LIGANOVA

presents

AI TRUST INDEX

MEMORIES OF TRUTH

AI generated LigaVision

FOCUS STUDY

HOW REALITY BECOMES MEMORY IN THE AI ERA.

THE LIGANOVA AI FOCUS STUDY 2026
IN COOPERATION WITH appinio

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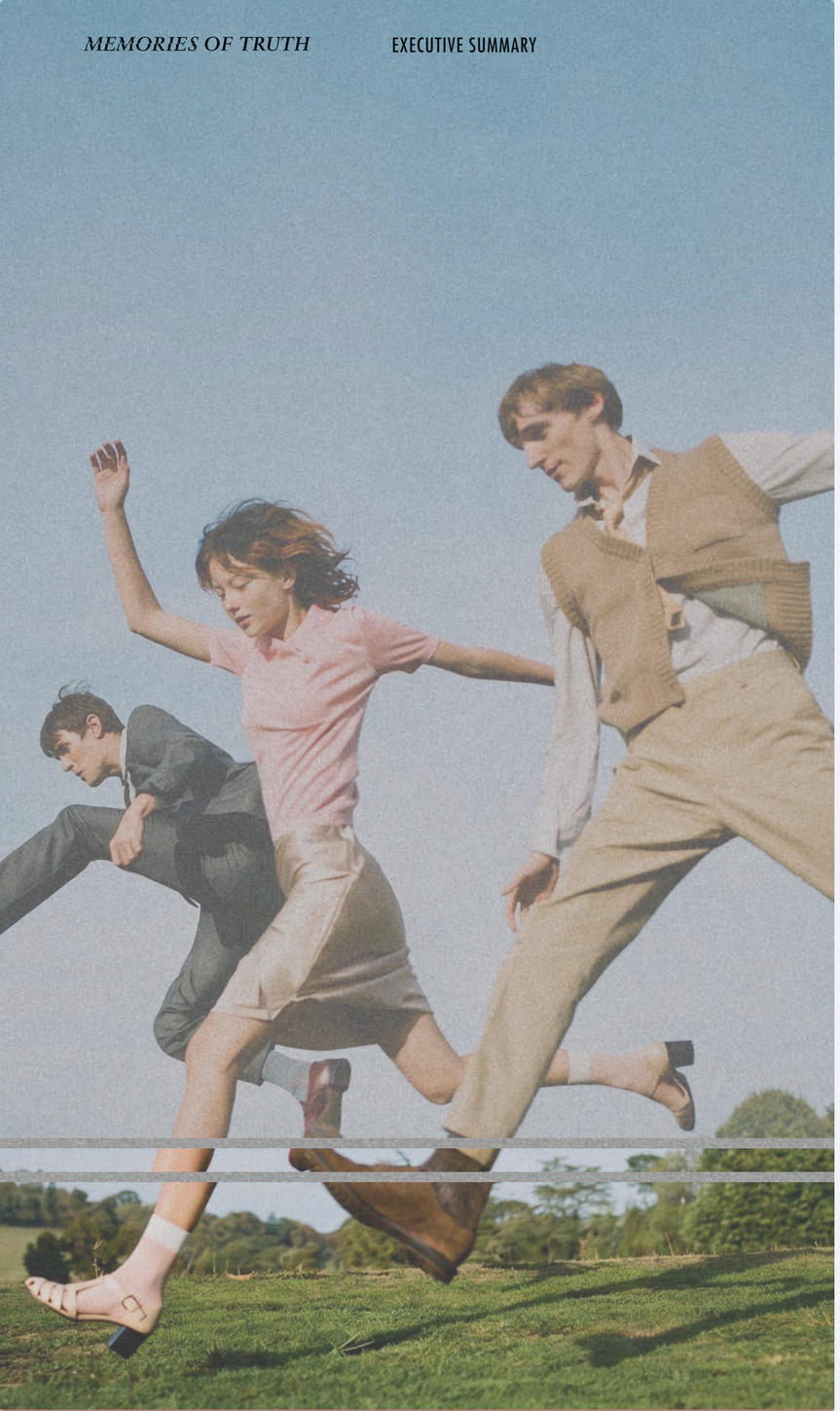
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INTRODUCTION

01



TRUST IS THE HARDEST CURRENCY IN MARKETING TODAY. AI MAKES PROOF MORE VALUABLE THAN EVER.

Consumers didn't wait for permission. AI already shapes what people discover, compare and buy. Four in five consumers find AI recommendations spot-on for their taste. Reach has never been cheaper. Content has never been easier to create. But success changed the rules.

The same consumers who use AI every day become skeptical the moment brands use it in ways that feel deceptive. More than three quarters now scrutinize social media more critically because AI makes fakes easier to produce. Many believe they can spot synthetic content. Most can't. Adoption is accelerating. Trust is declining. We call this the Trust Recession.

But this isn't a dead end.

When we asked consumers how brands could earn their trust back, 92% named at least one concrete solution. Their answer wasn't less AI. It was more proof: experiences that can be verified, people who can be trusted and moments that can be remembered. We call this shift the Renaissance of Real.

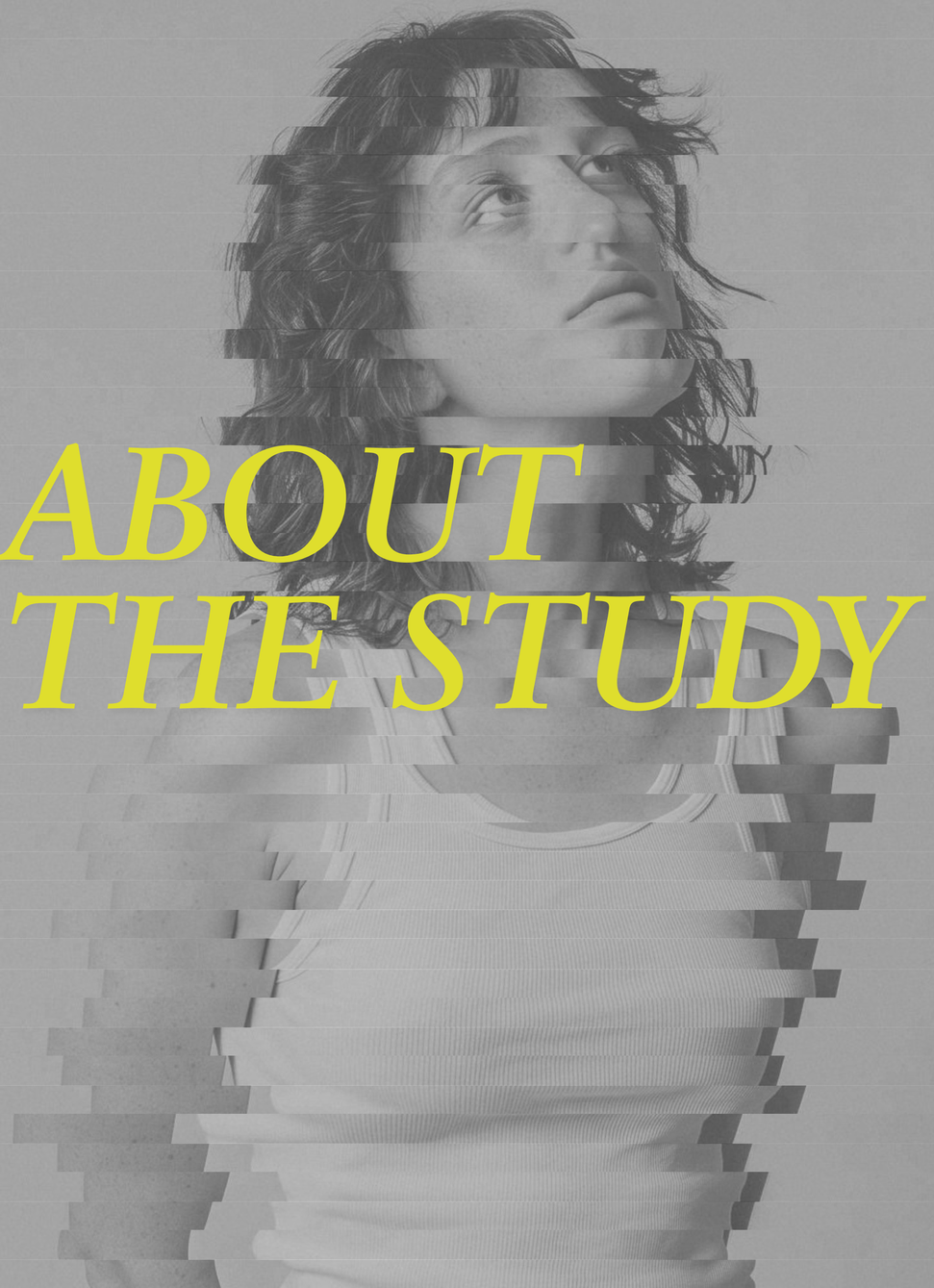
This is where the story turns.

Physical experiences (stores, events, installations and human interactions) have become the strongest trigger for purchase intent. More importantly, they increase trust in the same brand's digital channels. In an AI-driven world, reality doesn't compete with digital. It gives digital credibility.

This insight led us to a new strategic model: The Proof Loop. AI creates attention. Reality provides proof. Proof builds trust. Trust creates memories that become the next signal. The brands that orchestrate this loop will outperform those still treating AI and experience as separate disciplines.

AI scales reach. Proof scales trust.

STUDY DESIGN
Ages: 18-65
Lanced by age & gender
Consumer: 537
Markets: 3



ABOUT THE STUDY



REALITY GOT COMPLICATED

AI changes the rules of brand building. Never has it been cheaper to produce content and visibility. Never has it been easier to reach audiences algorithmically. And never has it been harder **for a brand to actually earn trust.**

We measure impressions, clicks, conversions, engagement. With extraordinary precision. **But trust remains largely invisible.** Yet it influences every purchase decision. And may become the only competitive advantage that can't simply be generated on demand. The gap between attention and trust is bigger than most brands realize.

At LIGANOVA, we build brand experiences wherever people meet brands. Digital spaces. Social platforms. Real life. Across every touchpoint, we see the same pattern: **Brands aren't competing for visibility anymore. They're competing for credibility.**

So where does trust actually come from?

Recommendations. Communities. Creators. AI. Retail. Brand experiences. Word of mouth.

Or does trust only emerge when these forces reinforce each other?

We set out to find the anatomy of trust: how consumers discover brands, what earns their belief, and how digital, social and real-world experiences interact to shape it, in an AI-driven world.
Welcome to the AI Trust Index.



FINDINGS

02

ACT ONE
EVERYONE´S ALREADY IN



ONE STORY. THREE ACTS.

Consumers embraced AI faster than anyone predicted. They became more skeptical just as quickly. The more AI shows up in daily life, the harder trust becomes to earn. This is a story in three acts: AI adoption is accelerating. Trust is under pressure. And consumers are redefining what creates credibility. Adoption is a sprint. Trust is a marathon nobody's training for. AI, in-store — one finish line, whether the encounter happens on-screen or in-store. Here's where the training starts.

ACT TWO
THE TRUST RECESSION



ACT THREE
THE RENAISSANCE OF REAL



ACT ONE

EVERYBODY IS ALREADY IN

Consumers didn't wait for permission. AI has become a mainstream part of everyday decision-making – inspiration, product discovery, comparison, purchase. It's no longer an emerging technology or an early-adopter phenomenon. It's consumer infrastructure.

ACCEPTANCE IS ALREADY THE MAJORITY POSITION.

AI has moved beyond novelty. Daily use has normalized machine-generated content faster than most brands realized. Consumers have stopped asking whether brands should use AI. The real question now: what do they expect once brands do?



ACCEPTANCE IS ALREADY THE MAJORITY POSITION.

17%

ONLY 17% STILL SAY: "AI IS FAKE."

FOR ANOTHER **26%,** AI IN ADVERTISING IS ALREADY SIMPLY THE NORM. RESISTANCE IS AGING OUT. EXPOSURE IS DOING THE REST.

REJECTION TAKES ENERGY PEOPLE NO LONGER SPEND.

ACCEPTANCE IS ALREADY THE MAJORITY POSITION.

WHY IT HAPPENS

Daily contact with AI tools normalizes machine-made content. Rejecting it takes energy most people no longer spend.

WHERE YOU SEE IT

AI ads spark less outrage every quarter; the comment-section shrug. Rejection clusters among older, low-usage groups.

THE BEHAVIOUR BEHIND

Mere-exposure effect — repeated contact turns the strange into the acceptable, without a single argument being won.

AI AS INSPIRATION SOURCE.

Wherever decisions feel like math, AI is already advising. Advice used to take effort. Now the path to purchase starts with a single prompt — search, comparison and recommendation put into one interaction. The first touchpoint has moved with it: the consumer journey no longer starts with search or social alone. Increasingly, it starts with AI. Brands aren't just competing for visibility anymore. They're competing to become the recommendation.



AI AS INSPIRATION SOURCE.

26%

ONE IN FOUR CONSUMERS ASKS AN AI BEFORE THEY BUY.

33% DISCOVER PRODUCTS THEY WOULD NEVER HAVE FOUND ON THEIR OWN.

ADVICE USED TO CAUSE EFFORT — NOW IT COSTS ONE SENTENCE.

AI AS INSPIRATION SOURCE.

WHY IT HAPPENS

An AI answers instantly, privately and without judgment — cheaper than asking friends, reading twenty reviews or visiting a store.

WHERE YOU SEE IT

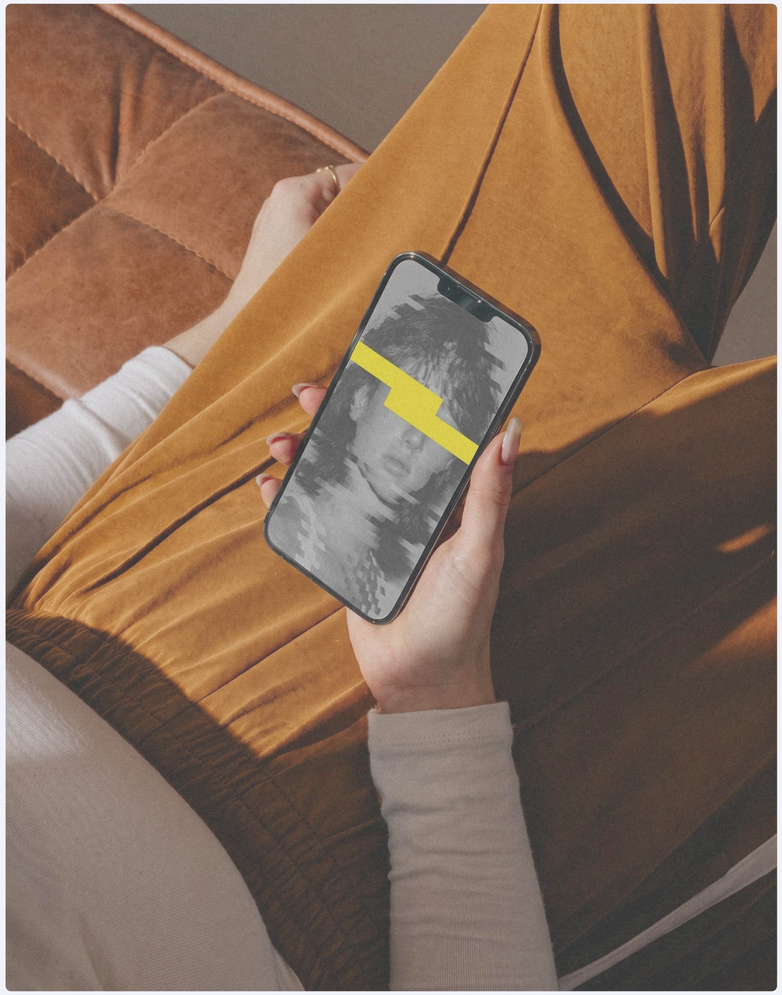
"I asked ChatGPT" replacing "I googled it." Assistants pre-shortlist products before a brand ever gets to speak.

THE BEHAVIOUR BEHIND

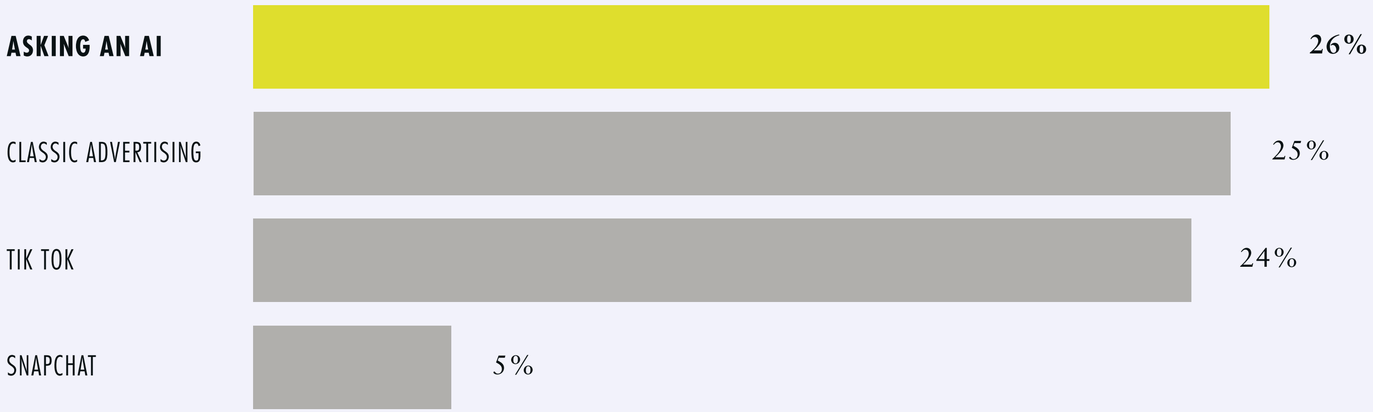
Cognitive offloading — we hand thinking to the nearest tool, then trust the result because we didn't see the shortcut.

MATCHING EVERY PAID CHANNEL — IN TWO YEARS.

Discovery is shifting from scrolling to asking. Ranked against paid media, asking an AI already matches classic advertising channel — and edges out TikTok — after just two years. Increasingly, assistants build the shortlist before brands ever get the chance to speak.



AI IS ALREADY A MEDIA CHANNEL.



DISCOVERY IS SHIFTING FROM SCROLLING TO ASKING.

FROM ZERO TO MEDIA CHANNEL IN TWO YEARS

BEFORE THE AD, THERE'S THE ANSWER.

MATCHING EVERY PAID CHANNEL — IN TWO YEARS.

WHY IT HAPPENS

Feeds push what's loud; a chat answers what's asked. When time is short, intent beats serendipity.

WHERE YOU SEE IT

Conversational commerce: journeys that start in a chat window, not a search bar. Brands remain invisible until the AI shortlist.

THE BEHAVIOUR BEHIND

Automation bias — a machine's answer feels more neutral than an influencer's post, even when it isn't.

THE ALGORITHM HAS EARNED THE BENEFIT OF TASTE.

Taste used to be the one thing algorithms couldn't fake. Consumers trusted their own eye over any recommendation engine's. That confidence is gone. When an AI curates, ranks, or generates, consumers increasingly assume it knows what looks good — as much as, or more than, they do. The algorithm hasn't just earned attention. It's earned aesthetic credibility.



THE ALGORITHM HAS EARNED THE BENEFIT OF TASTE.

80%

FOUR IN FIVE SAY THE ALGORITHM KNOWS THEIR TASTE.

ONE IN THREE SAYS IT FINDS WHAT THEY NEVER WOULD HAVE. IN THE UK, **46%** SAY IT SURPRISES THEM OFTEN.

TRUST IN THE TOOL BECOMES TRUST IN THE RECOMMENDATION.

THE ALGORITHM HAS EARNED THE BENEFIT OF TASTE.

WHY IT HAPPENS

Years of small, accurate suggestions compound into felt intimacy — "it knows me" is a learned emotion.

WHERE YOU SEE IT

"TikTok made me buy it." Spotify Wrapped worn as identity. The For-You page as a personal shopper.

THE BEHAVIOUR BEHIND

Machine intimacy — years of small correct guesses feel like being known. Once a system is mostly right, we stop auditing it.

THE BLIND TEST.

Consumers believe they can spot AI content. The study put that confidence to the test. Participants were shown four realistic advertising assets — all AI-generated, though they weren't told that. For each one, they were simply asked: real, or AI?





ACT ONE – EVERYONE´S ALREADY IN

THE BLIND TEST.

36%

ONLY ONE IN THREE SPOTTED THE AI FILM.

36% CALLED IT AI. THE OTHER 64% WERE FOOLED OR UNSURE

40%

40% SWORE THE AI FILM WAS REAL.

NOT UNSURE — CERTAIN. **40%** POSITIVELY ASSERTED "IT'S REAL"; ONLY **24%** HEDGED.

EVERYONE BELIEVES THEIR EYE — THE EYE ALREADY LOST.

THE BLIND TEST.

WHY IT HAPPENS

Generation quality improved faster than public calibration — people still benchmark against last year's AI.

WHERE YOU SEE IT

Viral "is this real?" threads. Real shoots accused of being AI — and flawless AI passing unchallenged.

THE BEHAVIOUR BEHIND

The Dunning-Kruger of the eye — the better the fake, the more real it feels. Confidence rises exactly as accuracy falls.

ACT TWO

THE TRUST RECESSION

AI crossed the adoption finish line. Trust never left the starting blocks. Consumers use AI themselves — and distrust brands for doing the same. They accept it as a tool. They reject it as a replacement for evidence, authenticity, credibility. Belief is no longer the default. Verification is.

BLIND TEST – THE REVEAL.

Consumers use AI daily. They don't forgive brands for it. Told that all four blind-test assets were AI-generated, reactions split. Scepticism won.





ACT TWO – THE TRUST RECESSION

BLIND TEST – THE REVEAL.

20%

AFTER THE REVEAL, **20% LIKED THE BRAND LESS.**

30%

30% LIKED THE BRANDS MORE AFTER THE REVEAL.

AI WASN'T THE PROBLEM — KNOWING WAS.

ACCEPTANCE IS A CONTRACT WITH CLAUSES.

Fake the stage — never the substance. Consumers will forgive a filter. They won't forgive a lie. AI can dress the scene — lighting, polish, presentation. What it can't touch is the claim underneath. Cross that line, and acceptance ends.



ACCEPTANCE IS A CONTRACT WITH CLAUSES.

74%

74% ACCEPT AI CONTENT ONLY WITH CONDITIONS — OR NOT AT ALL.

ACCEPTANCE IS A CONTRACT WITH CLAUSES.

Two red lines

Cross either, and acceptance ends:

42%

"ONLY IF THE **PRODUCT'S EFFECT ITSELF IS NOT FAKED**."

14%

"ONLY IF THE **PEOPLE IN THE ADVERTISING STAY REAL.**"

FAKE THE STAGE, NEVER THE SUBSTANCE.

ACCEPTANCE IS A CONTRACT WITH CLAUSES.

WHY IT HAPPENS

Backgrounds are decoration. People and product performance are the evidence a purchase rests on — faking that evidence is fraud.

WHERE YOU SEE IT

Outrage clusters on synthetic skin, fabricated demos and invented testimonials — not on AI landscapes or set design.

THE BEHAVIOUR BEHIND

The fraud reflex — embellishment is marketing, faked evidence is fraud. Consumers sort the two instantly, and only one is forgiven.

DEFAULT TRUST HAS FLIPPED TO DEFAULT DOUBT.

Consumers used to believe first and question later. AI reversed the order. Every claim now starts on trial. Proof isn't a bonus anymore — it's the entry fee.







ACT TWO – THE TRUST RECESSION

DEFAULT TRUST HAS FLIPPED TO DEFAULT DOUBT.

77%

THREE IN FOUR NOW QUESTION EVERYTHING ON SOCIAL MEDIA MORE CRITICALLY BECAUSE OF AI.

37%

TRUST ALMOST NOTHING WITHOUT CROSS-CHECKING.

AI DIDN'T KILL TRUST. IT KILLED THE BENEFIT OF THE DOUBT.

DEFAULT TRUST HAS FLIPPED TO DEFAULT DOUBT.

WHY IT HAPPENS

Once fooled — or shown they could be — people shift the burden of proof onto the sender. Every sender.

WHERE YOU SEE IT

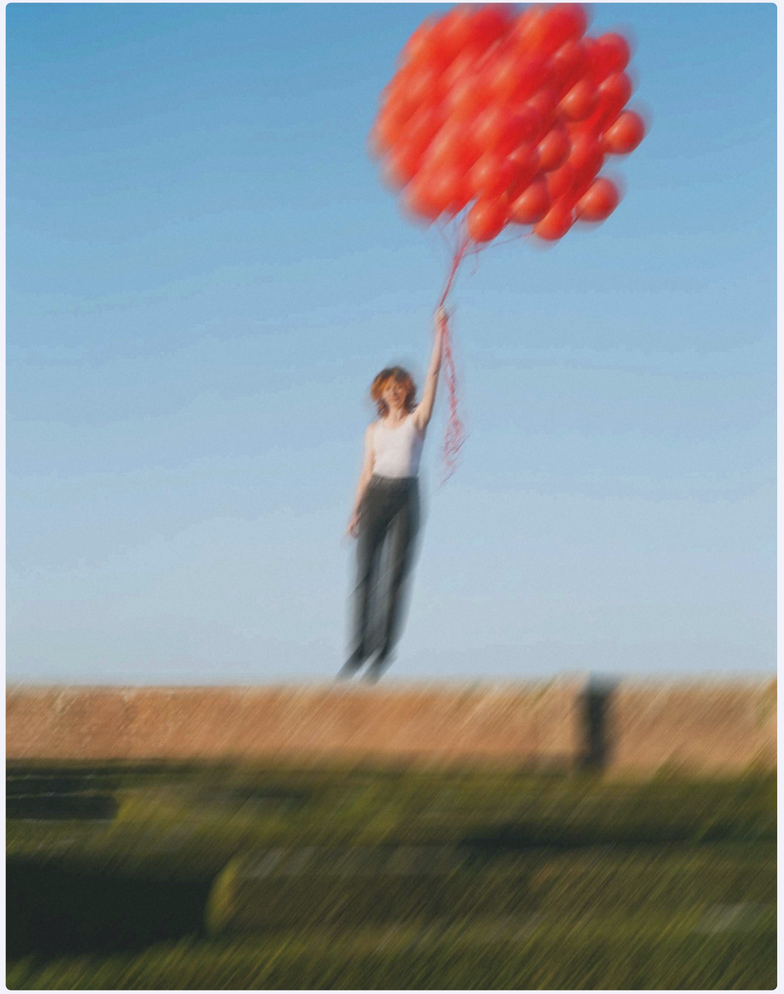
"Is this AI?" as the top comment. Reverse-image searches before sharing. And the twist: using a platform's own AI features makes people twice as likely to distrust its data practices (23% vs. 12%).

THE BEHAVIOUR BEHIND

The liar's dividend — when anything could be fake, even the genuine article loses credibility.

WHERE ALL THE DOUBT DRAINS TO.

Doubt doesn't make people give up. It makes them go somewhere checkable. Not a review, not a rating — a place. When belief runs out online, it goes looking for a floor to stand on.



ACCEPTANCE IS A CONTRACT WITH CLAUSES.

87%

WHEN NOTHING ONLINE FEELS REAL, 87% START LOOKING ELSEWHERE.

FOR ONE IN THREE, ONLY THE REAL THING STILL COUNTS AS PROOF.

AI IS WHERE EXPLORATION STARTS.

WHERE ALL THE DOUBT DRAINS TO.

WHY IT HAPPENS

When the eye fails online, the body takes over. Touch, smell and presence cannot be prompted.

WHERE YOU SEE IT

Store visits to verify online finds. Events as proof. "Come see for yourself" as a retail proposition.

THE BEHAVIOUR BEHIND

The Renaissance of Real — verification becoming a consumer movement, away from the performative and optimized.

ACT THREE

THE RENAISSANCE OF REAL

The encouraging finding of the whole study: trust is recoverable. It doesn't come back on its own — consumers told us exactly what it takes. Reality is the advantage.

TRUST IS RECOVERABLE.

Trust, once broken, isn't gone for good. This isn't a rejection of AI — it's a demand for proof. The repair kit is surprisingly simple: Brands that pair AI with human evidence and real experience build stronger trust than brands chasing synthetic perfection.



TRUST IS RECOVERABLE.

92%

92% NAMED AT LEAST ONE WAY FOR BRANDS TO MAKE IT UP.

ONLY 8% CLOSE THE DOOR FOREVER.

TRUST IS RECOVERABLE.

The way back

The way back, in their words: four formats of proof.
The national split: Germans demand a better product most (54%).
Engineer for one, apologise to the other.

54%

NOTICEABLY BETTER PRODUCT

45%

REAL PEOPLE VOUCHING FOR YOU

45%

HONEST, PUBLIC COMMUNICATION
65% (UK)

38%

A PERSONAL BRAND EXPERIENCE

TRUST CAN BE BROKEN. REALITY CAN REBUILD IT.

THE STORE IS THE NEW #1 TRUST SIGNAL.

Anyone can fake a feed. Nobody fakes a floor. As digital gets easier to fake, physical becomes the way to check — the store isn't just where transactions happen anymore, it's where trust gets earned. A live experience is what actually triggers a purchase — not the ad that led them there.



THE STORE IS THE NEW #1 TRUST SIGNAL.

86%

TRUST A BRAND MORE ONLINE AFTER EXPERIENCING IT IN REAL LIFE.

87%

SAY OFFLINE EXPERIENCES STRENGTHEN THEIR DIGITAL TRUST.

65%

SAY PHYSICAL EXPERIENCES ARE THE STRONGEST TRIGGER FOR PURCHASE INTENT—AND THE SAME SHARE OF GERMANS (65%) AND BRITONS (62%) SAY THEY'RE WHAT CREATES THE JOY OF BUYING.

36%

SAY ONLY A LIVE BRAND EXPERIENCE MAKES A BRAND FEEL PREMIUM AND WORTH BUYING.

THE STORE IS THE NEW #1 TRUST SIGNAL.

34%

EXPLICITLY LINK PHYSICAL PRESENCE TO GREATER TRUST AND LONG-TERM STABILITY.

ANYONE CAN FAKE A FEED. NOBODY CAN FAKE A FLOOR.

THE STORE IS THE NEW #1 TRUST SIGNAL.

WHY IT HAPPENS

Trust used to transfer from screen to shelf. Now it only moves the other way. People don't believe what they see until they've stood in it.

WHERE YOU SEE IT

Shoppers who'll drive across town for something they could click and buy. A pop-up outperforming the ad campaign that promoted it. The moment "I want to see it in person" becomes the actual reason for a sale.

THE BEHAVIOUR BEHIND

The authenticity tax. The less real anything else gets, the more people are willing to pay — in time, in distance, in money — for the one thing that still is.



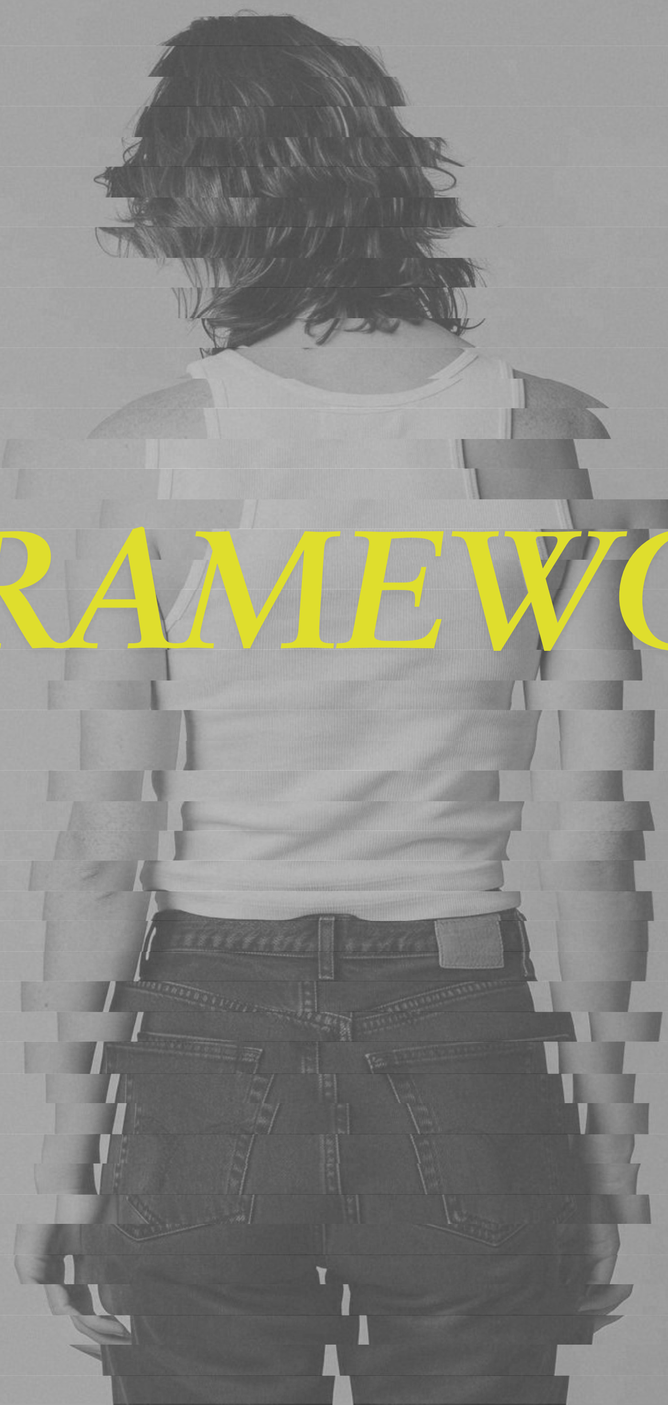
ACT THREE – THE RENAISSANCE OF REAL

THE TRUST TRANSFER.

86%

ONE REAL HANDSHAKE MAKES EVERY AD MORE BELIEVABLE.

AND IT ISN'T DUTY — IT'S PLEASURE: 65% OF GERMANS SAY THE REAL-WORLD EXPERIENCE IS WHAT TRIGGERS BUYING JOY. IDENTICAL ACROSS BORDERS.



FRAMEWORK

03

PROOF ISN'T ONE SIZE FITS ALL

Consumers don't all respond to AI in the same way. The data reveal three overlapping trust mindsets. They are not fixed customer segments, but different ways consumers decide whether a brand deserves to be believed.



~37%

"I HARDLY TRUST ANYTHING ANY MORE WITHOUT CROSS-CHECKING IT."

THE VERIFIERS

PROOF ISN'T ONE SIZE FITS ALL.



Verification comes before belief. Verifiers instinctively cross-check brand claims and expect transparency about how content is created. Hidden AI signals deception more than innovation.

~42%

"AI IS FINE — AS LONG AS THE PRODUCT'S EFFECT ISN'T FAKED."

THE CONDITIONALISTS

PROOF ISN'T ONE SIZE FITS ALL.



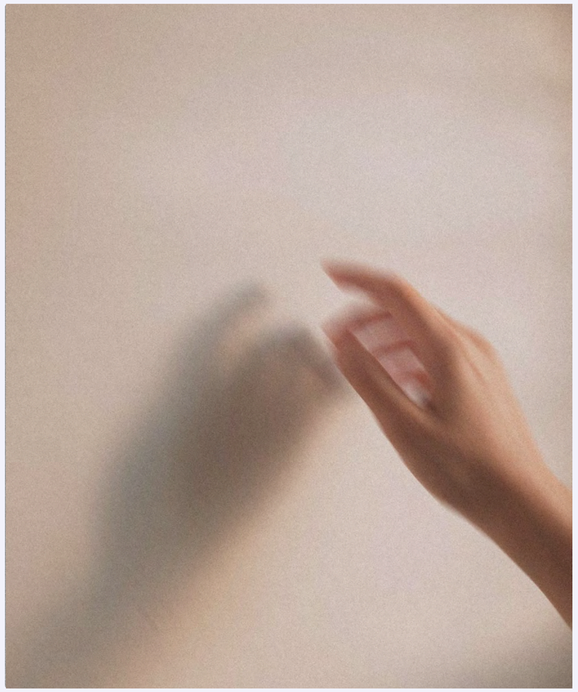
The largest group. AI is acceptable when it supports communication, but not when it replaces proof, people or product performance. They judge the substance of the claim – not the tool behind it.

~33%

"ONLY A PERSONAL IMPRESSION GIVES ME THE CERTAINTY I NEED."

THE REALITY SEEKERS

PROOF ISN'T ONE SIZE FITS ALL.



Physical experiences are their shortcut to trust. Responding to digital doubt, Reality Seekers go physical: stores, events, products in hand. Offline presence equals credibility, while online-only brands start with a deficit — a dynamic that grows stronger with every deception scandal the AI era feeds.



THE NEW TRUST MODEL

TRUST DOESN'T MOVE IN A STRAIGHT LINE.

AI GENERATES CLAIMS. EXPERIENCE DELIVERS PROOF. TRUST ONLY FORMS WHEN THE TWO ALTERNATE.



The study's findings condense into a coherent model that explains how trust actually forms under today's conditions — not linearly, but cyclically. We call this model the Proof Loop.

1. Signal (AI generates attention)

AI, content and social media generate reach, inspiration and early preference. This is the cheapest, fastest and most scalable phase of the model — and today the phase where AI gives brands the greatest competitive edge.

2. Credibility Check (Consumers test the signal)

Because AI content is easy to produce and hard to verify, every signal passes through a critical filter. Consumers know they could be deceived — even if they overestimate their own ability to detect it. This threshold decides whether attention turns into interest or into distrust.

3. Proof (physical or human experience delivers evidence)

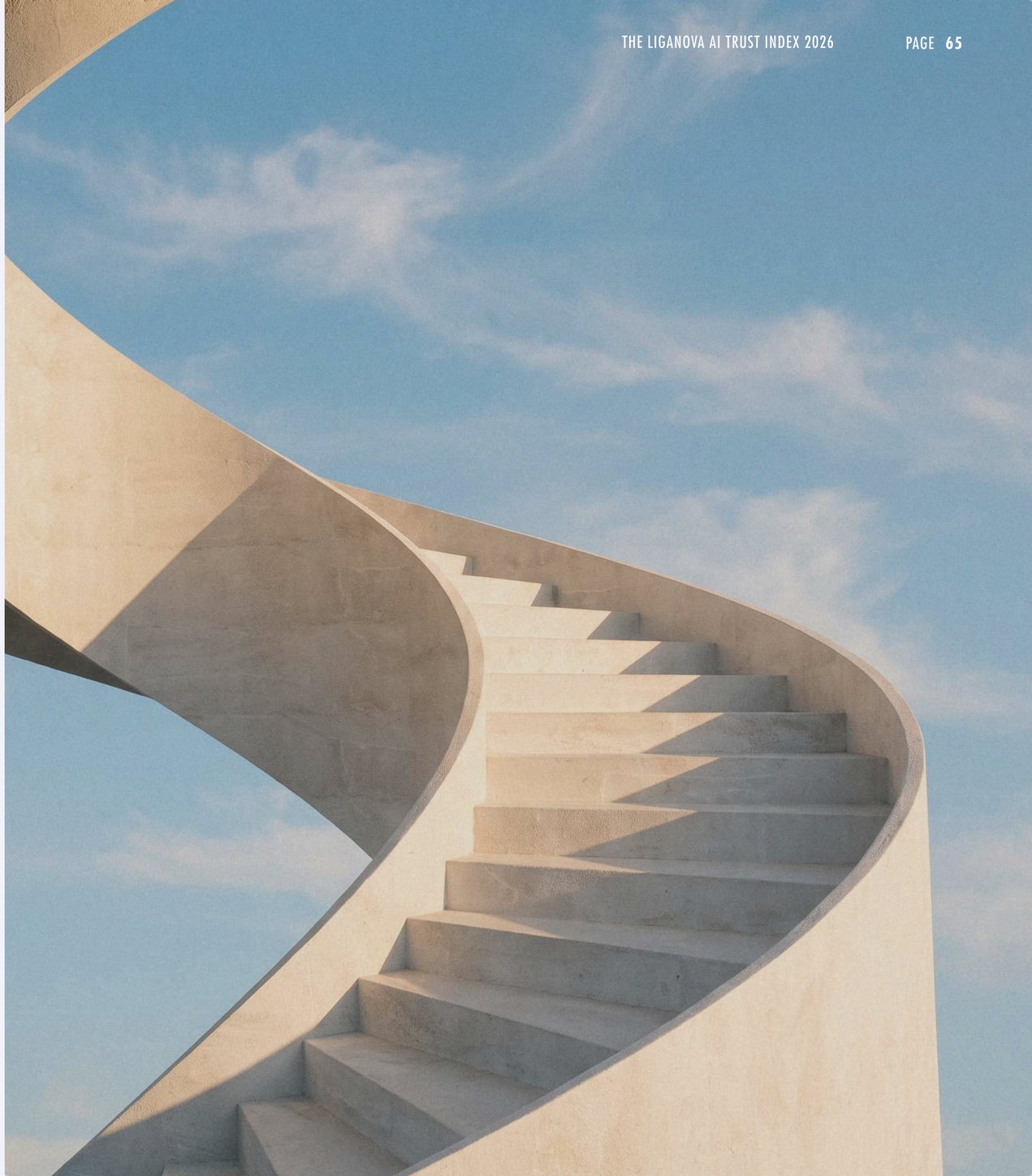
Store, event, installation, product trial, expert conversation: this is the point where the digital promise is either redeemed or disproven. It's the phase with the highest trust leverage in the entire model.

4. Trust & Advocacy (experience becomes new signal)

A redeemed experience generates trust, repeat purchase and referral. Consumers share that experience digitally — as a photo, a review, a story, or a recommendation among friends. That turns the proof into a new, more credible signal, restarting the loop — this time carrying the credibility of real experience.

ONE FUNNEL IS DEAD. WELCOME TO LOOP.

The classic funnel assumes attention flows linearly into purchase intent and loyalty. The study data disprove that: purchase moments arise at many equally weighted entry points, and physical experiences feed back into digital trust instead of sitting only at the end of the journey. The Proof Loop reflects this reality: every phase feeds the next — and the last phase feeds the first again.



DIGITAL AND PHYSICAL ARE NOT TWO CHANNELS. THEY'RE TWO BEATS OF THE SAME TRUST MACHINE.



APPLICATION

04

FROM LUXURY TO AUTOMOTIVE

The interplay of AI and physical experience doesn't play out equally across every industry. The higher the emotional, sensory or financial stakes of a purchase decision, the more the decisive moment shifts back to the physical. The following six sectors reveal where AI already shapes purchase decisions – and where reality continues to make the difference.

The cross-industry pattern is clear — and relentlessly consistent: AI reliably plays the role of discoverer. It inspires, informs and shortens the search. But almost everywhere, the decisive final step to trust is taken by physical or human experience. The difference between industries isn't whether this mechanism works, but how uncompromisingly it works.



AI OPENS THE JOURNEY. THE TEST DRIVE CLOSES IT.

AUTOMOTIVE

Car buying has become a complexity problem before it becomes a trust problem. Hundreds of configurations, financing options and specifications make AI a natural starting point.

Even five-figure purchase decisions now begin with a machine's shortlist. 77% of prospective car buyers would let AI recommend their next vehicle—including financing. AI simplifies the decision by turning countless options into one manageable shortlist.

The final decision, however, still belongs to reality. More than half of buyers (54%) only commit after a test drive, showroom visit or personal sales conversation (17%). AI opens the funnel. The physical showroom closes it.





NO FILTER REPLACES THE FIELD TEST.

SPORT & OUTDOOR

For sports and outdoor purchases, personal experience and in-store advice (49.5%) clearly outweigh creator content (6.6%) and AI product advisors (7.7%). Where fit, durability and performance decide the purchase, digital recommendation loses weight — hands-on testing wins.

Training tells a different story. 72% consider AI-generated training advice to be credible. When decisions are driven by measurable data – pace, power, heart rate or training load – AI is seen as a trusted coach.

BEAUTY DOESN'T LIE THROUGH A SCREEN.

BEAUTY

Consumers still trust recommendations from people (53%) and their own product testing (51%) far more than AI recommendations (28%). Yet AI is earning its place in the beauty journey. Once it proves useful in diagnosing skin or matching routines, its product advice inherits that credibility. Trust in the tool becomes trust in the recommendation. But the final proof still happens on the skin—not on the screen.





LUXURY CAN'T BE RENDERED.

LUXURY

In no other category is the lead of physical experience so clear: it's the single strongest source of trust (42%), while expert advice and the flagship store experience rank as the most valued elements of the entire luxury journey (53%). Luxury can't be scaled without losing what makes it luxury — it has to be experienced.

EVEN TECH NEEDS A HUMAN IT BELIEVES.

TECH

Even in a category that often features AI as a product feature itself, human expertise remains the more credible advisor: consumers rely more on expert advice (36%) than on AI (26%), and 58% trust human-written reviews over AI-generated ones. AI may be part of the product — it isn't proof of its quality.





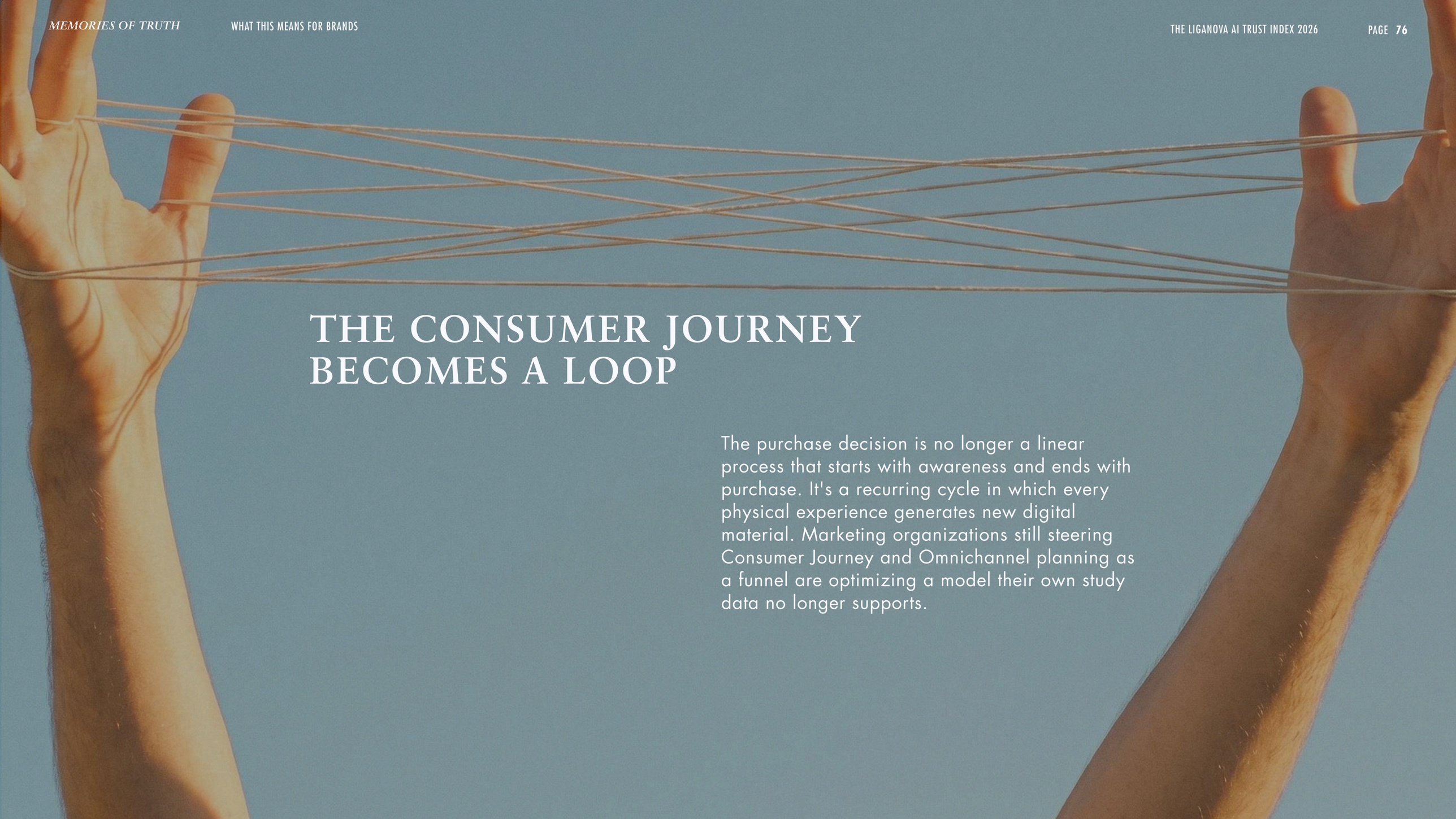
YOU CAN'T FAKE TASTE.

FOOD

For food, the trust advantage of physical experience is the largest of all: 67% name physical experience as the strongest trust factor, and for 74%, AI-generated product descriptions noticeably reduce credibility. Food is the category where the demand for immediate, sensory proof is least negotiable.

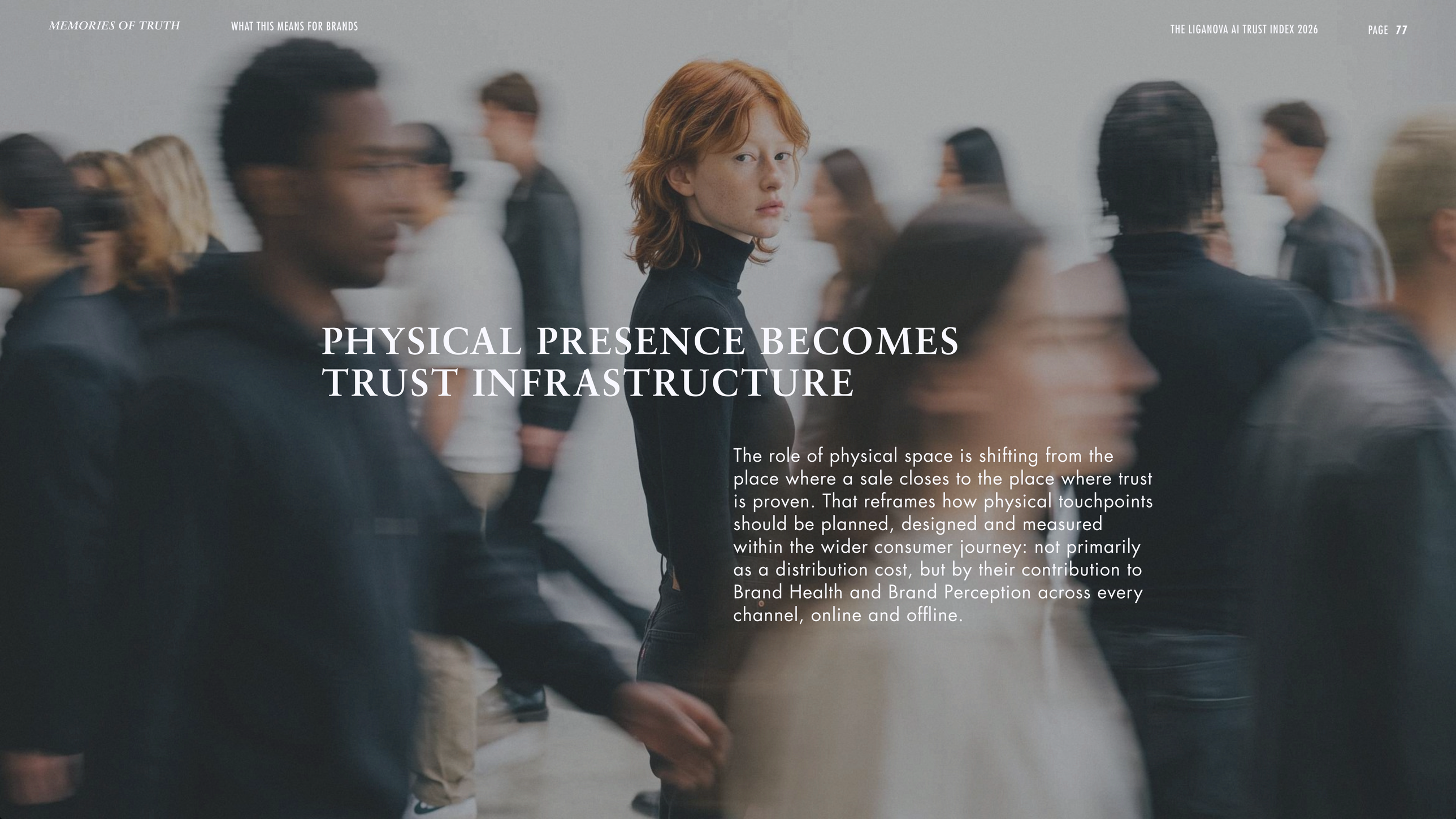


WHAT THIS MEANS FOR BRANDS



THE CONSUMER JOURNEY BECOMES A LOOP

The purchase decision is no longer a linear process that starts with awareness and ends with purchase. It's a recurring cycle in which every physical experience generates new digital material. Marketing organizations still steering Consumer Journey and Omnichannel planning as a funnel are optimizing a model their own study data no longer supports.



PHYSICAL PRESENCE BECOMES TRUST INFRASTRUCTURE

The role of physical space is shifting from the place where a sale closes to the place where trust is proven. That reframes how physical touchpoints should be planned, designed and measured within the wider consumer journey: not primarily as a distribution cost, but by their contribution to Brand Health and Brand Perception across every channel, online and offline.



EXPERIENCE BECOMES A CONTENT SOURCE

Physical experiences are no longer the end of the journey — they're the origin of the most credible content a brand can own: the experiences of real people. Experience design should therefore consider, from the outset, how a moment becomes shareable, documentable and retellable.



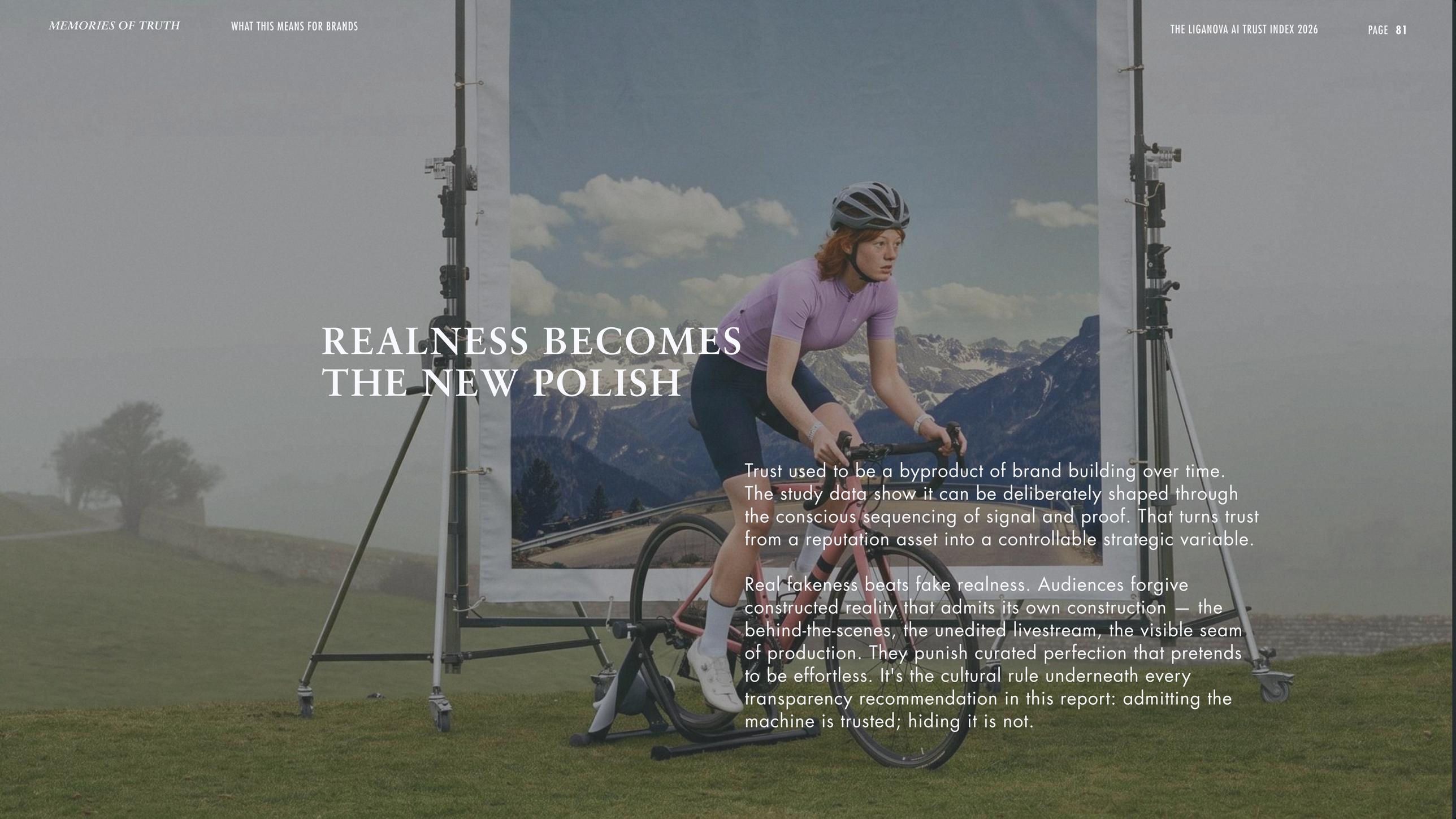
COMMUNITIES CHANGE FUNCTION

Communities become the connective tissue between the phases of the Proof Loop. They no longer form only online, but around shared physical experiences — and they spread trust more credibly than any paid campaign, because their members have themselves become proof.



KPI'S SHIFT FROM REACH TO PROOF

Reach, impressions and engagement remain relevant, but lose explanatory power when viewed in isolation. What matters more are metrics that make the shift from signal to trust visible within the Consumer Journey and roll up into Brand Health tracking: the share of digitally reached prospects who then experience something physical, or the change in brand perception after a physical or event touchpoint.



REALNESS BECOMES THE NEW POLISH

Trust used to be a byproduct of brand building over time. The study data show it can be deliberately shaped through the conscious sequencing of signal and proof. That turns trust from a reputation asset into a controllable strategic variable.

Real fakeness beats fake realness. Audiences forgive constructed reality that admits its own construction — the behind-the-scenes, the unedited livestream, the visible seam of production. They punish curated perfection that pretends to be effortless. It's the cultural rule underneath every transparency recommendation in this report: admitting the machine is trusted; hiding it is not.



NEXT

05

STRATEGIC RECOMMENDATIONS

The following recommendations follow directly from the study's findings and are deliberately concrete. Brand investment increasingly shifts toward three assets: visibility within AI systems, truthful social content that documents rather than performs, and real-life experiences that create memories and trust. As AI reshapes discovery and transactions, memory becomes the last defensible brand asset.



REAL-LIFE EXPERIENCES

BUILD TRUST WHERE IT CANNOT BE FABRICATED.



Separate proof budgets from reach budgets.

Treat physical experiences as trust infrastructure with their own KPIs, measured on trust lift, advocacy and repeat behaviour rather than immediate sales alone.

Turn physical experiences into proof stages.

Physical spaces are no longer campaign moments; they are where consumers validate brand promises. Flagship stores, pop-ups, showrooms, events and demonstrations should be designed as proof stages where people can touch, test and experience the claim.

Measure the Proof Loop.

Measure the Proof Loop, not just the funnel. Fold KPIs like trust lift after a physical experience, share of experience-driven content, and referral rate from experience touchpoints into existing Brand Health and Brand Perception tracking, not a separate retail scorecard.

Invest by purchase criticality, not channel trends.

Consumers discover brands everywhere, but trust is ultimately validated through real experiences. Allocate investment according to where confidence matters most.

TREAT EXPERIENCES AS TRUST CAPITAL.

TRUTHFUL SOCIAL

TURN REALITY INTO THE MOST CREDIBLE CONTENT.



Design every experience to become content.

Design physical and experiential touchpoints to be highly shareable. Every physical experience should be conceived from the start as a potential content origin that naturally restarts the Proof Loop.

Connect social and physical touchpoints.

Connect social and physical touchpoints as one omnichannel system. Build processes that turn on-site experiences directly into digital content — through dedicated content-creator moments, community partnerships, or simple on-site sharing mechanics.

Invest in community over campaigns.

Invest in community programs that systematically translate real experiences into digital reach. Communities formed at physical touchpoints generate more credible content than paid reach — especially when they are led by the people who actually know the product, not by rented influencers.

Create formats that are hard to fake.

Create formats that literally cannot lie, and staff them with insiders. Behind-the-scenes footage, unedited livestreams and real-customer co-creation are structurally harder to fabricate than a polished ad — and employee-creators who know the product outperform rented reach on perceived authenticity.

THE BARISTA BEATS THE INFLUENCER.

VISIBILITY WITHIN AI SYSTEMS

BE DISCOVERABLE. BE TRANSPARENT. BE TRUSTWORTHY.



Calibrate AI by category risk.

Calibrate AI use by industry and category risk. In categories with high sensory or emotional stakes (food, beauty, luxury), AI should support rather than replace; in more rational categories (automotive, tech), there's more room to maneuver.

Label AI content proactively.

Label AI content proactively. The EU AI Pact makes it mandatory. The data already made it obvious. Disclosure was never a legal problem to solve — it's a trust opportunity most brands were leaving on the table.

Guarantee human proof.

Guarantee that people and product performance stay real. Whether it's sales advice, genuine testimonials or authentic reviews, human expertise clearly beats AI recommendations in nearly every category studied.

Allocate dedicated AI visibility investment.

As AI compresses discovery and evaluation, invest intentionally in Generative Engine Optimization and AI-native discoverability rather than treating it as an extension of SEO.

REAL FAKENESS BEATS FAKE REALNESS.

TWO CURVES SQUEEZE BRAND EQUITY.

The more consumers use AI, the more invisible your brand becomes. The more brands use AI, the more interchangeable loyalty becomes.

Every brand now has to decide where it will compete.





FOUR POSSIBLE FUTURES. ONLY ONE ESCAPES THE SQUEEZE.

BRAND AI USE

Interchangeable

Your agent negotiates like every agent. Loyalty becomes a price parameter — LTV flattens.

The squeeze

Unnamed and unpreferred. Only the memory the consumer insists on survives both curves.

You bought the shelf, the ad, the ranking. Visibility was purchasable.

The old game

Consumers ask the model. If the model does not name you, you do not exist.

Invisible

CONSUMER AI USE – ASKING, NOT BROWSING

AI IS EATING THE FUNNEL FROM BOTH ENDS.

Eaten from the top

LLMs curate the shortlist.

Squeezed in the middle

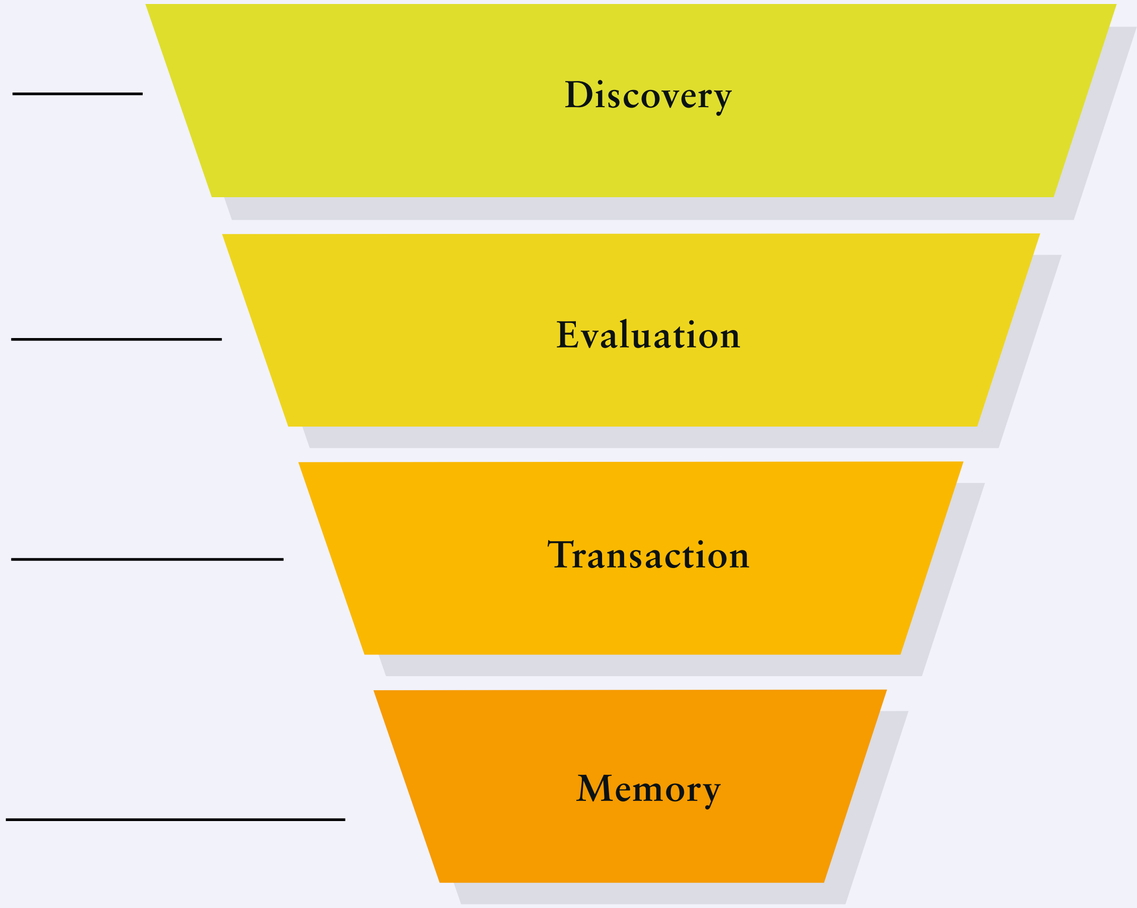
Compressed to one AI proposal; the anchor decides.

Eaten from the bottom

Agents negotiate the deal; price is the parameter.

Yours to own

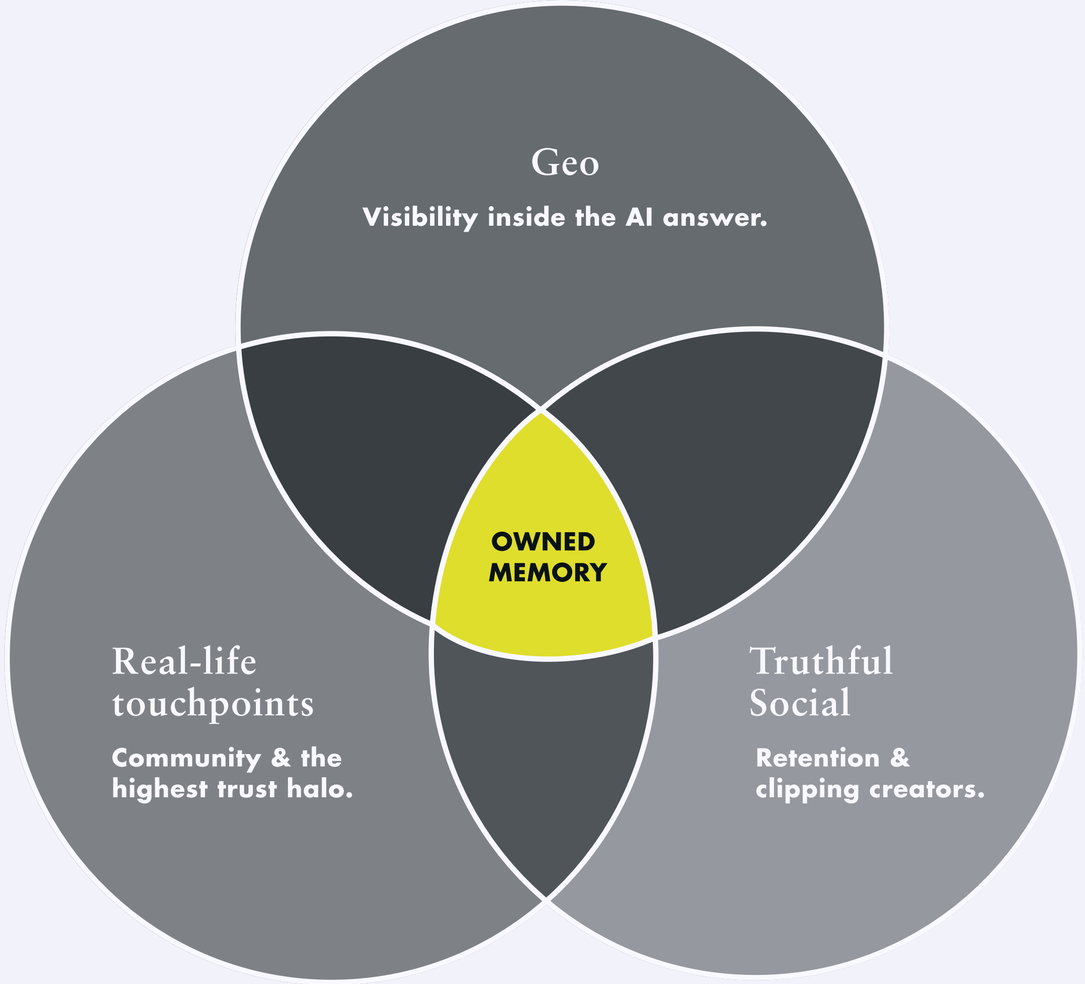
The only layer a brand can own outright.



MEMORY IS YOURS TO OWN.

THREE WAYS TO BUILD WHAT AI CAN'T OWN.

If memory is the asset brands can still own, investment needs to shift toward the places that create it.



ONE INCREMENTAL EURO, SPLIT THREE WAYS.

Indicative allocation guidance, to be calibrated by category, margin structure and existing footprint. All three land in the same P&L logic — ROAS in the quarter, LTV over the relationship — each measured on its own proof:

20 %

Geo

Structured data, citable content, machine-readable proof — so the model names you. Proof: share of AI answers.

40 %

Real-life touchpoints

Flagships, pop-ups, community programs — the trust halo that lifts every other channel. One handshake makes every ad believable. Proof: ROAS via the 86% trust transfer.

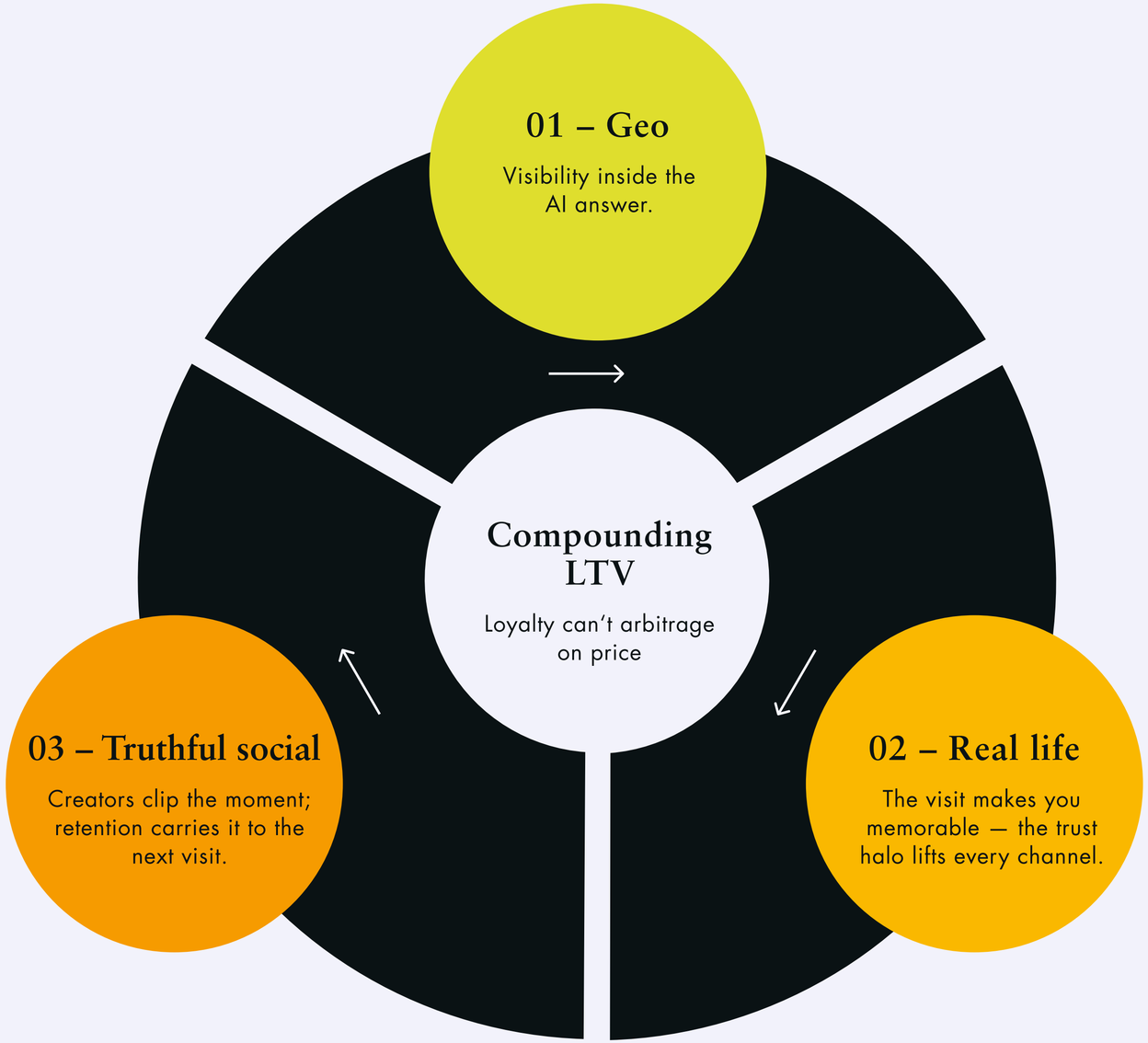
40 %

Truthful social

Live formats, employee creators, clipping creators on retainer — retention between real moments. Proof: retention, repeat rate, engaged-minute ROAS.

EVERY LOOP TURN LOWERS CAC, RAISES LTV

The community's reviews, citations and coverage feed the model — back to GEO. Run as a loop, it compounds: loyalty that agents cannot arbitrage on price.





CONCLUSION



AI SOLVED THE REACH PROBLEM. IT DIDN'T SOLVE THE TRUST PROBLEM.

AI solved the reach problem. It didn't solve the trust problem — it made it worse. Every brand can now produce impressive content in seconds. That's exactly why impressive content is no longer a differentiator — it's a commodity. What remains is whether a brand delivers on what it promises. More content can't answer that question. Only proof can: people, spaces, moments that are real and can be really experienced.

The more consumers use AI, the more invisible a brand becomes. The more brands use AI, the more interchangeable loyalty becomes. Both curves are already rising on their own — which is exactly why they can't be answered with more of the same.

The brands that win in the years ahead won't be the ones choosing between digital and physical. They'll be the ones who understood that both are part of the same machine — that digital attention evaporates without physical proof, and that physical experiences squander their potential without digital follow-through.

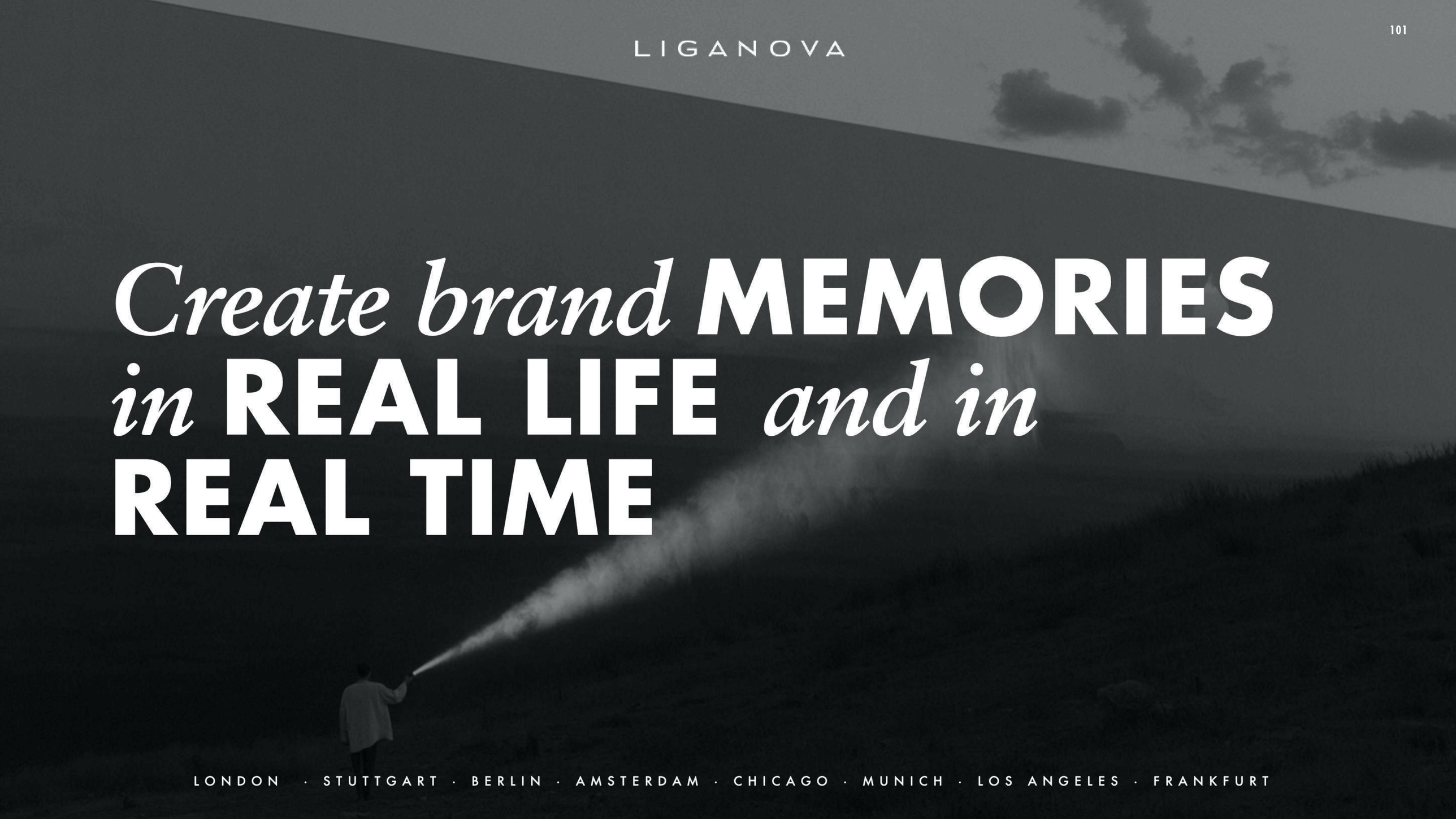
The strategic question is no longer 'online or offline?' It's: where in our Proof Loop does trust actually form today — and where are we unknowingly breaking it?

The future belongs to brands that translate digital attention into real encounters — and real encounters back into digital relevance.

Orchestrate this loop actively, and you don't just build campaigns. You build trust that reinforces itself — faster than any AI can copy it. The boldest brand move in the AI era is, in the end, remarkably simple to name: **being verifiably real.**

OUR THESIS

THE BOLDEST BRAND MOVE IN THE AI ERA: BEING VERIFIABLY REAL


Create brand **MEMORIES**
in **REAL LIFE** *and in*
REAL TIME



MARKET APPENDIX

MARKET APPENDIX UK & NETHERLANDS

Alongside our German deep-dive, we surveyed 100 people each in the Netherlands and the UK. Presented here as one compact market snapshot — the underlying pattern holds in both: trust still runs through real-world proof, not around it.



Discovery & Inspiration

NL: 35% cite online ads and 33% Instagram as top inspiration sources — but 23% now ask an AI (ChatGPT, Perplexity) too. Only 28% say algorithms genuinely surprise them positively; 46% call real surprises "the exception, not the rule."

UK: 37% cite online advertising and 35% everyday advertising as top sources — AI (26%) runs neck-and-neck with Instagram (26%). Algorithms land better here: 46% say their feeds often surprise them positively.

Takeaway: AI has entered the inspiration mix in both markets — but UK consumers trust their algorithms noticeably more than the Dutch do.

What Actually Builds Trust

NL: 36% only feel a brand is "worth it" once experienced live; 18% say a great live experience can offset a bad online one. After a letdown, trust returns through word-of-mouth (34%), transparency (33%), and product improvement (32%) — almost evenly split. 40% say online presence alone is enough; 37% say offline makes a brand feel more credible.

UK: 33% need the live experience to feel it's "worth it"; 29% say in-person can offset poor online. After a letdown, transparency dominates at 65% — far ahead of word-of-mouth (47%) and personal experience (39%). 43% say offline makes a brand more credible; only 24% say online alone is enough.

Takeaway: Both markets treat physical presence as more than a nice-to-have — but NL trust repair is spread evenly across three routes, while UK consumers overwhelmingly reach for transparency first.

Trust Transfer

NL: 82% show some trust transfer from a real-world encounter into their online perception of the brand — only 18% treat the two as disconnected.

UK: Even stronger — 90% show trust transfer, only 10% disconnect the two.

Takeaway: This is the empirical backbone of the Proof Loop thesis in both markets — physical proof doesn't stay physical, it feeds the digital trust score.



Conditional Acceptance

NL: 78% accept AI content under some condition; 22% reject it outright. Largest condition (37%): the product's real performance isn't faked. 31% accept it unconditionally.

UK: 74% accept under condition; 26% reject outright. Largest condition (42%): performance isn't faked. 23% accept unconditionally.

Takeaway: Nearly identical in both markets — it's not AI that breaks trust, it's a false product claim.

Rising Sceptism

NL: 67% report elevated skepticism toward content because of AI (32% "definitely more," 35% "somewhat more").

UK: Higher still — 83% report elevated skepticism (47% "definitely more," 36% "somewhat more").

Takeaway: Skepticism is becoming the default posture in both markets — and the UK is leading that shift.

The Renaissance of Real

NL: 87% lean on real-world experience once digital trust wavers (35% actively seek it out, 52% become more skeptical without checking). 28% cite a live event/store visit as what convinced them in the last 3 months, close behind online ads (30%).

UK: 93% lean on real-world experience (46% actively seek it, 47% become more skeptical). Live events/store visits sit at 29% — behind online ads and social media (39% each).

Takeaway: When digital trust cracks in either market, people don't wait for reassurance online — they go check reality themselves. The UK leans hardest on this instinct of the two.



CATEGORY DEEP-DIVES (INDUSTRY SPOTLIGHT)

Automotive

NL: 46% say the test drive itself is what most shaped their opinion — ~4x more influential than AI comparison tools/chatbots (11%).

UK: the manufacturer's website/configurator leads instead at 27%; test drive and AI tools tie at just 18% each.

Beauty

NL: 65% trust "trying it myself" (testers, samples) above everything else — AI-driven recommendations trail at just 4%.

UK: brand reputation and reviews/testimonials tie as the top drivers (58% each), ahead of trying it themselves (46%); AI recommendations sit at 10%.

Luxury

NL: 38% say personal in-store advice is what makes them trust an expensive purchase; 29% say it's the physical product itself. .

UK: brand heritage (30%) edges out the physical product (25%) instead — personal in-store consultation trails at just 10%. If they'd miss one thing, NL says personal advice/expertise (33%); UK ties flagship store and exclusive events (30% each).

Food

NL: 49% judge premium quality by their own senses (taste, smell).

UK: even higher at 60%. Both markets are equally unforgiving of AI-written copy — 47% (NL) and 75% (UK) say an AI-written description would feel at least slightly less authentic.

Sport & Outdoor

NL: 36% trust personal experience most, while community recommendations play a much smaller role at just 6%. AI recommendations still have some credibility: 64% find them at least fairly credible.

UK: personal experience leads at a similar 33%, but community recommendations matter considerably more at 19%. AI credibility is slightly lower than in NL, with 57% finding an AI recommendation at least fairly credible.

Tech

NL: 54% start with comparison websites when researching tech products; asking someone they know follows at 40%. 54% would trust an AI-written product test almost as much as a human reviewer's.

UK: personal networks lead instead — 56% start by asking someone they know, ahead of comparison websites at 40%. Trust in AI-written product tests is slightly lower than in NL, with 47% saying they'd trust one almost as much as a human reviewer's.



Takeaway: Across all six categories, one divide holds: NL trusts what it can experience directly — the test drive, the sample, the in-store advice — while UK trusts what other people say — reviews, reputation, personal networks. Neither market brings AI closer to the top; it ranks last or near-last everywhere.

The Blind Test

NL: 16% believed they'd spot AI content instantly, 48% said they mostly notice it. Actual correct detection: 55% on average, 79% in the best-performing case. 51% trust brands the same after learning content was AI-made; 29% trust it more.

UK: 28% believed instant detection, 55% said mostly notice. Actual correct detection: also 55% on average, 90% in the best case. Post-reveal, opinion splits three ways: 33% no change, 36% more positive, 31% more negative.

Takeaway: Confidence outpaces competence in both markets — but the UK is more volatile once the reveal happens; NL mostly shrugs, UK swings both ways.

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