

LeisurUp™

INFOGRAPHICS
MAPIC &
LEISURUP 2020
LIVE DIGITAL
EDITION
DATA JOURNEY

LEISURUP 2020

THAT'S ENTERTAINMENT: THE KEY TAKEAWAYS

leisurup.com



With a world disrupted by an unprecedented global pandemic, this year's MAPIC and LeisurUp moved to an online platform for 2020. Leisure and food and beverage (F&B) have played an increasingly important role within the MAPIC events in Cannes and, over the past two years, special events dedicated to leisure have run on the day before MAPIC. This year, LeisurUp launched on the same digital platform as MAPIC, expanding its presence and its role to cover every element of the leisure sector, from destinations and operators, to investors and suppliers. Next year it will play a central role alongside MAPIC and The Happetite, in three days celebrating retail, leisure, F&B and innovation at the Palais des Festivals, Cannes. For 2020, MAPIC & LeisurUp Digital brought the core retail and leisure themes together across a series of insightful live and on-demand sessions and the platform is available until December 31 via www.mapic.com which includes all the live content, plus exclusive on-demand sessions, special content and a networking platform.

This special report brings you a flavour of the challenges and opportunities facing the leisure and entertainment sectors as they prepare to reopen venues for business in 2021, as we tie together views, analysis and expertise from around the world.

LeisurUp will be a physical event in 2021, as it runs alongside MAPIC and The Happetite at the Palais des Festivals, Cannes, November 2021.

To find out more
www.leisurup.com



“Leisure is playing a crucial role in redefining the customer experience within retail and lifestyle destinations. At LeisurUp Digital, we brought together many of the great leisure and entertainment projects that are reshaping our cities, shopping destinations and tourism locations. The current health crisis has accelerated this huge change, which was already underway, pushing players to act to prepare for this new world. LeisurUp is the bridge between the leisure and the property world, helping players to define new and sustainable models of collaboration to build new places to live, play and shop.”

Francesco Pupillo,
Show Director
LeisurUp – The Happetite – Mapic Italy

Read this first: Five key lessons from LeisurUp 2020

1. **Story-telling:** Leisure is about engagement and stories, told well and authentically
2. **Active activations:** People increasingly want to get out for exercise and physical activities
3. **Esports and gaming:** New technology is opening up the opportunities for physical offers from the digital world
4. **Integration:** Landlords need to understand what leisure brings to the venue and to evaluate whether it's right for the location and the budget
5. **Fusion food:** New behaviour around how people consume F&B will remain post-COVID and operators and venues need to adapt fast

Leisure venues, entertainment offers and F&B operators have all spent much of 2020 grappling with the huge challenges created by the global COVID-19 health crisis. For much of the year venues have been closed or working under restricted capacity regulations and for the early part of next year at least, most markets will still be operating with COVID-secure measures in place.

F&B also plays a major role in urban regeneration, which is at the heart of many mixed-use schemes, featuring a new emphasis on creating places that are attractive locations to live, work, shop and play. This was a central theme of the two days and the on-demand sessions, with almost all new schemes and redevelopments featuring a mix of uses and projects featured, including completely new urban concepts.

And once public confidence returns the desire for interaction and engagement is expected to be stronger than ever, with destinations looking at how to engage with visitors and examining how immersive experiences should be about story-telling.

1. Entertainment: What's the story?

"What is fantastic to see is the hunger of people to go out again and have these social experiences with each other," says Boris Bielert, chief commercial officer, Zero Latency of Australian entertainment after the country largely eradicated COVID-19 and was able to reopen venues, offering hope to a Europe that is lagging.

At the heart of recovery, the element that connects all good immersive schemes is the "notion of storytelling" says Fri Forjindam, chief development officer, Mycotoo. "So when you look at immersive as one way of entertainment, one angle of entertainment, that is still ultimately about marketing and getting people to your location. To me now it is more integral than ever, it's more necessary than ever, to be able to redefine your space, tell an



Boris Bielert



Fri Forjindam

authentic story and then use entertainment not just as a seasonal attraction but as an anchor marketing tool to get people there, year-round.”

Part of this is around collaborating with brands, which can go global and stay local and relevant to their geographical and demographic audience, with real estate developers partnering with IPs and brands.

Fabienne Gilles, head of consumer products at The Smurfs, says she feels anything but blue about FECs. “Family entertainment is also a pillar of our brand development in order to engage the whole family and the youngest to discover new experiences, technology and learn and have fun with the Smurfs,” she says. “For The Smurfs this win-win situation is always the balance that we are looking for. So they [destinations] should never hesitate without contacting an IP and seeing the various possibilities together with us and discussing and engaging with projects.”

“What we see everywhere is that globally there is such a desire for good experiences, to enter into worlds, to understand and get closer to properties,” says Teri Schindler, co-founder and CEO, Harves of adapting The Care Bears. “So I think when you are talking about properties, the goal here is to stay as true to the brand values as you possibly can but interpreting those values for the markets.”

However, understanding the local market is key to determining whether an IP can “justify the cost



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Family entertainment is also a pillar of our brand development in order to engage the whole family,”
Fabienne Gilles, The Smurfs

and the issues of dealing with the IP holder”, warns Yael Coifman, senior partner, Leisure Development Partners, a sentiment echoed by Pablo Moragrega, former general manager, Parque Warner Madrid. He recalls Pepsi signing up superstar Lionel Messi for a campaign in Finland, where neither he nor football had strong traction. He says: “Make sure the IP is well recognised in the location you are going to develop your concept. Only use if you can engage your target market.”

Louis Alfieri, principal and chief creative officer, Raven Sun Creative, adds that COVID had become a massive technological accelerator. “Flexibility is key as to how we are going to integrate these technologies,” he says.

However, the most frequently asked question by property professionals was about what model to adopt to make leisure integration within property developments profitable and sustainable. Paul Barham, founder and director of competitive socialising concept Flight Club Darts adds: “We appreciate landlords who are up to speed and understand the situation. The more landlords we can push into a turnover rent rather than a flat



rent, the better. More landlords can see the value of keeping us.”

Adopting pure bricks-and-mortar KPIs as the main criteria to drive decisions on leisure and entertainment integration within retail property sites is not, it seems, the right model to build new sustainable lifestyle destinations.

2. Sports and activities drive change

However, reinventing cities with leisure and entertainment will require not just great innovation but also deep interaction and connection with host cities, adoption of mixed uses and great transport connections between city and venue.

To make a sports or entertainment concept work, it must be connected says Sebastien Vielledent, CEO, UCPA (Union Nationale des Centres Sportifs de Plein Air). “You can have the best site ever but if people cannot reach you that’s a problem and how to interconnect with the city is a very important question when we start a project.”

Indeed, one of the key developments with sports attractions is that they have become more flexible and adaptable in terms of scale, set-up and opportunities to leverage income. This is all about relationships, according to Miriam Cobbaert, international business development director at

standing wave specialist Wavesurfer: “We are agile, we have short communication lines, we have short response times, we have even short delivery times.” Alistair Gosling, CEO and founder, Extreme International, says multiple revenue streams are the secret to a successful, high level entertainment offer, including “ticket sales, food and beverage, viewing, licensing, retail and then events,” with the latter potentially driving mall footfall. “It’s really about looking at the consumer journey and looking at how that works from an overall perspective and making sure that everything aligns to making sure it’s going to work. It isn’t going to be the problem



“

Amusement parks are all about connections between families and friends,”
Antonio Zamperla, Zamperla

solver [facing retail] but I think it can definitely be part of the solution that large real organisations and real estate owners are looking for overall.”

Meanwhile, Coney Island, New York has been rejuvenated by Zamperla and CIO Antonio Zamperla says destinations are all about creating memories and events. “Amusement parks are all about connections between families and friends,” he says.

3. E-sport: Retail gets in the game

Beyond, sports and entertainment, new categories are emerging, including esports, which has broken out from gaming fans into the mainstream. Savills’ Nicky Wightman says esports has to be all about the customer: “Ultimately it’s going to be how you

look at that esports fan and ask what do they want? As a consumer, what does someone who is an esports fan want?” she says. “So for real estate this is a question of what does that mean for the physicality of space? So there’s a huge amount of conversation happening now between these two sectors, real estate and esports, gaming. I feel like there’s an understanding and knowledge gap that’s drawing closer all the time hopefully.

“But the real estate industry is trying to figure out what kind of physicality of space does this enormous sector have a mood for. What does this mean? Does this mean there would be broadcast space? Does this mean studio space? Are we thinking about venues where people are going to move from being an online participant in esports and actually physically come and be present? For me I guess that feels like the really exciting part of it.”

“Like any community it’s about aspiration and inspiration,” adds Alban Dechelotte, head of partnerships and business development EMEA, Riot Games. “That’s the two triggers that any brand should play on.”

4. Integration, integration, integration

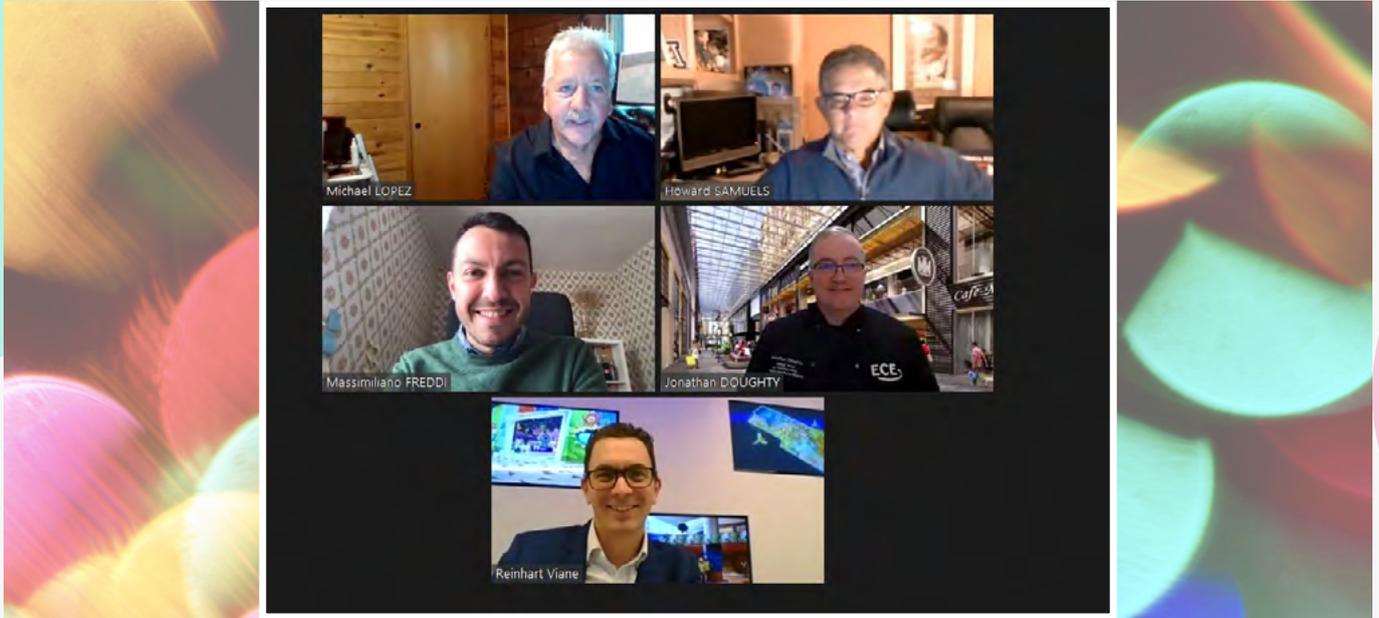
“Entertainment doesn’t dilute the retail experience, it intensifies it,” stresses Jonathan Doughty, global head of foodservice, leisure & placemaking, ECE, looking at a roadmap for where entertainment and leisure fits within retail destinations. “We need to think about what we are going to do to rebuild and how it works,” he says.

That point is echoed by Howard Samuels, president and CEO, Samuels & Company: “More than ever, cash is king. Cash long-term goes back to the fundamentals, if cap ex is really expensive – which it is for entertainment – landlords need to understand how capital stack looks. Location-based entertainment needs to reinvent itself every three to five years.”

“People want wonder, people want excitement, people want this everywhere. We have looked at a



Like any community it’s about aspiration and inspiration,”
Alban Dechelotte, Riot Games



site in Europe and we feel it could be all over the world. It is about curating, whether it's retail or experience or events," adds Winston Fisher, CEO, Area15-Fisher Brothers.

**“ People want wonder, people want excitement, people want this everywhere,”
Winston Fisher, Area15-Fisher Brothers**

5. Food: Delivering on the future

Food isn't just important, it is "mission critical", says Ian Sandford, president, Eurofund Group, as he insisted: "Food is at the absolute centre of shopping centres today. It's not just the amount, it's the variety of the food."

It was a view enthusiastically agreed with by the panel, who stressed that food operators and destinations need to adjust to the prevailing trends. Jochen Pinsker, SVP Foodservice Europe, The NPD Group, says: "Nothing is predictable, so make sure you can react fast. And make sure you can deliver at home."

And Francois Blouin, founder and CEO, Food Service Vision, echoes this point: "The crisis has changed the parameters – the choice between going out or not, visiting urban centres or not, new formats and best-in-class for local people. The largest change for me has been the places we live and the time we are spending in them. Working from home will create new places people want to go."

Joao Cepeda, president and creative director, Time Out Market, stresses that F&B is also a way of defining areas, saying of the group's first site at Lisbon, which is co-located with the original market: "The relationship is now a perfect one with the traditional market and the new Time Out Market. It helped change the whole neighbourhood and, I hope, the whole city. Everything is very much about content. It is always the key word, what type of content are we bringing to each corner of the city? We brought one solution, we brought it from editorial curation. The best venue cannot be filled up with the wrong tenants."



**“ Food is about three important things – the focus on customer centricity; hybrid formats; and changing business models. It is about the heart and the stomach,”
Reowen Niesten, Conceptional**

MAPIC & LEISURUP 2020 LIVE DIGITAL EDITION DATA JOURNEY

THE WHOLE RETAIL REAL ESTATE
AND LEISURE COMMUNITY GATHER IN
1 DIGITAL PLATFORM



2300

e-participants



60

countries



1037

companies



130

virtual
corporate pages

SPLIT PER COMPANIES



11%

PROPERTY DEVELOPERS
& CITIES



25%

SERVICES
PROVIDERS



45%

RETAILERS &
LEISURE OPERATORS



12%

BROKERS



3%

INVESTORS



5%

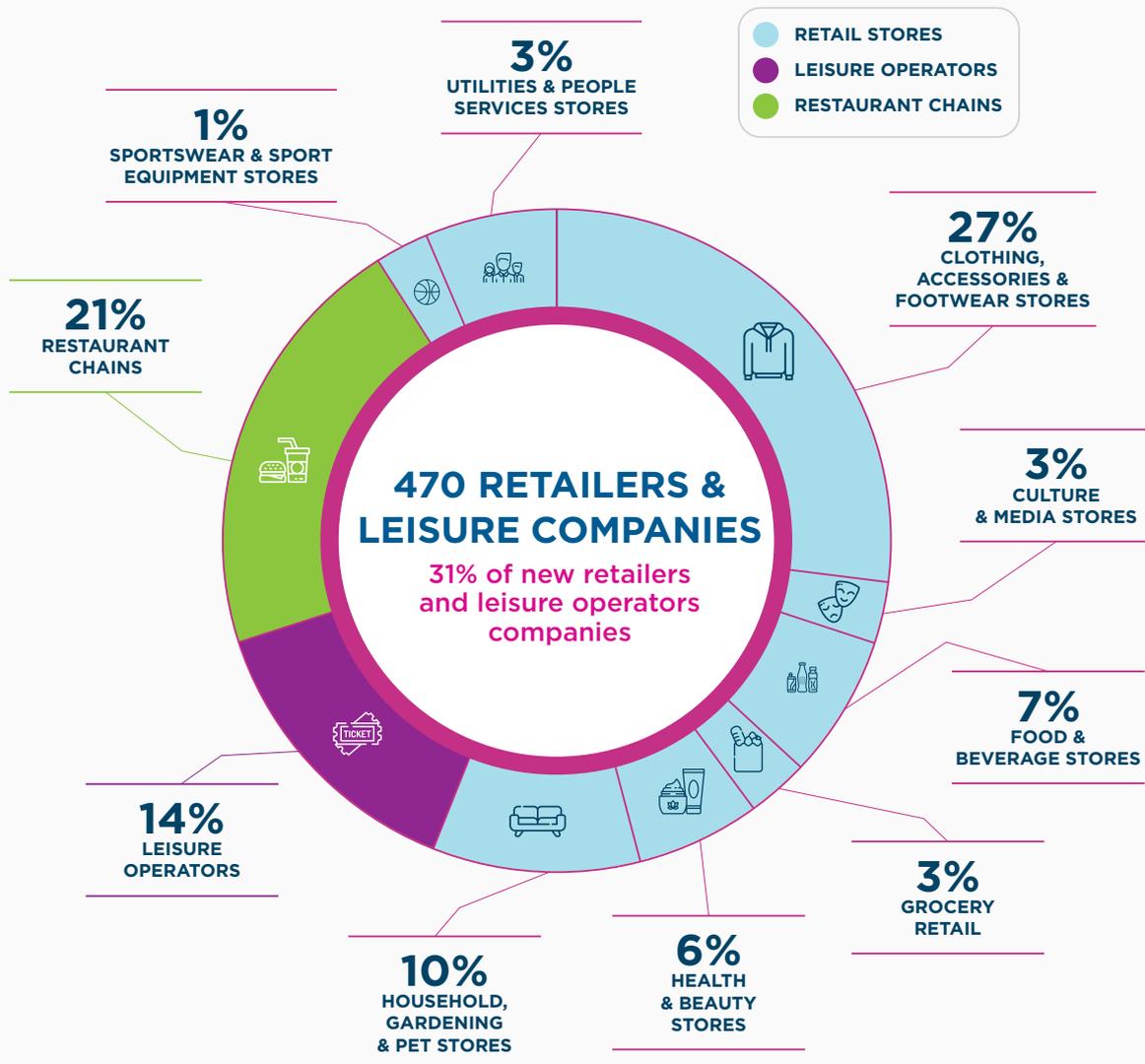
MEDIAS



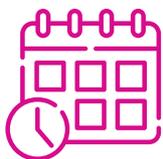
7%

SUPPLIERS

THE NEW RETAIL MIX PER COMPANIES IN 2020



LEISURE PARTICIPATION



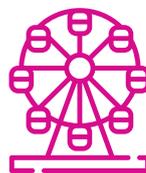
9

Leisure Sessions



35

Leisure Speakers



82

Leisure Companies



130

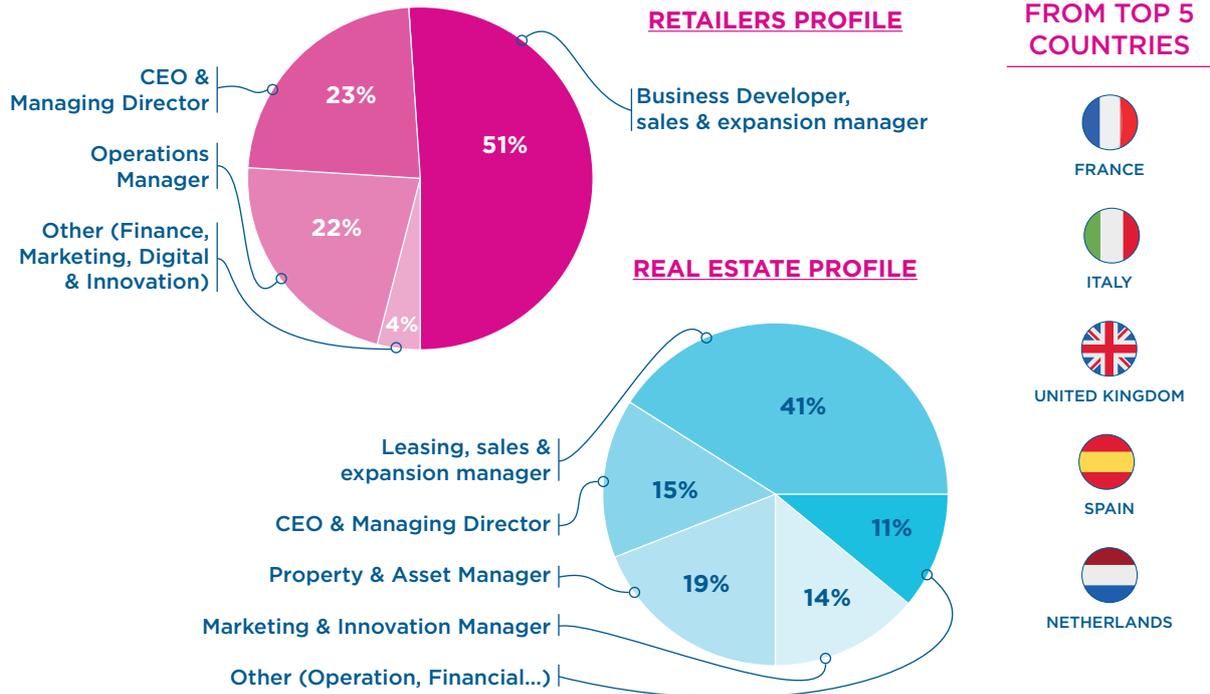
Leisure Participants

A POWERFUL PLATFORM TO EXTEND YOUR NETWORK

1561 ACTIVE USERS

70% of e-participants connected at least once to the platform

5000+ of virtual meetings



Matchmaking & Networking events



Networking events & Participants Directories



AN INDUSTRY HUB TO LEARN AND SHARE INSIGHTS

Session & Content



24+
SESSIONS



110
INTERNATIONAL
SPEAKERS



1900
VIEWS



725
UNIQUE
PARTICIPANTS

+30% ATTENDEES AT CONFERENCES (VERSUS LAST YEAR)



TOP 5 SESSIONS



- Reinventing retail with entertainment
- Collaborative retail: ready to change the rules
- Best time ever to invest in mixed-use projects
- (Re)building the next retail generation - part 1
- Think physical retail, think different



MAPIC & LeisurUp INDUSTRY CONTENT



ONE BOOK, 801 reads, average reading time 9 minutes

Top readers:

French, English, American, Italian and Spanish

40 Industry content articles and Market research

AN INTERNATIONAL AND HEAVY VOICE

Media & Online reach

14 SPONSORS

30 MEDIAS
PARTNERS

73
JOURNALISTS

37 MEDIAS
FROM
8 COUNTRIES

10 622 UNIQUE VISITORS ON MAPIC & LEISURUP WEBSITE*

FROM TOP 5 COUNTRIES: FRANCE/UNITED KINGDOM/ITALY/UNITED STATES/SPAIN



2788134
OF REACH*

(# OF USERS THAT COME
ACROSS OUR POSTS)

425
POSTS*

LINKEDIN
FACEBOOK
TWITTER



2 LIVE EMAILS¹ SENT TO 25 100 CONTACTS



OPEN RATE: 31 %²



¹ 2 emails were sent during the Live events to customers and prospects database

² The average B2B email open rate is 15.1% from "Data & Marketing Association - Email benchmarking report 2018"

mapic[®]
LeisurUp™ **digital**

*Mapic & LeisurUp from 1st of October until 20th of November

“ [MAPIC & LeisurUp Digital] allows
direct access to decision makers
in the property developer sector ”

Rios Salvador, Senior Business Development Manager,
Scheidt & Bachmann GmbH

“ This was my first time at Mapic
LeisurUp and I've been surprised
of the quality of attendees,
both exhibitors and visitors.
Also, the system worked super well! ”

Jorge Canela, Licensing Department,
Dorna Sports,S.L

“ Good content in the presentations
but the real value was the online
networking and the extended access
to the participants. There is never
enough time to get around old and
new clients at the 'real' MAPIC. ”

Director,
Coverpoint Foodservice Consulting