

EVENT

LONDON'S EXPERIENTIAL PLAYGROUND 2017

Assessing the value of
brand experiences
in the capital



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A WORLD-CLASS LOCATION

With its superb spaces, cultural diversity and trendsetting reputation, London has become a magnet for global brands



From a floating cinema on the River Thames and a secret dining club in a disused East London warehouse to a binge-watching hotel at a country estate and an edible art gallery in Soho, London is an ideal stage for brands and agencies to create brand experiences to engage their chosen audiences. Global brands return time and time again, from Nike's Air Max Day celebrations and Airbnb's 'Outside In' house experience with Pantone, through to the sensory House of Hyundai and Hoegaarden's floating 'gaarden' barge on the city's canals.

Alcohol brand Jack Daniel's hosted music stages as part of a partnership with Hackney Wonderland last year and regularly uses the capital for gigs as part of its Jack Rocks campaign. Michael Boaler, senior brand manager for the brand, explains its appeal: "London has a huge and socially diverse population, which is what makes it one of the most culturally interesting cities in the world."

Patrón Tequila's global chief marketing officer, Lee Applbaum, agrees: "The UK continues to be an important strategic focus for our brand. London, in particular, is a globally important city in terms of trend and style and in the areas of cuisine and mixology."

As a global brand served in more than 150 countries, when we look at our global priorities, London and the UK is at the top."

For Luke D'Arcy, president of Momentum Worldwide UK, London is the original home of brand experiences. "London can probably lay claim to being the founding father of brand experiences. You only need to look back to 1851 and The Great Exhibition to see that London set the standard, taking the best from across the globe and setting the bar on experiential event marketing. Since then, the desire of the city to raise the bar for its global audience has only increased with creativity and openness to push the limits of what is possible."

Helping with a brand's vision for its activation is a core remit for Deborah Kelly, head of UK sales for London & Partners. She says: "As the Mayor's official promotional agency and convention bureau for London, our role is to showcase what London has to offer to a range of audiences around the world."

"For experiential activations, this means highlighting the fantastic variety of spaces on offer. These range from World Heritage UNESCO sites and Royal Parks to world-leading museums and quirky, off-the-beaten track attractions, and we work with planners to find the best fit for their activation."

“We work with a range of event agencies and our network of partners to make introductions and facilitate the process for clients. Brand activations are an essential part of our work as it generates fantastic recognition for the city.”

THE MISSION

With experiential increasing in importance for London & Partners, the company has turned to *Event* for the second consecutive year to further its mission to measure the value of experiential in the capital and whether the sector is seeing growth year-on-year.

THE DEFINITION OF EXPERIENTIAL

The age-old question of defining experiential naturally forms a part of this research. Experiential marketing, engagement marketing, event or live marketing, brand experience and brand activation – these are among the terms that *Event*'s audience use to define their campaigns and work. This is broadly taken to mean a marketing strategy that directly engages the chosen consumer and invites and encourages them to participate in the evolution of a brand or its identity and brand values.

METHODOLOGY

Ahead of last year's report, *Event* spoke to a small sample group of agencies to assess what data they would be happy sharing confidentially, to be collated and reported as one statistic. Agencies were consulted on what terminology would be best and they settled on brand experience budgets spend. For last year's report, *Event* approached the top 30 agencies ranked by experiential billings, from its annual *Brand Experience Report*, to calculate an estimate of the total level of brand experience budgets spend delivered in the UK between 1 June 2015 and the end of May 2016. The result was a colossal £171.9m, and spend in London was £81.4m.

Due to an incredible 12 months for brand experiences, the number of significant agencies to analyse has grown. The Institute of Promotional Marketing has seen significant growth in the sector with managing director Carey Trevill and her team working on a measurement standard to support the rise in experiential activity and underline the business case for live events. This year's *Brand Experience Report* was expanded to list the top 45 agencies by experiential billings. *Event* contacted each of these and, like last year, asked them to submit:

- **The total level of brand experience budgets spend that your agency delivered in the UK between 1 June 2016 and the end of May 2017**
- **Plus the spend delivered in London only**

Of the 45 agencies contacted, 27 were able to submit or estimate these figures in a bid to collectively understand the value of experiential in London. Of course, there are more agencies than this in the UK delivering brand experiences in London – *Event* estimates that there are up to 6,000 delivering activations across the UK and, furthermore, a number of clients are activating without agency support. However, the 45 that

“ Our unique city attracts residents, workers and tourists alike with a significant propensity for engaging with brand experiences ”

were contacted represent some of the most regular deliverers of experiential work.

So, combining and estimating for the top 27 and then calculating an average to multiply up to 45 meant the total for brand experience budgets spend that agencies delivered in the UK between 1 June 2016 and the end of May 2017 was an incredible £262m. In London alone, the spend on brand experience activities for the same period was £105m.

“Brand experience has seen an exponential growth over the last year, both in the UK and in London,” says London & Partners' Deborah Kelly. “Marketing is changing and, with more and more competition, face-to-face interactions between brands and consumers are more important than ever if brands are going to make a lasting impression on their audience. This is where activations can really add value to a communications strategy overall. Finding the right places for brands to activate is absolutely key, and the UK and London are serious contenders on the international stage.”

Nick Adams, managing director of Sense, isn't surprised by London's strong appeal. “The profile associated with any capital city will always be a significant draw for brands looking to generate maximum impact from a brand experience. London has both national and global interest and prominence, and inevitably activating on the most prominent turf will always be a brand's first choice.

“Generally speaking, many of the UK's leading news outlets also reside in London. When maximum traction relies on also gaining the attention of national and international media, activations on the doorstep of major news outlets is commonly a brand's best bet.

“The cultural diversity, pace and energy of one of the world's highest profile cities is also the perfect background to brand experiences. Our unique city attracts residents, workers and tourists alike with a significant propensity for engaging with brand experiences. When relevance of mindset is a key success factor for any brand experience, the London ambience often provides a sure fire approach to a successful consumer engagement.”

Indeed, across every pocket of London, brands are now activating in a bid to engage their chosen audiences, as the next section of this report shows.

LONDON'S PROWESS

The stats that show why the capital is leading the way in experiential

£105m
Total brand experience London budgets spend in 2016-17



45k
Footfall to The Cocktail Village during London Cocktail Week

100k
Visitors expected to attend Peroni Ambra's six-month residency at Somerset House



19m
tourists visit London a year
Source: ONS



22k
Drinks served at London Beer Week 2017



1,000+
Diverse venues in London

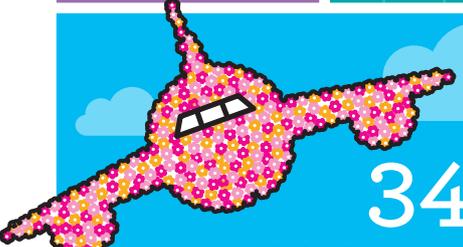
8.8m
London's population

40%
of European headquarters of the world's top companies are based in London

1st
London's position as the most influential city for talent, location and cost
Source: Colliers International's Cities of Influence report 2017

50k
Number of festival-goers expected at Wireless 2017 in Finsbury Park

9,142
Unique visitors to L for Lacoste exhibition at Westfield London

343k
Average daily footfall to Monarch's giant floral plane at London Victoria station

3rd
London ranks joint-third with Hong Kong as one of the best cities to do business in
Source: Ipsos Mori's Top Cities survey 2017



125
Number of partnering venues across the capital for London Wine Week 2017

229k
Social media reach of Tilda's Urban workout at Lumiere London

2nd
most visited city in the world, behind Bangkok



2,000
Footfall to Garnier's Ultimate Blends pop-up in Soho

EXPERIENTIAL IN THE CAPITAL

Five innovative and engaging brand activations that make the most of London's variety of venues



NIKE: STRIKE NIGHT



Collins Music Hall in Islington created a stadium-like atmosphere for Nike's Strike Night competition



CONCEPT

Sports brand Nike's first ever Strike Night brought six of Europe's top football strikers together for a special knock-out competition. The activation was aimed at crowning the best goal scorer and to mark the release of new Nike boots, the Hypervenom 3.

EXPERIENCE

The competition was held at a secret venue in London – Collins Music Hall in Islington, on 1 March and broadcast globally on Facebook Live. The player line-up included Pierre-Emerick Aubameyang, Marcus Rashford, Alex Oxlade-Chamberlain, André Silva, Christian Benteke and Mauro Icardi. Former Chelsea forward Didier Drogba was a judge at the event alongside Arsenal legend Ian Wright.

Each player wore one of the latest colourways of the Nike Hypervenom 3 football boots to compete. Fans were able to find out about the event via the Nike football app.

The battle was scored by the world's first full-size, fully interactive LED goal. Portuguese international Silva emerged as the victor, following a face-off with Manchester United forward Marcus Rashford. Grime stars AJ Tracey and Santan Dave

rounded off the evening with an exclusive live performance. The activation was coordinated by agency XYZ, with other agencies working on the project including AKQA, Limelight, Groovy Gecko and United Visual Artists.

WHY LONDON?

Nike's crowd of sneakerheads and footie obsessives might have expected a stadium or arena for this inaugural event, but the choice of a secret underground location in Islington added to the intrigue surrounding Strike Night. With several levels, the venue created a stadium-style atmosphere for the fans, while providing perfect filming opportunities at ground level to ensure a slick Facebook Live experience.

SUCCESS

Alongside the 300 people attending the event in person, figures released from AKQA showed that the launch plan leveraged Nike athlete, retail and media partner channels, resulting in 1.9 million views of the broadcast in its first day alone. The campaign generated a combined social media reach of more than 700 million, plus global newspaper and TV coverage.

THREE: BED 'N' BINGE RETREAT



Three's Bed 'N' Binge Retreat at Osterley Park in West London featured themed rooms

CONCEPT

Mobile operator Three, together with Samsung, wanted to promote its 'Go Binge' offering, a new UK service in partnership with Netflix, Deezer, TVPlayer and SoundCloud. It enables new and existing customers looking to upgrade to watch and listen to episode after episode and song after song without worrying about their data limit. Three has removed the data charges associated with these services allowing customers to feed their 'bingeing obsession' away from their houses and wifi.

EXPERIENCE

The Three Bed 'N' Binge retreat took place from 6-9 July at Osterley Park, a country estate in Isleworth, West London. On arrival, guests were handed a Samsung Galaxy S8 or S8+ before beginning their one-night bingeing session in the themed hotel. Guests were able to binge on their favourite Netflix shows in 15 suites with interiors inspired by some of Netflix's most popular shows, such as *The Crown*, *Stranger Things*, *Orange Is The New Black* and *House Of Cards*.

Guests could also order room service from a menu of gourmet food and drink and use hands-free docking stations in the bathroom to enable them to binge while even on the toilet.

In addition to overnight stays, daytime binge sessions were available in the retreat's Samsung lounge, while guests could also live-stream the tennis at Wimbledon via TV Player. Music streaming site Deezer had a space where guests could stream unlimited amounts of their favourite songs.

WHY LONDON?

For this particular activation, Osterley Park was chosen due to its natural fit with the idea. The Bed 'N' Binge retreat was a parody of a digital detox – a place where people could binge watch their favourite shows and relax and unwind without feeling guilty, after research by Three found that 41% of people find binge-watching is a good way for them to relieve stress. To host this retreat in a setting that was relaxing and beautiful in itself was the perfect fit.

SUCCESS

Three hosted 140 overnight guests at the retreat over four days. New tickets were released each day at 2pm and quickly sold out. A total of 460 day passes completely sold out.



PATRÓN SECRET DINING SOCIETY



The Patrón Secret Dining Society at the MC Motors venue in East London



CONCEPT

The Patrón Secret Dining Society brings together acclaimed chefs and talented mixologists in interesting venues for an intimate dining experience in cities across the globe. It's an exclusive evening of creative Patrón Tequila cocktails paired with once-in-a-lifetime culinary achievements, along with fascinating people and spirited conversation – all curated by Patrón in unusual and unexpected places. The objective of the experience is to showcase the versatility of Patrón ultra-premium Tequila.

EXPERIENCE

The London Patrón Secret Dining Society was hosted at the historic MC Motors venue.

Patrón Tequila's commitment to innovation is fundamental to every brand experience. With this in mind, the Patrón Secret Dining Society partnered with award-winning chef and culinary forward-thinker Douglas McMaster from zero-waste restaurant Silo and Mr Lyan's celebrated mixologist Iain Griffiths.

Guests were welcomed at the beginning of the evening by Patrón's global chief marketing officer Lee Applbaum, who explained the concept and the brand ethos before introducing McMaster and Griffiths. Both chef and bartender spoke about the inspiration for the food-pairing menu and explained how they were inspired by Patrón's approach to social responsibility.

The menus were printed on paper made from agave fibre, a by-product of the tequila-making process. Each dish echoed McMaster's mantra of "waste is a failure of the imagination" and featured up to four predominantly plant-based core



ingredients, carefully paired with cocktail serves from Griffiths, showcasing the versatility of the Patrón expressions. In keeping with the secret theme, the menu included surprise dishes on the night, such as a cheese fondue.

WHY LONDON?

The UK is an important market for Patrón Tequila and London is a key influencer city that is leading the way in terms of cocktail and food culture, making it the perfect location for the event. The historic MC Motors, hidden in East London and home to a secret Victorian street running through its centre, added character and vintage charm and fitted with the secret theme.

SUCCESS

Matthew Sykes, director of international marketing for Patrón Spirits International, says: "The feedback from the event was overwhelmingly positive, guests were truly surprised and delighted and walked away with a stronger understanding and appreciation of the quality and craft behind Patrón, its commitment to sustainability and how versatile it is as a spirit. The event generated a wave of social media posts and a number of detailed reviews, as well as interviews with our chef and bartending partners around how they are innovating in their respective fields to reduce the environmental and social impact of their work."

VOLVO: ESCAPE THE CITY IN YOUR CITY



Volvo created a pop-up studio in Canary Wharf where Londoners could recharge



CONCEPT

The new Volvo XC60 is a car for busy urbanites who like to lead a healthy lifestyle. The Swedish automotive brand wanted to create an experience in the city, which gave this audience the opportunity to press the pause button and recharge.

EXPERIENCE

Volvo worked with brand experience agency TRO to create an Escape the City in your City pop-up studio in Canary Wharf, with lots of experiences geared towards giving busy professionals a moment of escape from their daily routine.

Visitors could choose from a range of 30-minute activity sessions, including yoga, Swedish massage, meditation, art classes and guided run clubs. Amid tranquil Scandinavian architecture, the new Volvo XC60 was displayed and guests were invited to explore the new car.

Through this concept, Volvo hoped to convey its understanding of city dwellers' needs and give them a positive, active



experience that they would associate with both the Volvo brand and product.

All sessions were pre-registered via a dedicated microsite accessed from the Volvo website. *Time Out* was also used to reach a wider on-target audience.

WHY LONDON?

The Volvo XC60 is targeted at urbanites, so it was important that the activity took place in city locations. London was chosen specifically for three reasons. Firstly, it was selected for its density of target audience. During the working week, Canary Wharf holds an unrivalled number of business professionals, so it offered the best chance of filling sessions with on-target consumers. Secondly, London has a 'work hard, play hard' culture where exhaustion regularly sets in, which meant that the experience's aim of giving Londoners some time out really resonated with visitors. Thirdly, Canary Wharf – with its modern skyscrapers – offered a striking backdrop for photos of the experience.

SUCCESS

A total of 759 on-target consumers took part in the experience in London – eight per cent over target and reached almost full capacity for the three days. (The studio also toured Edinburgh and Manchester.)

Social media wasn't encouraged as it didn't fit with the theme of a tranquil escape, however many participants took photos and selfies helping to spread the experience digitally, as well as word-of-mouth.

MARIE CURIE: GARDEN OF LIGHT



Marie Curie's Garden of Light featured 2,100 handmade glowing daffodils in Paternoster Square

**CONCEPT**

Terminal illness charity Marie Curie worked with agency Hope&Glory to develop a strategy and platform that enabled Marie Curie to engage its audience with a new, uplifting and motivating message – from both a fundraising and brand understanding perspective.

The objectives were to launch Marie Curie's annual Great Daffodil Appeal – the charity's biggest fundraiser, which takes place through March – and to create greater understanding of Marie Curie's work, which focuses on providing care and support to people living with a terminal illness in their own homes and the charity's hospices.

EXPERIENCE

The Marie Curie Garden of Light was a creative expression of this new way of framing the organisation's communications. The Garden of Light was an installation made up of 2,100 handmade daffodils, representing the 2,100 nurses that work for Marie Curie. Created by Greyworld, each flower glowed through the night and represented how the nurses bring light to those the charity supports in their darkest hours.

Motion-sensitive audio was added around the Garden of Light, so those visiting could hear letters written to Marie Curie nurses thanking them for their work and telling the stories of those who had benefited from their care. The Garden of Light was installed

for 12 days in London – before it was transported to Edinburgh and then Belfast. There was also a memory wall where visitors could leave a note with a happy memory of a loved one they had lost – a physical manifestation of the 'legacy of happy memories' message that the charity wanted to convey.

WHY LONDON?

The installation was created in Paternoster Square, in the shadow of St Paul's Cathedral, providing a high footfall location with a relatively affluent audience who generously donated to the appeal and a phenomenal backdrop for photography. It was also close to media houses, allowing the brand to interact with the relevant people.

SUCCESS

Thousands passed by the installation and Marie Curie raised £15,500 from collections at the Gardens in London, Edinburgh and Belfast – considerably more than an average charity collection site. On Twitter, the activation prompted 1,895 messages which reached 4.7 million people (delivering 13.1 million impressions). The Marie Curie website saw a 166 per cent increase in traffic over the first two days following the launch. Hope&Glory achieved 160 pieces of coverage for the Garden of Light, including 25 pieces across national titles. Post-campaign research revealed that 92 per cent of those aware of the campaign were aware of the installation's core messages.



F1 Live London showcased the teams, drivers and cars in Trafalgar Square

CITY OF EXPERIENCES

A generation of experience-hungry consumers is fuelling a surge in experiential activity across London, with a packed calendar of events ahead

As the roar of the Formula 1 racers echoed through Trafalgar Square on 12 July, it marked yet another first for the capital, in what has been a defining year for brand experiences. F1 Live London put the spotlight on teams, drivers and cars alongside headline music acts marking the first time in history that all ten teams have come together outside of a race weekend to put on a show.

The spectacular event marked the beginning of Liberty Media's vision to open up Formula 1 to new audiences and to bring the sport's stars closer to fans outside of the racing calendar, with Velocity Experience, part of the TBA Group, delivering the activation.

Guy Horner, executive chairman of TBA Group, says: "When it came to choosing a location for this event, where else could possibly be more iconic than Trafalgar Square, with Nelson's Column forming part of the backdrop? The London authorities have been hugely supportive in helping us pull off this

“ London has so many of those hidden gems that clients will always find the perfect spot to activate ”

event, in fact the Mayor himself came down to it and was very complimentary.”

And a rise in experiential activity across the capital is both welcomed and championed by the team at London & Partners. Tracy Halliwell, director of business tourism and major events at London & Partners, says: "The great thing about London is that it never ceases to surprise. While the centre of the city is as popular as ever for brand activations, we receive more and more requests for unusual, quirky, off-the-beaten track spaces. ▼

Adidas has used Printworks – an enormous industrial space near Canada Water – for brand activations



London has so many of those hidden gems that clients will always find the perfect spot to activate. We look forward to being able to carry on working with brands to highlight the best of our city and create fantastic experiential activities.”

EVOLVING VENUE LANDSCAPE

Indeed across the capital, spaces are being transformed for events across all seasons – newcomers include the pavilion at the Serpentine, East London's newest hangout The Curtain and of course, the talk of the City – Soho House and Sydell Group's venture The Ned. And further out towards Canada Water, Printworks, a former print facility housing print presses has been transformed to provide an urban backdrop for brands.

The venue's brand activation highlights this year include Gorillaz' world-premiere secret album launch, the world's first drive-through immersive experience for Toyota and several experiences for Adidas.

Chloe Aldridge, senior production manager at Iris Worldwide, Adidas' event agency finds much to admire about the new space: "Printworks is a blank canvas with endless possibilities for creative production – industrial and gritty, the original machinery, concrete blocks and steelwork add to its charm. An enormous space, with vast ceiling height, power in abundance and unrivalled load-in routes, it may sit just outside the client comfort of Zone 1, but it is worth the journey."

FUTURE WATCHING

The city offers some standout events to look forward to as the IAAF and IPC 2017 World Championships come to town this summer, followed by the MTV European Music Awards in November.

Brand experiences are transforming the capital's drinking and dining scene as pop-ups, food markets and bespoke festivals are increasingly commonplace from the city's parks to London's rooftops. June's London Food Month celebrated the capital's diverse culinary offerings while July welcomes Corona SunSets, Aperol Spritz Sessions, Chambord's Le Crown and Cactus pub, The San Miguel Experience, Bombay Sapphire's Grand Adventure tour and Brancott Estate's Red Shed at Kew Gardens.

Ice-cream brand Ben and Jerry's has opened its 'Summer in Soho' pop-up, which will take up a four-month residency – a growing trend for brands accustomed to the success of a pop-up, as demonstrated by Peroni with its six-month residency for Peroni Ambra at Somerset House.

Australian coffee liqueur brand Mr Black has teamed up with DrinkUp London to launch the first Espresso Martini Fest, which will take place in London from 10-12 August, while publisher *Time Out* plans to open *Time Out Market* in Commercial Street, towards the end of the year. Amazon has partnered with new consumer show DrinksFest for its inaugural event, at the end of October, while the organisers of London festival Field Day and Street Feast will launch a new Christmas-themed festival called Winterville. Meanwhile, major sporting events continue next year with London Marathon's spin-off event The Big Half in March followed by the Hockey World Cup in summer 2018.

This vibrant culture capital continues to evolve, affording ever more opportunities for brands to engage and delight Londoners and visitors that are eager to embrace the world of experiences.