



GMR

# MUSIC + MEMORIES

What fans are really looking for—and how brands can deliver better experiences

## ABOUT THE RESEARCH

**Music + Memories is an extension of Experiential EQ, proprietary research and analysis conceived and powered entirely by GMR Marketing's in-house Strategy team.**

Conducted over the course of many months, our data comes from firsthand field interviews, field surveys and online panels of 2,000+ experience seekers at 15 different types of events. GMR Strategy is a leading team of marketers, strategists and psychologists within GMR, who dig into the "why" of branding and brand experiences every day. Music + Memories and Experiential EQ are part of the team's work to yield strategy as an applied science across marketing processes, tools and campaigns. This includes proprietary approaches to consumer psychology at live events, sponsorship and partnership measurement, experiential efficiency/efficacy benchmarks, and quantification of brand memory and recall. ■

# MUSIC IS MEMORABLE

**Everyone remembers their first concert—the crowd, the venue, the volume, the buzz of anticipation.**

The emotional high of a live music event is so concentrated that we remember the experience in vivid sensory detail—where we stood and what we drank, even the outfit we wore or the cologne of the stranger dancing next to us.

Our music memories don't just capture the details of

a concert or festival. They mark a specific time and place in our lives. Even as our taste in genres and events changes and our relationships evolve,

**91% OF MUSIC FESTIVAL ATTENDEES TOLD US THAT TAPPING INTO OR CREATING MEMORIES IS AN IMPORTANT REASON FOR ATTENDING LIVE MUSIC EVENTS.**

a musical memory captures in amber the personal significance of that music and those people at a singular point on our life's journey.

Live music's power to encapsulate a moment into a memory is a very real part of why we seek it out. Even many years later, musical memories transport

us back to the very place and time they were formed.

The recall strength of these emotionally-steeped memories make music—particularly live music events—an exceptionally powerful vehicle for brand marketing. And with events that attract fans across virtually every demographic and every cultural group, music offers brands ample opportunity to forge these lifelong connections. Brands spent more than \$1.5 billion on music sponsorship in 2017<sup>1</sup> for good reason.

1. [http://www.sponsorship.com/About/Press-Room/Sponsorship-Spending-On-Music-To-Total-\\$1.54-Billi.aspx](http://www.sponsorship.com/About/Press-Room/Sponsorship-Spending-On-Music-To-Total-$1.54-Billi.aspx)



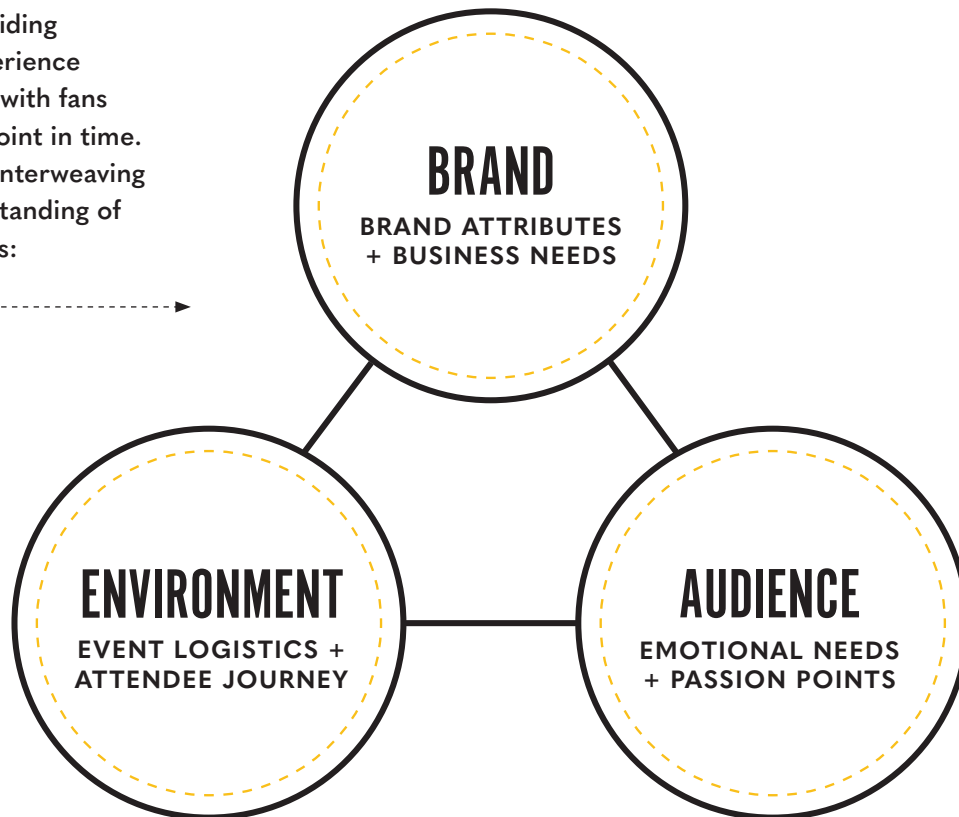
# MARKETING SUCCESS AT MUSIC EVENTS REQUIRES UNIQUE FOCUS.

**GOAL:**

Make music manageable to help brands focus—and market better.

# GET IT RIGHT, OR GET LOST IN A MUSIC MARKETING BLACK HOLE.

It's about providing a specific experience that connects with fans at a singular point in time. That involves interweaving a deep understanding of three elements:



“Audience” is the biggest blind spot for most brands whose music marketing falls flat. Yes, brands know who their audience is on paper, their demographics, likes and dislikes. But when they come to a music

event, who are they in that time and place? Why are they there? What are the memories they want to take home?

GMR spent months visiting dozens of live events and surveying/

talking to 2,000+ event goers to find the answers.

The emotional landscape we uncovered and framework we’ve developed helps brands understand the deeper human needs that drive

event attendance—and how to become a more meaningful part of music experiences. ■

## LET’S BE CLEAR:

Success isn’t about “standing out from the crowd.” We’ve all heard that a thousand times. Bigger and louder doesn’t necessarily mean better or more memorable.

## OUR PRIMARY QUESTION:

## WHY DO PEOPLE SEEK OUT LIVE EVENTS?

With so many at-home entertainment options, many of which are more convenient and lower cost, what brings people to a physical event? We identified four primary emotional need states

that drive people to seek out experiences at events: belonging, identity, enrichment and release. These need states are universal, deep and important—and as shown below, they can be

mapped onto a spectrum of internal vs. external and security vs. openness. They are the deep human needs that drive experience seekers, usually unconsciously, to attend live events. ■

# THE EXPERIENTIAL EQ FRAMEWORK

TO UNDERSTAND HOW TO REALLY FOCUS IN AT A MUSIC EVENT, YOU NEED TO FIRST UNDERSTAND THE UNDERLYING EMOTIONAL NEEDS THAT DRIVE EVENT ATTENDANCE, WHICH IS THE FOCUS OF OUR EXPERIENTIAL EQ REPORT.

## SECURITY BELONGING

The acceptance as a natural member of a group, or part of a chosen collective with common tangible/intangible interests. This may be a uniting mindset, a shared passion, or a support system that emerges in an event setting. Belonging is the driver of tribalism, which we anticipated finding as the dominant force for sports attendance.

## INTERNAL RELEASE

The escape from daily life, using experiences to help cope with societal pressure, demands and stressors. Attraction to other fans or the lifestyle, simple fun, and just being present and in the moment are all forms of release.

## EMOTIONAL NEED STATE

## EXTERNAL IDENTITY

The qualities, beliefs and values that make a person or group unique and different from others. Traditions, external proofs, and aspirations all fall into this category.

The growth that comes from digging in deep on a vertical, or simply discovering or learning something new. This may include novelty and surprise, knowledge and personal growth, and creativity and experimentation.

## ENRICHMENT OPENNESS

Want to learn more about the emotional need state framework? Download Experiential EQ at [gmrmarketing.com/EQ](http://gmrmarketing.com/EQ)

# MUSIC'S MULTIFACETED APPEAL

We visited all sorts of events to build this framework—from the runway to the rodeo, from college bowl games to dusty music festivals.

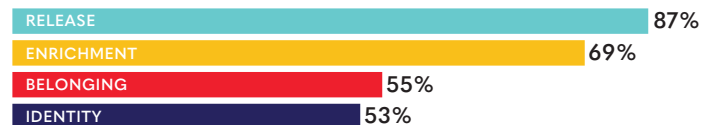
As we visited, patterns began to emerge. Sports events proved to be less about belonging and team spirit and more about release than we had expected. Food and fashion events were an exceptionally high draw for those seeking enrichment through new influences.

But music stood out in a different way.

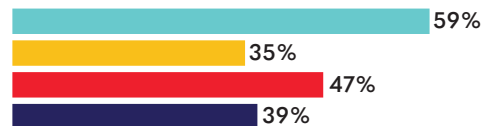
Consistent with our research on all event types, *release*—a medium for stress relief and rebalancing from life's pressures—is the main motivator for live music attendance, with results on par with lifestyle and sporting events. What's notable, however, is that music ranked higher for enrichment, belonging and identity than the other event types.

**OF ALL OF THE EVENTS WE VISITED, THE MUSIC ENVIRONMENT WAS THE MOST COMPLEX, ENRICHING AND DIVERSE IN EMOTIONAL RANGE.**

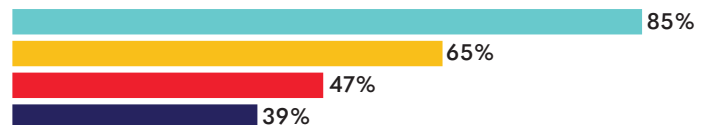
## MUSIC



## SPORTS



## LIFESTYLE



## What drives fans to live music experiences?

In other words, music is strong across all four emotional need states, helping to satisfy what music event attendees need emotionally.

That's because the core of music events—music itself—is so multifaceted. It can fulfill different individual needs for different people at different times of their

lives, even differing within a group attending together. Whether it's marking a milestone or creating a sense of community, providing an outlet or a space for self-expression, the imprint music leaves on people's lives, even as they grow and change, cannot be replicated by other experiences. ■

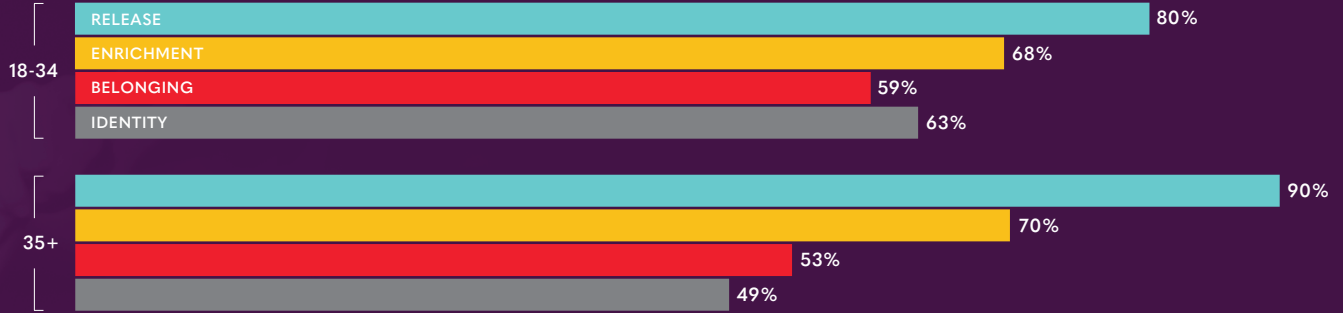
# FINDING YOUR FOCUS



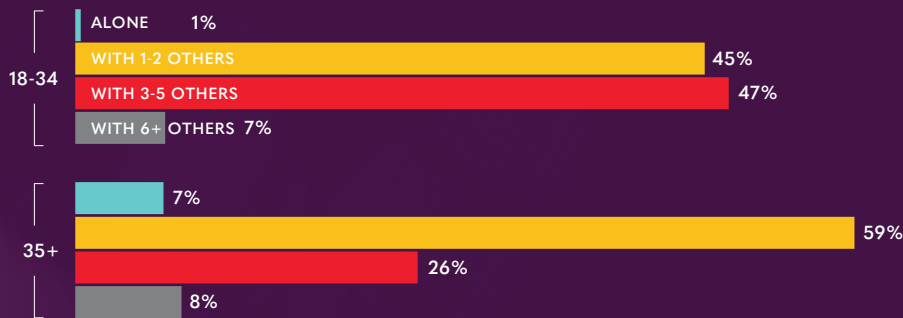
If all four need states—belonging, identity, enrichment, release—are strong drivers of attendance at music events, how do brands decide where to focus? The good news is that music isn't everything to everyone at the same time.

Our research found compelling distinctions in how emotional need states and preferences play out across different ages and life stages. Even a need state like release, which is universally high, means different things to different people. A 19-year-old college student and a 38-year-old father of three both need it—but for different reasons.

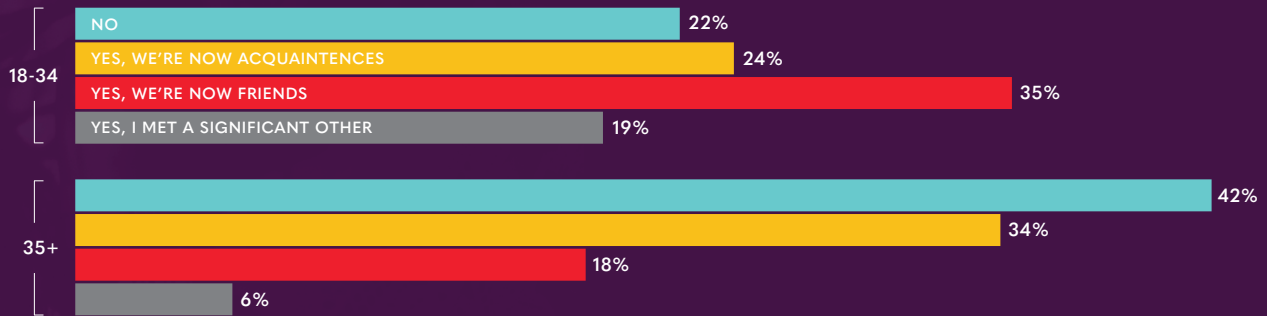
### What drives fans to live music events? (0-100%)



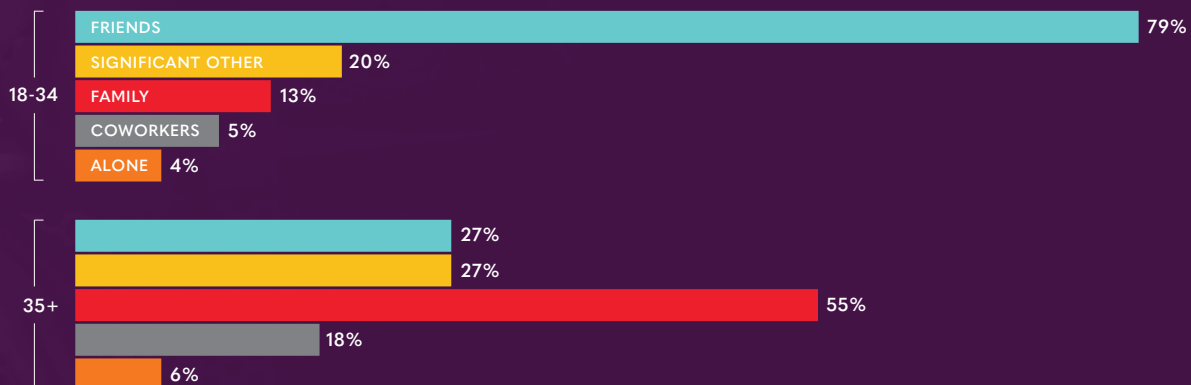
### How many people did you attend with? (0-100%)



### Have you met new people through music events? (0-50%)



### Who did you attend with? (0-100%)



# INSIGHTS+ CONSIDERATIONS

## AGES 18-34 SOCIAL+ SELF-EXPRESSION

### Emotional Needs Identity

For attendees aged 18-34, the ability to express themselves at this life stage is the most important reason for attending live music events. They're also more inclined to play with different styles and personas as they solidify their identities into adulthood, making the freedom and energy of a music festival ideal for self-expression and exploration.

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*"I look and I see the different range of styles and all these girls dressed in what might be new and trendy, or just whatever they're feeling. That's super cool to me. I've never felt so comfortable complimenting other girls or having them come up and compliment me." **Anna***

### Social Priorities New Connections

Music is a meeting place, and 47% of 18-34 year olds said they attend with 3-5 other people (compared to just 26% of the 35+ set). This cohort is much more likely to attend with friends (79%) than with family or a significant other.

They're also prospecting for new friends or romantic interests, especially at music events, where 35% of 18-34 year olds say they've met people who became friends—and nearly 20% have met a significant other.

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*"My husband is playing. We actually met through the music scene, so that was like my life. It all led to him." **Sucora***

### Life Stage Marking Milestones

Many in this cohort use music festivals or events as a rally point before launching into a new life chapter—post-graduation, pre-wedding, or a last group outing before a move. Younger people use music to build important memories, celebrate where they've been, and look forward to where they're going.

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*"It was definitely a transitional time in my life, going in between high school and college, becoming an adult. Overall, it was more like a spiritual experience during that transition. August, late in the summer, right before I went to school, so it was kind of a good cap to that stage of life." **Ross***

# AGES 35+ FINDING YOUR PLACE

## Emotional Needs

### Release

A whopping 90% of those 35+ said that release was an important factor for attending music events—the highest weighting of any emotional need across our entire body of research. For this ‘older’ group, release is less about having a wild time, and more about fully unplugging from the routines and responsibilities of everyday life.

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*“I get to be who I am, I get to release anything that I’ve got, any of the endorphins that I’ve got in my head to make me happy, any of the aggression I’ve got. I get to be who I am, and then I’ve got to return home to my family and do my thing. But, this is what I’m here for.” Jon*

## Social Priorities

### Family Ties

82% of attendees in this group attended with family or a significant other, whereas 79% of the younger set went with friends. They’re also less inclined to build new relationships: just 24% of those 35+ say they’ve found friendship or romance through a music festival, compared to 54% of those 18-34.

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*“I’m here with my husband. We’re a Venn Diagram of musical tastes.”*

**Autumn**

## Life Stage

### Passing It Down

Live music events give people, particularly families, an opportunity to pass an appreciation for music from generation to generation. Parents use music to make family memories and older siblings often act as the introduction to the live music scene. Observationally, parents are especially inclined to bring their adolescent-aged children to their first festival, and many music enthusiasts said they were introduced to music through their parents’ own love of an artist or genre.

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*“Well, my mom is a rocker and I’m a rocker. I shared something with my mom.” Shane*

## Millennials in Transition (0-100%)



**As younger music attendees move into the older end of this age range (25-34), their values start to shift.**

Reflecting a blend of where they’ve been and where they’re headed, this subset

ranked all four need states high. They value release more than the younger set, but care just as much about identity and enrichment. And they rated belonging higher than any other age group, indicating they’re especially attuned to the

communal aspect of music experiences.

While Gen Z soaks in the world around them, and fans 35+ are more well-established, this later Millennial set is in a dynamic, transitional phase—

launching new careers, building relationships and making life choices that will define their future. They are coming into their own—and music is an especially important companion during this period. ■

DESIGNING MEMORABLE

# MUSIC EXPERIENCES

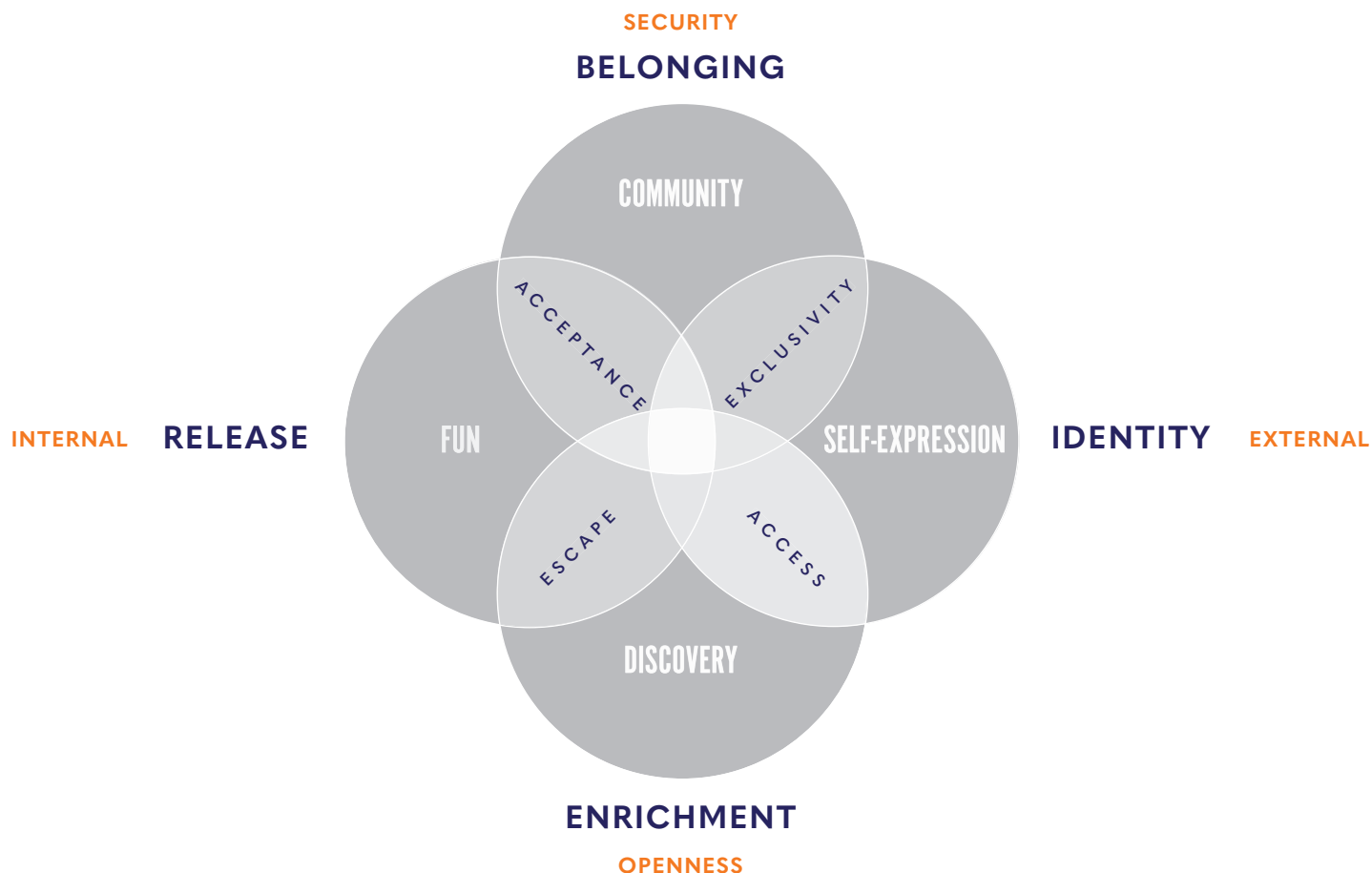
**The four emotional need states explain why people attend live events.**

So how are those needs met in the live environment? And how can brands use that insight to connect through music? Our surveys and


interviews identified eight distinct experience territories that correspond to the four emotional need states—and directly fulfill those needs.

For music fans who come seeking release (emotional need), brands who use the event to deliver fun (experience territory) are well-positioned to meet that need and make a stronger connection. The need for belonging

is fulfilled by community-building experiences. Fans who seek identity will connect with brands who enable self-expression. And so on.



Creating engagements that evoke and embody these interrelated emotional territories allows brands to meet their audience on the deepest levels—by speaking to their underlying emotional needs. This places the brand squarely within the emotional fulfillment of the live event—and the memories made there. ■



**MUSIC TAPS HEAVILY INTO ALL FOUR  
EMOTIONAL NEED STATES, MAKING  
IT THE ULTIMATE EXPERIENTIAL  
MARKETING UTILITY PLAYER.**

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By delivering the right fan experience at the right moment, a brand can strengthen, and become part of, the critical

memories an attendee takes home with them. How this comes to life is different for every brand and every setting. No two

activations are ever the same. Understanding the experiences attendees are looking for—and the emotional needs that

underlie them—is critical to developing brand experiences that don't just entertain, but connect. ■

# WHAT IT ALL MEANS

Music is personal, powerful, and unlike anything else. It is versatile yet specific, private yet universal. It's cathartic, memorable, and a whole lot of fun—especially in the socially and emotionally charged context of a live event. There is something for everyone in live music, and lifelong memories to be made.

This setting holds tremendous possibility for brands. But it's not easy to know your role in music. Going in with a broad ubiquity strategy can get eyeballs, but it won't necessarily break through, build meaning or elicit memories that stick.

It is crucial for marketers to fine tune what they want music lovers to take away about their brand or product. And that means understanding what those music lovers want to take away—on a deeper, human level—from the event itself.

If you create a brand experience that delivers both, then music will help carry your message—via the memory it's a part of—for a very long time. ■



**WE BELIEVE  
EXPERIENCE  
MATTERS.**

Designing experiences that meet these complex and nuanced needs is both an art and a science. As an innovative, insight-based sponsorship and experiential agency, this is what GMR does day in and day out.

If you're interested in digging deeper into how to not just speak to your audience, but engage them in deep and memorable ways, contact GMR Marketing.

Founded in 1979, GMR is an innovative global sponsorship and experiential leader, connecting brands and their consumers through shared passions. We change how people think, feel and behave through the power of experience. Experiences founded on data, rooted in insight, grounded in strategy, designed meticulously and executed flawlessly. ■

GMR

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