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Segmentation of music festival attendees

Maarit Kinnunen[a]*, Mervi Luonila[b] and Antti Honkanen[c]

[a, c]*Multidimensional Tourism Institute, University of Lapland, Rovaniemi, Finland*

[b] *The Sibelius Academy of the University of the Arts Helsinki, Finland*

*corresponding author

Abstract

Festivals have seen a surge in both size and numbers leading to a more business-oriented festival management. Thus, knowledge regarding the audiences and consumption of festivals deserve more attention, and monetary properties such as ticket sales and partnerships have become focal points in festival management. All these aims can be achieved by market segmentation.

Festival Barometer is a longitudinal survey focused on the audiences of the largest Finnish rhythm music festivals. Using 7,797 answers from the years 2014 and 2016, the audience was segmented using personal music preferences into groups named: hedonistic dance crowd, loyal heavy tribe and highly-educated omnivores.

The members of the loyal heavy tribe are the most confident about their future participation in festivals. The hedonistic dance crowd love to have fun, and highly-educated omnivores see festivals' values important for them. However, music preferences might not necessarily indicate the respondent's actual taste but rather the referential group that best reflects the festivalgoer's own identity. Additionally, the meaning of the music is highest in the youngest age group and it will be replaced with other priorities as the person gets older. This indicates that the music festival organisers are forced to attract constantly a new younger audience.

Introduction

Festivals as an industry have increased rapidly since the 1990s (Ballantyne, Ballantyne, & Packer, 2014; Chacko & Schaffer, 1993; Webster & McKay, 2016; Yeoman et al., 2015). As Prentice and Andersen (2003) illustrate, the 'explosion in festival numbers' is evident in both size and amount of festivals. They point out that the causes behind this

phenomenon are multifaceted "ranging from supply factors (such as cultural planning, tourism development, and civic re-positioning), through to demand factors (such as serious leisure, lifestyle sampling, socialisation needs, and the desire for creative and "authentic" experiences by some market segments)" (Prentice & Andersen, 2003, p. 8).

The development is apparent in the Nordic countries as well (see Andersson, Jutbring, & Lundberg, 2013; Karlsen & Stenbacka Nordström, 2009; Nordvall et al., 2014). Originating mainly from niche voluntary-based events conducted by content-oriented enthusiasts, as in the case of Finland (Amberla, 2013), the Nordic festival field has moved on to more professional, business-oriented productions (Andersson & Getz, 2009; Hjalager, 2009; Larson, 2009; Luonila, 2016a; Luonila, Suomi, & Johansson, 2016; Mossberg & Getz, 2006; see also Newbold et al., 2015). This is emphasised especially in the context of large rhythm music festivals (Nordvall & Heldt, 2017). Recognising the challenge of terminology, in the present study we draw on the term 'rhythm music' "to mark music outside Western art music or classical music" (Väkevä & Kurkela, 2012, p. 244; see also Kurkela, 2004). The term 'rhythm music' refers here to jazz, pop and rock music and other musical genres drawing on these genres (see also Uimonen, forthcoming).

Resulting from the reasons stated for the evolution of the festival industry, the knowledge regarding the audiences and consumption of festivals deserves attention more explicitly than ever before. As Luonila et al. (2016, pp. 461-462) notice, "the available resources of festival organisations have remained moderate compared to the growth of the events they produce". Thus, the monetary properties such as ticket sales and a variety of partnerships become focal points in festival management (Andersson & Getz, 2007; Larson, 2009; Luonila, 2016a; Mossberg & Getz, 2006; see also Towse, 2014). The targets for ticket sales can be achieved by finding ways to attract new audiences (Kolhede & Gomez-Arias, 2017), and increasing the number of loyal attendees by developing measures to meet their needs better (Lee & Kyle, 2014). Both approaches mean a thorough understanding about existing and potential attendees. In addition, deep knowledge of the audience enables festivals to attract sponsors as well since they want to get their marketing messages directed to specific consumer categories (Oakes, 2003).

Market segmentation is an established way to define consumer subgroups that have different needs and wants (Haley, 1968; Smith, 1956). Concentration on selected market segments allows the use of the most suitable marketing mix to reach potential

customers (Dolnicar et al., 2012; Hunt & Arnett, 2004; Li, Huang, & Cai, 2009). Furthermore, focusing on certain segments makes it possible to optimise the use of resources and still enable the fulfilling of desires of the selected segments (Hunt & Arnett, 2004). The understanding about the customer base and their preferences will also be a valuable facilitator in attracting sponsors by offering them well-defined target groups (Luonila, 2016a; Oakes, 2010).

Drawing on the longitudinal survey focused on the audiences of the largest Finnish rhythm music festivals and aiming to deepen the knowledge on the Finnish rhythm music festival audience, the present study defines the characteristics of different attendee segments based on musical preferences.

Literature

Segmentation

The concept of market segmentation was introduced by Smith (1956) as an alternative to product differentiation. He argued that product differentiation is based on the efforts to converge demand by advertising and promotion, whereas market segmentation relies on accepting divergent demand and concentrating on promoting a firm's products to one or more market segments: "Market segmentation consists of viewing a heterogeneous market (one characterized by divergent demand) as a number of smaller homogenous markets in response to different product preferences among important market segments. It is attributable to the desires of consumers or users for more precise satisfaction of their varying wants." (Smith, 1956, p. 6). Smith calls for attention to "smaller or *fringe* market segments" (p. 7, emphasis original) that contemporary marketing vocabulary refers to as *niche* market (Dolnicar et al., 2012; Hunt & Arnett, 2004).

Haley (1968) stated that segmentation should be done using variables that describe the benefits that consumer seeks from the products. He claimed that this kind of segmentation would serve best as a predictor of purchase behaviour. A more recent definition of market segmentation "refers to such things as the use of particular statistical techniques for identifying groups of potential customers who have different needs, wants, tastes, and preferences" (Hunt & Arnett, 2004, p. 8). Hunt and Arnett (2004) continue that a segmentation strategy relies on three assumptions: (1) markets are heterogenous and can be divided into smaller homogenous subgroups called segments; (2) market offerings are planned to meet the needs, wants, tastes and

preferences of these segments; and (3) targeting selected segments might lead to competitive advantage. Kotler, Bowen and Makens (2010, pp. 209–210) characterise useful segmentation with measurability, accessibility, substantiality and actionability, meaning that the purchasing power of each segment is measurable; segments can be assessed and served; they are big and productive enough; and it should be possible to define an action plan to reach and serve the chosen segments with reasonable costs. A successful market segmentation can lead to loyal customers whose wants and needs are better fulfilled with a more suitable offering (Hunt & Arnett, 2004); opportunities for price discrimination (that is, having different prices for different customer categories) and profit maximisation (Hunt & Arnett, 2004); concentrating resources on the most profitable and useful customers (Hunt & Arnett, 2004); and developing a targeted marketing mix for the selected segments, which "increases the chances of marketing success" (Dolnicar et al., 2012, p. 41).

Firat and Schultz (1997) claimed that one cannot segment postmodern consumers since their focus is in the moment, their behaviour is not stable, consumption is hedonic instead of utilitarian, and in consumption there are different preferences present simultaneously (see also Cova, 1997). Cova (1997) stressed that postmodern consumption is based on consumer tribes (Maffesoli, 1997/1988), not on societal classes or consumer segments. Thus, the image produced by and through consumption is more important than the use value of products or services. Firat and Schultz (1997) concluded that feelings should be included in the segmentation, not only socio-demographics, values and attitudes. Similarly, Oh, Fiore and Jeoung (2007) stressed that values do not influence all the functions of an individual, but instead, many decisions are based on momentary situational factors like mood. Furthermore, Ehrnrooth and Gronroos (2013) argued that "seemingly unpredictable, erratic, hybrid behaviour of postmodern consumers indicates that the conventional methods of segmentation and targeting are dated" (p. 1817), and they emphasised the need for more fine-tuned segmentation and targeting of smaller segments. Dibb (2001) described how there is an emergence of more individual-oriented marketing, 'one-to-one-marketing' or a segment of one, which inevitably requires sophisticated software tools for both identification and distribution of marketing messages. All in all, the variables used for segmentation have changed from socio-demographics to more complicated needs assessments and consumer behaviour predictions (Dibb, 2001). However, segmentation remains an important tool for classifying potential customers: Tkaczynski and Rundle-Thiele (2011) found up to

120 event audience segmentation studies from the years 1993–2010, which indicates that segmentation is considered an essential means for the development of measures to increase audiences (Clopton, Stoddard, & Dave, 2006; Kolhede & Gomez-Arias, 2017) and their commitment (Kolhede & Gomez-Arias, 2017).

Segmentation methods

Segmentation methods can be divided into two broad categories. The first one is called conceptual (Dolnicar, 2002), a priori (Dolnicar, 2002, 2004; Myers & Tauber, 1977) or common sense segmentation (Dolnicar, 2004). In this approach, the segments are predefined using typically "one variable at a time" (Myers & Tauber, 1977, p. 68); for instance, residents vs. non-residents, or first-time visitors vs. regular attendees. The second approach is called data driven (Dolnicar, 2002), post hoc (Dolnicar, 2002), a posteriori (Dolnicar, 2004) or construction of taxonomies (Dolnicar, 2002). It is empirical and based on a set of research participants' responses that are grouped using typically quantitative methods.

Dolnicar and Grün (2008) noted that nearly 60% of travel research segmentation is done first by summarising answers with factor analysis and then conducting cluster analysis (e.g. Formica & Uysal, 1998; Li et al., 2009). Factor analysis is principally done to compress a large number of variables (Dolnicar, 2003) but also for tackling multicollinearity, that is the correlation between segmentation variables (Ketchen & Shook, 1996). However, in factor analysis, those questions that have weak loadings are dropped out and the explained variance is often quite low, meaning that much information is lost (Dolnicar, 2003). This conclusion implies (Ketchen & Shook, 1996; Sheppard, 1996, as cited in Dolnicar and Grün, 2008) that those questions that would distinguish segments from each other might be eliminated (see also Dolnicar et al., 2012). Dolnicar and Grün (2008) compared the results of factor-cluster analysis and segmentation based on raw data and concluded that the best results are gained using raw data (see also Dolnicar, 2002).

Before using any segmentation technique, participants' response tendencies should be considered if Likert scale or semantic differential are used. Some respondents use only the lowest values of the given scale while others might choose only the highest values. Ketchen and Shook (1996) state that standardisation is not necessary and might lead to distortion. On the contrary, Pesonen and Honkanen (2014) argue that response styles might lead to segments where there are always (among other segments) the

following two segments: ‘passive’ respondents and ‘want-it-all’ respondents. Here, ‘passive’ respondents refer to people who use the lowest values of the scale, and ‘want-it-all’ refers to the ones who use only the highest values. The influence of response styles should be checked from the mean values of segmentation variables: if any of the resulting segments contain all the highest or lowest mean values of the segmentation variables, data standardisation should be considered (Pesonen & Honkanen, 2014).

Segmentation of festival audiences

Tkaczynski and Rundle-Thiele (2011; see also Tkaczynski & Toh, 2014) reviewed event and festival audience segmentation studies to summarise the data collection and analysis methods, as well as segmentation variables. In Table 1 we summarise the segmentation studies of music-related festivals that were included in Tkaczynski’s and Rundle-Thiele’s study, adjusted by our partly different interpretation of segmentation variables and methods, together with several more recent studies. The audience segmentation techniques for music festivals have varied from factor-cluster analysis (Bowen & Daniels, 2005; Formica & Uysal, 1998; Kinnunen & Haahti, 2015; Kruger & Saayman, 2016, 2017) and cluster analysis (McMorland & Mactaggart, 2007; Pérez-Gálvez, Lopez-Guzman, Gomez-Casero, & Fruet Cardozo, 2017; Saayman & Saayman, 2016), to a priori segmentation based on the answers to one selected question (Formica & Uysal, 1995; Oakes, 2010; Thrane, 2002; Vinnicombe & Sou, 2017), and a mixed (Prentice & Andersen, 2003) or qualitative (Mackellar, 2009) approach (see Table 1 for details). The most used perspective for the segmentation of music festival attendees is motivation. Other segmentation variables are demographics (Saayman & Saayman, 2016), origin (locals vs. non-locals; Formica & Uysal, 1995; Vinnicombe & Sou, 2017; see also Kottemann et al. 2018), musical preferences (Pérez-Gálvez et al., 2017), behaviour or behavioural intentions (Kruger & Saayman, 2017; Mackellar, 2009), consumption (Oakes, 2010; Thrane, 2002), activities (Prentice & Andersen, 2003) and perceptions on event attributes (like sponsors, recycling and services; Kinnunen & Haahti, 2015). The sample sizes of music festival segmentation studies are predominantly very small, in many cases even too small for the segmentation variables that were used (Mooi & Sarstedt, 2011).

** TABLE 1 HERE **

Furthermore, one could speculate that all the existing data driven segmentations based on Likert scale questions suffer partially from the uncorrected response bias referred to by Pesonen and Honkanen (2014); this means that, when studying the mean values of the resulting segments of these studies, there are 'want-it-all' and 'passive' segments containing the highest and lowest mean values, respectively. Interestingly, all the studies using cluster analysis based on Likert scale variables include the 'want-it-all' segment: Formica's and Uysal's (1998) *enthusiasts*; Bowen's and Daniels' (2005) *love it all*; Kruger's and Saayman's (2016) *enthusiasts*; Kruger's and Saayman's (2017) *high bassists*; Kinnunen's and Haahti's (2015) *activists*; McMorland's and Mactaggart's *family and inspiration seekers*; and Pérez-Gálvez's et al's (2017) *guitar-lovers*. Some of the studies include also the 'passive' segment: Formica's and Uysal's (1998) *moderates*; Bowen's and Daniels' (2005) *just being social*; Kruger's and Saayman's (2016) *electros*; Kruger's and Saayman's *low balancers*; and Kinnunen's and Haahti's (2015) *omnivores* (see Table 1 for all the segments).

Methodology

Research data

The first national Festival Barometer was conducted in October 2014 by the consortium of the academia and practitioners of the Finnish rhythm music festival field: the Sibelius Academy of Uniarts Helsinki, the Turku School of Economics Pori Unit, the Multidimensional Tourism Institute of the University of Lapland, the Seinäjoki University of Applied Sciences, the Association of Finnish Rock Festivals and ten large rhythm music festivals. From the beginning, the objective was to repeat the survey biannually to enable longitudinal research on Finnish rhythm music festivalgoers. Thus, in September 2016 the survey was repeated in ten festivals by the Multidimensional Tourism Institute of the University of Lapland, the Sibelius Academy of Uniarts Helsinki, and the festivals in question. The aim of the barometer is to define the overall profile of the Finnish rhythm music audience, and to follow the change of music and festival preferences over the years.

Table 2 provides an overview of the festivals included in the study. The organising festivals distributed the survey link using email lists and social media (Facebook, Twitter, Instagram). The survey was a voluntary response sample (Moore, 2010) where anyone interested in the research survey could participate. In 2014, the

target audience was the festivalgoers of the following ten large rhythm music festivals: Blockfest (Tampere), Flow Festival (Helsinki), Ilosaarirock (Joensuu), Jurassic Rock (Mikkeli), Kuopio RockCock (Kuopio), Provinssi (Seinäjoki), Qstock (Oulu), Ruisrock (Turku), Tuska Open Air Metal Festival (Helsinki) and Weekend Festival (Helsinki). The survey got 4,475 answers. In 2016, Blockfest dropped out and Pori Jazz (Pori) joined the study. This time the survey resulted in 3,322 new answers. The segmentation was done using all the 7,797 answers from the years 2014 and 2016.

** TABLE 2 HERE **

Table 3 includes socio-demographics of the participants. Two thirds of the respondents were female. However, it is noted that in the 2014 survey the answer options were 'Female' or 'Male', while in the 2016 survey there were also 'Other' (0.1%) and 'Don't want to answer' (0.3%) options. The mean age was 29.2 years and median 27 years. The youngest respondent was 12 years old and the oldest 73. One third of the respondents was blue-collar workers and another third was students, meaning that their acquisition of educational capital is ongoing. The large number of students are typical for rock festivals (see for example, Ilosaarirock in Mikkonen, Pasanen & Taskinen, 2008, p. 57). Up to 90% of research participants lived in a city or town, most commonly in university cities. Since the respondents were predominantly young adults and many of them students, their income level was low: 36% earned less than 10,000 € per year. The respondents were asked to define their own social class between one (lowest value) and ten (highest value). Even though the average income level was low, the mean value of social class was 5.5, and the median 6 indicating a tendency to consider oneself as a member of the middle class (see Table 3 for details).

** TABLE 3 HERE **

Paying attention to the participants' personal values (see for example, Firat & Schultz, 1997; Oh et al., 2007), the data were collected using the value orientation of Shalom H. Schwartz (2007, 2009). The survey question concerning values was defined using Short Schwartz's Value Survey constructed by Lindeman and Verkasalo (2005), where respondents are given a list of attributes describing each value (Table 4) and asked how important each value is for them. The Schwartz's Value Survey scale

comprises: - (opposed to my values), 0 (not important), +, ++ (important), +++, ++++ (very important) and +++++ (of supreme importance), (adapted from Lindeman & Verkasalo, 2005, p. 174).

** TABLE 4 HERE **

Clustering of respondents

The audience segmentation was done using a posteriori approach, because a priori segmentation has less potential. For instance, a priori segmentation based on socio-demographics is considered poor value in practice (Haley, 1968; see also Ehrnrooth & Gronroos, 2013).

The selection of segmentation variables was inductive (Ketchen & Shook, 1996) due to the exploratory nature of the segmentation. The segmentation variables include musical preferences. They were studied in the context of music festivals also by Pérez-Gálvez et al. (2017) but in one festival only and based on Spanish guitar music genres. In our case, the scope includes 11 rhythm music festivals and the selection of musical tastes is wider. The responses to the following question were weighted as equally important, thus allowing the use of traditional clustering techniques (Dolnicar et al. 2012):

- How interesting do you consider the following music styles?

(1 = not at all interesting … 7 = very interesting)

  - Pop
  - Rock
  - Heavy metal
  - Punk
  - Indie, alternative
  - Rhythm & blues, soul, funk
  - Jazz
  - Blues
  - Schlager
  - Electronic dance music
  - Other electronic music
  - Rap, hip-hop

The number of segmentation variables, even though quite high, is in line with the number of observations since the "number of observations should be at least 2^m, where m is the number of clustering variables" (Mooi & Sarstedt, 2011, p. 263). Additionally, Formann (1984) states (as cited in Dolnicar, 2003) that preferably $5*2^m$ respondents should be used. In our case, the number of variables is 12 and thus the number of observations should be at a minimum 2^{12} = 4,096, when the actual number of observations is 7,797. The preferable sample size, 20,480 ($5*2^{12}$) is not, however, reached.

Multicollinearity is not an issue with the variables. The biggest correlation exists between the musical genres of electronic dance music and other electronic music (Pearson correlation of 0.862) and the next biggest correlation is between blues and jazz (0.775). All the other correlations are less than 0.6. In addition, multicollinearity was checked by variance inflation factor (VIF) using regression analysis where Y_i is the simulated variable and independent variables X_{ij} are the segmentation variables. All VIF-values are less than ten. The highest VIF-values are electronic dance music (4.56), other electronic music (4.32) and jazz (3.04). Thus, no principal components analysis was conducted to reduce the multicollinearity since Dolnicar (Dolnicar et al., 2012; Dolnicar & Grün, 2008; see also Ketchen & Shook, 1996) strongly opposes doing it. Furthermore, the standardisation of the Likert scale responses was not needed either since 'want-it-all' or 'passive' segments (Pesonen & Honkanen, 2014) did not appear in the results: there were no segments that had all the highest or the lowest mean values of the segmentation variables (see Table 7).

Segmentation was done using cluster analysis. "The basic idea of cluster analysis is to divide a number of cases (usually respondents) into subgroups according to a pre-specified criterion (for example, minimal variance within each resulting cluster) which is assumed to reflect the similarity of individuals within the subgroups and the dissimilarity between them" (Dolnicar, 2002, p. 4). The clustering method was k-means, since it is the de facto standard clustering algorithm (Dolnicar, 2002), and since the data set is very large and thus unsuitable for hierarchical clustering (Dolnicar, 2003; Mooi & Sarstedt, 2011).

K-means clustering requires a predefined number of segments. Haley (1968) estimated that the likely number of segments is between three and seven; a review of tourist segmentation studies revealed that a typical segmentation contains three or four segments (Dolnicar, 2002); and in a review of business administration segmentation

studies, two thirds ended up as three to five segments (Dolnicar, 2003). In the present study, the number of segments was approximated using first hierarchical cluster analysis and then tests with k-means cluster analysis on a different number of segments. In the first phase, a scree plot was produced using the agglomeration coefficients of hierarchical clustering, since it might show a clear elbow at the appropriate number of segments (Ketchen & Shook, 1996; Mooi & Sarstedt, 2011). Due to the large data set, the scree plot was heavily zoomed and restricted to the solutions of one to ten segments. In our case, there were elbows at three, six and seven segments. Consequently, three to seven segments were tested using k-means clustering. The seven-segment solution proved to be difficult to interpret since two segments resembled each other so much. The six-, five- and four-segment solutions were tested for the whole data set and by splitting the data set into two subgroups, the answers of 2014 and 2016 respectively. The result was not consistent among the data sets. Thus, the final number of segments was reduced to three since it was interpretable and consistent in the total data set, as well as in the 2014 and 2016 subsets. The respondents divided evenly into the clusters, which were clearly distinguishable. The resulted segments were named as the hedonistic dance crowd, loyal heavy tribe and highly-educated omnivores (see Table 5). The ANOVA results show that all 12 items make a significant ($p < 0.05$) contribution to the clustering process.

** TABLE 5 HERE **

The factors that differentiated most clearly the segments were heavy metal, electronic dance music and jazz. Table 6 represents the F values of each clustering variable. The higher the F value, the more important the role of the variable in segmentation.

** TABLE 6 HERE **

Table 7 represents the mean values of segmentation variables by defined segments, both for the whole data set and by subsets of 2014 and 2016. For instance, among the members of the loyal heavy tribe, the preferred music is rock and heavy metal. The characteristics of each segment are discussed next, reflecting the segments

on the respondents' socio-demographics and perceptions on future attendance that were asked in the surveys as well.

** TABLE 7 HERE **

Findings

The clustering resulted in the following segments: the loyal heavy tribe, hedonistic dance crowd and highly-educated omnivores. There are statistically significant differences in age between clusters (ANOVA $F = 566.2$, $p < 0.001$). The loyal heavy tribe (mean age 31.9 years, median 31 years) and highly-educated omnivores (mean 30.8, median 28) have the oldest members while the hedonistic dance crowd (mean 23.9, median 22) is the youngest of the segments.

Loyal heavy tribe

The favourite music of the loyal heavy tribe is heavy metal and rock: for them, the median value is seven and is the highest rating. Since heavy metal and rock music are most important for the members of the segment, the heavy tribe is very loyal: their attendance at festivals over the next ten years is more probable than for other segments (see Figure 1). Furthermore, the segment is the oldest and includes more men than any other segment (46%; $\chi2=313.3$, $p < 0.001$), and their annual income is in the same range as highly-educated omnivores (median is less than 30,000 € per year), whereas the hedonistic dance crowd has the lowest income (median less than 10,000 € per year). Despite the income level, the loyal heavy tribe members' own perception of their social class is the lowest of all the segments: the median value is five in the scale from one to ten, whereas both other segments' members have a median value of six (Kruskal-Wallis: $\chi2 = 70.4$, $p < 0.001$). The most important personal values for the loyal heavy tribe are benevolence, hedonism and self-direction. There are statistically significant differences between segments in all the Schwartz's value orientations (Kruskal-Wallis tests $p < 0.001$).

** FIGURE 1 **

The loyal heavy tribe has not been discussed earlier in festival studies, even though the clustering reflects Cova's perceptions of consumer tribes (Cova, 1997). They resemble Peterson's (1992) univores due to the strong genre-specific music interest.

Hedonistic dance crowd

The members of the hedonistic dance crowd are the youngest of the segments. They are very interested in electronic dance music, pop and other electronic music, and quite interested in rap and hip-hop. The dance crowd detests blues, punk and heavy metal. Even though their income level is low (median below 10,000 € per year) they consider themselves middle-class, since the median value for the social class perception is six.

The most important values for members of the hedonistic dance crowd are benevolence and hedonism. The members of the segment are sure that they will attend festivals the following year (median value being the highest, seven), but not so sure about participation in ten years' time (see Figure 1).

Hedonists have been present in various studies (for example, Haley, 1968; Kinnunen & Haahti, 2015; Zarantonello & Schmitt, 2010) after Holbrook's and Hirschman's (1982) article about consumers' needs for fantasies, feelings and fun. The separation from everyday life and the possibility to enjoy oneself comprises the important elements of hedonistic festival attendance. The hedonistic dance crowd is one manifestation of this phenomenon, which Kruger and Saayman (2016) also indicate in their segmentation of electronic dance music festival attendees in South Africa.

Highly-educated omnivores

The age of the highly-educated omnivores is in the middle of the segments. They have the highest educational level and consequently, their income level is also the highest along with the loyal heavy tribe. They perceive themselves as middle-class as the median for the social class is six. Omnivores enjoy nearly all kinds of music and their favourites are rock, pop, rhythm & blues, soul, funk, indie and alternative music. Purhonen, Gronow and Rahkonen (2010) state that cultural omnivores in Finland are predominantly female and this applies to this segment as well, since the proportion of women is 70%, which is less than among the hedonistic dance crowd (76%), but more than the loyal heavy tribe (53%). The most important values are benevolence, hedonism, universalism and self-direction. From these values, universalism is typical for highly educated people (Puohiniemi, 2002).

Highly-educated omnivores have been a widely recognised cultural consumption group (for example, Eijck & Majonara, 2013; Peterson & Kern, 1996). Peterson and Kern (1996) pointed out that the term cultural elite was associated with cultural consumers appreciating fine arts and who tended to undervalue mass or popular culture, and thus the term 'cultural snobbism' was connected with this phenomenon. They further proved that cultural snobbism is giving way to omnivorousness and argued that "before the third quarter of the twentieth century youngsters were expected to like pop music and pop culture generally but to move on to more "serious" fare as they matured" (Peterson & Kern, 1996, p. 905; see also Alasuutari, 2009; Jæger & Katz-Gerro, 2008). In recent studies it is stated that today's retirees are holding onto the musical taste of their youth (Djakouane & Négrier, 2016; Liikkanen, 2009).

Alasuutari (2009) evaluated the perceptions of the Finnish cultural elite by using the leisure time research of 2002 by Statistics Finland. He defined 'high culture' as art exhibitions, opera, concerts and following arts in general. He argued that educational level does not have as high influence on orientation towards high culture as previously, and that the change started after the mid-1990s. Instead, education increased tolerance towards different kinds of music, except schlager and dance music, which are not favourites of the highly educated (Alasuutari, 2009). Warde, Wright and Gayo-Cal (2007) state that omnivorousness is connected with educational level and tolerance, but that the term 'cultural elite' should *not* be linked to omnivorousness which is more a feature of the well-educated middle class. Purhonen et al. (2010) agree with them, arguing that over 40% of Finns belong to the musical omnivores and that omnivorousness is the highest among well-educated middle-aged and older women.

Discussion and conclusion

Festival Barometer is a longitudinal survey focused on the audiences of the largest Finnish rhythm music festivals. The number of visits at these festivals was nearly 0.4 million in 2014 and exceeded half a million in 2016. The aim of the barometer is to define the overall profile of the Finnish rhythm music audience and to follow the change of music and festival preferences over the years. Therefore, the barometer contributes to the requirement for measuring how festivals could meet customers' needs better and increase the number of loyal attendees in a competitive project-based industry (Luonila, 2016b). The aim of the present study is to produce a deeper knowledge about the Finnish rhythm music festival audiences, which gives new insights for both academia

and practitioners. Using altogether 7,797 answers from the years 2014 and 2016, the audience was segmented into three categories using music preferences: the loyal heavy tribe, hedonistic dance crowd and highly-educated omnivores.

The members of omnivores and heavy tribe represent the oldest attendees whereas the hedonistic dance crowd embodies the youngest audience. From the organiser's point of view, the loyal heavy tribe is the most valuable in terms of loyalty, since they are the most confident about their participation in festivals over the next ten years. They come back year after year. They have good earnings and can pay more than others for tickets, food, alcohol, travel and accommodation. The young dance crowd is the segment whose consumption habits will change most in the future. Now they just want to have fun and hedonistic experiences. They will probably move towards other segments as they get older and more educated, since hedonism typically decreases as person gets older (Schwartz, 2006) and higher education tends to lead towards omnivorousness (Alasuutari, 2009; Purhonen et al., 2010; Warde et al., 2007).

As Schwartz's value orientation is considered, benevolence and hedonism deserve more attention. Benevolence is the most important value for all the segments, because it is the most important value for all Finns (Puohiniemi, 2006). Furthermore, hedonism is quite high in all the segments as well since it is valued by young people (Schwartz, 2006) even though its importance has started to grow among the elderly people (Puohiniemi, 2006). Our sample contains predominantly young adults, which indicates that hedonism should be high among their values.

It is noteworthy that rock music is liked by all the segments, even though there are some differences in scaling (see Table 7). Thus, there are signs of 'boundary-effacement phenomenon' as Holbrook, Weiss and Habich (2002) name it, where certain 'universal culture', in this case rock music, is absorbed. The overview of the current emphasis of artistic contents in the largest Finnish rhythm music festivals exemplify that the cultural boundaries are blurred in the festival context (see also Eijck & Majonara, 2013). Even though six of our case festivals represent so-called rock festivals (that is, either the term 'rock' is included in the festival name or the line-up is clearly focused towards heavy metal or rock music), a closer look reveals the manifoldness of contents. Only one case festival (Tuska Open Air Metal Festival) focuses purely on heavy metal and rock music, one on electronic dance music (Weekend Festival) and one on hip-hop (Blockfest), whereas eight other festivals (including Pori Jazz and Flow) might be considered as platforms for omnivorousness. This unveils an interesting viewpoint in

festival management as our findings concerning the loyal heavy tribe are examined. It seems that most of Finnish rhythm music festivals maintain the illusion of a ‘rock festival’ by artistic decisions that include only some headliners from the rock genre among the other representatives from a variety of other genres like electronic dance music. Strategically this appears as seeking the loyalty of the members of the heavy tribe with the aim to strengthen the vitality of the festival. At the same time, the objective seems to be to reach the members of the hedonistic dance crowd by offering content that intrigues them. However, in the light of our findings, the managers should acknowledge the double-edged sword in the line-up design, because both the heavy tribe and the hedonistic dance crowd abhor other musical genres apart from their own.

The stability of the segment formation was ensured by splitting the sample into two and analysing them separately (Dolnicar, 2003; Ketchen & Shook, 1996). The subsamples indicated the consistency of the findings.

Limitations of the study lie in the bias towards female respondents, which is typical in web surveys both in Finland (Cantell, 2003; Silén & Ronkainen, 2013) and in other Western countries (Eaker et al., 1998; Smith, 2008). When comparing the respondents with the other published audience surveys concerning Finnish rock festivals, the respondents of Festival Barometer are older. For instance, in Ilosaarirock the mean age was under 25 years in 2007 (Mikkonen et al., 2008, p. 43), and 22 years in Provinssirock in 2012 (Tuuri et al., 2012, p. 16), whereas our mean age was 29.2 years. Interestingly, Négrier et al. found out that the average age of a large French rock festival increased by five years between 2004 and 2014 (Négrier et al., 2015, p. 9), indicating that the audience of rock festivals might be aging. On the other hand, it is noted that Festival Barometer included also a jazz festival, and the jazz festival audience is much older than in rock festivals (Oakes, 2010; Thrane, 2002). However, since also electronic dance music festivals were a part of Festival Barometer and as their audience is very young, it is concluded that the respondents of Festival Barometer are a little older on average than in the festivals studied. Further limitation is caused by the k-means clustering since it tends to neglect niche segments because it produces segments of equal size (Dolnicar et al., 2012). If the target is to identify niche segments, other techniques than k-means clustering should be used (see biclustering suggested by Dolnicar et al., 2012).

It is noted that music preferences might not necessarily indicate the respondents’ actual taste but rather the referential group which best reflects the festivalgoer’s own

identity (Purhonen et al., 2014). Additionally, the meaning of music is highest in the youngest age category. For instance, there is a highly significant correlation between the year of birth and actively seeking new interesting music (Pearson correlation 0.231, p = 0.0000). This will be replaced with other priorities as the person gets older (Kinnunen et al., 2015; Purhonen et al., 2014), which indicates that the music festival organisers are forced to constantly attract a new, younger audience to tackle the possible challenges regarding future attendance.

From the practitioners' viewpoint, it should be noted that even though conventionally customer segmentation is used for marketing in appropriate channels to reach the desired segments and improving those services and products that are valued by them, a more sophisticated way would be engaging the chosen segments in co-creation of festival experiences. Prahalad and Ramaswamy (2004) urge firms to start co-creating efforts with their customers. Since facilitated co-creation practices are still emerging in festival management, at least in the Finnish festival field, the first step could be establishing pilot groups with members of the selected segments by including attendees as partners in the design process of festivals. In the present work, the acknowledgement of value orientations (Schwartz, 2007, 2009) and insights of festival attendees widen the scope from the music preferences towards the production process, and may assist the design of the co-creation practices, creating value in the productions. Overall, this kind of profound knowledge drawing on the attendees' value orientation provides a competitive edge for festivals in the festival industry in particular, and leisure industry in general, and helps in acquiring sponsors that are interested in the specific consumer segments (see also Luonila, 2016a).

Methodologically, the influence of response tendency was reviewed in earlier music festival segmentation studies and it was found out that there are signs of its impact on segmentation when Likert scale variables and cluster analysis are used. However, in the present study, response tendency seemed not to have an impact on the clustering result. Response tendency is often linked to different cultures of respondents. In this study, only 1% were foreigners. It is also possible that music festival participants are quite homogenous compared to the general population and they are ready to tell more honestly about their music preferences compared to, for example, political attitudes.

In the theoretical contributions, clustering Festival Barometer participants offers insights into the Finnish rhythm music festival scene. Firstly, it is a multiple case study

(Yin, 2014) consisting of 11 rhythm music festivals, whereas other event segmentations typically include the attendees of one festival only (Tkaczynski & Rundle-Thiele, 2011). Secondly, the analysis of segments offers new insights, since the background information about participants included value questions. This said, the Festival Barometer offers opportunities for comparative studies in the future since value orientations are different in different cultures (Schwartz, 2007).

It would be beneficial to enlarge the present research setting to other musical genres and to widen the time span in data gathering. For academia, the long-term research might deepen the understanding of omnivorousness and its impact on festival participation and experience of the music. For practitioners, this kind of approach might provide new and strategically important knowledge about future attendance in music events, such as rhythm music festivals.

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Table 1. Music festival segmentation studies.

Segmented festival audiences	Segmentation methods	Segmentation variables	Sample size	Data collection method	Resulting segments
Participants of an Italian musical-cultural festival (Formica & Uysal, 1998)	A posteriori: Principal components analysis and cluster analysis	Motivation (Likert scale)	278	Questionnaire	Enthusiasts and moderates
Participants of a music festival in the US (Bowen & Daniels, 2005)	A posteriori: Principal components analysis and cluster analysis	Motivation (Likert scale)	374	Interviews (questionnaire)	Just being social; enrichment over music; the music matters; love it all
Participants of a South African EDM festival (Kruger & Saayman, 2016)	A posteriori: Principal components analysis and cluster analysis	Motivation (Likert scale)	263	Questionnaire	Enthusiasts, energisers and electros
Participants of a South African jazz festival (Kruger & Saayman, 2017)	A posteriori: Principal components analysis and cluster analysis	Post-festival behavioural intentions (Likert scale)	311	Questionnaire	High bassists, moderate brasses and low balancers
Participants of 17 Finnish cultural festivals of different genres, including music festivals (Kinnunen & Haahti, 2015)	A posteriori: Principal components analysis and cluster analysis	Experiential factors (Likert scale)	1,434	Questionnaire	Hedonists, activists, universalists and omnivores
Members of Scottish music and culture associations (McMorland & Mactaggart, 2007)	A posteriori: Cluster analysis	Motivation (Likert scale)	110	Questionnaire	Modernists; family and inspiration seekers; social pleasure seekers; thrill seekers
Participants of a Spanish guitar festival (Pérez-Gálvez et al., 2017)	A posteriori: Cluster analysis	Musical preferences (Likert scale)	612	Questionnaire	Rock audience, classical audience and guitar-lovers

Participants of a South African classical music festival (Saayman & Saayman, 2016)	A posteriori: Cluster analysis	Demographic characteristics	497	Questionnaire	Modern enthusiasts, vintage females and vintage males
Participants of a music and fan festival in Australia (Mackellar, 2009)	A posteriori: Categorisation (that is, qualitative)	Behaviour	Approx. 30	Participant observation, conversations, photos, video	Social, dabbler, fan, fanatic
Participants of Scottish festivals, including a military tattoo festival (Prentice & Andersen, 2003)	A posteriori: Forming a composite multiplicative indicator from the consumption style answers and cluster analysis	Intentions (motivation) Activities	403	Interviews with closed questions	Serious consumers of international culture; British drama-going socialisers; Scottish performing arts attendees; Scottish experience tourists; gallerygoers; incidental festivalgoers; accidental festivalgoers
Participants of an Italian jazz festival (Formica & Uysal, 1995)	A priori	Locals vs. non-locals	313	Questionnaire	Out-of-region visitors and Umbria region visitors
Participants of a classical music festival in Macao (Vinnicombe & Sou, 2017)	A priori	Locals vs. non-locals	410	Questionnaire	Residents and visitors
Participants of a British jazz festival (Oakes, 2010)	A priori	CD purchase patterns	244	Questionnaire	Modern and hybrid jazz fans
Participants of a Norwegian jazz festival (Thrane, 2002)	A priori	Personal expenditure	1,061	Interview and questionnaire	Big and low spenders

Table 2. Case festivals (*n* = 11).

Festival	Location	Established	Main musical genre	Organisation	Number of visits (year)
Blockfest	Tampere	2008	Hip-hop	For profit	34,000 (2014)
Flow Festival	Helsinki	2004	Hip-hop / EDM / Urban	For profit	80,000 (2016)
Ilosaarirock	Joensuu	1971	Pop / Rock	Not-for-profit	54,500 (2016)
Jurassic Rock	Mikkeli	2007	Pop / Rock	For profit	15,000 (2016)
Kuopio RockCock	Kuopio	2003	Pop / Rock	For profit	18,000 (2016)
Pori Jazz	Pori	1966	Jazz / Blues	Not-for-profit	56,500 (2016)
Provinssi	Seinäjoki	1979	Pop / Rock	For profit	71,000 (2016)
Qstock	Oulu	2003	Pop / Rock	For profit	32,000 (2016)
Ruisrock	Turku	1970	Pop / Rock	For profit	100,000 (2016)
Tuska Open Air Metal Festival	Helsinki	1998	Heavy metal / Rock	For profit	28,000 (2016)
Weekend Festival	Helsinki	2012	Hip-hop / EDM	For profit	70,000 (2016)

Table 3. Festival Barometer participants (*n* = 7,797).

Variable	Classification	%	*n*
Sex[a]	Male	33	2,601
	Female	66	5,163
	Other	0	9
	Don't want to answer	0	24
Domicile	Metropolitan area	27	2,075
	Other city / town	63	4,900
	Other municipality	10	751
	Abroad	1	71
Education	Comprehensive school	11	886
	Vocational school or course	21	1,626
	General upper secondary school (senior high)	22	1,738
	Vocational upper secondary school (for example, technical college)	9	731
	Polytechnic / University of Applied Sciences	20	1,524
	University, Bachelor's degree	6	492
	University, Master's degree	10	800
Socio-economic group	Managerial position	2	133
	Upper level white-collar worker	9	720
	Lower level white-collar worker	10	792
	Blue-collar worker	34	2,618
	Entrepreneur / self-employed person	3	237
	Student	33	2,607
	Pensioner	1	48
	Housewife / husband	1	84
	Unemployed	6	456
	Other	1	102
Social class Mean: 5.5 Median: 6	1 = The lowest class	2	120
	2	3	261
	3	9	712
	4	12	945
	5	22	1,688
	6	20	1,567
	7	20	1,583
	8	10	795
	9	1	83
	10 = The highest class	1	43
Annual income	Less than 10,000 €	36	2,772
	10,000 – 19,999 €	16	1,272
	20,000 – 29,999 €	18	1,411
	30,000 – 39,999 €	16	1,259
	40,000 – 49,999 €	8	624
	50,000 € or more	6	459

Notes: [a] In 2014, the only options for sex were male and female.

Table 4. Attributes presented in Short Schwartz's Value Survey (Lindeman & Verkasalo, 2005).

Value	Attributes describing the value
Power	Authority, wealth, social power
Achievement	Ambitious, successful, capable, influential
Hedonism	Pleasure, enjoying life, self-indulgent
Stimulation	A varied life, an exciting life, daring
Self-direction	Creativity, freedom, choosing your own goals, curious, independent
Universalism	Broadminded, social justice, equality, world at peace, world of beauty, unity with nature, wisdom, protecting the environment
Benevolence	Helpful, honest, forgiving, responsible, loyal, true friendship, mature love
Tradition	Respect for tradition, humble, devout, accepting one's own role in life
Conformity	Obedient, self-discipline, politeness, honouring parents and elders
Security	Social order, family security, national security, cleanliness, reciprocation of favours

Table 5. Resulting segments.

Segments	*%*	*n*
Hedonistic dance crowd	29	2,256
Loyal heavy tribe	33	2,591
Highly-educated omnivores	38	2,950
Total	**100**	**7,797**

Table 6. F values per questions.

Question group	Question	F values	Sig.
How interesting do you consider the following music styles?	Heavy metal	3,832.592	0.000
	Electronic dance music	3,176.574	0.000
	Jazz	3,146.295	0.000
	R&B, soul, funk	2,716.629	0.000
	Rap, hip-hop	2,626.309	0.000
	Blues	2,362.458	0.000
	Other electronic music	2,335.355	0.000
	Punk	1,696.839	0.000
	Rock	1,519.591	0.000
	Pop	1,365.498	0.000
	Indie, alternative	1,205.437	0.000
	Schlager	290.719	0.000

Table 7. Mean values per total data set (*n* = 7,797), 2014 data set (*n* = 4,475) and 2016 data set (*n* = 3,322).

Question group	Question	Total data set			2014 data set			2016 data set		
		Hedonistic dance crowd	**Loyal heavy tribe**	**Highly-educated omnivores**	**Hedonistic dance crowd**	**Loyal heavy tribe**	**Highly-educated omnivores**	**Hedonistic dance crowd**	**Loyal heavy tribe**	**Highly-educated omnivores**
How interesting do you consider the following music styles?	Pop	**5.80**	3.85	**5.72**	**5.60**	3.74	**5.63**	**6.07**	4.20	**5.74**
	Rock	4.31	**6.26**	**6.07**	4.38	**6.23**	**6.24**	4.31	**6.31**	**5.88**
	Heavy metal	1.90	**6.21**	3.78	1.91	**6.30**	4.27	1.86	**5.86**	3.35
	Punk	1.87	4.45	4.04	1.90	4.52	4.50	1.90	4.22	3.61
	Indie, alternative	3.06	3.68	**5.32**	3.14	3.67	**5.62**	3.13	3.65	**5.00**
	R&B, soul, funk	4.10	2.51	**5.41**	4.19	2.44	**5.20**	4.16	2.72	**5.61**
	Jazz	2.01	2.11	4.59	2.12	2.10	4.33	2.00	2.12	4.95
	Blues	1.77	2.59	4.39	1.87	2.59	4.22	1.75	2.55	4.66
	Schlager	3.10	2.21	3.30	2.93	2.11	3.19	3.28	2.54	3.35
	Electronic dance music	**5.88**	2.14	4.37	**6.02**	2.09	4.67	**5.79**	2.19	4.01
	Other electronic music	**5.50**	2.27	4.41	**5.65**	2.20	4.71	**5.36**	2.31	4.10
	Rap, hip-hop	**5.30**	2.18	4.71	**5.16**	2.06	4.69	**5.50**	2.49	4.66

Notes: High mean values per segment in bold.

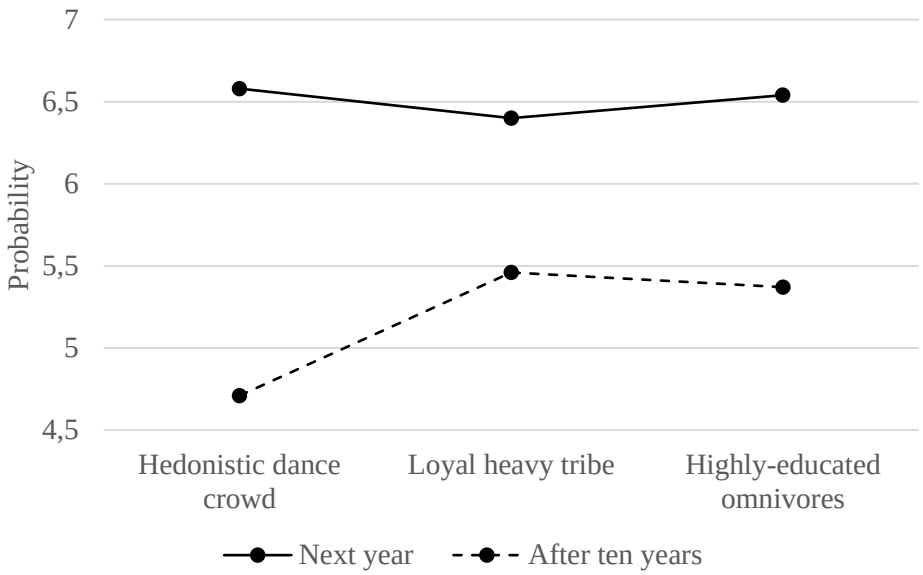

Figure 1. How probable is your participation in festivals (1 = Very unlikely … 7 = Very likely) next year (Kruskal-Wallis: $\chi 2 = 47.7$, $p < 0.001$) / in ten years (Kruskal-Wallis: $\chi 2 = 339.0$, $p < 0.001$)? Figure contains mean values per segment.