

GMR

Meet the YFF

Young Female Festivalgoers
Take the Stage

Young Female Festivalgoers Take the Stage

There's no shortage of proof that American millennials love music festivals. In 2014, 14.7 million of them attended at least one.¹ But tucked within the generation of 80 million, there's a subset of festivalgoers whose habits are changing the festival landscape of today and tomorrow.

Meet the Young Female Festivalgoer. We call them YFFs for short.

Thanks to increased buying power and interest in festivals, these 18-24-year-old women are among the most formative forces behind the evolving music festival landscape.

They wield a hefty financial influence alongside a powerful digital one. 18-24 year olds are the highest adopters of nearly every social platform² and women are particularly avid social media users (80% of adult women are active). They prefer photo-heavy platforms like Instagram, Facebook and Pinterest—which are perfect for capturing the excitement and broadcasting the shortcomings of a live event.³

18-24 year olds are the highest adopters of nearly every social platform.

YFFs are the overlap between those groups and are positioned as the most digitally-influential consumer segment today. Brands who can command the attention of this group can not only develop long-term brand advocates, but also authentically connect with the YFF's extended social network—connections that will become critical to the success of a music festival sponsorship.

Through a survey of festivalgoers,⁴ we familiarized ourselves with YFFs to discover how—more than any other subset of their generation—this powerful group of young women's likes, dislikes, values and habits are shaping music festivals.



Raisa Kanareva/shutterstock.com

1 Billboard 2015 - <http://www.billboard.com/articles/columns/music-festivals/6539009/music-festival-statistics-graphic>

2 Statista 2015 - <http://www.statista.com/statistics/471553/millennials-usa-social-media-reach-age/>

3 Pew Research 2015 - <http://www.pewresearch.org/fact-tank/2015/08/28/men-catch-up-with-women-on-overall-social-media-use/>

4 Methodology: During Q4 2015 and Q1 2016 GMR Research launched an online survey to a panel of 820 music festivalgoers across the US between the ages of 18 and 54. Of these, 607 fell between the ages of 18 to 34 ('Millennials'). To qualify for this survey, respondents had to attend music festivals at least one time per year on average.



Meet the #YFF


The Young Female Festivalgoer is a frequent attendee and an avid music fan. More than anyone else in her peer group, she demands the immersive and highly social festival experiences we're seeing everywhere from Coachella to FYF Fest.

She learns about festivals from her friends and social networks and is looking for ways to extend the festival experience while meeting up with other fans.

She isn't overly concerned about the price of tickets, beer and mementos because to her, the festival experience is an investment

worth making. She's engaged with brand sponsors, unlikely to leave without purchasing a memento and not afraid to provide her personal information in exchange for something. She's bothered by gross bathrooms and wants shorter lines. She requires reliable WiFi and hates to miss a second of the action when her favorite bands are onstage.

YFFs' festival pain points are already changing the festival experience—from influencing onsite facilities to 360-degree video streaming at Coachella—and will continue to inform what festivals and brands do next.



32 million Americans
say they attend at least
one festival each year...
it's clear there's a new
American pastime on
the rise.

Festival Fever

Music festivals are turning out huge numbers. A whopping 32 million Americans say they attend at least one festival each year.⁵ Contrast that with the 2014 World Series' audience of 13.9 million—less than half—and it's clear there's a new American pastime on the rise.⁶

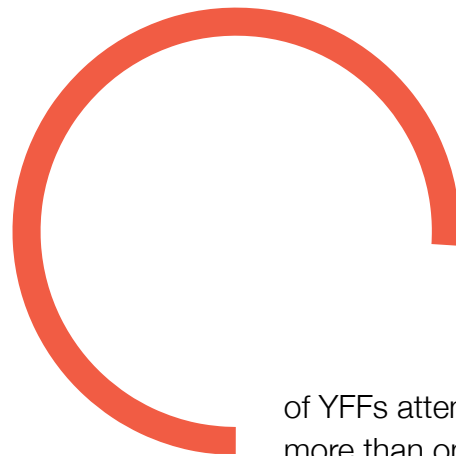
Plus, many fans attend multiple festivals annually, including a good portion of our YFFs. In fact, three quarters (76%) of YFFs attended more than one festival annually, and half (49%) attended three or more.

This demographic is using an enormous amount of time and money pursuing their passion for festivals, music and the bands they love. They're likely forming traditions and habits that will make them festivalgoers for life. This makes festivals a great place to begin or enhance a brand dialogue with YFFs.

⁵ Billboard 2014 - <http://www.billboard.com/articles/columns/music-festivals/6539009/music-festival-statistics-graphic>

⁶ Forbes 2014 - <http://www.forbes.com/sites/maurybrown/2014/10/30/game-7-of-world-series-a-tv-ratings-hit-for-fox-keeps-2014-from-lowest-watched/#7f5a6a87ddb0>

As they age, it's likely that YFFs' willingness to spend money on festivals will increase alongside their spending power. Differentiating each festival experience and upping the onsite spectacle, while continuing to eliminate common pain points for YFFs, will encourage continued attendance over time.



of YFFs attend more than one festival per year.

...  F 18-24

49%

of YFFs attend three or more festivals per year.



Why Music Festivals?

Understanding why your audience comes—and keeps coming back—is crucial to any festival marketing, especially when trying to reach YFFs. The better a brand understands YFFs, the easier it is to offer tailor-made solutions that connect.

So what brings YFFs to the festival gates?

Overall, YFFs are drawn to the general atmosphere of being physically at a festival (83%). They view festivals as a social outing opportunity with friends and family (71%), not a solitary experience.

They're much more likely to attend a festival because of specific lineups (63%) and band loyalty (66%).

As festivals become more competitive within an increasingly saturated market, differentiation becomes crucial. Studies prove that finding differentiation through artist lineup is quite difficult and nearly nonexistent, as very few festivals today offer truly unique artist lineups.⁷

But YFFs do say they would love to vote on which artists play their favorite fest (77%)—an indication that more interactive, crowdsourced experiences are one way to stand out.

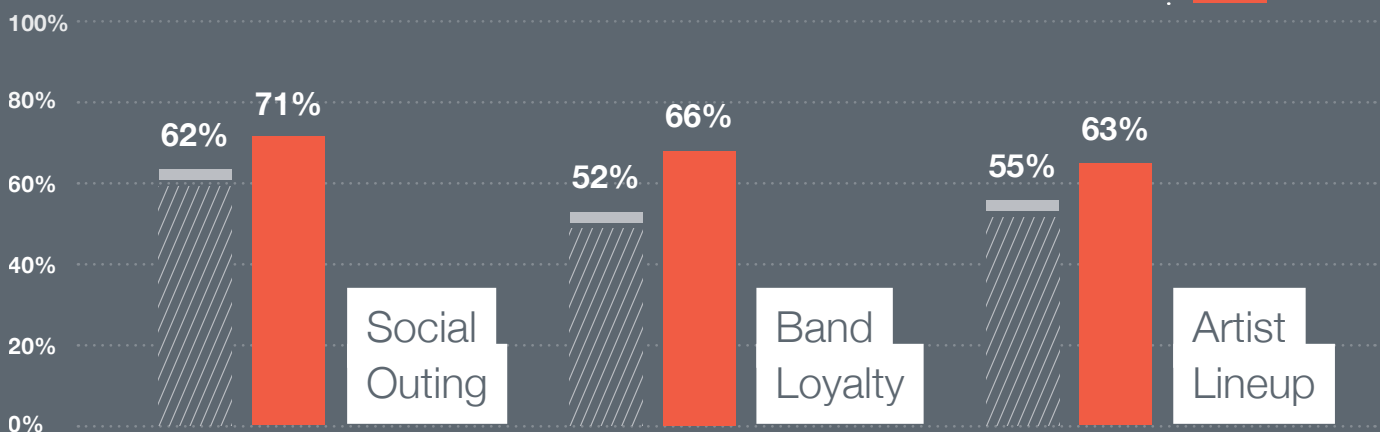
⁷ Deadspin 2015 - <http://adequatemanager.deadspin.com/are-music-festivals-really-all-the-same-now-1771174117?curator=MusicREDEF>

83%

of YFFs are drawn to the general atmosphere of being physically at the festival.

Rawpixel.com/shutterstock.com

Why They Enjoy Attending





Young millennial women's expectations about the festival experience are important for festival planning, marketing and brand engagement.

Hit the “Like” Button

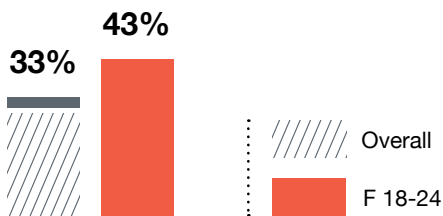
Let’s look at what these festival-loving ladies want out of a festival experience. What makes them hit the “like” button?

More than other millennials, the Young Female Festivalgoer is looking for opportunities to connect and meet up with other attendees (72%). This includes both before and after the festival (74%)—especially through unique, extended social experiences (43%).

As avid fans with ballooning purchasing power as they move into the workforce, young millennial women’s expectations about the festival experience are important for festival planning, marketing and brand engagement. Viewing a festival as more than a three-day event is critical to maximizing sponsors’ investment and relationship with the YFF.

of YFFs are eager to meet up after the festival.

Extended Party Experience



What They’re Interested In

Attending meetups with other attendees

66%

72%



Pain points will become increasingly important to fix—a worthy endeavor for brands who seek to build valuable relationships with YFFs.



Sadface Emoji

Next, let's evaluate the stuff that makes these young attendees post sadface emojis to their followers. Like everyone we surveyed, YFFs are bothered by unclean or inadequate bathrooms and long lines to use them (64%).

YFFs are more bothered than other attendees by poor WiFi and cell service (58%). And more than most, they really hate missing performances while away from their seats (54%). They also dislike the cost of parking (61%).

Interestingly, YFFs aren't as bothered by unhealthy types of food (21%) as other groups, and they don't mind shelling out for more expensive tickets (50%).

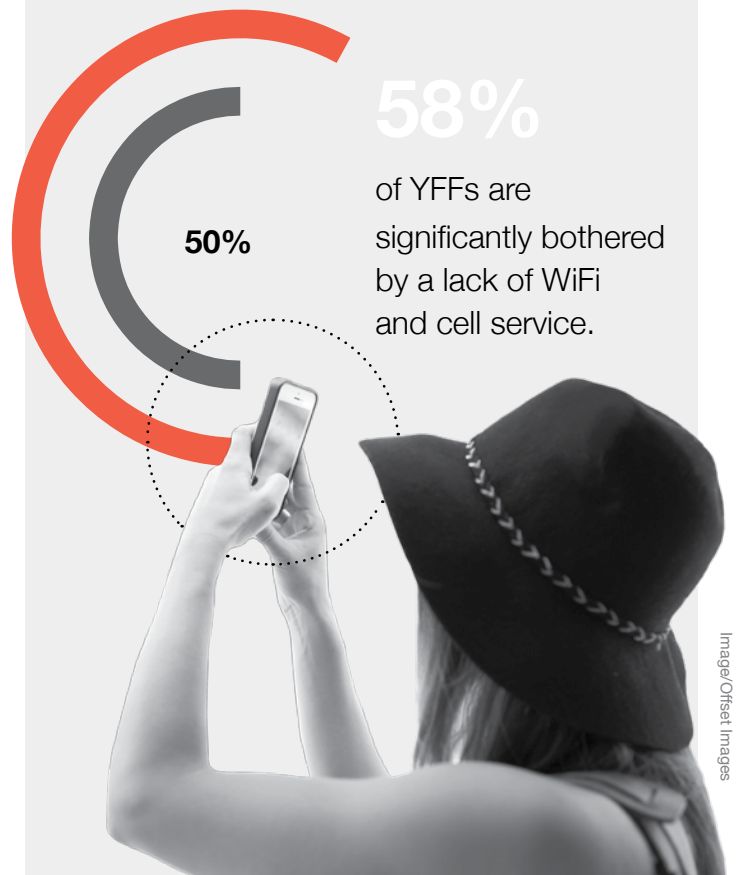
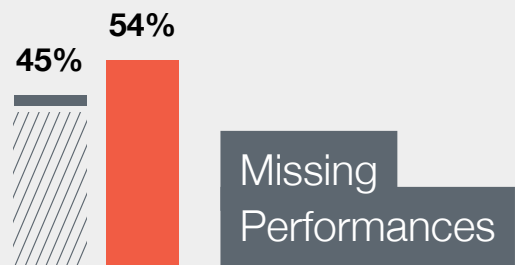
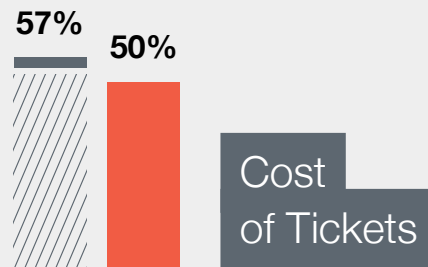
As this base ages, but still wants to attend festivals, pain points will become increasingly important to fix—a worthy endeavor (and ripe opportunity) for brands who seek to build valuable relationships with this group.



64% of YFFs are bothered by unclean bathroom facilities and long lines to use them.

Pain Points

Overall F 18-24



To stand out and win YFFs' hearts and minds, brand sponsors must prove their value by providing innovative, immersive experiences.

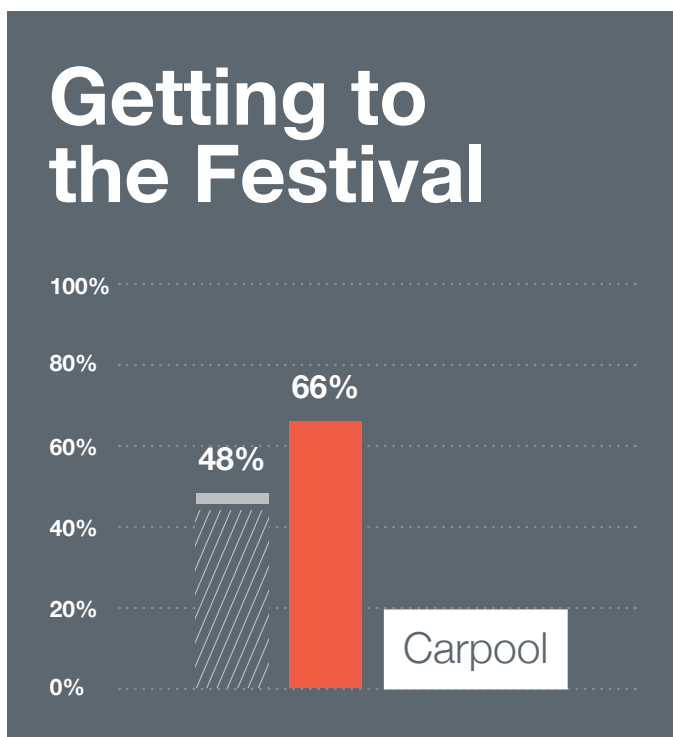
Making a Connection

Now that you know more about these influential fans, how can you better engage them at festivals?

Brands should start by finding shared values and attributes between themselves and their audience. If you're wooing YFFs, here are some good places to start:

Discovery: More than other millennials, younger women are more likely to hear about upcoming festivals via word of mouth (77%). Brands can empower this group to share in the content rich environment of a festival by coordinating unique festival experiences for each festivalgoer.

Travel: Young female festivalgoers are significantly more likely than average to carpool (66%) or get dropped off by a friend or family member (17%), and less likely than average to take their own vehicles (69%). Finding ways to transport these fans to and from the festival could enhance the overall festival experience in a memorable way.



Overall F 18-24

Tribe: These women are more likely to attend a festival in small groups, with two other people (30%). Tailoring experiences to small groups, or making sure a YFF doesn't have to leave her friends, could increase her onsite participation with brand activations.

Swag: YFFs are more likely to leave a festival with a keepsake than other millennials (58%). Half of YFFs have given a brand their personal information in exchange for something (53%) and nearly half are "very likely" to visit brand-sponsored areas or booths on the ground at festivals (47%). They want to commemorate their experience, so providing festival-related mementos would likely interest them.

Extend: Their interest in pre- and post-festival meetups offers plenty of opportunity for marketers to engage outside the festival grounds and continue the relationship with the YFF. From the ticket purchase months in advance to attendees enjoying the afterglow, brands can connect throughout festival season and beyond.

Connect: YFFs appreciate constant connection to their extended social network. Updating their social channels with content from the event in real time and providing free WiFi or other cell service is a valuable tool to engage with this demographic at festivals.

Or dig even deeper—start from the ground up to build a sponsorship and execution plan deeply rooted in both consumer insights and brand strategy.

To stand out and win YFFs' hearts and minds, festivals and brand sponsors must prove their value, by providing innovative immersive experiences that enhance and extend the qualities that attract YFFs to music festivals in the first place.



GMR

GMR is an award-winning global experiential marketing agency.

We connect brands with consumers through innovative experiences rooted in the things people are passionate about—music, lifestyle, sports and entertainment.

Want to Connect Your Brand with YFFs?

Consider GMR your guide. From consulting, to constructing a panel of industry experts and YFFs, to building out a complete festival partnership strategy, we're here to help your brand make a lasting impression.

- Strategy + negotiation
- Creative consulting + experience design
- Digital + social + mobile
- Activation + staffing
- Content development + amplification

Get in Touch

Brand inquiries

Steve Dupee
EVP, Business Development
sdupee@gmrmarketing.com
+1 262 780 6193

.....

PR inquiries

Jamie Hannah
Director, Public Relations
jhannah@gmrmarketing.com
+1 414 232 5560

www.gmrmarketing.com

No endorsement is intended or implied by any third party referenced in this report.