BLACKLIST

the *Real* Algorithm *is* Memory

TREND REPORT 2026



From the Founders

We started BLACKLIST because we believe that when you put creative into the world that makes people stop, feel something, and tell someone, that's culture.

This report is our annual temperature check. A look at what's actually moving the needle in the spaces between screens, where real memory gets made. This is our thinking. We'd love to know if it sparks something for you.



DOM
Co-Founder



LOLA
Co-Founder



MATHIAS
Co-Founder

47% of the industry says the real value of experiential lives in long-term brand memory.

BLACKLIST Industry Survey, 2026

THE INDUSTRY NAMED IT.

BLACKLIST

A quiet shift is happening.

Brands spent a decade trying to win social feeds.

The winners are now leaving.

Because culture doesn't live inside platforms.

IT LIVES WHERE PEOPLE SHOW UP.

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TURNS OUT, PEOPLE ARE GOING OUTSIDE AGAIN.



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We spent years optimising for feeds. For a while, it worked. Now everything looks the same, feels the same, and disappears the same way.

People aren't disengaged. They are fatigued, so they are selective. Physical presence has become premium. The work that cuts through is the work people remember, and they remember the work they connect with on a visceral level.

"The internet amplifies culture. Real life is what makes it stick."

75%

Of immersive experience attendees say those experiences help them disconnect and engage more meaningfully (Brandwatch, 2026)

-20 MINS

Daily screen time decline since 2021

58%

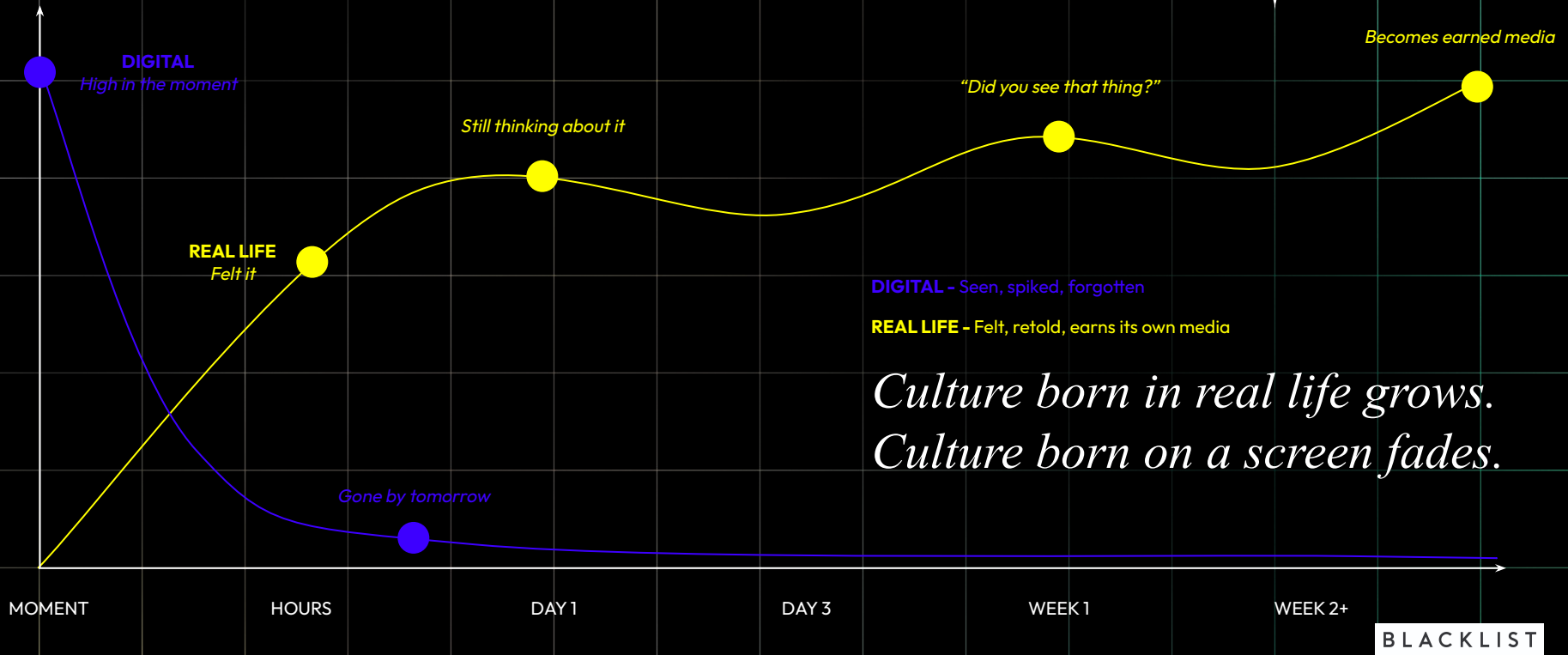
Of consumers trust OOH advertising - and that number is rising year-on-year, as confidence in digital channels continues to fall (Talon, 2026)

200%

Growth in online mentions of 'slop' in 2025 - 82% of that conversation negative (Brandwatch, 2026)

BLACKLIST

What stays in memory, and what doesn't.



DIGITAL - Seen, spiked, forgotten

REAL LIFE - Felt, retold, earns its own media

Culture born in real life grows.
Culture born on a screen fades.

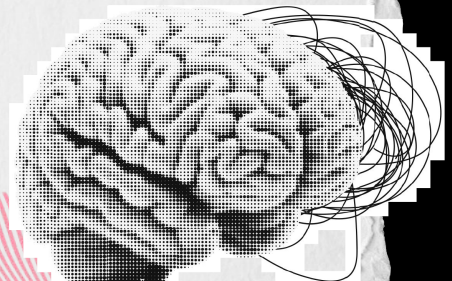
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The New York Times's 2026 predictions:

Dumb phones as status symbols.
War on slop.
The rise of exfluencers.

The Washington Post claims

"phone-free bars" are in.



81% of Gen Z wish it were easier to disconnect from digital devices.

71% of consumers say physically experiencing a brand deepens their connection to it.

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DON'T JUST TAKE OUR WORD FOR IT

WE ASKED THE INDUSTRY TOO



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Industry Voices

We surveyed senior practitioners across agency leadership, brand marketing, strategy, and experiential. Founders, ECDs, CSOs, VPs. People who work at the sharp end every day.

63%

define experiential primarily as a brand storytelling channel.

47%

say the real value lives in long-term brand memory.

48%

believe experience will become a layer applied to all channels.

When asked what cuts through in an oversaturated media environment, emotional intensity ranked first. Physical presence in a digital world ranked second. Novelty didn't make the top two.

79% are optimistic about where this is going. The remaining 21% describe themselves as sceptical but open. Nobody said it isn't working.

WHAT FOLLOWS IS OUR READ ON WHY.



BUILD A MOMENT

AND PHONES WILL FOLLOW.



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01 OOH IS NOW INTERRUPTIVE THEATRE.

THE INSIGHT

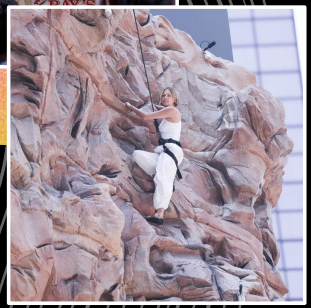
Billboards stopped being background noise the moment they started behaving like art installations. The OOH that travels doesn't explain, it declares. It surprises. It behaves more like public art than paid media.

WHY IT MATTERS NOW

OOH is the purest form of advertising. One idea. One moment. No skip button. The best work creates unmissable moments. It's not about reach, it's about resonance.

When asked what makes experiences cut through in an oversaturated media environment, emotional intensity ranked first and physical presence in a digital world ranked second, ahead of novelty, participation, and cultural relevance. No medium delivers both better than OOH.





BLACKLIST

01 OOH IS NOW INTERRUPTIVE THEATRE.

BILLIE - SCRATCH & SNIFF

A giant scratch-and-sniff armpit billboard in New York City let passers-by test Coco Villa deodorant right on the street. Millions of organic views. Zero media spend to generate them. A deodorant launch turned into a sensory, participatory moment.*

CARLSBERG - BEER TAP BILLBOARD

One physical interaction, a working beer tap built into a billboard, outperformed entire multi-channel campaigns. Proof that doing one thing brilliantly beats doing many things adequately. Everyone loves a free beer. That part helps too.

STEPH CURRY - PHOTOGRAPHY + ASTROPHYSICS

A billboard that combined sports photography and astrophysics to create the ultimate moonshot. Proof that the medium can do more than advertise, it can inspire and educate.







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GEN Z ARE MORE LIKELY TO QUEUE



FOR EXPERIENCES THAN PRODUCTS.

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02 POP-UPS ARE NOW SIDE QUESTS.

THE INSIGHT

The pop-ups people care about now create their own logic: rules, tone, atmosphere, lore. You're opening a portal into a universe that exists for a limited time only.

$95B
Projected global pop-up retail market in 2025

78%
Of Gen Z appreciate brands that create IRL moments

17%
Of other age groups seek the same

WHY IT MATTERS NOW

Gen Z don't want things. They want to belong. The pop-up is the most powerful world-building tool a brand has.



PINTEREST COACHELLA POP-UP 2026

BLACKLIST

02 POP-UPS ARE NOW SIDE QUESTS.

OATLY, BIKE THRU, AMSTERDAM

Amsterdam runs on bikes. Oatly built for that. The world's first Bike Thru let riders pedal through, collect a drink, and continue into the city without dismounting. Miso caramel, hojicha soft serve, a deliberately unnamed Mystery Drink. The concept slotted into the way people already move through the city. A brand that understood its audience well enough to disappear inside their daily routine.



PINTEREST, COACHELLA 2026

The most talked-about brand experience at Coachella 2026 asked festival goers to lock away their devices and create in-the-moment memories, not content. Touchpoints included charm-making, sticker-filled joy guides that could be mailed home as physical memories, and beauty touch-ups from e.l.f. Bold because it asked people to experience something instead of document it. At Coachella, that's a provocation.



IF IT DOESN'T CREATE AWE.

IT'S JUST FURNITURE.



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03 SPECTACLE CREATES SIGNIFICANCE.

THE INSIGHT

The moments that stick are the most surprising. Spectacle in 2026 means feeling more. Experiences designed to be felt, not decoded.

WHY IT MATTERS NOW

Emotionally-driven campaigns outperform rational ones 5x in long-term brand growth. The brands still equating spectacle with spend are solving the wrong problem. The ones winning are asking a different question entirely: what will make someone feel something they didn't expect to feel?



03 SPECTACLE CREATES SIGNIFICANCE.



DISNEY - PERCY JACKSON 4D BILLBOARD, LA

A billboard at Hollywood and Vine that physically splashed water onto the street in sync with on-screen action. It didn't exist to flex technology, it existed to create a moment that felt impossible, and therefore worth sharing.



WARNER BROS - SUPERMAN ON THE SHARD, LONDON

To launch Superman, Warner Bros. put the man himself on The Shard. The stunt travelled because the image was undeniable, a figure from a fictional universe standing on a real London landmark. People shared it because they wanted to, not because they were asked to.

RESPECT THE LORE

OR DON'T BOTHER



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04 IP WORLDS AS PHYSICAL PILGRIMAGE SITES.

THE SHIFT

When people love a world, they want to step inside it. IP-led experiences are evolving from merch drops into destinations. Pilgrimages. Physical chapters in an ongoing story.

Netflix House is the clearest signal: IP as a permanent physical destination.

WHY IT MATTERS NOW

49% of fans buy IP-related products to extend experiences beyond the screen. 24% cite community connection as their primary motivation. People aren't just consuming these worlds. They're looking for a place inside them. The brands that build that place win something a traditional media budget can't buy.





04 IP WORLDS AS PHYSICAL PILGRIMAGE SITES.

HARRY POTTER - A FORBIDDEN FOREST EXPERIENCE, GLOBAL

When Warner Bros. built the Forbidden Forest, they created a space fans have imagined since childhood. Glowing creatures, illuminated trails, scenes lifted directly from the world of the books. Two million people across 14 cities have made the trip.

SEVERANCE, APPLE TV+, GRAND CENTRAL TERMINAL

Apple put the essence of the show inside a glass box in the middle of one of the world's busiest transit halls. A Lumon Industries office, exact replica, dropped into Grand Central. Unknown actors first, then the full cast arriving in character, doing yoga, throwing paper planes, sorting numbers that feel wrong. For a few hours, the world of the show bled into the real world so cleanly that it was impossible to tell where the fiction ended.

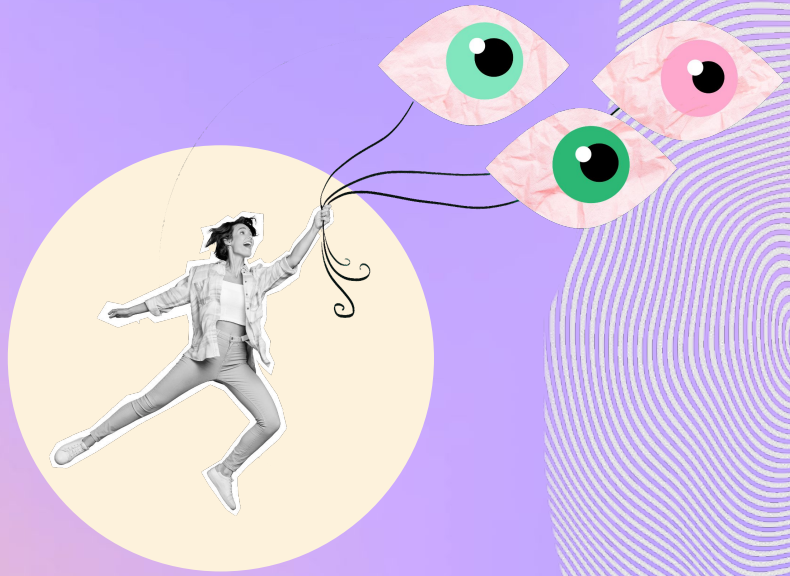
HASBRO

Over 65 physical locations, 500 events annually, bringing Monopoly, Nerf and Transformers to life through branded hotels and restaurants, immersive retail, and competitive socialising. Toy IP as hospitality. The board game as a place you can go.



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“DID YOU SEE THAT THING?”



IS THE ONLY METRIC THAT MATTERS.

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05 IMPRESSIONS FADE STORIES TRAVEL.

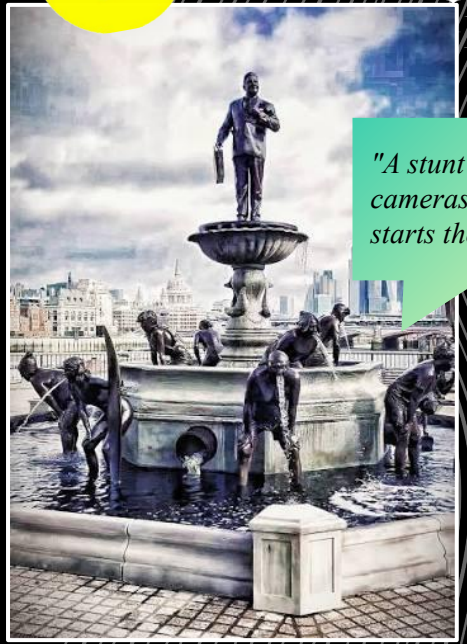
THE INSIGHT

The work that wins is the work people talk about days, or weeks, later, even if it never topped a single dashboard report. An activation that tells a story invites people to step inside and leave the real world behind.

WHY IT MATTERS NOW

The smartest brands treat physical experiences as the content launchpad. One powerful concept, multiple layers: felt in real life, shared online, remembered forever.

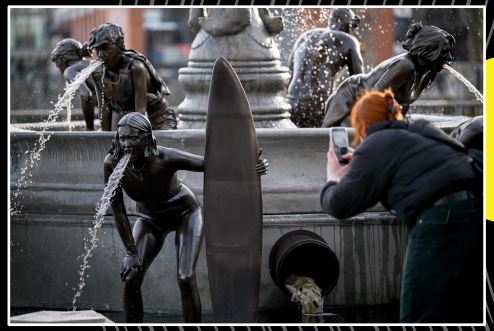
Nearly half the practitioners we surveyed believe experience will become a layer applied to all channels. The brands that build for story now won't need to retrofit it later.



"A stunt ends when the cameras stop. A story starts there."

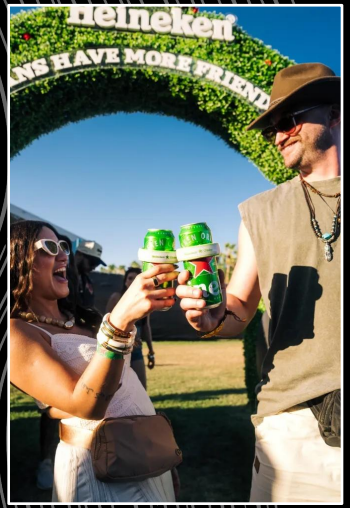
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05 IMPRESSIONS FADE STORIES TRAVEL.



CHANNEL 4 - FOUNTAIN OF FILTH, LONDON

To launch Dirty Business, a drama about Britain's sewage scandal, 4Creative placed a 10-metre fountain on the Southbank at Observation Point. Bronze-like statues of men, women and children appeared to vomit murky brown water. A suited executive stood at the top, pockets full of cash. No explanation needed. The image did the work.*
The statues were modelled on real people affected by the scandal. A QR code on the plaque led to their stories. Three days. Entirely organic reach. A piece of public art that made the show's argument before anyone had watched a single frame.



HEINEKEN - THE CLINKER, COACHELLA 2026

Heineken has been at Coachella for 23 consecutive years. In 2026 they used that equity to do something nobody else could. The Clinker, a smart device that clips onto a beer can and lights up when two people's music tastes align, turned a festival of 125,000 strangers into a network of potential connections. Two cans touch. The devices sync Spotify data. A light signals compatibility. Handles are exchanged. A memory is made.

THE CITY IS
THE CANVAS.

THE BUILDING IS
THE BILLBOARD.



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06 BUILDINGS ARE BECOMING MEDIA.

THE INSIGHT

The billboard on the building is old thinking. Architecture is becoming a living canvas, responsive, programmable, native to its environment. When the screen is the structure itself, brands stop interrupting the city and start contributing to it.

WHY IT MATTERS NOW

Projection mapping at scale, responsive facades, ambient lighting systems, these are no longer experimental. They are becoming infrastructure. The brands utilising these placements are weaving themselves into the fabric of cities.



06 BUILDINGS ARE BECOMING MEDIA.

LOUIS VUITTON - NEW YORK

The entire building became the brand. A Manhattan skyscraper wrapped floor to ceiling in the LV monogram, instantly recognisable, impossible to ignore, and impossible to scroll past. When the architecture is the creative, the city does the media buying for you.

BURJ KHALIFA - ADIDAS, DUBAI

The world's tallest building has become a canvas. Adidas used projection mapping to turn the Burj Khalifa into a moving brand statement visible across the Dubai skyline. Scale in service of idea.

TAMAN ANGGREK MALL - JAKARTA

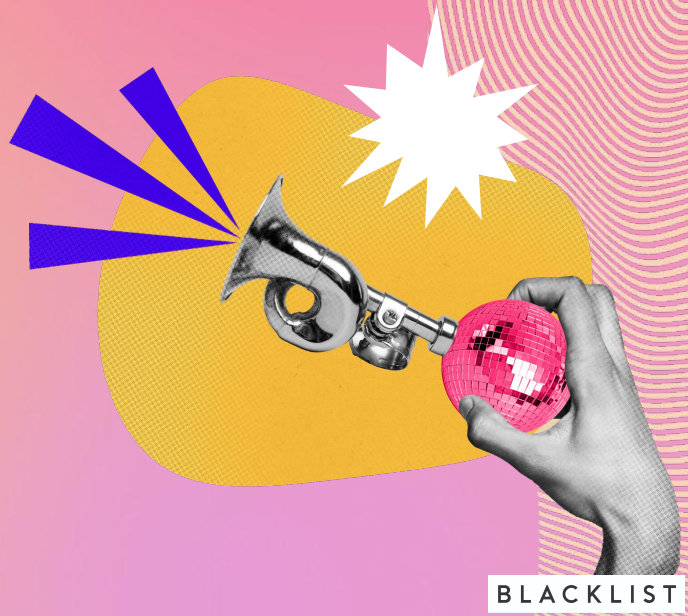
A curved LED facade wrapping the entire building, turning a shopping mall into a piece of urban infrastructure. No separation between architecture and screen. The building breathes content.



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THE EYES FORGET.

THE BODY REMEMBERS.



BLACKLIST

07 THE BODY IS THE MEDIUM.

THE INSIGHT

Screens speak to the eyes. Memory lives everywhere else. Scent, sound, texture, temperature, the senses that marketing has largely ignored are the ones most directly wired to emotional recall. The experiences people carry longest are the ones they felt in their bodies, not the ones they watched on a screen.

WHY IT MATTERS NOW

Multi-sensory design is the key to creating whole body sensations that connect on a visceral level. Smart use of emerging tech makes this frictionless and accessible to even modest scale campaigns.

Ocean Outdoor's Portal is a freestanding half-cube of five high-definition LED screens with motion tracking and mixed reality that builds environments you step inside.

Volta XR takes it further. A spatial platform that syncs audio to real-time 3D visuals, letting audiences manipulate what they see and hear live from their phones. The experience changes because the people inside it change it.





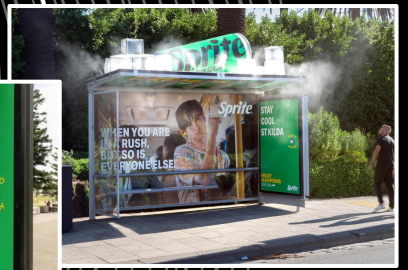
BLACKLIST

07 THE BODY IS THE MEDIUM.









HUNTER GRAND CENTRAL TERMINAL, NEW YORK

Hunter didn't take a retail space. It took over one of the world's great transit halls and turned it into a Scottish greenhouse, mist, moss, the sound of rain, 750,000 people walking past daily. The product was rainwear. The environment was rain. For four days, a corner of New York smelled like the Highlands.

SPRITE, MISTING BUS STOPS

Sprite replaced standard bus shelter advertising with misting units that sprayed a cool mist over waiting passengers on hot days. Just immediate, involuntary physical relief at the moment people needed it most without the need for screens or QR codes. The body registered the brand before the brain did.

FOOTFALL IS NOT A FEELING.

IMPRESSIONS ARE NOT IMPACT.



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ROX. THE METRIC NOBODY HAS CRACKED



THE INSIGHT

The industry is trying to measure memory with tools built for clicks. Impressions, reach, dwell time, these are proxies for attention, not evidence of impact. An activation that changes how someone feels about a brand forever will score worse on a dashboard than a digital ad that was seen and immediately forgotten. The data is not fit for purpose. Everyone knows it. Few are doing anything about it.

WHY IT MATTERS NOW

Return on Experience is the most important metric in marketing right now and the least understood. The practitioners we surveyed ranked long-term brand memory as the primary value of experiential. But most brands are still reporting back on footfall and social impressions, metrics that were designed for a different kind of work entirely. 79% say they know experiential works. Without a robust, benchmarkable impact metric, justifying those budgets to stakeholders remains hard.

A single number. Benchmarked against campaigns that have already worked. Defensible in any boardroom. The industry has the instinct but it's been missing the instrument.

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WHAT IF YOU COULD KNOW IT WOULD WORK...

BEFORE YOU BUILT IT.



BLACKLIST

INTRODUCING



BLACKLIST's proprietary prediction engine for experiential marketing.

Predict before you build.

Rook generates a 0–100 score for any activation before a penny is spent.

Ten years of BLACKLIST campaign data,

built into an algorithm that knows what resonates.

THE GUESSWORK IS GONE.

BLACKLIST

THE SHIFT IS REAL.

AND IT'S ACCELERATING.



BLACKLIST

Brands are waking up to the fact that memory is the metric that matters, and the opportunity to lead it has never been bigger.

The brands moving fastest are building worlds. Creating moments people carry with them long after the experience ends. The experiential sector is growing because it works. And the agencies that understand why are the ones worth talking to.

WE UNDERSTAND WHY.

BLACKLIST

That's the algorithm now.



IF NO ONE TELLS A STORY ABOUT IT TOMORROW,

IT DIDN'T HAPPEN.

BLACKLIST

BLACKLIST

Thank You!

TREND REPORT 2026



BLACKLIST PROPRIETARY RESEARCH

BLACKLIST Industry Survey, 2026 - Over 900 Senior practitioners across agency leadership, brand marketing, strategy and experiential.

THIRD PARTY RESEARCH & DATA

GWI Core Report — daily screen time decline of 20 minutes since 2021: https://www.gwi.com/reports

Talon, Thinking Outside in 2026 — 58% of consumers trust OOH advertising, rising year on year: https://talonooh.com/2026-trends-shaping-ooh-advertising/

Brandwatch (2026) — 75% of immersive experience attendees say experiences help them disconnect and engage more meaningfully: https://www.brandwatch.com/reports/

Brandwatch (2026) — 200% growth in mentions of "slop" in 2025, 82% negative sentiment: https://www.brandwatch.com/reports/

The Harris Poll x Quad, The Return of Touch (2025) — 81% of Gen Z wish it were easier to disconnect from digital devices: https://www.quad.com/newsroom/81-percent-of-gen-z-report-wishing-it-was-easier-to-disconnect-from-digital-devices

The Harris Poll x Quad, The Return of Touch (2025) — 71% of consumers say physically experiencing a brand deepens their connection to it: https://www.quad.com/insights/why-consumers-want-more-irl-and-tactile-brand-experiences

The Harris Poll x Quad, The Return of Touch (2025) — 78% of Gen Z and Millennials appreciate brands that create IRL moments: https://www.quad.com/newsroom/81-percent-of-gen-z-report-wishing-it-was-easier-to-disconnect-from-digital-devices

Allied Market Research — global pop-up retail market projected to reach $95B by 2025: https://www.alliedmarketresearch.com/

Household Fanalytics (2025) — 49% of fans purchase IP-related products to extend the experience; 24% cite community connection as primary motivation: https://shots.net/news/view/a-new-experience-how-ip-driven-brands-can-deepen-fan-loyalty

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The Washington Post, The 2026 In/Out List — "phone-free bars" are in: https://www.washingtonpost.com/style/interactive/2025/in-out-list-2026/

Netflix (2025) — Netflix House announced as permanent IP destination venues: https://about.netflix.com/en/news/made-in-texas-how-netflix-house-dallas-is-leaving-a-lasting-footprint