecosystem and becomes one of its nodes; the remaining propositions (the bifurcation of AI, the fourth type of interactivity, the hyperpersonalization paradox, and the notion of meta-infrastructure) are hypotheses and open research avenues stemming from this finding.

Chart 1 presents the ten brands in the corpus, their categories in the 2014 Top of Mind Internet survey and their situation in the 2025 Top of Mind Datafolha survey, allowing a longitudinal reading of each one's positioning over the decade. It should be noted that the 2014 Top of Mind Internet (Datafolha/UOL) and the 2025 Top of Mind Datafolha

Chart 1 – Corpus: the ten brands and their Top of Mind trajectory (2014–2025)

Brand	Category (2014 TOM Internet)	2014 TOM	2025 TOM Datafolha
Brastemp	Home appliance	Leader	Leader (washing machine)
Coca-Cola	Soft drink	Leader	Left the "Top do Top" (since 2024)
Colgate	Oral hygiene	Leader	Leader (toothpaste)
Fiat	Automobile	Leader	Led only in 2016 (MACEDO, 2016); since then, VW dominates the category
Itaú	Bank	Leader	Not leading (lost to Banco do Brasil)
McDonald's	Fast food	Leader	Leader
Samsung	Mobile phone/ Electronics	Leader (4 categories)	Leader (mobile, TV and computer)
Skol	Beer	Leader	Statistical tie at the top with Brahma in the latest measurement (MACEDO, 2024); category absent from the 2025 edition
TIM	Mobile carrier	Leader	Not leading (Vivo leads)
Visa	Credit card	Leader	Leader

TOM: Top of Mind. Note: "Top do Top" refers to the overall ranking of unaided brand recall, regardless of product category.
Sources: Ghisleni (2016); Macedo (2024); Folha de S.Paulo and Datafolha (2025); for the beer category.

are surveys that differ in their target populations, question wording and categories; Chart 1 does not treat them as strictly equivalent series, but as two portraits of brand recall read qualitatively rather than as continuous variation.

A reading of Chart 1 anticipates a relevant finding: of the ten brands, five maintained or consolidated leadership in their categories (Brastemp, Colgate, McDonald's, Samsung and Visa); two lost the leadership they held (Itaú and TIM); one left the top position (Coca-Cola); one led only in 2016 — precisely the base year of this research — and did not return to the top (Fiat) (MACEDO, 2016); and one (Skol) had a singular trajectory: the beer category, absent from the survey since 2016, returned only in the 2024 edition, when the brand shared the top with Brahma in a statistical tie (MACEDO, 2024), and was again not measured in 2025. This pattern, analyzed in conjunction with each brand's digital transformations, produces one of the most intriguing findings of this investigation, developed in the subsection "Third movement: Top of Mind under reconfiguration — the cross-cutting pattern."

The rationale is threefold. Empirically, longitudinal studies spanning more than eight years are scarce in Brazilian digital communication research, and returning to the same corpus with the same framework allows one to observe what changed with a precision that synchronic studies cannot achieve. Methodologically, the article presents the new matrix, with seven dimensions and 21 criteria, including dimensions not included in the 2016 analytical matrix (AI and platform ecosystems). Theoretically, it identifies three cross-cutting shifts and the hypothesis of a decoupling between technological sophistication and unaided brand recall.

Media ecology, platformization and the reconfiguration of portals

Media ecology is the central theoretical framework of this investigation (GHISLENI, 2016). Heir to McLuhan (2007) and to Postman, who formalized the field as the study of the interactions between communication technologies and the environments they build, it starts from

a premise that longitudinal analysis makes evident: new media do not eliminate previous ones, but reorganize their functions and centrality. Scolari (2012; 2015) translates this into evolutionary terms: in complex ecosystems, species survive by finding niches.

In 2016, the brands operated in an ecosystem transitioning between Web 1.0 and Web 2.0, with the institutional portal as the central habitat. Formats evolved from static banners to HTML5; Flash, dominant for over a decade, was already declining and would be discontinued in 2020. The transition to mobile was a trend not yet completed by all brands (GHISLENI, 2016). In 2025, all operate with responsive portals, and mobile has overtaken desktop: the horizon that was then unfolding became the ground of a new ecosystem.

The structural transformation that reorganized this ecosystem between 2016 and 2025 has a name: platformization. Van Dijck, Poell and Waal (2018) define it as the progressive penetration of the logic and infrastructure of digital platforms into the various sectors of social and economic life; Poell, Nieborg and Van Dijck (2020) characterize platforms as reprogrammable infrastructures that shape interactions through the systematic collection and algorithmic processing of data. For brands, the effect was direct: the algorithm came to operate as an increasingly relevant mediator between brand and consumer, displacing the portal from the center of the ecosystem.

In Brazil, this debate has been gaining ground: Borba (2023) examines the platformization of advertising in immersive environments; Bentes (2025) analyzes how data infrastructures and hyperpersonalization place advertising at the center of platform capitalism; and Pereira and Petermann (2025) mobilize cartography to investigate the logics of platformization in advertising work. The period's most significant transformation was not one of formats, but a structural one that changed the logic of how brands relate to consumers.

To describe the position the portal comes to occupy in this arrangement, network analysis offers a vocabulary complementary to that of media ecology: a network is a set of nodes and the connections that link

them, and the graph that represents it has no hierarchical center, since each node derives its significance from the relative position it occupies and the ties it maintains (RECUERO, 2009). This vocabulary — node, tie, and relative position — will be revisited in the analysis of the portals. First, however, it is necessary to examine how the very forms of interaction between brands and users are reconfigured in this environment, the subject of the next section.

Interactivity, artificial intelligence and digital advertising: the state of the field in 2025

McMillan's (2002) typology of interactivity remains the central analytical instrument for examining the forms of interaction between users and brands' digital platforms. The tripartite model — type 1 (user–document), type 2 (user–system), and type 3 (user–user) — was the analytical axis of the 2016 dissertation, and its application to the current corpus reveals both continuities and ruptures.

The trajectory of advertising formats preceding the period examined here was documented empirically in a study of Samsung's website between 1994 and 2013: from static banners transposed from print media, through animated GIFs and streaming formats, to the first social widgets integrated into the brand's homepage from 2007 onward (BARICHELLO; GHISLENI, 2013). This trajectory is the starting point onto which the 2016–2025 transformations are superimposed.

In 2025, a phenomenon observed in the corpus does not fit McMillan's (2002) three existing types: the generative AI agent as a brand interlocutor. The Itaú Investment Intelligence (*Inteligência de Investimentos Itaú*) agent (2025) produces original responses at each interaction, personalizes recommendations and can execute transactions. It is neither a document (type 1), nor a system of predefined responses (type 2), nor a human (type 3). One might object that this is merely an evolution of type 2 (user–system); what distinguishes the generative agent, however, is the nature of the interlocutor, not the degree of sophistication of the responses. In type 2, the system returns responses contained within a

finite repertoire predefined by the sender; the generative agent produces responses not foreseen by its programmers, takes communicative initiative and occupies, from the user's standpoint, the position of an interlocutor — approaching type 3 (user–user) without being human. It is this undecidability between system and interlocutor that the 2002 typology does not accommodate and that motivates, in an exploratory way, the proposition of a fourth type. Guzman and Lewis (2020) named this entity "communicative AI," and Hancock, Naaman and Levy (2020) proposed the concept of AI-mediated communication. This article locates the phenomenon in the corpus, proposing, in an exploratory way and as a hypothesis extending the typology, its designation as a fourth type of interactivity (user–AI agent interaction); its theoretical development is the object of a subsequent study dedicated to the Itaú case.

At the market level, the 2025 context differs from 2016: R$ 42.7 billion (Brazilian reais) were invested in digital advertising in Brazil (up 80% from 2020), with about 70% of media acquired programmatically (IAB BRASIL, 2026). Social commerce consolidated as a structural phenomenon: in 2024, Brazil became the Latin American country with the highest level of shopping via social media, with 51.3% of consumers declaring an intention to buy through this channel (REDAÇÃO, 2025). Generative AI, popularized among the general public following the launch of ChatGPT (November 2022), introduced into the advertising chain a layer of automation ranging from campaign optimization to the creation of transactional brand agents. Its adoption is advancing rapidly: the use of AI in Brazilian industry jumped from 16.9% (2022) to 41.9% (2024) (LOPES; BELLO, 2025), and 88% of agency leaders in Brazil consider that AI enhances creativity (MEIO & MENSAGEM, 2024).

Methodological strategies

Cartography is the methodological strategy of this investigation, in continuity with the 2016 study (GHISLENI, 2016). As proposed by Rolnik (1987) and activated by Deleuze and Guattari (1995) as the principle of the rhizome, it is not a technical-procedural method, but a stance

oriented toward following processes in motion: the cartographer does not describe a fixed territory, but maps territories in transformation, attentive to lines of force and points of rupture that characterize them.

Rolnik (1987, p. 6, our translation) defines cartography as "a method with a dual function: to detect the landscape, its accidents, its mutations and, at the same time, to create paths of passage through them." Maintaining the same method means that the differences between the 2016 map and the 2025 remapping can be interpreted as transformations of the territory, and not as methodological artifacts — a condition of any rigorous longitudinal analysis.

The ten brands maintain active institutional portals in 2025, confirmed by direct observation between March and May 2026. Although the portal is the unit inherited from 2016 and the anchor of the longitudinal comparison, the analysis incorporates, where pertinent, the other channels of each brand's digital ecosystem (apps, social networks, messaging, e-commerce, events, and press rooms) as complementary sources. The object, therefore, is the brands' digital ecosystem anchored in the portal, not the portal in isolation. This is, strictly speaking, a study of the brands' communication output (what they produce and make available on their digital channels), and not a study of reception or use: the corpus does not include audience, engagement, or consumer-behavior data. Top of Mind data are taken as an indicator of brand memory produced by a third party (Datafolha), and not as a measure of the effect of the communication output analyzed. To access the portals in their historical versions, the Internet Archive Wayback Machine (IAWM) was used — the same tool employed in the earlier study, which has archived web pages since 1996 (BARICHELLO; GHISLENI, 2013; GHISLENI, 2016).

The analytical scope runs from 2016 to 2025. Events from early 2026, such as Visa's first commerce transaction carried out by AI agents with Banco do Brasil (March), are treated as developments recorded during the data-collection window (March to May 2026), and not as part of the period analyzed, since they illuminate trends already identified in 2025.

The central instrument of this research is an analytical matrix developed from the matrix used in the 2016 study (GHISLENI, 2016),

updated to incorporate emerging dimensions of the contemporary digital ecosystem. Chart 2 presents the complete structure. In the 2016 and 2025 columns: "original" indicates a criterion present in the 2016 dissertation;

Chart 2 – Updated analytical matrix: dimensions, criteria, and origin.

Dimension	Core criterion	2016	2025
D1 — Portal: existence and nature	Main function of the homepage	Original	Updated
	Portal as center or node of the ecosystem?	—	New
	Fragmentation into subdomains or microsites?	—	New
D2 — Advertising formats	Predominant technology (HTML5, video)	Original	Updated
	Programmatic/personalized advertising?	—	New
	AI-generated or AI-assisted content?	—	New
D3 — Interactivity (MCMILLAN, 2002)	Type 1: user–document	Original	Maintained
	Type 2: user–system	Original	Maintained
	Type 3: user–user	Original	Maintained
	Type 4: user–AI agent interaction	—	New
D4 — Mobile and multiplatform	Proprietary app? Does the portal encourage installation?	—	New
	Integration with messaging (WhatsApp)?	—	New
D5 — Social networks and ecosystem	Active redirection to social media platforms?	—	New
	Presence on TikTok/use for short-form video?	—	New
	Integrated social commerce?	—	New
D6 — AI and personalization	Use of generative AI in communication?	—	New
	Content personalization on the portal?	—	New
	AI as brand or product attribute?	—	New
D7 — Positioning in the ecosystem	Predominant type of advertising (PINHO, 2001)	Original	Maintained
	Position in Top of Mind 2014 *vs.* 2025	—	New
	Brand repositioning in the period?	—	New

AI: artificial intelligence.
Source: prepared by the author from McMillan (2002) and Ghisleni (2016).

"maintained," a criterion preserved without alteration; "updated," an adapted criterion; "new," a criterion incorporated for 2025; and "—," a criterion that did not exist at that moment.

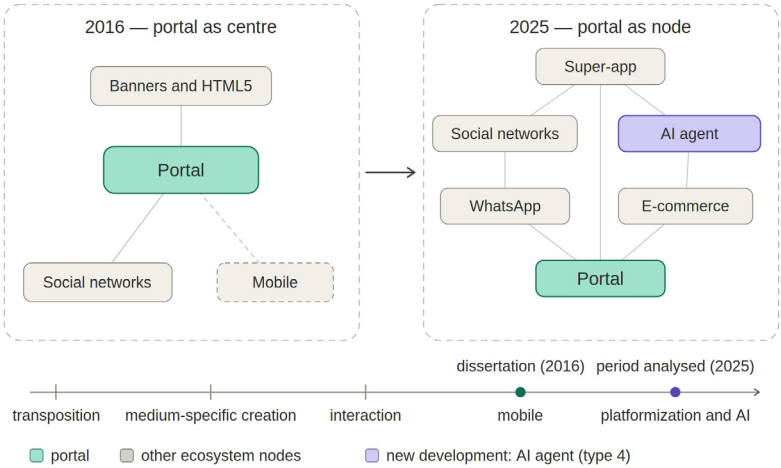
The new matrix has seven dimensions and 21 criteria: 6 maintained or adapted from the original version and 15 new. The main innovations are dimension D6 (AI and personalization), entirely new; type 4 in D3, which extends McMillan's (2002) typology to interaction with AI agents; and the D1 criteria that distinguish between the portal as center and the portal as node. This distinction did not exist in 2016, when all portals in the corpus still functioned as their brands' digital centers. Data collection followed four procedures: direct observation of the portals (March–May 2026), analysis of press rooms and institutional reports, a survey of specialized outlets, and consultation of market data. Longitudinal comparability, however, is not uniform across dimensions: only the criteria inherited from 2016 (marked as "original" in Chart 2) were applied equivalently at both moments and support the direct comparison between 2016 and 2025; the new criteria (above all, dimension D6, on AI and personalization, and type 4 in D3) describe phenomena that were non-existent or unobservable in 2016 and characterize the 2025 state with no comparable counterpart. The longitudinal character thus rests on the subset of effectively comparable criteria; the new ones record what emerged over the period.

In the interest of methodological transparency, it is declared that generative AI tools were used to support the organization of references, textual revision, and the preparation of the synthesis figures (Figures 1 and 2), always under the author's full conception, verification, and responsibility. The analysis, the interpretation of the data, and the conclusions are of human authorship.

The movements of the Brazilian digital advertising ecosystem

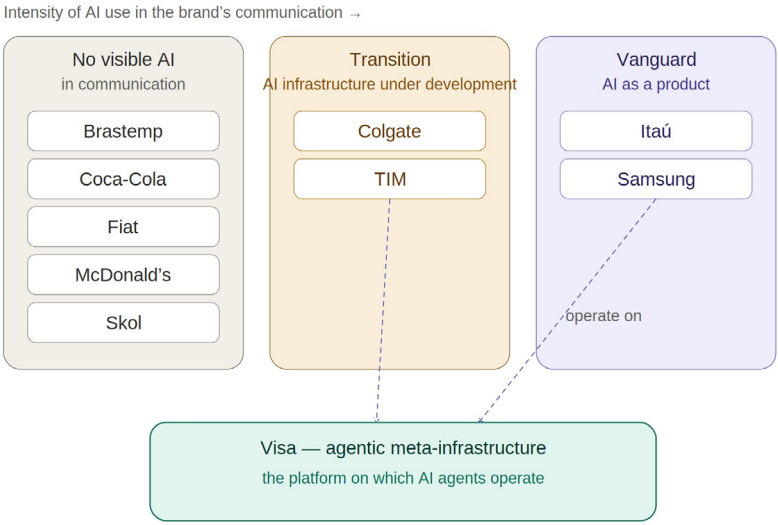
Applying the matrix to the ten brands reveals that Brazilian digital advertising did not follow, between 2016 and 2025, a linear and homogeneous evolutionary trajectory. The data show an ecosystem in bifurcation:

Figure 1 – The cartographic movement of the corpus: the portal, from center (2016) to node (2025) of the ecosystem.



Source: prepared by the author (2026).

Figure 2 – The bifurcation of artificial intelligence in the corpus: the four groups and Visa as meta-infrastructure.



Source: prepared by the author (2026).

brands that adopted the logic of platformization and AI as the organizing principle of all communication and brands that pursued digital strategies recognizable as extensions of Web 2.0. This bifurcation is organized into three cross-cutting shifts.

First movement: the specialization of the portal, from center to node

In 2016, the ten brands' portals were the digital center of their strategies: the address where the brand existed fully online, presented products, ran campaigns, and served the consumer. This centrality reflected a lack of alternatives: there were no superapps, TikTok had not yet been launched globally, and WhatsApp had no commercial functionality.

In 2025, none of the ten brands keeps the portal as its exclusive digital center. The movement, however, is not homogeneous, as there is a spectrum ranging from an almost total migration of the center to other platforms to the maintenance of the portal as a robust hub with expanded functions. Figure 1 synthesizes this shift, and three patterns are organized along this spectrum.

Three patterns organize this spectrum: the advanced-platformization pattern, in which the center migrates from the portal to a superapp or e-commerce; the expanded-portal pattern, in which the portal remains the center but broadens its functions; and the pattern of centrality in events and networks, in which the axis shifts to social networks and physical presence. Each is detailed below.

The advanced-platformization pattern characterizes Itaú, Brastemp, and McDonald's. Itaú migrated the center to the superapp, and the portal itau.com.br is the gateway to an ecosystem of eight subdomains. Brastemp shifted its digital center to VTEX e-commerce, with the site now primarily an online store. McDonald's, repositioned as "Méqui" (its colloquial Brazilian nickname), shifted the center to TikTok and its own app; the portal persists as an institutional repository.

The expanded-portal pattern characterizes Coca-Cola, Fiat, Colgate, and TIM. These brands kept the portal as the center but expanded its functions beyond the institutional. Coca-Cola operates a portal with login, official store, and campaigns via QR code and WhatsApp. Fiat developed

a portal with a vehicle configurator, dealership geolocation, and online financing. Colgate maintains two portals (end consumer and B2B), with an app connected via Bluetooth for its electric toothbrushes. TIM operates its portal with digital eSIM, WhatsApp support, and its own app.

The pattern of centrality in events and networks characterizes Skol, Samsung, and Visa. Skol, which underwent a profound repositioning between 2017 and 2025 — from the controversial feminist "reposter" campaign to the 2025 revival of the "round" (*redondo*) concept — centralized its digital presence in physical events (Carnaval, Carnatal) and social networks, keeping the portal skol.com.br as a purely institutional hub, where all purchase buttons redirect to external partners (Zé Delivery, iFood). Samsung organized all its communication around #GalaxyAI, with TikTok — where it gathers millions of followers and likes — as the central channel: an arc that begins with the first social widgets documented in 2007 (BARICHELLO; GHISLENI, 2013) and reaches 2025 with networks as its epicenter. Visa occupies a singular position: the portal visa.com.br is an institutional and B2B hub, but the true digital product is the infrastructure for the AI-agent ecosystem.

To speak of the portal as a node has conceptual precision: to say that it ceased to be a center and became a node (RECUERO, 2009) is to affirm that it lost the hierarchical primacy of 2016 and came to be worth its relative position in a distributed topology, among superapp, social networks, messaging, e-commerce, and AI agents.

In ecological terms, this is what Scolari (2015) would call speciation: the portal became a more specialized species in a more diverse ecosystem. The ten portals remain active in 2025: there is no extinction, but a profound reconfiguration of functions and centrality.

Second movement: the bifurcation of artificial intelligence — vanguard, transition and infrastructure

The second movement is the richest in the corpus and the one that most clearly delineates the ecosystem's bifurcation: applying dimensions D3 and D6 to the ten brands reveals four groups with distinct profiles.

The first group, the AI vanguard, comprises Itaú and Samsung. A distinction is in order: the grouping refers to the AI dimension (D6), not the portal pattern (D1), which is why Itaú appears in both readings. These are the only brands in which AI ceased to be a back-office tool and became a central product and advertising appeal. Samsung organized its communication around the hashtag #GalaxyAI; Itaú went further, with Itaú Investment Intelligence (*Inteligência de Investimentos Itaú*) (June 2025), the only case in the corpus in which generative AI functions as a transactional interlocutor — the type 4 proposed here. The agent integrates dozens of proprietary databases, responds by text and voice, and can execute operations upon authorization.

The second group, comprising the transitioning brands, includes Colgate and TIM. Colgate-Palmolive piloted, in 2025, a generative-AI chatbot integrated into the Profitero platform for managing content on online retailers' platforms — a B2B initiative, in closed testing, without public communication in Brazil. TIM tested generative-AI models in customer service, still without communicating AI as a brand attribute. In both cases, AI is present as infrastructure under construction.

The third case deserves a category of its own: Visa as infrastructure for the AI-agent ecosystem. With "Visa Intelligent Commerce" (2025) and the first commerce transaction carried out by AI agents in Brazil, with Banco do Brasil on 11 March 2026 (E-COMMERCE BRASIL, 2026), Visa built the infrastructure for third-party agents to transact with Visa cards: tokenization, biometric authentication, and security controls. Visa does not operate type 4 interactions: it is the platform on which other brands' type 4 interactions take place, a meta-infrastructure role that, in the analyzed corpus, finds no precedent in the 2016 corpus.

The fourth group, with no visible AI in its communication, is the most numerous: McDonald's, Coca-Cola, Brastemp, Skol, and Fiat. In none of them is AI communicated as a product or advertising appeal in Brazil. Skol is the most emblematic opposite pole: in 2025 it wagered on reviving the "round" concept and on physical presence at events, with no reference to AI. Figure 2 distributes the ten brands across the four groups, highlighting Visa's singular position.

With the portal's place reorganized and the bifurcation of AI revealed, it remains to ask how these transformations are reflected — or not — in the brands' unaided brand recall, the subject of the third movement.

Third movement: Top of Mind under reconfiguration — the cross-cutting pattern

Read together for the ten brands in the corpus, the 2025 Top of Mind data reveal a pattern that would not be visible in a single case study: technological sophistication and leadership in unaided brand recall are decoupling.

Of the ten brands, five have maintained or consolidated their leadership (Brastemp, Colgate, McDonald's, Samsung, and Visa). Two lost it: Itaú (to Banco do Brasil) and TIM (to Vivo). Coca-Cola has been out of the "Top do Top" since 2024. Fiat led only once, in 2016 — the base year of this research — when it broke Volkswagen's hegemony (MACEDO, 2016), and did not return to the top (SODRÉ, 2023). The most intriguing datum is the cross-reference with the AI map: the two brands that made the greatest advances in AI, Itaú and Samsung, show opposite trajectories in Top of Mind. Samsung consolidates and expands; Itaú loses. These trajectories cannot be attributed solely to the degree of digital sophistication: competitive movements explain part of the shifts in position — the rise of Banco do Brasil and Vivo, for instance, competes for unaided brand recall with Itaú and TIM through factors that go beyond the digital communication of the brands analyzed. And the brands that do not communicate AI — McDonald's, Brastemp, and Colgate — maintain stable leadership; Skol shared the top of its category with Brahma, in a statistical tie, in the most recent available measurement (MACEDO, 2024).

This pattern suggests that the relationship between digital sophistication and unaided brand recall is mediated by variables that cannot be precisely isolated using this corpus. What can be affirmed is that the equation is not simple: investing in generative AI and hyperpersonalization is not a sufficient condition, and may not be a necessary condition, to lead a category's unaided brand recall. It must be emphasized that the corpus

of ten cases and the change in Top of Mind categories over the period do not allow causal relations to be established or factors to be isolated; what follows is therefore an interpretive hypothesis generated by the study, to be tested in future research with a broader corpus and reception data. The hypothesis, here termed the hyperpersonalization paradox, is that algorithmic personalization could weaken brands' collective presence: a brand experienced in radically different ways by each user would lose the experiential homogeneity that sustains unaided brand recall.

Discussion

From mobile to artificial intelligence: the continuity of a line of transformation

The first contribution in relation to the 2016 dissertation is empirical: to complete the map left open. Transposition to mobile, not yet completed in 2016, is today consolidated — but it was a step, not a destination. Upon it a new ecosystem was built: superapps, social networks as transactional channels, programmatic advertising as the hegemonic logic, and generative AI as a product and brand interlocutor.

The 2016 map was not wrong, but incomplete; the 2025 map completes that horizon and opens another, whose question already takes shape: how will generative AI, today emerging as a brand interlocutor, consolidate as a standard, and which brands will lead this movement?

The bifurcation of the ecosystem and the hyperpersonalization paradox

The second axis of discussion deepens the decoupling identified in the third movement. The analytically most rigorous contrast is internal to the AI vanguard: Itaú and Samsung invested comparably in AI, in the same period, and show opposite trajectories in Top of Mind: Samsung consolidates its leadership; Itaú loses it to Banco do Brasil. Itaú invested in maximum hyperpersonalization — the home screen of the Itaú Empresas

app came to offer up to 2.3 million unique combinations for each client (ITAÚ UNIBANCO, 2025), with a transactional agent and hundreds of AI models — and lost the lead. Since two equally AI-sophisticated brands follow opposite directions in unaided brand recall, digital sophistication does not appear to govern Top of Mind: Itaú's loss is more plausibly explained by competitive and market factors, such as the rise of Banco do Brasil, than by its bet on AI. Skol, with low sophistication, illustrates the other extreme (MACEDO, 2024); because they belong to distinct categories and years, however, the brands are not directly comparable, and the juxtaposition serves as a qualitative illustration. What the corpus allows us to affirm is a decoupling between the two dimensions, not a relationship in which hyperpersonalization would weaken the brand — a hypothesis that remains to be tested.

The hyperpersonalization paradox is structural: the promise "Made for you" (*Feito para você*), which Itaú carried from 2003 to 2021 as an affective slogan (and which would give way to "Made with you" (*Feito com você*) and, in 2023, to "Made of the future" (*Feito de Futuro*), finds a technical echo in the 2025 hyperpersonalization, in which each client receives a distinct experience and, by individualizing so much, the brand may have lost the shared character that sustained collective recall.

Visa and meta-infrastructure for artificial intelligence agents: a new analytical category

The third axis of discussion addresses Visa's singular position, the only one of the ten brands whose relationship with AI does not fit the available analytical categories. With "Visa Intelligent Commerce," Visa does not communicate AI to the end consumer; it builds the platform on which other brands' AI agents operate. This meta-infrastructure role has no precedent in the 2016 corpus and is not captured by the existing literature on digital interactivity. Theorizing this role — distinct from the roles of advertiser, content platform, and agent operator — is an agenda this article opens, without seeking to develop it fully here.

Final remarks

This article produced the first systematic longitudinal mapping of the digital advertising of the ten Brazilian Top of Mind brands, covering the period from 2016 to 2025, with an antecedent documented in the empirical study of Samsung between 1994 and 2013 (BARICHELLO; GHISLENI, 2013) and in the 2016 study (GHISLENI, 2016).

The article makes three main contributions: empirical, in completing the mobile horizon opened in 2016 and recording the emergence of AI; methodological, with the new matrix of seven dimensions and 21 criteria; and theoretical, with the three cross-cutting movements, the decoupling hypothesis, and the characterization of Visa as infrastructure for the AI-agent ecosystem.

Five limitations deserve mention: the external observation of the portals, without audience data or internal metrics, limits causal inferences; the corpus of ten brands is small for statistical inference, so the patterns are analytical hypotheses; the analytical path, resting on qualitative observation of portals and continuously changing channels, is only partially reproducible from the manuscript, which constitutes a limitation in terms of traceability; the speed of the phenomenon implies that new developments occurred between data collection (May 2026) and publication; and the scope anchored in the institutional portal, inherited from 2016, does not systematically cover social networks — a limitation the agenda proposes to overcome.

Four research fronts emerge from the findings: the deepening of the Itaú case, already under way, which will extend type 4 and the hyperpersonalization paradox; the application of the matrix to the same brands' social media channels, producing the complete map of the ecosystem; the theorization of the meta-infrastructure identified in Visa; and the investigation of the decoupling hypothesis with a broader corpus and audience data.

The map presented here is, by nature, provisional: the territory continues to transform, and the corpus of Brazilian Top of Mind brands, followed since 1994, is a privileged analytical laboratory for tracking it.

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