2026

GMR BRAND EXPERIENCE INDEX ©

The Memory Advantage

©GMR MARKETING 2026

Confidential - Not for Public Consumption or Distribution

INTRODUCTION

THE MEMORY ADVANTAGE

2,100
unique brands analyzed to date

5,600
brand activations audited

527
events, domestically and globally

2018
the year we launched SOLE Science™

At GMR, we've built our reputation on understanding how brand experiences become memories — and why those memories matter.

We understand that experience marketing is regularly challenged to demonstrate ROI. Through the String of Lights Effect (**SOLE Science™**), our proprietary experience design methodology, we can give our partners a definitive answer to the ROI question, which turns out to be memory.

We launched **SOLE Science™** in 2018, having established how a single powerful interaction can embed itself in a person's story, resurfacing at moments of choice and influence. We're able to do this through the deployment of GMR Experience Auditors (EAs), who collect in-person data week in and week out. To date we have analyzed more than 2,100 unique brands, and 5,600 brand activations at 527 events domestically and globally, across categories, contexts, and cultures.

In 2023 we published our first annual **GMR Brand Experience Index©** (GBEI) to recognize the 25 most memorable brands of the year, based on their live experiences. You can access the 2026 GBEI Top 25 Most Memorable Brands at the end of this report.

Three years later, with continuous measurement unlocking thousands of observations and data points, we're pushing the envelope to the next level and asking: which brands have the memory advantage, and how would you know if yours is one of them?

THE SQUEEZE

There's increasing pressure on every marketing dollar, and experiential isn't immune, but it's proving to be where your dollars work harder.

Confidential - Not for Public Consumption or Distribution

01

THE SQUEEZE

EXPERIENTIAL IS SORT OF WINNING, AND THAT'S A PROBLEM

$139B
spent on experiential marketing globally in 2025[1]

7.8%
of revenue: total marketing budgets, flat on last year[2]

76%
of sport sponsors struggle to calculate the return[3]

80%
of fans left a show liking the brands there more[4]

According to PQ Media[1], brands in 2025 spent $139 billion on experiential marketing globally, and that figure is set to grow another 10% in 2026, helped by the Winter Olympics and the FIFA World Cup. But total marketing budgets haven't grown as a share of revenue.

Gartner's 2026 CMO survey[2] puts them at 7.8% of revenue, flat on last year and down from 9.5% in 2022. So, every point of share experiential wins comes out of another channel, and someone will want to know what it bought. That's the problem with winning: brands now compete on two fronts, against their competitors and against every other internal channel fighting for budget.

In a late 2024 Forrester survey[3], 76% of US consumer marketers who sponsored sport said they struggle to calculate the return. Yet across all the B2C marketers Forrester asked, 39% planned to spend more on sport and 28% planned to sponsor it for the first time. More brands are crowding into the same moments with the same blind spot.

But this isn't about cutting back — live works. In Live Nation's 2025 survey[4] of 40,000 fans, 80% left a show liking the brands there more, and 70% were more likely to buy from them.

This is why the memory advantage matters in 2026. It's crowded, the budgets aren't growing, and the brands pulling ahead are the ones that know which moments matter. They design around what people need, and can prove that it works.

1 PQ Media, Global Experiential Marketing Forecast 2026–2030, press release (June 2026), pqmedia.com
2 Gartner, 2026 CMO Spend Survey (May 2026), gartner.com/en/newsroom
3 Forrester, "Sports Sponsorships Surge Despite Fuzzy ROI" (2024), forrester.com/blogs
4 Live Nation for Brands, Living for Live 2025 fan survey (n=40,000), livingforlive.livenationforbrands.com

© GMR MARKETING 2026

THE SIGNAL

What audiences need from live brand activations and who's delivering it well.

Confidential - Not for Public Consumption or Distribution

02

THE SIGNAL

ROI AND EXPERIENTIAL: FRENEMIES OR A REALITY WITHIN REACH?

"A moment can be designed, measured, and repeated in a way an entire event can't."

Seeing what's working means looking closer than the event itself — it's about a connected ecosystem and integrated marketing mix, where experiential rises to the top. This comes from specific, intentionally designed moments: the ones people bring home and recall when it's time to choose.

SOLE Science™ is GMR's data science-led experience design methodology; it's how we're able to consistently create moments that matter.

Using the data our EAs collect, we map how design choices work (and how they don't) for different brand categories across every event type. This is essential because the impact of every design element varies based on the circumstances and on the brand.

Ultimately, people make choices about where they spend their time based on what they need, and what they need drives how they interact with experiences. Something intended to engage multiple senses may draw people in in one setting but repel them in another. But people are fickle and expect different things from different brands; a token piece of swag may trigger gratitude from an affordable brand but spur mild resentment from a brand that feels expensive.

EXPERIENCE EQ

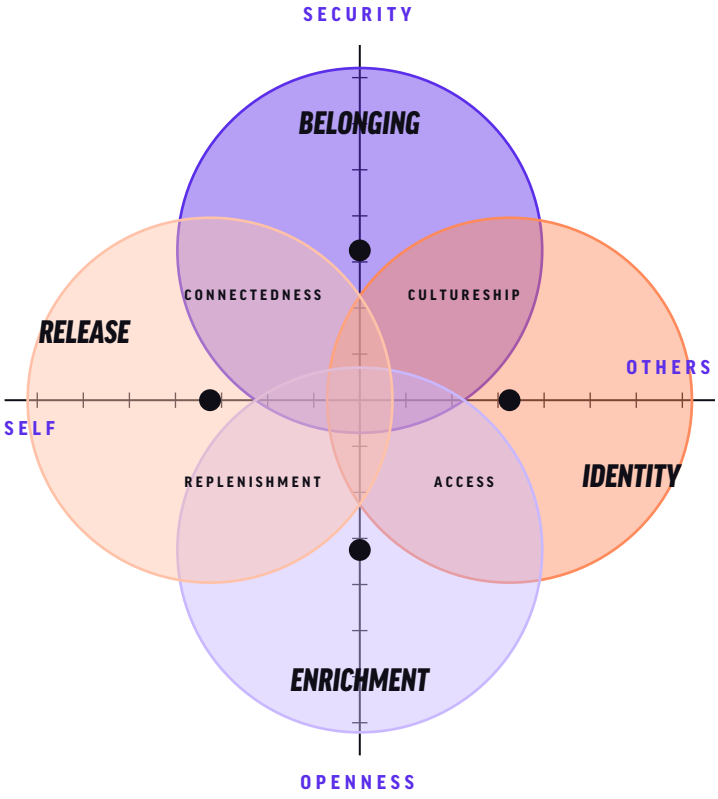
Years of detailed primary research on need states and events has made it possible for us to understand and predict experience impact on memory. GMR's Experience EQ is our model of need states, and at the heart of our ability to optimize experiences that people remember.

02

THE SIGNAL

EXPERIENCE EQ

GMR's model of need states: what people come to a live experience to feel, and what they remember



SPECTRUM OF NEEDS

Self · Others · Security · Openness

NEED STATES

Belonging · Identity · Release · Enrichment

EXPRESSIONS

Cultureship · Access · Replenishment · Connectedness

NEED STATES

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 a part of something bigger than themselves. Belonging isn't about the "me", it's about the "we". It taps into the comfort in community.

IDENTITY

More image-driven. Identity is a spectrum that can range from the validation one seeks from others (e.g. external recognition) to how one perceives oneself. Establishing your identity through self-expression can include anything from pride parades and Coachella to superfans in a gaming or sporting context.

RELEASE

Honoring oneself by letting go of stress, anxiety, or worries, and engaging in moments of joy. Embracing playfulness and a sense of catharsis from vibing to one's favorite bands or an afternoon of tasting food and wine.

ENRICHMENT

Where an individual seeks opportunities to add new dimensions to their life. Enrichment is more likely to require risk through trial, a necessary catalyst for growth and fulfillment. Enriching oneself through discovery can aid in becoming a better version of oneself.

Source: GMR Experience EQ

©GMR MARKETING 2026

SKIP THE PASTA

What people ask for at live events isn't always what they remember.

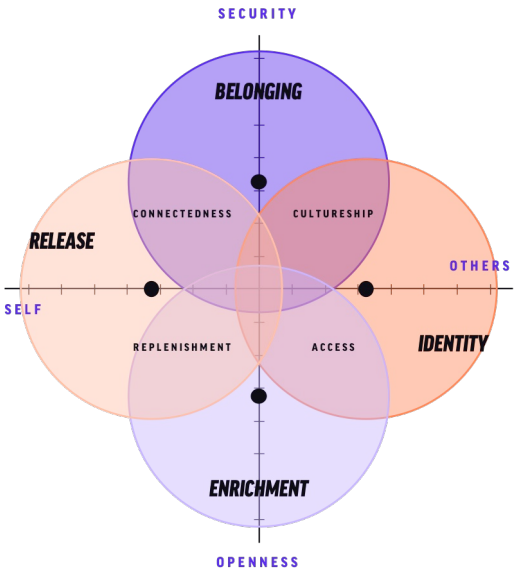
Think of it like this: If you ask an ordinary hotel concierge in Milan for the best pasta in town, you'll get an address. Ask a truly seasoned concierge and you'll get something better:

> *"I've had this conversation a thousand times. You don't want pasta. Go to this trattoria and order the saffron risotto. You'll never forget it."*

This is the role GMR plays for brands at live events. The obvious move, the one that matches what the crowd seems to want, isn't always the one people remember. Years of data collection, observation and analysis through our SOLE Science™ methodology, ensures we're able to consistently deliver memory-making experiences that matter.

THE GMR DIFFERENTIATOR

Knowing the need state ensures we're able to consistently deliver memory-making experiences that matter.



©GMR MARKETING 2026

02

THE SIGNAL

FOOD & BEVERAGE BRANDS AT SPORTS EVENTS

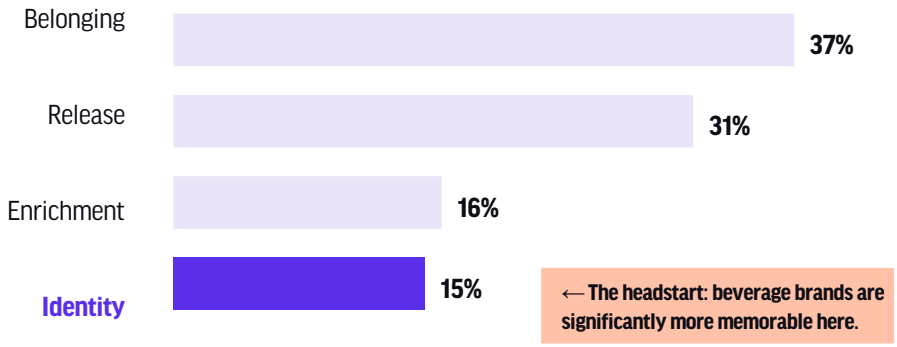
THE CROWD ISN'T THE STORY. THE FAN IS.

15%

of audited activations happen at Identity-led events — where beverage brands are significantly more memorable

MOST BRANDS SHOW UP FOR BELONGING. BEVERAGE BRANDS WIN ON IDENTITY.

Share of brand activations at sporting events, by the event's dominant need state



Source: GMR SOLE Science™, 1,075 brand activations audited at sporting events

"Belonging is the pasta. Nothing wrong with it, but nobody remembers it."

Food & beverage brands + sport is a natural pairing: big crowds, shared rituals, a round for the group. It's no surprise that Belonging-led events are where most brands show up at sports, food & beverage brands included. But delivering Belonging in this environment does almost nothing for the brands' memorability. Other categories get a lift from it; food and beverage brands don't. The crowd already has its togetherness. It doesn't need a hot dog brand to supply it.

The head start is somewhere else. At sporting events where Identity is the dominant need, beverage brands get a statistically significant memorability advantage. These fans are open to a brand that becomes part of their personal story, yet Identity-led events account for only 15% of the brand activations we audited.

02

THE SIGNAL

FOOD & BEVERAGE BRANDS AT SPORTS EVENTS

FOUR MOVES MAKE AN INDEPENDENT, STATISTICALLY SIGNIFICANT DIFFERENCE

Most of the usual playbooks don't move the needle. Sampling is table stakes. Fun and entertainment, which lift most brands at sport, do far less for beverage brands. Information and education barely register, even though the same content works for these brands at music events. Self-expression, the move closest to Identity, helps when it lands, but only 13% of beverage brands at sport manage it. Four moves make an independent, statistically significant difference:

The move to make. If your brand is going to have a presence, invest in people before props, and design every detail so that fans leave with an experience and a feeling that says something about them. This is where they come to be their authentic self. *That's* the risotto.

01 People are the Medium.

Stop staffing experiences. Cast them. The right personalities don't just represent the brand - they *are* the brand in the moment. Chemistry beats credentials every time.

02 Earn the Center of Gravity.

Bigger isn't always the goal. Magnetic is. Create the kind of presence that pulls people off their path, sparks curiosity, and makes your footprint impossible to ignore.

03 Make the Takeaway the Trophy.

Most swag gets left behind. The best pieces get hunted for, posted about, and held onto. Give people something that feels less like a giveaway and more like a keepsake for insiders.

04 Create Energy People Want to Join.

Nobody shows up for an activation. They show up for a moment. Build experiences with enough momentum that spectators become participants and participants become advocates.

None of them are silver bullets. Competition in this category is fierce, and the edge comes from the vibe and the creative nuance. But look at these four moves through an Identity lens, and they share something rooted in humanity: A BA who takes the time to see the fan in front of them makes them feel recognized. A premium worth keeping says something about the person who uses it at home. A big, high-energy space gives fans a stage.

©GMR MARKETING 2026

02

THE SIGNAL

THE SOLE SCIENCE™ EFFECT: GMR CASE STUDY

THE MEMORY ADVANTAGE IN ACTION

Why one frozen food brand won before shoppers reached the freezer aisle

"The objective wasn't simply to influence a purchase decision. It was to shape the memory consumers would bring with them into that decision."

The freezer aisle is where the purchase happens, but it's not where the decision begins. For a well-known frozen specialty food and appetizer brand, the goal was to create memories so distinctive that it would break shoppers out of autopilot when they eventually stand in front of the freezer case.

That was the challenge behind our client's live experience. It was built to win in the aisle, but it wasn't designed for the aisle at all. It was built outside retail locations, before shoppers ever reached the freezer case.

The strategy started with insight. Competitors often compete on convenience or nutrition, but this brand is about emotion and the role its products occupy in everyday family moments. So, we built our experience around those.

Participants entered the brand experience through oversized freezer-door portals and stepped into a warm home dining room environment centered around food, connection, and shared experiences. They sampled products, created personalized video memories, engaged with brand ambassadors, and left with keepsakes designed to extend the experience beyond the event itself.



"THE EXPERIENCE WASN'T DESIGNED TO DRIVE TRIAL. IT WAS DESIGNED TO CREATE A MEMORY."

THIS IS WHERE SOLE SCIENCE™ ENTERS THE STORY

"The freezer aisle may be the moment of choice, but memory is often where choice begins."

SOLE Science™ helps us understand not only which experiences become memorable, but how combinations of experience design tactics interact to amplify memorability. Rather than evaluating individual elements in isolation, it reveals how they work together to produce lasting memory.

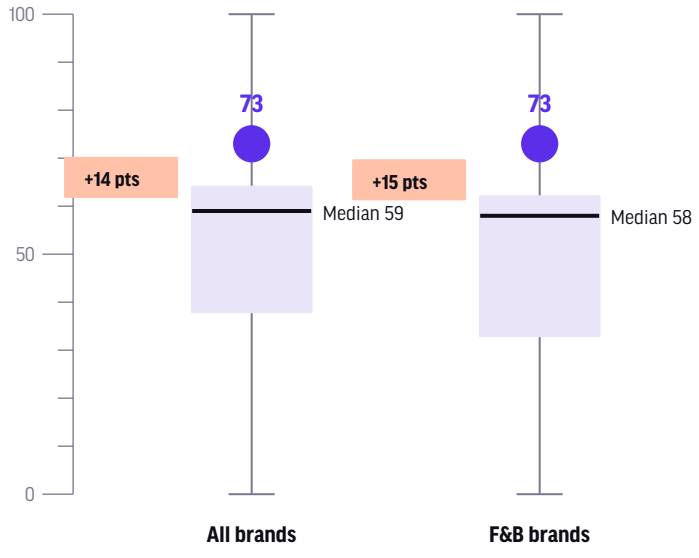
For this brand, the results were striking.

Across more than 1,000 audited experiences, and specifically among food and beverage programs, the experience landed in the top quartile of memorability. Its GBEI score of 73 exceeded median performance by 14 points overall and 15 points among food and beverage brands, representing roughly a 25% over-performance in memorability.

This matters because memorability is ultimately about being remembered at the moment of choice. For our client, this moment happens later, in the freezer aisle.

GROW BRAND CONNECTION: BUILD BRAND EQUITY AND PRODUCT UNDERSTANDING

Frozen Food brand overperforms on GBEI Memorability by 25%; performs in top quartile of all 2025 experiences.



Source: GMR SOLE Science™, 2025 audited experiences

INSIGHT

Brand Experience creates lasting emotional connections, setting it apart from other marketing channels

25% MORE MEMORABLE THAN THE TYPICAL FOOD & BEVERAGE EXPERIENCE

GBEI memorability score (0–100). Top quartile: +14 points vs. all brands, +15 vs. food & beverage

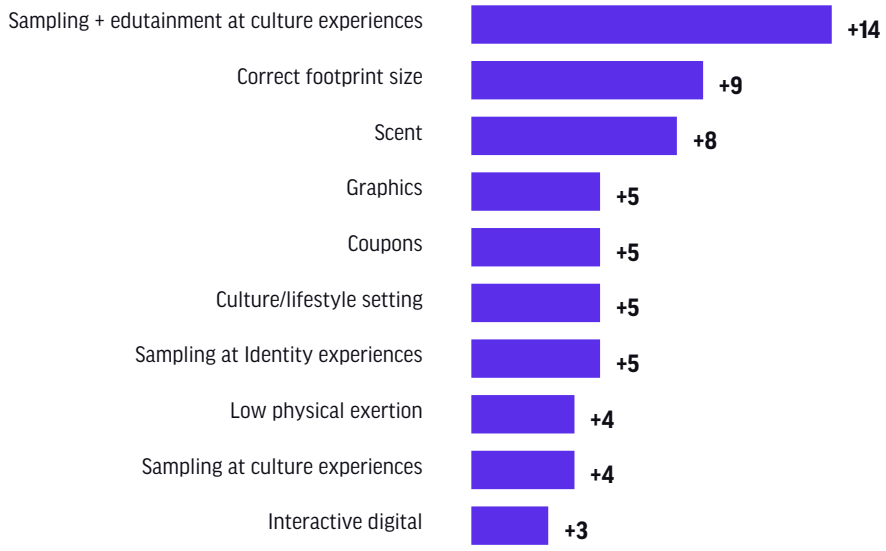
MEMORABILITY IS NOT ADDITIVE, BUT INTERACTIVE

"It was memorable because every element was purposefully orchestrated to reinforce every other element."

The strong memorability performance wasn't driven by any single element of the experience. It was the result of a deliberate combination of experience design tactics working together. **SOLE Science™** reveals that memorability is not additive, but interactive. Product sampling, sensory cues, immersive environmental design, personalized content creation, educational storytelling, entertainment, and one-on-one brand ambassador engagement each contribute to memory formation, but their impact compounds when intentionally combined.

NO SINGLE HERO TACTIC: THE DESIGN CHOICES COMPOUNDED

SOLE Science™ allows for an understanding of how combinations of experience design tactics interact to enhance memorability.



Source: GMR SOLE Science™

The experience was designed with exactly this philosophy in mind. Rather than relying on one hero tactic, the activation layered multiple proven memory-building inputs into a unified experience. It wasn't memorable because of any one thing guests did.

AND THEN THERE IS WHAT HAPPENED INSIDE THE STORES.

+14%

above baseline, weeks after the experience had ended, at one national mass retailer

+38%

sustained lift afterward at a leading national grocery chain

This is what the memory advantage looks like at the register.

At one national mass retailer, sales remained elevated at 14% above baseline weeks after the experience had ended, and consumers returned to their daily lives. At a leading national grocery chain, the results were even stronger, sustaining a 38% lift afterward.

The data reveals a compelling relationship: when experiences are intentionally designed for memory, their impact appears to persist long after the event itself is over.

In an industry obsessed with the next transaction, this experience points toward a different possibility. The brands that win tomorrow may be the ones that understand a simple truth today: people don't remember marketing. They remember experiences. And those memories come with them when it's finally time to choose.

> *"A 38% sales lift long after the experience ended suggests the experience didn't really end at all."*

©GMR MARKETING 2026

Confidential - Not for Public Consumption or Distribution

WHAT WE'RE WATCHING IN 2027

B2B

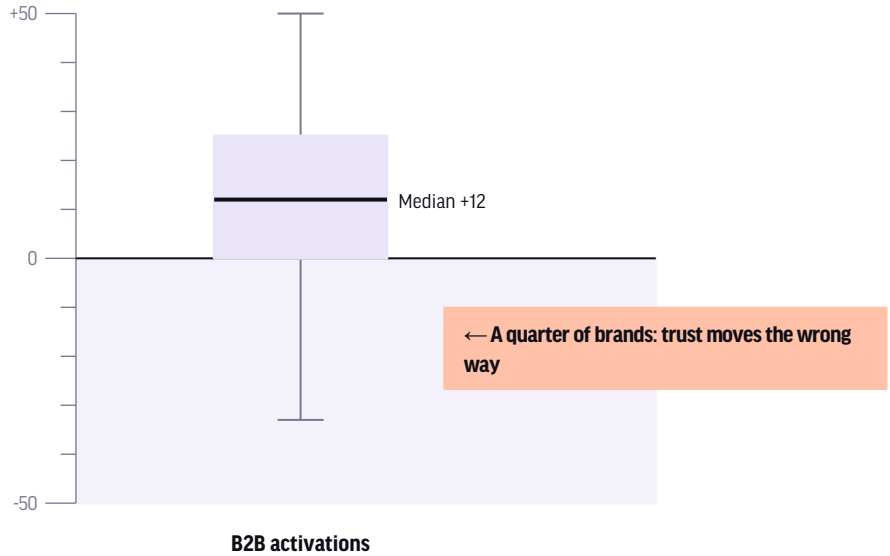
Increasingly, companies in this space are realizing that at conferences, trade shows and expos, the tactics that work on consumers work on business audiences, too. According to PQ Media[5], B2B experiential grew faster than B2C in 2025 (9.7% vs 7.7%, PQ Media).

Based on in-person measurements collected by GMR EAs at B2B events across the experience landscape, brands succeeded at increasing levels of trust between themselves and participants, with the median activation increasing trust by about 20%. However, a full quarter of brands saw the trust needle move in the *wrong* direction post-experience, indicating that mis-calibrated B2B activations can lead to significant risk.

"A full quarter of brands saw the trust needle move in the wrong direction post-experience."

POST-EXPERIENCE TRUST CHANGE, B2B

Post-experience trust change index (–50 to 50), B2B activations



Source: GMR SOLE Science™, in-person measurements at B2B events

5 PQ Media, Global Experiential Marketing Forecast 2026–2030, press release (June 2026), pqmedia.com

THE RETURN OF SIMPLE JOY

Tech-led activations (an AI avatar, a robot dog, one more photo booth) are giving way to experiences that ask nothing of people except to join in. Half of Americans say they've made a point of disconnecting for their well-being, rising to 63% of Gen Z.[6] Phone-free events on Eventbrite grew 567% in a year.[7] QuikTrip showed us the simple version at two ballparks this season: a 10-foot inflatable hot dog and bun, bounced across the crowd until they met. No screens and no sign-ups; just a whole stadium playing together, (and it drew 230 million social views with no paid media!).[8] That's Release and Belonging at their simplest, and anyone can take part.

"Some moments belong to the room. Some belong to the feed."

The brands to watch will design moments people want to join, not just film. Get that right and, as QuikTrip found, the content follows.

B2I2C (BUSINESS TO INFLUENCER TO CONSUMER)

At the 2026 FIFA World Cup, Unilever made creators the center of its activation: around 50,000 of them across 35 brands, with House of Fresh pop-ups in New York, Miami and Mexico City built for creators, not fans.[9] Consumers weren't invited in, yet the brand still reached them through people they already follow or discovered. The experience still happens live, but the creator decides what's worth sharing, and they share what fits their image. On the face of it, Identity feels like the natural fit.

Some moments belong to the room. Some belong to the feed. The skill is knowing which one will authentically move the needle.

6 Talker Research, "Half of Americans … disconnecting for their well-being, rising to 63% of Gen Z" (January 2026), talkerresearch.com
7 Eventbrite, "Phone-free events +567% year on year" (2026), eventbrite.com
8 QuikTrip, Ballpark inflatable hot dog, 230 million social views, no paid media, adsoftheword.com
9 TheDrum, Unilever House of Fresh, 2026 FIFA World Cup (≈50,000 creators, 35 brands), thedrum.com

©GMR MARKETING 2026

YOUR MOVE

Where your brand sits now, and what it takes to lead.

Confidential - Not for Public Consumption or Distribution

03

YOUR MOVE

EVERY BRAND BELIEVES ITS EXPERIENCES CONNECT

Few can prove it, and even fewer know how they compare to the competition.



Take a moment to think about the following questions. Answer for what you did last year, not what you plan this year. Then decide where you think you sit on the grid and ask whether your audience would put you in the same quadrant.

01 Do you know how your experience compares with your top competitors, or do you think you know?

02 Did people discover something new about you or themselves in your space, or just see your logo?

03 When the crowd let go and had fun, was your brand part of it, or just watching from the sidelines?

04 Is experiential the anchor of your plan, or what's left once media is bought?

05 Did your experiential budget grow last year, or hold flat with the rest of your plan?

06 At your last event, did people share a moment in your space, or just head straight for the swag?

07 Did people take home something that said who they are, or just more merch they tossed or forgot about?

These questions are a taste, not a score. If you answered the first two with confidence, you're probably near the top of the grid below; the next four decide how far right. But a gut answer is what most brands tend to pick: Leader. Where you really sit depends on how your audience experiences you, how you compare with your competitors and whether your activations deliver a memory advantage to your brand.

03

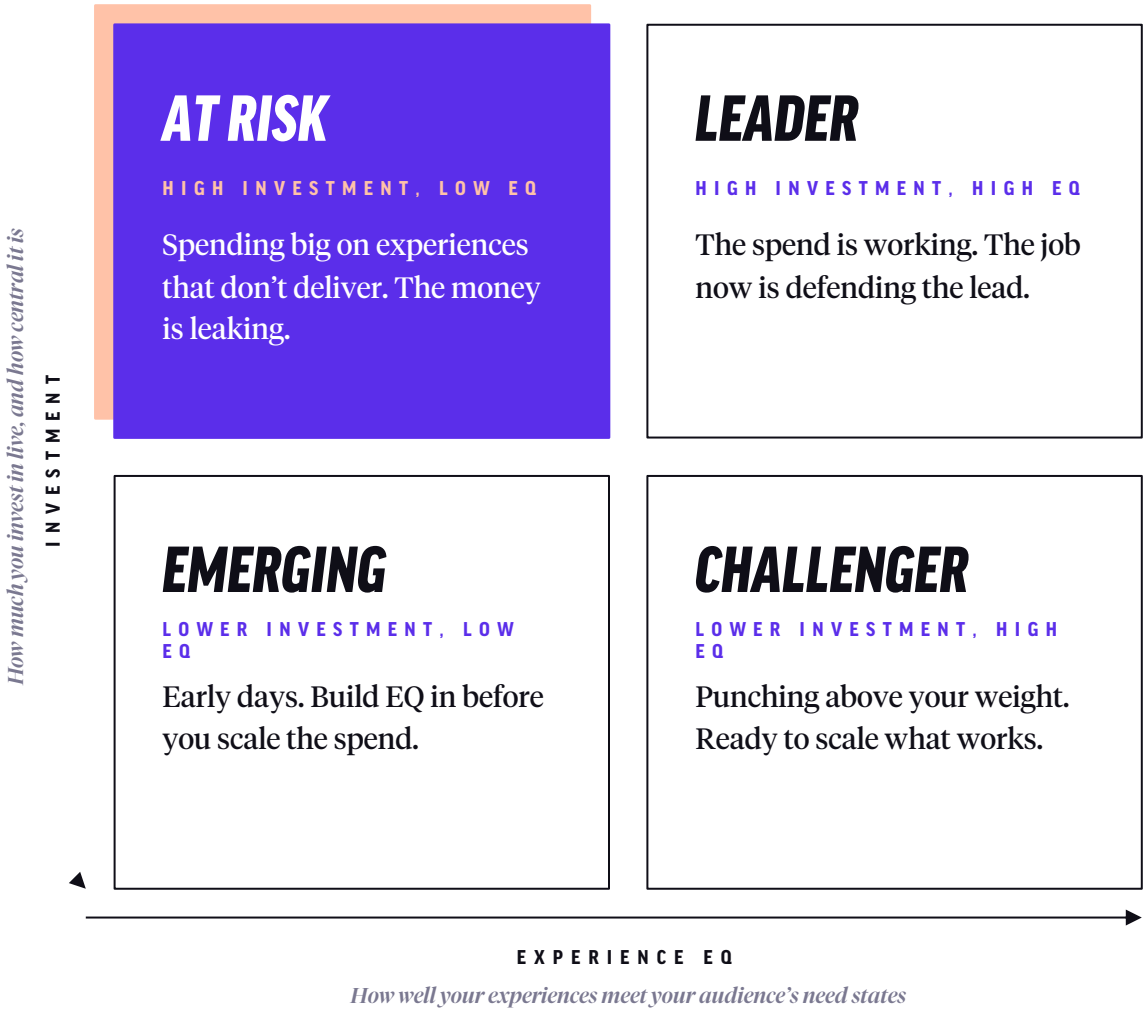
YOUR MOVE

WHERE DO YOU REALLY SIT?

Want to know where your brand really sits, and the one move that would shift it?

The big spender with low EQ is the one at risk

Tier map · Commitment against Experience EQ



Book a one-hour session with us. Tell us your category and two competitors at the time of booking; we'll confirm if our **SOLE Science™** data covers those brands. We'll then complete the remaining questions together based on the above prompts.

©GMR MARKETING 2026

03

YOUR MOVE

WHAT YOUR 1:1 SESSION WILL REVEAL

What's in it for you? Clarity and the gap worth closing, now.

TIER	VERDICT	MOMENT OF CLARITY
LEADER	*"You're winning, and your competitors are studying you."*	Shows where a challenger could overtake you, using SOLE Science™ data from your competitors' activations
CHALLENGER	*"Your experiences outperform your budget."*	Helps you build the case for appropriate investment informed by SOLE Science™ data
EMERGING	*"You have room to get this right before you scale."*	Identifies the most relevant EQ need state for your environment, so that your investment lands and your audience responds
AT RISK	*"You're paying for presence, not impact."*	Highlights why and how your efforts aren't cutting through compared to your competitors

©GMR MARKETING 2026

YOUR MOVE.

To go deeper into The Memory Advantage, see how your brand's experience health stacks up against competitors, and map your next move, contact Tyson Webber, GMR's President and CEO.

TYSON WEBBER

PRESIDENT AND CEO, GMR

tyson.webber@omc.com

Confidential - Not for Public Consumption or Distribution

APPENDIX

THE TOP 25 MOST MEMORABLE BRANDS

Based on their live experiences, as measured through SOLE Science™

01	**TARGET**	Retail and Wholesale
02	**BACARDÍ**	Beer, Wine, & Spirits
03	**CASH APP**	Technology
04	**JIMMY JOHN'S**	QSR/Casual Dining/Restaurants
05	**WILLIAMS RACING**	Sports
06	**C4 ENERGY**	Food & Beverage (Non Alcohol)
07	**CHARMIN**	Retail & Wholesale
08	**CULVER'S**	Food & Beverage (Non Alcohol)
09	**CAPITAL ONE**	Financial Services
10	**OFF THE CHARTS X ST. IDES**	Tobacco & CBD & Cannabis
11	**BEATBOX BEVERAGES**	Beer, Wine, & Spirits
12	**CHEVROLET**	Transportation Products
13	**JENIUS BANK**	Financial Services
14	**META**	Technology
15	**NIKE**	Retail & Wholesale
16	**ON!**	Tobacco & CBD & Cannabis
17	**RAZER**	Technology
18	**APEROL SPRITZ**	Beer, Wine, & Spirits
19	**KING'S HAWAIIAN**	Food & Beverage (Non Alcohol)
20	**WHITE CLAW**	Beer, Wine, & Spirits
21	**OSCAR MAYER**	Financial Services
22	**AMERICAN EXPRESS**	Financial Services
23	**DURACELL**	Manufacturing
24	**SNAPCHAT**	Technology
25	**YOUTUBE**	Technology

ABOUT GMR MARKETING

GMR is an 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 in strategy, designed meticulously, and executed flawlessly. Our passionate global team creates, consults, and activates in more than 70 countries.

©GMR MARKETING 2026

Confidential - Not for Public Consumption or Distribution