



TABLE OF CONTENTS

01 ROI ISN'T A DIRTY WORD

- 05 ARE YOU REALLY MEASURING BRAND EXPERIENCE?
- 06 LET'S GET CREATIVE
- 09 ANTICIPATION

02 DO UNTO OTHERS

- 12 THE CLUE IS IN THE NAME

03 MAKING MEMORIES WITH PURPOSE

- 15 THE GOLD DUST OF BRAND EXPERIENCE

04 SEE ME, ALL OF ME

- 20 A CRYSTAL BALL THAT WORKS?
- 21 ART & SCIENCE
- 24 THE IMPORTANCE OF NEED STATES

05 BE THERE, BUT FOR THE RIGHT REASONS

- 27 KNOW YOUR AUDIENCE
- 28 DOING GOOD IS GOOD FOR BUSINESS

06 OUR RECIPE FOR SUCCESS

- 31 A POWERFUL TRIFECTA
- 32 WHAT'S IN A NUMBER
- 33 SOLE SCIENCE™ AND WHY IT MATTERS

07 THE FUTURE OF BRAND EXPERIENCE

- 37 THE ONLY WAY IS UP

40 **2022 GMR BRAND EXPERIENCE INDEX® METHODOLOGY**

45 **GMR EXPERIENCE EQ 2022**

49 **2022 GMR BRAND EXPERIENCE INDEX®**

“NOTHING IS EVER REALLY LOST TO US AS LONG AS WE REMEMBER IT.”

L.M. MONTGOMERY



Most people have that one special memory that when triggered, brings them back to a unique moment in time. For me it's the smell of vanilla, and no matter how many years go by or how infrequently this memory is unlocked, it never fails to transport me back to my grandmother's house and make me feel like a kid again.

GMR is in the business of global experience marketing, creating memory-making activations for thousands of brands across sports, entertainment, culture and B2B environments.

Over my tenure at GMR, I have watched with a mixture of curiosity and frustration at how our industry - one designed to uplift and nourish people's passion - regularly finds itself on the receiving end of skepticism for its perceived inability to demonstrate ROI. Some brands still question the value of investing in Experience Marketing and need convincing that a brand experience, whether physical or digital, will have as much or more impact on a behavior or the bottom line as other marketing tactics within an integrated plan.

Just like those childhood memories made with family or friends, we believe that brands also have a role to play. Given the right circumstances and carefully selected tactics, a great brand experience can easily become part of our personal repository of memories that we get to 'revisit' again and again while

importantly, delivering ROI for brands. You just need to know which levers to pull.

After five years and thousands of hours of in-market and lab-based research, GMR's big bet has paid off. I'm proud to share that our Strategy and Data Science teams have developed the String of Lights Effect (SOLE Science™), a qualitative and quantitative approach to assessing the impact and value of a brand experience. GMR prides itself on creating memories that matter, which is why our research remained laser focused on the impact brands have on memory making vs other metrics such as brand awareness. After all, long after a product launch or sponsorship is over, a great memory lives on.

I invite you to read our report and learn more about SOLE Science, our proprietary GMR Experience EQ and the role of Need States as they relate to memory making.

Be unforgettable.

TYSON WEBBER | GMR MARKETING
PRESIDENT & CEO



ROI ISN'T A DIRTY WORD

Are you *really* measuring brand experience?

We are. And
we can show
you how.

The experience industry has never had an accepted or universal way to measure ROI. It's hard to imagine that in 2023 this is still the case, yet sadly it is.

The majority of marketers recognize the value in creating meaningful experiences where people choose to engage, are rewarded for their time, and leave with powerful memories. And while there is no shortage of reports on the best brand experience activations at events large and small, ROI and Need States (what people consciously or unconsciously expect from brands) – have never been formally assessed.

GMR is an award-winning global experience agency with 25 offices in 12 countries. Our clients look to us to create meaningful strategies and deliver beautifully designed and

flawlessly executed experiences with measurement at the core. But these are the brilliant basics – the must haves in our industry. To be the best partner to our clients and importantly, help drive the experience industry forward, we set ourselves an industry-wide challenge to prove that like other marketing channels, **experience-based investments can:**

- ✓ Be measured
- ✓ Deliver concrete ROI
- ✓ Empower clients to focus on forward planning with great certainty
- ✓ Fulfill people's needs.

Over the past five years, we've undertaken lab and in-market experiments to stress test our hypothesis with data at the forefront of brand experience. Along the way we uncovered a few golden nuggets that on the surface may seem obvious, but in the absence of data and knowing how and which tactics and strategies to deploy, in which environments and for which audiences, these findings would have simply been relegated to "meh, it just felt right." Comments like this rarely fill the CFO with confidence.

Let's get creative

Imagine a mixing board created specifically for brand experience where you can literally hear and see the effect of your choices?

By dialing different levers up or down, you can select, with great accuracy, which components of your live experience will work best regardless of industry, environment, or audience. The ability to manipulate the right combination of tactics and devise optimal brand experiences ensures brands are remembered for creating positive vs negative memories. What a game changer!



MULTI-SENSORY

SIGHT
SOUND
SMELL
TASTE
TOUCH

PEOPLE

GENDER IDENTITY
ETHNICITY
CULTURE
MINDSET

CONTEXT

ENVIRONMENT
LOCATION
FOOTPRINT SIZE
LINE LENGTH

NEED STATES

BELONGING
RELEASE
ENRICHMENT
IDENTITY

MEMORABLE BRAND EXPERIENCE

BRAND

BRAND CONVICTION

WASTE REDUCED, CO2 EMISSIONS, CLARITY, SUSTAINABILITY, RECYCLING RATE, NON-CERTIFICATION, DE&I, ACCOMMODATIONS, SUSTAINABILITY, NO BIAS, ACCOMMODATIONS, DE&I, PURPOSE, BRAND AMBASSADORS, GIVEAWAYS, PERSONALIZATION, ON-SITE TALENT, CELEBRITY/INFLUENCER, EDUCATIONAL, MESSAGING, DIRECTORIAL, PARTNERSHIPS, ONE BACK, EDUCATIONAL

ENGAGEMENT

BRAND AMBASSADORS
SAMPLING
GIVEAWAYS
PERSONALIZATION
ON-SITE TALENT CELEBRITY/INFLUENCER



“Having the tools to know that the tactical creative and design decisions we are making will have a compelling and tangible effect on the memories of those who experience them, is a gamechanger. We’re crafting powerful stories and spaces, with the intent of creating unforgettable memories in the minds of those who experience them. Knowing that the experience decisions we are making will have that effect in advance is like seeing into the future, and helping us to make even more powerful work.”

KEN BLACK, CHIEF CREATIVE OFFICER, GMR

Anticipation

...not just a great
70s ad for ketchup

Rarely do people get excited at the prospect of waiting in line, especially when they've arrived at an event they've been looking forward to, for days, weeks, or even months. But guess what? The more folks in line, the more excited people tend to get. We call this the bandwagon effect. It doesn't matter if what's at the end of the line is mind blowing or as dull as dishwater - the line represents the possibility for awesome, which drives people to give it a chance. In fact, even if the line is 25 people deep, most are prepared to roll with it, although the sweet spot is around 10. Anything more than 25 and people are unwilling to hang around for what could

be a total (and very time consuming) let down. Unsurprisingly, no line is a big no-no.

Be honest: how often have you peered inside an empty restaurant and thought to yourself, "keep walking?" Yeah, it's the same principle.

When designing your brand experience, be intentional with how you enable access to your space. Are there logical moments to "narrow" the line, slow people down and engage them in some fun moments while driving a bit of line FOMO to onlookers?



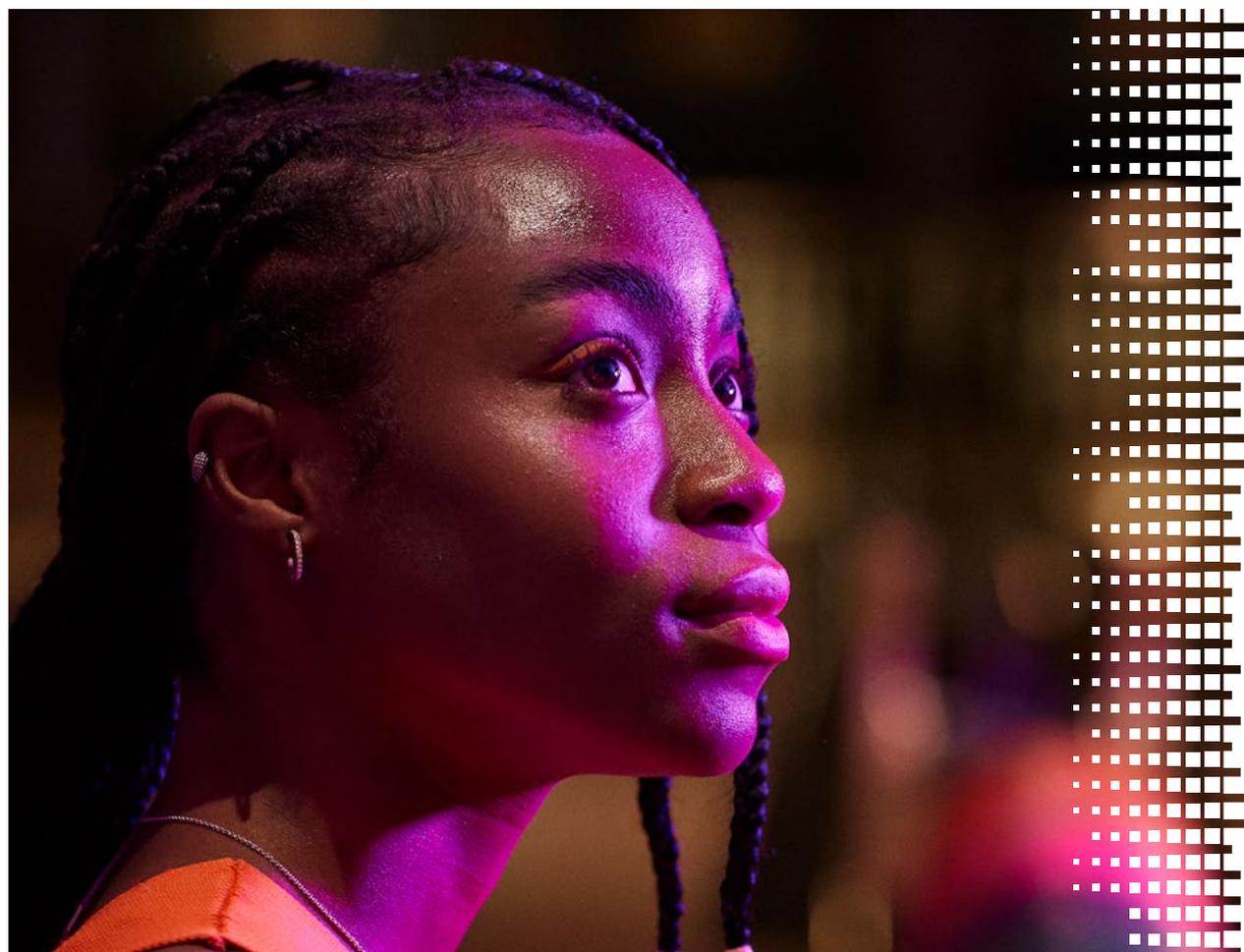
TAKEAWAY
01



The line forms here.
Make sure people want
to join yours.

DO UNTO OTHERS

The clue is in the name



Without the presence of brand ambassadors (BAs), many if not all live experiences would simply fall flat. Yet we regularly observed unengaged and/or uninformed BAs, which is far worse than having none onsite.

If the first touchpoint with your brand is a negative one, you as the brand marketer must work twice as hard to win that person back, assuming they're willing to give you a second chance. Now imagine you're just "you" attending a Fan Fest, and not your brand marketer self. Was there a time when you were put off by a grumpy or disinterested BA? Did it ruin the moment, change your perception of the brand, or get your hackles up so badly that you went straight to

social and called out the brand? Perhaps you haven't, but others have and will.

Brand ambassadors aren't simply extensions of your brand – they ARE your brand and should be as well trained as a full-time team member to accurately represent your company's values, mission, and objectives. These folks can make or break an experience and help or hinder the growth of your brand community. Relegating them to basic hype roles or collecting typically unwelcome data capture should ideally be avoided.

Don't be that brand.

“I entered this footprint twice. At no point did anyone engage with me in a meaningful way. I had to approach the BA and ask what I was signing up for or entering to win. What a miss!”

KAWASAKI, COUNTRY THUNDER
(AS OBSERVED BY A GMR DATA COLLECTOR)

TAKEAWAY
02



You never get a
second chance to make
a FIRST impression.

[CLICK HERE](#) FOR ADDITIONAL INSIGHTS AND A
DEEPER UNDERSTANDING OF OUR METHODOLOGY.

01

02

03

04

05

06

07

CGMR MARKETING 2023

13

MAKING MEMORIES WITH PURPOSE

The gold dust of brand experience

THE GMR THREE FACTOR MODEL

Tactics are only one piece of the brand experience puzzle. To add texture to observation, we then measure each activation in relation to GMR's Three Factor Model. These three components look at how the brand accommodates an individual's sensory immersion and level of engagement, underscored by the brand's relevance to context at a given event. We define these as follows:

SENSORY IMMERSION

The number and intensity of senses engaged within a brand experience, and to what extent they grab your attention. Examples include which senses and the centrality of the experience (i.e. was this the main attractor or simply one of many touchpoints).

LEVEL OF ENGAGEMENT

The number of touchpoints a person is invited to interact with. This incorporates the duration of each and the type of content aligned to that touchpoint. Examples include BA engagement, premium giveaways, access to talent/influencers.

RELEVANCE TO CONTEXT

The degree to which the brand and its activation aligns with the event and delivers against the audience's passions and interests. This accounts for the "fit" of the brand at the event, the activation components and audience expectations.



THE STRING OF LIGHTS EFFECT™

If we think of our memories as a string of lights, sensory immersion, intensity of engagement, and contextual relevance determine which bulbs burn brightest. At GMR, our experience design philosophy is guided by this String of Lights Effect™. But some memories burn brighter than others, so much so that when a person encounters a stimulus associated with the event it's formed around, that event plays back in their mind. They're literally

transported back to that specific moment. These are called autobiographical memories, and we all have them.

Initial results have shown that when a person is fully engaged in a multi-sensory brand experience, they're almost *six times more likely* to remember that brand when considering other options. The more robust the engagement and immersion levels, the more memorable the experience.

However if there's little relevance to context and people are left confused, your brand may still be remembered, just not for the right reasons.

[CLICK HERE](#) TO VIEW THE STRING OF LIGHTS EFFECT™ VIDEO.



“The Air France Bubble Bar Lounge was a really lovely space that encouraged you to discover without needing to sign up for anything or be educated about the brand. BAs were friendly and greeted you. Sample size champagne, berets and wine carrier tote bags were handed out. There was even a little tuk tuk truck. It was nice to have a place to sit down for a while and listen to the French singer. All around it just made me feel good to be there.”

AIR FRANCE BUBBLE BAR, NY FOOD & WINE FESTIVAL
(AS OBSERVED BY A GMR DATA COLLECTOR)

TAKEAWAY
03



Moments are Fleeting
Create memories that
LAST a lifetime.

01

02

03

04

05

06

07

CGMR MARKETING 2023

18

SEE ME, ALL OF ME

01
02
03
04
05
06
07
GMR MARKETING 2023
20

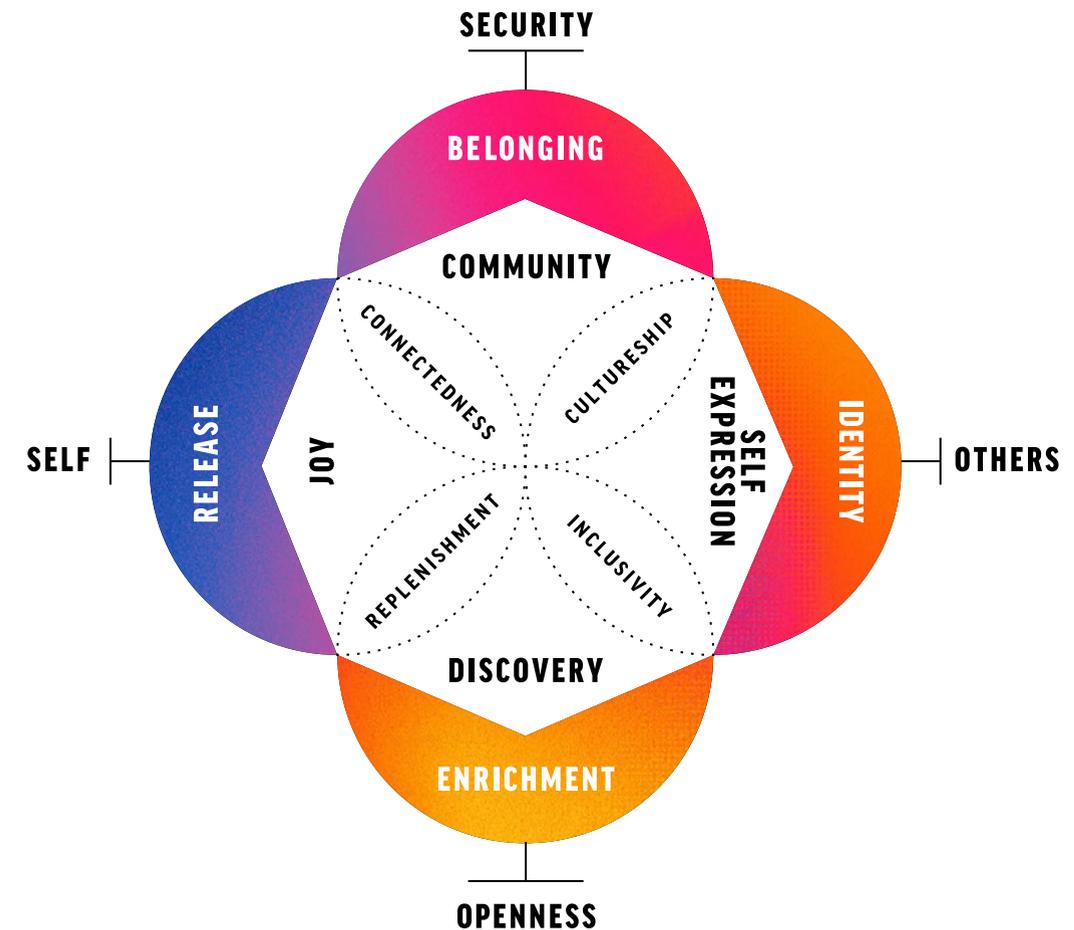
“What if you could anticipate your audience’s needs and fulfill it through your brand experience? Cool, right? Yes, very, but you’re probably thinking that sounds impossible and awesome in equal measure. Yet that’s precisely what our Experience EQ framework does.

We use EQ to map human needs based on the environment, that in combination with the right tactics, places your brand on the best path for a differentiated and memorable experience. It’s a brand saying to its audience, ‘Hey, we got you, we know exactly what you’re looking for!’ and for a brand to genuinely deliver against its promise.”

ELKE JONES, CHIEF STRATEGY OFFICER, GMR

CHAPTER
04

A crystal ball that works? *Yup.*



Art & Science

that delivers on
brand and business
objectives



As of today, five years of quantitative and qualitative data collection has allowed us to intercept tens of thousands of people across a range of events and geographies. In the past year alone, we observed over 55 events in 41 cities, where more than 450 brands delivered 550+ unique activations to a diverse group of fans, ethnicities and cultural tastes.

When we released the first GMR Experience EQ in 2018, there was no COVID, the #MeToo Movement had just gone global, Brexit was looming large, and a biracial divorced American actress became a (short lived) royal princess. There was a lot going on.



Fast forward to 2022 where the world had (mostly) emerged from the other end of the longest roller coaster of madness many of us have ever experienced. Apart from adapting to our new normal, people set out to enjoy life by seeking moments of escape that would physically and emotionally distance them from the societal, political, environmental, and economic funk that loomed large. This desire to embrace life post COVID super charged people to emerge full of energy, and with a renewed sense of freedom. Given these changes, we took a moment to review our 2018 findings and determine where or if human sentiment had changed. Indeed, it had.

In 2018 people were looking for Exclusivity, where being part of a select group came with a certain caché. But by 2022 this had evolved into Cultureship, a supportive network typically associated with allyship, yet experienced through the lens of culture. Cultureship bonds like-minded individuals across environments where they can authentically celebrate their identity through music, hair, fashion, food, sexual orientation etc. Brands that understood this delicate balance were welcomed and rewarded through positive WOM, loyalty and advocacy. But brands that showed up for their annual “do good” moment were rejected.

“[GEICO] did nothing while at Pride, which was disappointing. They’re such a large brand yet they had no specific giveaways, signage or activities that demonstrated they were proud to be there or supportive of the community. It didn’t feel like they made an effort at all, which was a real turn off.”

GEICO, CHICAGO PRIDE
(AS OBSERVED BY A GMR DATA COLLECTOR)

CHAPTER
04

Another interesting shift we identified was around Fun. By 2022, people were looking to experience Joy rather than Fun, through celebratory moments that lifted them up and helped them feel alive or optimistic. Joy is such a rich territory and a great space for brands to add depth and value.

“OGX just got it right. They tapped into all the senses and allowed everyone to get their hair done with 90s/early 2000 styles. There was this cool nostalgic photobooth featuring 90s pre-teen bedrooms...everything about it just made me happy. I also really loved how they honed in on the re-emergence of great trends, in this case, the 90s.”

OXG - LOVE IS IN THE HAIR, THE GOVERNORS BALL
(AS OBSERVED BY A GMR DATA COLLECTOR)



The importance of Need States

Our data indicates that in 2022 brands were most successful in generating positive autobiographical brand-embedded memories at events where Release and Belonging were the predominant Need States. By extension, these Need States then feed into Joy and Community.

Whether brands were small and regionally based or a global behemoth, people who experienced these powerful brand activations felt supported, recognized and connected to others.

Designing the right menu of tactics for the right environment and audience is predicated on understanding what people are looking to get out of an experience. On occasion, these expectations aren't even

clear to the individual – it's simply a feeling or an anticipation of what's to come. When brands understand the scale of people's needs and desires, they can ensure that their experience delivers, supports, or elevates that person's emotional needs.

When we're in the process of ideating, we apply this construct against specific audiences to curate solutions that will connect brands to an individual's underlying need.

Understanding the critical role that Need States play in designing activations should not be underestimated - this could be the difference between brand love and brand rejection.

EXPERIENCE EQ IN ACTION

ORANGE COUNTY COAST, VANS U.S. OPEN OF SURFING BELONGING > COMMUNITY > CONNECTEDNESS

Orange County Coast Keeper's mission is to protect swimmable, drinkable, fishable water and promote watershed resilience throughout their region. Their presence at the Vans U.S. Open of Surfing fully delivered on its purpose while making people feel that they belonged - they were part of something bigger than themselves - a community that advocates for environmental protection.

FEDEX, NFL DRAFT EXPERIENCE RELEASE > JOY > CONNECTEDNESS

FedEx's onsite presence included a physical activity that featured a degree of competitiveness to achieve a specific goal. This simple approach encouraged people to let go of stress, indulge in a little playfulness and connect with others, whether it was family members or other attendees.

When measuring human experiences and feelings, subjectivity is always part of the picture. But subjective measurements and judgments don't equate to an absence of empirical value. On the contrary. It's no secret that humans are on the whole,

emotionally led creatures. Leveraging the richness of feeling-based observations such as coolness and shareworthiness added a layer of authenticity and relatability, providing greater depth and relevance to the tactics we measured.

FOR ADDITIONAL DETAIL ON THE
GMR EXPERIENCE EQ, [VIEW OUR
2022 OVERVIEW HERE.](#)

TAKEAWAY
04



Showing up isn't the
same as being ALL IN.

01

02

03

04

05

06

07

CGMR MARKETING 2023

25

BE THERE, BUT FOR THE RIGHT REASONS

Know your audience

Consciously or not, people seek out experiences with others who make them feel welcome or help them discover new things about the world or themselves. These interactions and feelings of belonging lead to stand out moments that become lasting memories.

“McDonald’s featuring a mango flavored smoothie spoke directly to the Hispanic community, which was a nice touch. Same for the signage, which was mostly in Spanish. These small acts made me and my friends feel welcome.”

MCDONALD’S, RUIDO FEST
(AS OBSERVED BY A GMR DATA COLLECTOR)



At this same event, data collectors experienced quite the opposite of McDonald’s culturally significant act. They were left feeling disappointed by a large number of brands that appeared to subscribe to the path of least resistance.

“It felt like other brands were applying the ‘Hispanic discount,’ the assumption being that we’ll be happy with whatever they throw at our community. They put the least amount of effort into what they provide.”

MULTIPLE BRANDS, RUIDO FEST
(AS OBSERVED BY A GMR DATA COLLECTOR)



Let’s dig a bit deeper into this theme of understanding your audience.

Previously we mentioned that more people in line led to greater anticipation. This is where things start to get really interesting. Once you start mapping Need States against observations, a new picture begins to form.

Where Identity is the predominant Need State, a few people in line becomes a good predictor of a memorable experience. For the person seeking out Identity, the longer the line, the greater the drop off and decrease in desire to participate. Short but sweet is key here.

If the Need State is Enrichment, a longer line equates to the subconscious belief that a person will have a better experience. Think “the more the merrier.”

Doing good is good for business

As brand marketers, there's an expectation and an opportunity for us to add greater value to the live experience. Achieving this requires respect for people's differences as well as the ties that bind them. We need to be ferociously interested in what makes people tick and dedicated to understanding what they're looking for. A case in point is the importance and impact of sustainability.

There's a perception that being sustainable is costly and difficult. Yes, it takes planning and commitment but being sustainable doesn't have to signal an exponential increase in budget.

We repeatedly heard that the majority of events and brands rarely prioritized or made mention of sustainability apart from the odd recycling bin. Given that our industry is regularly called out for being notoriously wasteful from single-use plastics to non-recyclable giveaways, we need to do better.

“I think we’ve moved on from it being a pleasant surprise when events provide free water filling stations where you can fill up your own bottle - now it’s a disappointment when that’s not an option.”

RIBFEST

(AS OBSERVED BY A GMR DATA COLLECTOR)

“There was a company on-site that collected trash post-marathon and processed it to create benches that were then donated to Chicago parks and community gardens. What a great idea that was really in line with The Chicago Marathon.”

CHICAGO MARATHON

(AS OBSERVED BY A GMR DATA COLLECTOR)

TAKEAWAY
05



Be part of the solution,
not the problem. And
really MEAN IT.

OUR RECIPE FOR SUCCESS

GMR
Experience EQ
+
GMR Three
Factor Model
+
Ongoing
Measurement =



CHAPTER
06

A powerful trifecta

The GMR Brand Experience Index® (GBEI) is the first ever holistic assessment on the impact of brand experience.

We can determine ROI through a combination of our GMR Three Factor Model, our unique understanding of Need States (GMR Experience EQ) and thousands of hours of in-market research and machine learning to generate long term brand memories that affect down funnel behaviors.

In this inaugural GBEI, we focused exclusively on North America*, where many of the usual suspects like The Coca-Cola Company and American Express ranked high. A handful of unexpected brands such as the U.S. Air Force and lesser known/challenger brands also broke through to give the big guys a run for their money, including Idahoan Mashed Potatoes, Vital Proteins and Alaffia.

The GMR Brand Experience Index logo, which consists of a stylized 'G' made of vertical lines of varying heights. To the right of the logo is the text 'GMR BRAND EXPERIENCE INDEX®'. Further right is the text 'CAN'T WAIT TIL THE END TO CHECK OUT THE GBEI? FEEL FREE TO **CLICK HERE.**' The entire logo and text are enclosed in a thin black oval border.

**The 2023 GBEI and subsequent editions will feature more brands, more events, and more global markets.*

What's in a number

Brand experiences that rank in the top quartile of our GBEI report display three characteristics:

- ✓ they clearly exhibit the hallmarks of memory-making consistent with the GMR Three Factor Model
- ✓ they provoke positive reactions from participants
- ✓ they stand out from other onsite experiences

When a brand delivers against the above, we know that people are more likely to form brand-embedded autobiographical memories that positively impact their future purchasing behavior. Conversely, brands that have a low GBEI score aren't cutting through or connecting with people. A word of caution: if a low scoring brand experience is remembered, it's generally not for the right reasons.



“Liquid Death’s sexy design and dramatic/theatrical Sell Your Soul tagline created high anticipation for their experience. Unfortunately inside I found low energy Brand Ambassadors, a warm (yet free!) can of Liquid Death, and limited things to actually do if you didn’t want to wait in the temporary tattoo line. I thought it was going to be the coolest thing but it was such a letdown to hear nothing else about ‘selling my soul’ or ‘death to plastic.’”

LIQUID DEATH, LOLLAPALOOZA
(AS OBSERVED BY A GMR DATA COLLECTOR)

SOLE Science™ and why it matters

By leveraging machine learning and statistical modeling, we can uncover the impact of each experience attribute, how likely it is to move the needle on memory, and importantly what this means for consumer behavior at the point of purchase.

We learn how these effects interact with each other when combined in an experience design and how that might change when we take human characteristics into account.

Together these insights inform our strategic and creative planning processes - a practice we call the String of Lights Effect Science, or SOLE Science™ for short. We continually nourish our repository of thousands of data points in order to advise brands

where, why and how they should activate, and importantly, what ROI they should expect.

The accuracy of GMR'S methodology means that brands will no longer have an excuse for handing out koozies as their go-to freebie of choice.

Let's be honest: swag and giveaways that matter, are useful or are ideally remembered a month or even a year down the line is what people care about. Free, yet unhelpful or unrelated items that end up in the bin, can ruin people's level of joy and shift their perception of a brand ("they really don't get me"). When brands meet people's conscious or unconscious needs at the point of a physical engagement, this unexpected treat can elicit feelings of happiness, belonging, and advocacy.

“Some of the brands really fit the context of [NorthCoast]: they either fulfilled a common need like Red Bull handing out energy drinks or they targeted a specific subgroup with the EDM audience by mixing pop culture with EDM clothing options. They really understood what the audience wanted.”

MULTIPLE BRANDS, NORTHCOAST
(AS OBSERVED BY A GMR DATA COLLECTOR)

**Go on,
take a peek!
We know you're
wondering if your
brand made the
2022 GBEI**



**CLICK HERE TO VIEW THE 2022 GBEI
AND DISCOVER WHERE YOU AND/OR
YOUR COMPETITORS NETTED OUT.**

TAKEAWAY
06



C'mon brands, you
can do better.

THE FUTURE OF BRAND EXPERIENCE

The only way is up

Long after the festival is over, the home team has won (or lost), the booths packed up for the next event, and assuming a person enjoyed a multi-sensory brand experience, long term autobiographical memories can be triggered that will:

- ✓ drive a behavior change or enhance a person's perception of your brand
- ✓ influence a person's decision to purchase your brand over another
- ✓ encourage a person to advocate on behalf of your brand

No marketer wants to invest precious dollars into a brand experience that a) falls flat, b) is forgotten (worse still, remembered for the wrong reasons) or c) doesn't deliver against agreed objectives. If you can spare an hour, why not sign up for a complimentary 1 to 1 consultation (we've listed a few below) or we can create a bespoke session just for you. We'd be happy to deep dive into a variety of topics that will help you:

- ✓ better operationalize your strategic and tactical decisions
- ✓ remove the guesswork from your planning process
- ✓ create great vs "meh" activations
- ✓ predict ROI while turning people into brand fans.

I'D LOVE TO...

find out if you measured our brand experience. I'd also like to hear GMR's POV on the right tactics for our audience based on the event(s) where we activated and how this aligns to our brand value proposition.

know more about GMR Experience EQ, and the Need States, particularly how this affects the people that are important to us in the live event space.

get additional intel as to what other brands did, where they activated and how they did it. That's not wrong, right?

stand out from a sea of brand sameness and create memories that matter without wasting our time and money. This is a marketer's dream come true. I'll have some of this please.

Whichever session you choose, we promise it'll be a great experience. See what we did there? 😊

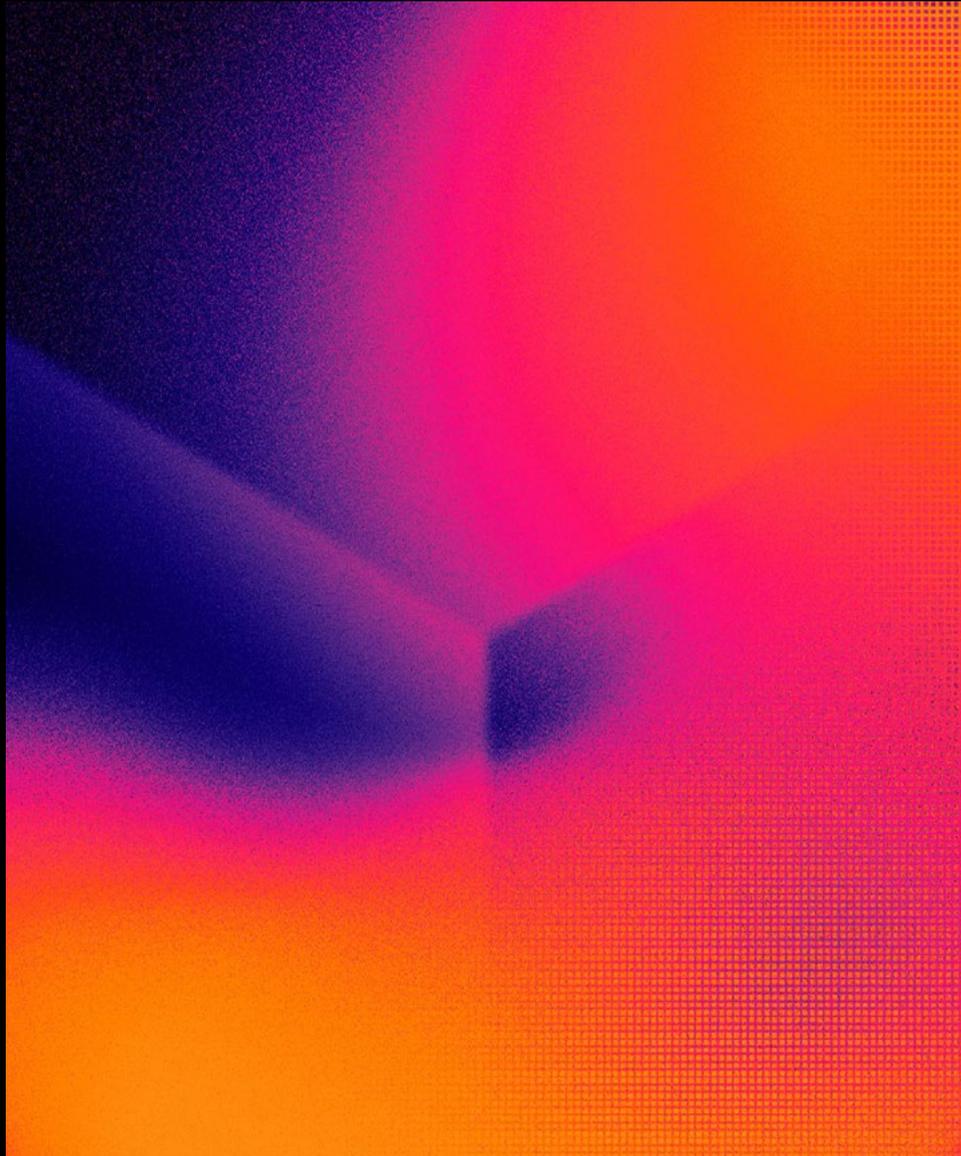
[CLICK HERE TO BOOK YOUR 1 ON 1 CONSULTATION](#)

By now you've signed up for a one to one consultation (YAH!), and while reading our report you may have clicked through to peruse our three stand-alone reports. In case you haven't, we invite you to:

DISCOVER THE METHODOLOGY
BEHIND THE GMR BRAND
EXPERIENCE INDEX®

**LEARN ADDITIONAL
RATIONALE INTO THE
2022 GMR EXPERIENCE EQ**

 **GMR BRAND
EXPERIENCE
INDEX®**
**SEE THE BIG REVEAL OF
THE 2022 GMR BRAND
EXPERIENCE INDEX®**

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ABOUT GMR MARKETING

We are the experience agency, built to make stories that become lasting memories. GMR pioneered experience marketing back in 1979, and we're still leading the way. We embed brands into experiences leveraging shared passions. We create experiences that are founded on data, rooted in science, grounded to strategy, designed meticulously, and executed flawlessly. Our passionate global team creates, consults and activates in more than 70 countries. We're headquartered in the United States and are part of Omnicom Group Inc. Learn more at ***GMRMarketing.com***.

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2022 GMR BRAND EXPERIENCE INDEX® METHODOLOGY

The 2022 GMR Brand Experience Index[®] Methodology

BACKGROUND & CONTEXT

In 2018, GMR began a series of laboratory experiments informed by behavioral psychology and cognitive neuroscience frameworks where memory functions as they relate to recall were tested under various conditions. As a result of these experiments, we identified a set of factors that reliably predict the formation of brand-embedded memories; the GMR Three Factor Model.

SENSORY IMMERSION

The number and intensity of senses engaged within the experience

LEVEL OF ENGAGEMENT

The number of touchpoints a person is invited to interact with

RELEVANCE TO CONTEXT

The degree to which the brand and the experience align with the event and/or deliver against the audience's passions and interests

As sensory immersion, level of engagement, and relevance to context increase, experience participants become more likely to form the kind of brand-embedded autobiographical memories that impact downstream consumer behavior.

Related in-market research conducted as part of our GMR Experience EQ work revealed that experiences can be interpreted or felt in systematically different ways based on individual or contextual differences. In light of these insights, we extended our research program to include investigations into how the effectiveness of tactics aimed at influencing memory are conditioned by environmental and human factors.

GMR developed research instruments to measure live brand experiences and operationalized a data collection infrastructure to conduct ongoing measurements across the experience marketing landscape. This data collection methodology was developed by a team of data scientists in partnership with strategists, behavioral psychologists, and external consultancy.

2022

*GMR Brand
Experience
Index®
Methodology*

DATA COLLECTION: WHAT AND HOW

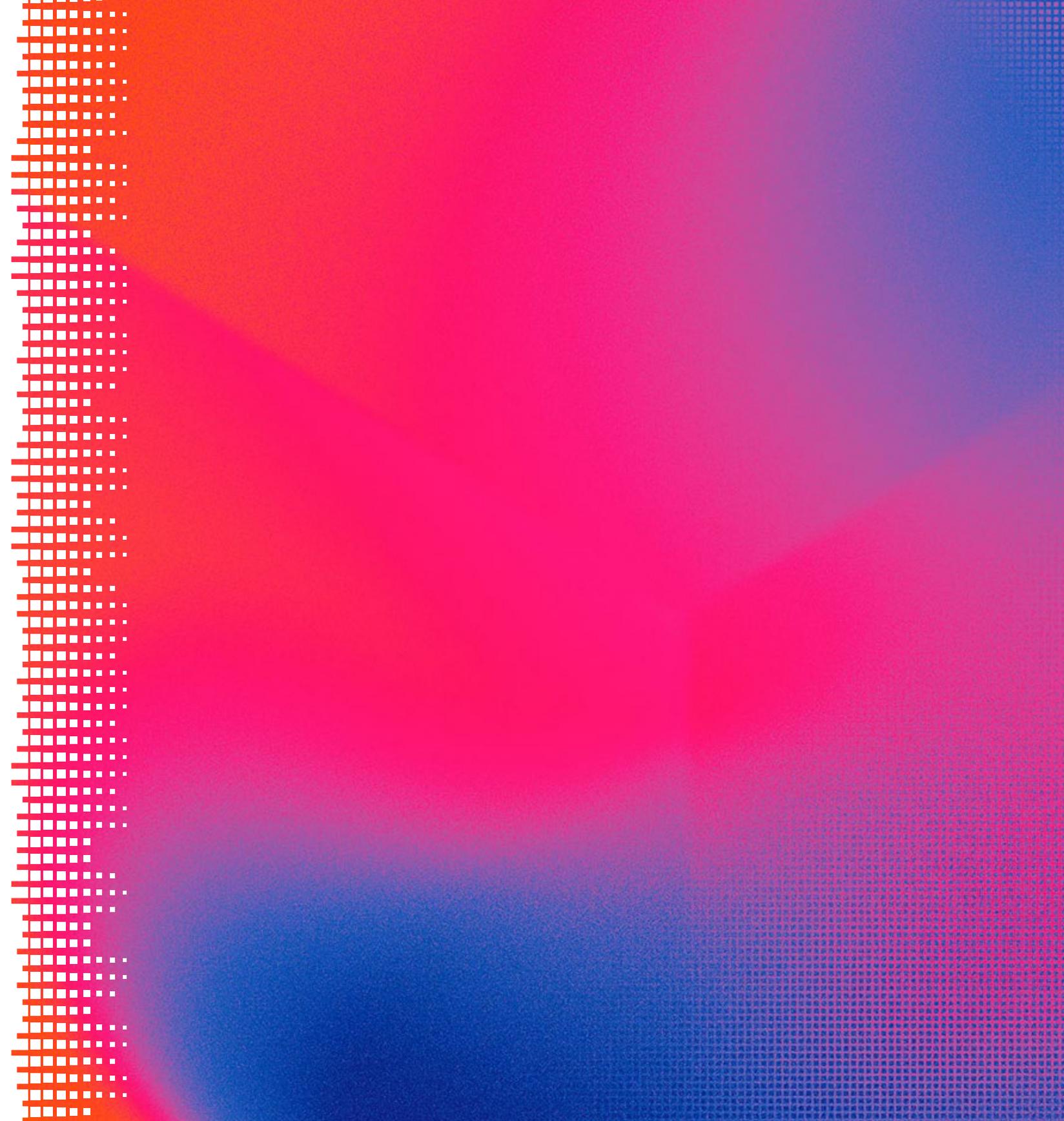
In 2022, GMR data collectors attended more than 550+ individual brand experiences across 55+ live events. In total, we gathered comprehensive data from activations involving 450+ distinct brands.

On-site quantitative data collection, facilitated via a mobile survey instrument, focused on three areas:

- Tactical and executional features of experiences (footprint size, brand ambassador behavior, sampling, items distributed, digital technologies, consumer data capture, amenities, product demos, etc.)
- Participant reactions (footprint utilization, line length, dwell time, evaluations of coolness and shareworthiness)
- Hallmarks of memory making in accordance with the GMR Three Factor Model (sensory immersion, level of engagement, relevance to context and the GMR Experience EQ)

Qualitative data was aggregated through live, facilitated debrief sessions held immediately following event attendance. Structured and recorded sessions allowed GMR researchers to explore concepts around events and brands in greater detail as well as validate and drive exploration around trends. Each post-event debrief was analyzed to tease out insights, identify patterns, and map live experiences to Need States.

In addition to quantitative and qualitative measures, data collectors were tasked with capturing content in order to visually document their experience and contextualize their descriptive observations of the physical brand experiences they measured.



EVENT SELECTION

Data collection was undertaken at live events across 41 cities in the U.S. between January and October 2022. Events were selected based on the following approach:

Defined a framework:

- Established four primary passion categories of live events to target - Sports, Music, Culture, and Conferences/Expos
- Within each Primary Category, thorough research of sub-categories was conducted to inform the prospective event list

Established a sample of events:

- Leveraged an internal event database with thousands of events across North America
- Conducted additional research involving online event databases, experiential media sources, industry-specific publications, social media, LinkedIn, etc.
- Received direction from internal and external subject matter experts with personal and/or professional expertise in special interest categories

Selected events to conduct data collection:

- The qualifications considered in selection include but are not limited to:
 - Size of event
 - Cost of admission
 - Likelihood of brand presence
 - Sponsor involvement
 - Industry
 - Emerging vs mainstream
 - Cultural categories
 - Geographic location

CREATING THE INDEX

GMR is actively measuring branded experiences everywhere they occur in the marketplace. Our measurements allow us to construct estimates of how memorable each experience we encounter is likely to be. At the same time, we collect measurements of consumer reactions. This experience/event/consumer data is blended*, yielding our GMR Brand Experience Index®.

An experience with a high score on our Index had the highest relative likelihood of triggering the formation of positive, brand-embedded autobiographical memories and, by extension, the largest impact on post-experience consumer behavior relative to event peers and industry competitors.

**The method for calculation of individual scores on the GMR Brand Experience Index® is proprietary to GMR. Scoring was consistent across all events and experiences.*

REPORT CONTENTS

The GMR Brand Experience Index® rankings included in this report feature the top-scoring brand experiences by event. All brands featured scored within the top quartile across the entirety of our data set. Scoring within the top quartile means the experiences had greater likelihood of creating the type of positive, autobiographical brand-embedded memories that contribute to downstream consumer choices.

Up to three experiences per event that met the above criteria were included in this report. Some events did not feature experiences that fell within the top quartile of the Index overall; other events featured less than three that met the criteria for inclusion.

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The background features a 3D blue cube on the left side, set against a vibrant, multi-colored gradient that transitions from blue and pink to yellow and orange. A black horizontal bar is centered over the image, containing the text 'GMR EXPERIENCE EQ 2022'.

GMR EXPERIENCE EQ 2022

Oracles are Real - Discuss.

During the 2010 FIFA World Cup, fans and the curious alike enjoyed endless amounts of entertaining moments thanks to Paul the octopus and his uncanny ability to predict 12 out of 14 matches (a success rate of 85.7%).

It's highly unlikely that he was blessed with some sort of other worldly wisdom, but it got people talking. There's something in us humans that is eager to accept and understand how and if it's possible to correctly predict outcomes when the problem isn't finite. It's pretty hard to argue that 1 + 1 equals anything other than 2, but when emotions are at the core of the inputs, can we really look into a crystal ball and confidently make choices? In the context of live brand experiences, we believe it is.

The GMR Experience EQ is our proprietary oracle-like crystal ball that empowers our strategy and creative teams:

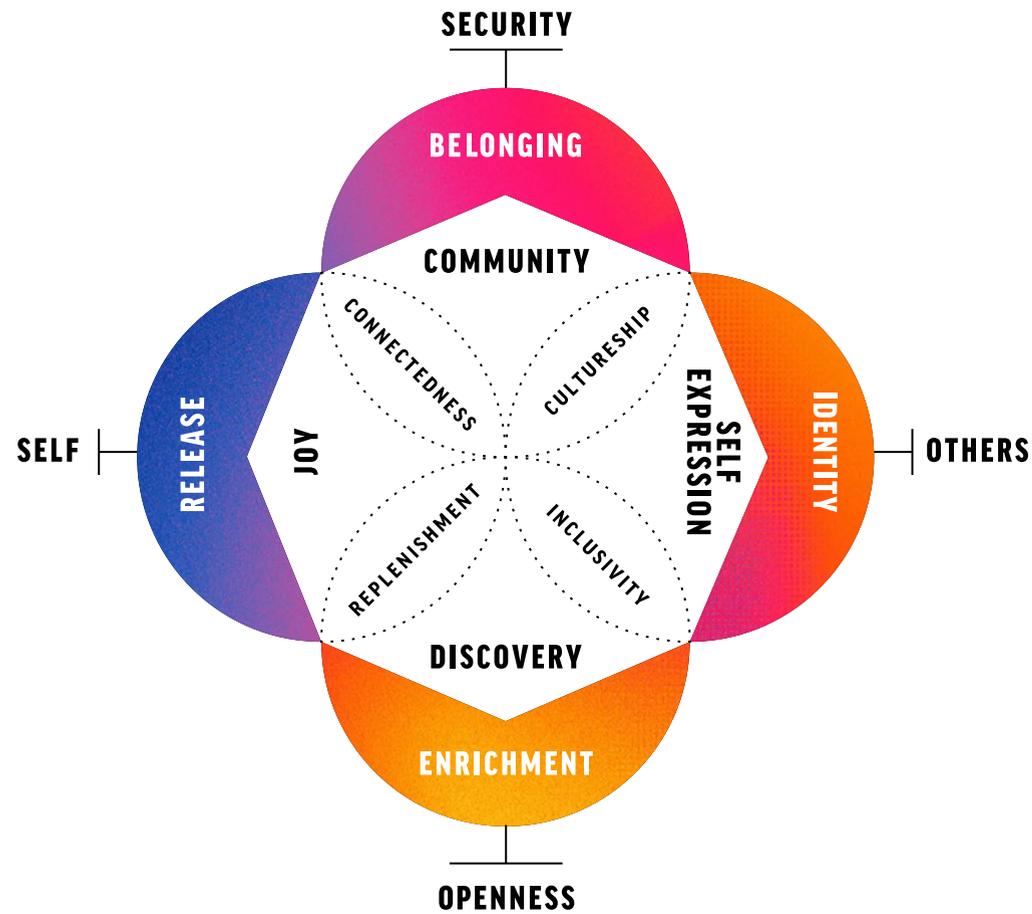
- ✓ to select the right set of tactics based on a given audience
- ✓ to build ideas around the environment in which the audience will encounter a live brand experience
- ✓ to balance human Need States with a brand's objectives and importantly, help us improve ROI

You might say that we're on a strategic soapbox and with good reason.

We've spent the past five years observing and interacting with people as they navigate brand experiences large and small, local and global.

Every choice we make from where we want to spend our time and with whom we want to enjoy that moment, all ladders up to a Need State that people consciously or unconsciously expect will be met during a live brand experience. Need States are powerful and universal emotions, not specific to gender, ethnicity or geography. Smart brands that are genuinely invested in delivering solutions that benefit the end user (and not just the bottom line), will create activations that fulfill people's needs and positively impact ROI.

And in case you were wondering, Paul passed away in the Fall of 2010, but his legacy lives on. RIP Paul.



SCALE (SPECTRUM OF NEEDS)

SELF

Where an individual is primarily focused on personal desires and how a brand can meet their needs. Projecting an image that makes a person feel good about themselves. There is a little bit of ego at play here.

OTHERS

Where needs are fulfilled by aligning with new or other trusted groups. Attraction: I think, do, or look a certain way to attract others to me.

SECURITY

Where an individual seeks out environments where they can feel safe or protected.

OPENNESS

Where an individual is willing to lean in, learn or engage in new or unknown environments.

NEED STATES

In the context of a live experience, Need States are fundamental expectations people have of brands that oftentimes aren't even clear to them – it's simply a feeling or an anticipation of what's to come. Brands that understand the scale of people's expectations can create experiences that deliver, support, or elevates that person's emotional needs.

RELEASE

Honoring oneself. Letting go of stress, anxiety, or worries and engaging in moments of joy that help rebalance one's coping systems. A sense of playfulness.

IDENTITY

How one sees themselves through others' eyes; where the individual is reliant on external recognition to feel included.

BELONGING

Unlocking connections to the past or to others who share a common interest. Belonging is deeper than simply fitting in; it connects with a person's desire to be part of something bigger than themselves.

ENRICHMENT

Where an individual seeks out opportunities to add new dimensions to their life. Enrichment is more likely to require risk through trial, a necessary catalyst for growth and fulfillment.

EXPERIENCE TERRITORIES (COMMUNITY, SELF-EXPRESSION, DISCOVERY, JOY)

In order to meet Need States, we leverage a brand's identity and positioning to identify relevant Experience Territories where they can authentically play.

If you're a beverage brand, we might suggest focusing on meeting a person's need for Release, which is then amplified through moments of Joy. For the individual, once their initial need is met through the Experience Territory, it's then fulfilled via two potential Expression Territories. In this example, Joy can lead a person to Connectedness or Replenishment, depending upon what's important to them at the specific moment when they're engaging in a live brand experience.

EXPRESSIONS

Each layer of the GMR Experience EQ feeds into and powers an individual's unconscious vs subconscious need during a brand experience. The intersection of each is typified through Expressions – feelings and emotions that are actively sought out by the individual and brought to life through the brand's efforts.

CULTURESHIP:

A supportive network typically associated with allyship but experienced through the lens of culture. A bonding of like-minded individuals who authentically celebrate their identity and invite others to join them through shared connections e.g. music, hair, fashion, food, sexual orientation, etc...and who warmly invite others to participate.

INCLUSIVITY:

Where people look to brands to provide welcoming spaces for everyone. Although VIP spaces still have a role to play in certain environments, particularly B2B, they're no longer as valued: they separate friends, can detract from the ambiance, and make those left behind feel "othered." 2022 was about belonging, not division.

REPLENISHMENT:

Where people look to brands to awaken multiple senses and/or help them recharge by increasing energy levels or on occasion quite the opposite, by enabling people to downshift and chill.

CONNECTEDNESS:

A desire to align with people and environments who are united through common interests, culture, or experiences, and where all are welcome to create and enjoy together. Connectedness is a good proxy for levels of fandom.

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2022 GMR BRAND EXPERIENCE INDEX®

GMR's Powerful Trifecta

Throughout the course of 2022, GMR data collectors attended 55 events in 41 U.S. cities, participating in over 550 brand experiences created by over 450 unique brands.

After nearly five years of lab-based research complemented by in-market observation, GMR's Data Science team synthesized these findings into robust qualitative and quantitative measurements that were assessed against the GMR Three Factor Model and GMR's Experience EQ to determine if, how and why a brand scored in the top quartile at a given event.

Each brand was reviewed against the category it appeared in (Sports, Music, Culture or Conferences/Expos) and in turn was allocated a Need State, which by default is dictated by the event.

Here's the d'oh moment: people go to events they don't go to see brands. Yet brands have the privileged opportunity to enhance and add unexpected value to a person's onsite experience, if they know what people are looking for.

THE TOP QUARTILE

Brands that landed in the top quartile of the GMR Brand Experience Index® (GBEI) understood why people attended a particular event and crafted an activation that supported an unconscious need or expectation they had. These stand-out brands successfully leaned into the event's primary Need State (Release, Identity, Belonging or Enrichment), met those needs and, depending upon their own purpose and objectives, dove deep into Territories (Joy, Community, Self-Expression, or Discovery), and finally, Expressions (Connectedness, Cultureship, Inclusivity or Replenishment), delivering experiences that were meaningful, relevant, and which created brand-embedded autobiographical memories.

Interested to know more about the GBEI scores? Or why some brands were so successful at winning the hearts and minds of their intended audience? Or better yet, how you, too can tap into the right levers?

We'd love to answer your questions and walk you through why some brands really understood the assignment.

UNDERSTANDING THE GBEI

The page overleaf features the final list of brands that secured their place in the top quartile of the 2022 GBEI.

Once each brand was assessed through the GMR Three Factor Model and the GMR Experience EQ, we were left with 34 events and 73 brands. Why such a sharp drop? Simply put, not all events delivered against audience Need States and brands in turn didn't show up to engage, educate or entertain. They were present but they lacked the key ingredients that create brand-embedded autobiographical memories. In other words, they didn't understand the assignment.

[CLICK HERE TO GET IN TOUCH WITH OUR TEAM.](#)

RELEASE

WASHINGTON STATE FAIR
Culture



CMA FEST
Music



HAVERFORD TOWNSHIP MUSIC FESTIVAL
Music



SUNFEST
Music



SUMMERFEST
Music



SWEETWATER 420 FEST
Music



THE GOVERNORS BALL
Music



MEN'S FINAL FOUR FEST PRESENTED BY CAPITAL ONE
Sports



MONSTER ENERGY SUPERCROSS CHAMPIONSHIP & FAN FEST
Sports



RED BULL GRAND PRIX OF THE AMERICAS
Sports



SUPER BOWL LVI EXPERIENCE PRESENTED BY LOWE'S
Sports



TOURNEY TOWN PRESENTED BY CAPITAL ONE
Sports



U.S. WEEKLY PRESENTS RACING FAN FEST MIAMI 2022
Sports



IDENTITY

ABBOTT HEALTH & FITNESS EXPO @ BANK OF AMERICA CHICAGO MARATHON
Conference & Expos



AFROPUNK MIAMI
Culture



CHICAGO PRIDE FEST
Culture



NYC PRIDE
Culture



LOLLAPALOOZA
Music



RUIDO FEST
Music



BELONGING

CHARLOTTE AUTO FAIR
Culture



AUSTIN CITY LIMITS
Music



COUNTRY THUNDER ARIZONA
Music



SHAKY KNEES MUSIC FESTIVAL
Music



2022 NASCAR ALL-STAR RACE
Sports



SOUTH CAROLINA SPARTAN RACE
Sports



GEICO 500 TALLADEGA
Sports



MUSIC CITY GRAND PRIX
Sports



NFL DRAFT EXPERIENCE
Sports



VANS U.S. OPEN OF SURFING STILLHOUSE
Sports



ENRICHMENT

OVERLAND EXPO WEST
Conference & Expos



ALBUQUERQUE INTERNATIONAL BALLOON FESTIVAL
Culture



RIBFEST
Culture



SXSW
Culture



3M OPEN
Sports



BRANDS ARE FEATURED LEFT TO RIGHT IN ORDER OF THEIR GBEI POSITION.