KANTAR



The IRL Advantage:
The Role Physical Media Plays in an Agentic World

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> *Real-life experiences are what consumers trust and what they value most. Brands that recognize this can gain a competitive advantage over those that don't.*

Brand marketers are confronted with an increasingly frustrating advertising landscape. This qualitative research revealed that:

- Engagement is declining on channels that historically delivered reliable performance.
- Long-trusted social, search, and broadcast placements are underperforming, even as CPMs continue to rise.
- Click-through rates are stable, but conversions are dropping, even with consistent creative execution.

This leaves brand teams asking difficult but necessary questions: Why aren't digital campaigns landing the way they used to? Why is engagement falling on social platforms? Why are viewers skipping the ads they used to watch?

Ultimately, this leads to the most critical question of all:
instead of simply asking, why are consumers now asking,

"Is this product for me?" *"Is this even real?"*

The answer may be found in a significant shift in consumer preferences in just the last few years. More people are putting their phones down at dinner, opting for meaningful human interaction, and spending more time outside and at the mall.

Meanwhile, AI-generated deepfake videos and voices, fabricated testimonials, AI-manipulated product images, and even AI hallucinations in legal briefs have injected skepticism into every facet of society.

For brand marketers, algorithm-driven distrust has created both an obstacle and an opportunity. We believe consumers' hunger for meaningful human connection and emerging preference for real-life media can help brand marketers reverse performance declines in both digital and broadcast channels and strengthen the entire media mix.

Increasingly, real-life experiences are what consumers trust, and what they value most. Brands that recognize this can gain a competitive advantage over those that don't.

Research Objectives & Methodology

IRL Media

— Interactive brand experience & live experiences
— In-store or mall advertising signage
— Sponsorships
— Ads in transit spaces or inside/outside transit vehicles
— Street level ads
— Ads on billboards/walls/posters along roads/highway

Traditional Media

— Ads included in printed media that are sent to home
— Commercials on the radio
— Commercials on TV

Online Media

— Ads on streaming sites
— Commercials on podcasts
— Ads on social media and YouTube from brands
— Sponsored content on social media and YouTube
— Online ads/Mobile Ads

Our qualitative and quantitative research, conducted in Q1/Q2 of 2026, was designed to examine how media channels differ in their ability to build trust, credibility, preference, and drive brand influence. We tested how consumers experience and perceive online, traditional, and out-of-home (OOH) ads, and defined the role OOH media was playing in building trust and amplifying impact across the journey.

We conducted qualitative focus groups with consumers across the country and deep-dive interviews with senior client-side brand marketers and agency executives in March of 2026.

We also conducted a quantitative online survey among **2,000 U.S. consumers aged 18–64**. The survey was fielded in April and May of 2026 across 11 major U.S. metropolitan markets including:

Atlanta
Boston
Chicago
Dallas
Houston
Los Angeles
Miami
New York
Philadelphia
San Francisco
Washington, DC.





Doubt Is The New Default

93% of consumers now question whether the content they encounter online was created by a real person or generated by AI.[1]

When looking at the generational skew, Gen Z and Millenials reported the highest levels of skepticism.

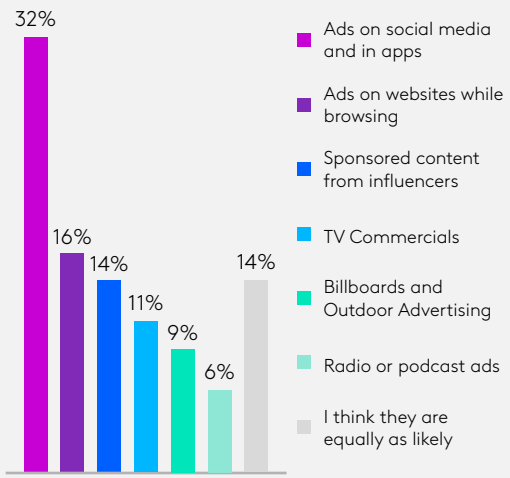
As generative AI has become exponentially more visible, more accessible to users, and more sophisticated, today's consumers feel overwhelmed by un-reality. **Fully 93% of consumers now question whether the content they encounter online was created by a real person or generated by AI.**[1]

Algorithm-based targeting feels more intrusive than helpful, and AI-generated content feels more manipulative than informative or entertaining. In a media landscape where much of the content is artificial, doubt and disconnection are the new defaults.

Reach and targeting only matter if the consumer believes your message is credible. When the majority of consumers question the authenticity of what they see, media has another job: giving consumers a respite from the mental burden of skepticism and fact-checking.

Kantar's research revealed that three out of four Gen Z and Millennial consumers question whether online content is AI-generated at least sometimes, with one in three doing so constantly.[2] Across every generation, social media feeds and apps were ranked as the advertising environment most likely to contain AI-generated, fake, or misleading content[3], cited by 27% to 35% of consumers, compared to just 3% to 10% for billboards and outdoor advertising.

Type of Advertising Consumers Believe Most Likely to be Misleading, Fake, or AI-Generated





Surprisingly, this isn't merely a Boomer backlash against technology. **Gen Z and Millennials are driving the shift to real-life experiences, with four out of five saying they've actively sought more real-life experiences in the past year,** along with 66% of Gen X and 61% of Baby Boomers.[4]

The AI-accelerated collapse of consumer trust has profound implications for brands. High-trust brands can spend significantly less time proving themselves and more time building customer relationships and loyalty. Brands that can't demonstrate a real-world connection with their audience run the risk of being judged as less credible if their ads appear only in channels that consumers increasingly distrust.

Key Media Insight:

While reach and targeting still matter, media has another job, especially with younger consumers: establish trust that the brand is legitimate and real.

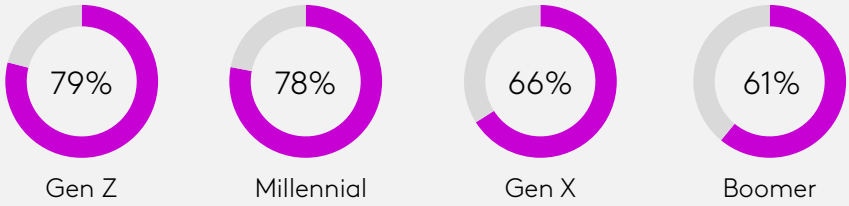
Reality Is Becoming More Valuable

As their digital lives become more synthetic, automated, and siloed, people are increasingly seeking real-life, filter-free experiences that feel authentic, human, and shared.

"Everything online feels curated or fake now. When you're out in the real world, you can't filter it or fake it. It just feels grounding."

—Maya, age 24

Consumers who are seeking out more experiences in the real world over the past year



People are making intentional efforts to spend meaningful time with others, prioritizing in-person activities like book clubs, concerts, cultural outings, church attendance, and local festivals.[5] For the first time, the number of Americans participating in team sports has surpassed 90 million and was the fastest-growing activity measured.[6]

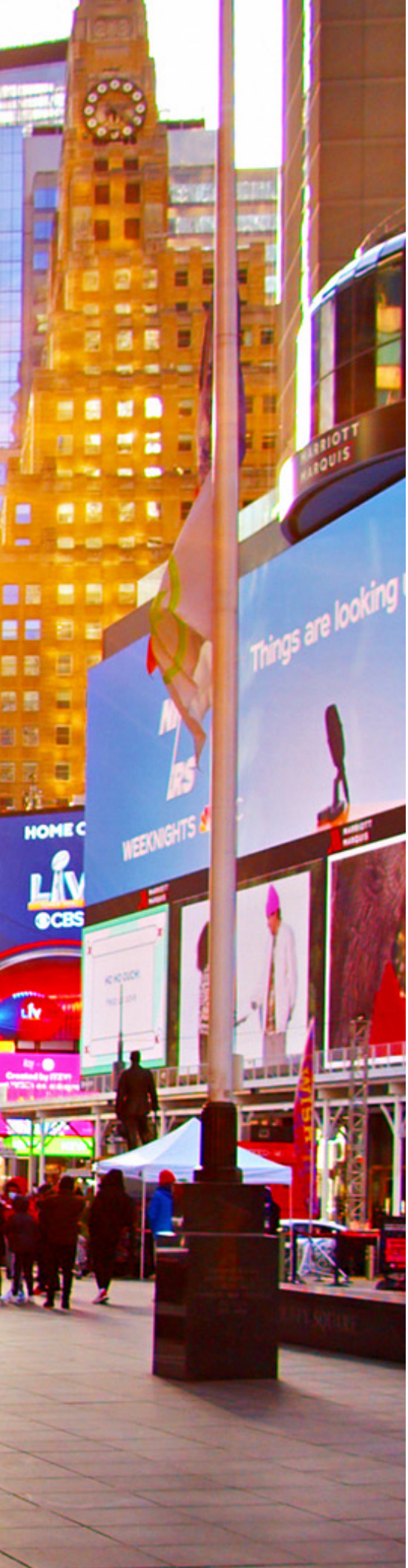
"I spend all day looking at screens for work, and then I catch myself scrolling at night. Going to an event or just being out in the city feels like coming up for air. You realize how much you miss just being in an actual place with actual people."

—Marcus, age 31

Key Media Insight:

The generation raised by algorithms values connection, surprise, discovery, and real-world experience even more than prior generations. The future of media isn't less technology, it's more reality.





Physical Presence Carries Meaning

The majority of consumers say advertising they can see in person is more believable than advertising they only see on a screen, including 80% of Millennials, 77% of Gen Z, 72% of Gen X, and 66% of Boomers.[7]

Consumers told us that brands that physically advertise in their neighborhood signaled that they "actually care about this place."[8] In-person advertising was seen as "something we share in common" by 64% of Gen Z and 67% of Millennials, and 43% of Baby Boomers agree.[9] Consumers believe real-life advertising communicates effort, credibility, permanence, and confidence.

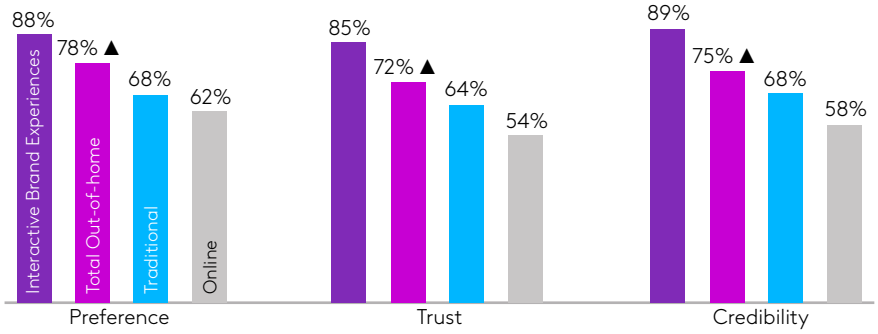
"If [a brand is] able to put money behind other services, like sponsoring a show or an event, it says that they have real financial resources and are established enough in the community."
—Dylan, age 27

Conversely, consumers told us that low-effort, AI-generated creative signals a brand's lack of seriousness:

"...when a brand uses AI to generate an entire 30-second ad, it feels like cutting corners. It's too easy, and it comes across as cheap...."
—Christine, age 23

The brands smart enough to meet consumers in real life, in their neighborhoods, on the streets they actually walk aren't just buying impressions, they are aligning themselves with the trust and credibility that out-of-home has established with consumers in a world where distrust in advertising has become the norm

Preference, Trust, & Credibility by Media Channel Averages – T2B %



Key Media Insight:

Physical presence is more than visibility. It creates community and shared cultural connection. In an increasingly frictionless digital environment, the effort required to show up physically can itself become meaningful.



Brand Media Plans Need a Physical Layer

The Physical Layer is the part of a brand's media architecture that people can see, experience, and verify in the real world. This includes ads on billboards and walls, in public transit spaces, at street level, along the highway, and in stores and malls. It also includes interactive brand experiences such as pop-up events and in-store kiosks.

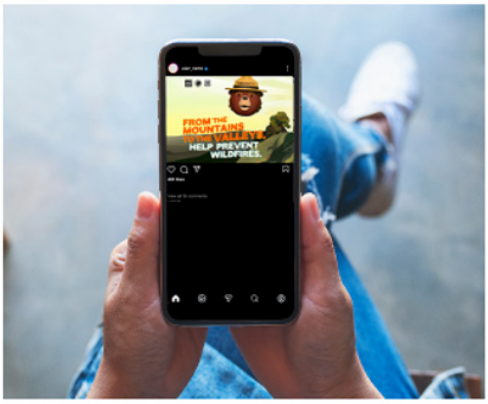
When we asked what it says about a brand when it advertises in a public place, consumers' top three responses were:

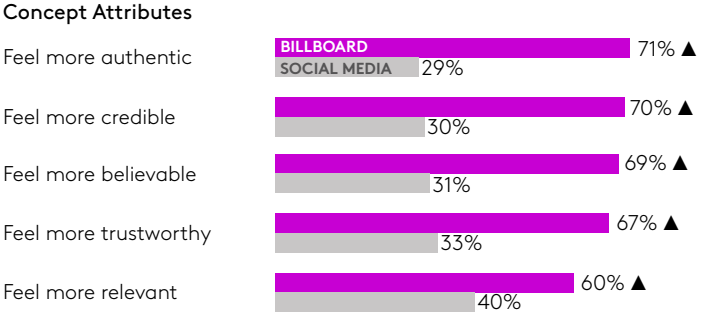
— It has the confidence to be seen, and judged, by everyone (41%).
— It's established: a brand that's legitimate, not a flash in the pan (39%).
— It's committed to being a part of the real world (38%).

Billboards and outdoor advertising were among the most trusted real life advertising channels, and consistently perceived as the least likely to be AI-generated, fake, or misleading by every generation surveyed (Gen Z 10%, Millennials 10%, Gen X 4%, Boomers 3%).

When shown exactly the same creative on either social media or a billboard, consumers rated the billboard environment at least twice as authentic, credible, believable, and trustworthy.







Significantly for brand marketers, anchoring a campaign with real-life media drives brand trust up to 74%, with more than half of all consumers reporting that **multi-channel physical presence directly increases their trust in the brand.[10]**

Key Media Insight:

The strongest media plans don't live exclusively online. A physical layer creates the trust foundation that makes every other channel work harder, turning exposure into credibility and cross-channel impact.

How the Physical Layer Works

The Physical Layer creates value in three distinct ways:

I. It Makes Brands More TRUSTED & REAL

Over 60% of consumers agreed that a brand showing up in in-person advertising **"feels more like part of real life" than one encountered exclusively online[11],** and that a brand appearing in their neighborhood or at a local event feels "meaningfully different" than a brand appearing in their digital feed.[12]

In a world where AI can generate content instantly and distribute it infinitely, a real-world presence signals legitimacy, permanence, confidence, and commitment.

"Some credibility was built with that brand because of those ads, at least the ones on buses and in the subway. It feels like they have to be approved by the state or the county, so they seem more legitimate."

—Christine, age 23

II. It Makes Brands More SHARED

Consumers, particularly younger consumers, interpret The Physical Layer socially, with the majority of Gen Z and Millennials both agreeing that **"public advertising feels like something people share in common."** This is in contrast to data showing that 57% of adults believe that "technology has made us feel more isolated."[13]

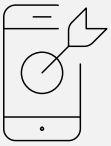
"In that shared moment [seeing a brand installation] it didn't matter what age you were...it was a nice moment passing through a busy terminal where people stopped."

—Angelica, age 46

"I like feeling a part of something bigger, and the [public] ads help me connect with that; the on-screen stuff is just tracking me and trying to spy on me."

—Blake, age 25

Digital media can tell us what a consumer is likely to want. The Physical Layer can give people something they didn't know they wanted, and give them a shared experience and a reason to connect with everyone around them.



The "Digital Native" Opportunity

Brands targeting consumers under 45 have especially compelling reasons to leverage the Physical Layer. Gen Z and Millennials, the generations raised on digital media, are among the most skeptical of synthetic content.

Young adults are also the most eager for real-world experiences in their local community,[14] the most likely to associate physical presence with community, and the most open to discovery.

Their leisure choices reflect their real-world orientation and present opportunities for brand activation. About three out of four Gen Z consumers visit a mall in a given month, often for discovery and leisure as much as for shopping.[15] Consumers under 45 lead all generations in filmgoing, with 87% of Gen Z and 82% of Millennials reporting they saw at least one movie in theaters in the past 12 months.[16] Six in ten Gen Z consumers report waiting in line for food[17] at a trendy restaurant in the past year.

This behavior carries directly into media receptivity: according to Kantar research, Gen Z and Millennials are significantly more likely to trust real-life advertising[18] and three out of four say they are paying more attention to advertising in public spaces, compared to just 56% of Gen X.[19]

How the Physical Layer Works

The Physical Layer creates value in three distinct ways:

III. It Makes Other Media Work HARDER.

Consumers increasingly judge brands not just by what they say, but by where they show up. When a brand advertises in public spaces, 64% of consumers report that it feels more like "part of real life,"[20] and 37% see it as proof of an established, legitimate business.[21]

That real-world credibility carries directly into downstream actions. **When out-of-home advertising is paired with online or TV campaigns, nearly three out of four consumers (74%) rate the brand as trustworthy[22], and consumers told us this real-world exposure makes them significantly more receptive to the ads they later see on their screens,** more likely to research the brand, and more confident when making a purchase.

Trust in the Physical World acts as a force multiplier, amplifying trust across every other channel, from digital to broadcast.

Trust: Multi-channel Amplification
Among OOH Ad Exposed Group



Credibility: Multi-channel Amplification
Among OOH Ad Exposed Group



Key Media Insight:

The Physical Layer brings brands to life, making them more tangible, more shareable, and more credible. It builds trust in the Physical world and amplifies that credibility across the entire media plan.



Interactive Experiences

Among all forms of real-life advertising, interactive brand experiences rank highest across key dimensions of trust, credibility and preference, and are particularly effective at driving

- Social engagement
- Content sharing
- Word of mouth
- Brand discovery
- Purchase behavior
- Consumer participation

"At Snap, we believe the most powerful experiences don't just reach audiences; they invite them in, and [augmented reality] is one of the most powerful ways Snapchatters engage with the world around them. In this iconic partnership with HBO Max and OUTFRONT, we transformed Times Square into a live, immersive canvas for Season 3 of House of the Dragon, giving fans the chance to step into Westeros, see themselves in the story, and experience fandom on a whole new scale."

—Laurel Duquette, Head of Media and Entertainment, Snap Inc.

Adding a layer of participation makes the impact of real-life advertising even more dramatic. For example, when asked how the advertising environment alters the consumer's perception of a brand, interactive brand experiences were perceived to generate a significant positive effect, on brands deploying these experiences achieving the highest ratings for both trust (76%)[23] and credibility (79%) among consumers exposed to real-life advertising.



The Power of Digital + IRL Media

Digital isn't going away. It continues to deliver targeted impressions, personalized messages, and social amplification for real-world experiences. The Physical Layer complements these strengths through brand discovery, physical community, and connection to culture.

Real-Life		Online & Social
Brand Discovery	+	Targeted Impressions
Shared Experiences	+	Personalized Messages
Physical Communities	+	Digital Communities
Culture Connector	+	Social Amplification
Street-level storytelling	+	Content Feed

Brands that integrate a Physical Layer into their media mix improve the effectiveness of tv, online, and social, establishing a foundation of legitimacy that they can no longer build alone.

65% of Gen Z and Millennials enjoy brand discovery, more than 20 points higher than Boomers

Conclusion

Our research makes a compelling case that trust is now the most valuable resource in media. With the majority of consumers questioning whether the content they see is AI-generated, algorithmic feed saturation and manipulation have markedly eroded the credibility of both digital and broadcast channels.

The Physical Layer provides a stabilizing foundation that makes all other media more credible, precisely because it is grounded in the consumer's everyday reality. Integrating the Physical Layer empowers brand marketers to regain control of their results by leaning into their customers' growing demands for authenticity, honestly, and humanity. It works because it signals something that cannot be faked: in-person commitment, public accountability, and respect for the consumer's attention.

When campaigns are anchored in the Physical Layer, every digital impression gains secondary credibility and trust. In an era of synthetic noise, a verifiable, physical presence in their customers' lives is a brand's most effective tool for restoring brand authority, driving meaningful engagement, and securing a sustainable competitive advantage.



Back Cover & Legal Notices

Summary and Conclusions

Publication Details

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Methodology Matters:

A wide variety of inputs came together to inform this work

6	12	2,000
Qualitative customer interviews	**Qualitative consumer discussions**	**Consumers interviewed via a quantitative survey**

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Sources

[1] [2] Kantar research: Online Content Confidence: "When you're scrolling online, how often do you find yourself wondering whether what you're seeing—an ad, an article, a photo—was made by a real person or generated by AI?"

[3] Kantar research: Advertising Confidence: "Advertising type most likely to be AI-generated, fake or misleading."

[4] Kantar research, OOH Attitudes: "Over The Past Year, I've Found Myself Seeking Out More Real-World Experiences...".

[5] Qualitative IDIs and focus groups conducted by Kantar March 17 – 19, 2026

[6] Sports & Fitness Industry Association, 2026 Topline Participation Report (Silver Spring, MD: SFIA, June 2026)

[7] Kantar research: Advertising Attitudes: I find advertising I can see in person more believable than advertising I only see on a screen."

[8] Kantar research: Advertising Attitudes: "Brand advertising in my neighborhood feels like it actually cares about this place."

[9] Kantar research: Advertising Attitudes: "Seeing a brand in a public space makes it easier to bring up with others—something we share in common."

[10] Kantar research: Creative Context: "Next, we'll show you an example of a public-service announcement. The message and visuals are the same, but the place where it appears will vary. Please focus on how the message comes across in this context, rather than judging the look and messaging of the ad itself."

[11] Kantar research: Advertising Attitudes: "A brand that shows up in the physical world feels more like part of real life than one I only encounter online."

[12] Kantar research: Advertising Attitudes "When a brand shows up in my actual neighborhood or at an event I'm attending, it feels meaningfully different than when it shows up in my feed."

[13] Kantar's U.S. MONITOR study (nationally representative, adults 18+, fielded March–May 2026).

[14] Eventbrite, Social Study 2026: The year's trends in live experiences, January 2026.

[15] International Council of Shopping Centers, Gen Z and Retail: A Generation of Physical and Digital Shoppers (New York, NY: ICSC, 2023). For recent 2026 trends confirming this continued high-frequency visitation, see: ICSC, Shopping in the age of AI: Redefining stores for a new era (New York, NY: ICSC, April 2026).

[16] Fandango, 2026 Moviegoing Trends Study, as reported in Rebecca Rubin, "How Gen Z Became the Unlikely Savior of the Box Office," Variety, April 9, 2026.

[17] The New Consumer & Axios, 2025. In the TikTok Treat Era, Gen Z's More Willing to Wait in Line Than Other Generations.

[18] Kantar Research: Advertising Attitudes: "I trust an ad more when I encounter it in person/in the physical world rather than on a screen."

[19] Kantar Research: OOH Attitudes: "Over the past year I've been paying more attention to advertising in public spaces."

[20] Kantar research: Advertising Attitudes: "A brand that shows up in the physical world feels more like part of real life than one I only encounter online."

[21] Kantar research: Brand Public Space Perceptions: "When a brand advertises in public spaces (such as billboards, transit, or street furniture), what does that signal to you about the brand? (Select all that apply). Row option: "It's established — a brand that's legitimate, not a flash in the pan."

[22] Kantar research: Imagine seeing the same brand advertised in OOH and online or on TV. In each order—OOH first or OOH second—to what extent do you see the brand as more or less trustworthy?

Imagine seeing the same brand advertised in OOH and online or on TV. In each order—OOH first or OOH second—to what extent do you see the brand as more or less credible?

[23] Kantar research: Brand Trust: Interactive brand experiences (e.g. pop-ups, installations, or event-based experiences) (76%) and Brand Credibility: Interactive brand experiences (e.g. Pop-ups, Installations, Or Event-based Experiences), the highest across all tested channels for the real-life-media exposed group, compared to 69% for billboards, 73% for in-store/mall, 66% for street-level, and 65% for transit.