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Prof. Cândida Silva, Prof. Mónica Oliveira and Prof. Susana Silva

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Contents

Audience Segmentation and Communicating Towards a Music Festival – The NOS Primavera Sound

António Lopes de Almeida[1,2], Elvira Vieira[1,3] and Ana Pinto Borges[1]
[1]**ISAG – European Business School and Research Center in Business Sciences and Tourism (CICET-FCVC), Oporto, Portugal**
[2]**GOVCOPP – Research Unit, Universidade de Aveiro, Portugal**
[3]**IPVC- Polytechnic Institute of Viana do Castelo and UNIAG - Applied Management Research Unit, Portugal**
lopes.almeida@isag.pt
elvira.vieira@isag.pt
anaborges@isag.pt

Abstract: The purpose of this paper is to highlight the main communication channels to promote a music festival. Music festivals are one of the central drivers for the promotion of cultural tourism and are highly significant for local economies. Understanding the main marketing communication channels, and the most effective way to reach different segments of public, is an essential feature for festival management. To explore this theme, data were collected during the 2018 edition of the NOS Primavera Sound music festival, and then analysed through non-parametric tests. The methodology used was based on audience segmentation considering sociodemographic characteristics and participation engagement. Thus, this paper aims to contribute to this field of research identifying the diverse potential communication channels across different segments of music festival audiences, contemplating also their motivation and global satisfaction levels with the event.

Keywords: Music Festival Audience Segmentation, Marketing Communication, Music Festivals, NOS Primavera Sounds, Oporto

1. Introduction

Cultural tourism is one of the oldest forms of travel and one of the most significant and fastest growing components of the tourism phenomena (Krajnović and Gortan-Carlin, 2017). In the specific case of events' tourism, as a segment of cultural tourism, music events have assumed an important role as integrated tourism products at destinations. According to Carneiro et al (2011) music festivals are important generators of economic benefits in terms of income growth and job creation. Borges et al (2016) state that music festivals are highly popular events among youngsters, mostly during summer time and/or school breaks. Music festivals have risen in prominence in recent years, particularly among millennials, with the internet playing an important role on tickets' sales (Perez, 2016).

Portugal has been asserting in cultural activity with positive impacts on different dimensions of the economy, and the biggest symbol of the cultural boom is the festival season that marks the Portuguese summer. The NOS Primavera Sound is one of many examples of a music festival which takes place every year in Portugal. This music festival originated from the Primavera Sound music festival which has been taking place in Barcelona since 2001. Since 2012, Oporto was chosen for the festival's expansion strategy because of its many similarities with Barcelona, such as the proximity to the sea, the climate, the variety of offerings in gastronomy, sports activities, nightlife and shopping and it is also the second largest city of the country.

The main focus of this paper is to evaluate the central communication channels of the NOS Primavera Sound music festival. Exploring the most effective communication channels to increase awareness and engagement for the festival can support the festival organization with the definition of their marketing strategy.

This paper is organized as follows: first the literature review is presented, followed by the research questions formulation. After that, the data collection, the questionnaire design, the data analysis technique description and, finally the results' presentation. The paper ends with the conclusions and future research suggestions.

2. Literature review

Music festivals are now a prominent feature of society's cultural life, and in Portugal there are more than 280 music festivals every year, not to mention many other one-day community and local festivals. The opportunities

they provide for Portuguese economic development represent in 2019 about 18 billion euros in gross revenue, attracting 2.1 million participants (Aporfest, 2019).

This data shows the vitality and importance of this specific category of cultural events, justifying the growing interest and attention of academic research in this area. At this field the results of the research could provide means for further organizational development and better marketing planning of events, boosting public attraction, stimulating loyalty and increasing their competitiveness (Lee and Kyle 2014; Frost and Laing 2015; Vinnicombe and Sou, 2017). The music festival industry is seen as one of the greatest instigators for cultural tourism and a major contributor to regional economic activity in many countries (Blesic et al, 2013; Getz, 2008).

According to Wilson et al (2017), academic research in this area has been focusing on five predominant themes: interests, experience, location, impact, and festival management. In fact, a significant part of the research focuses on the economic and social impacts of festivals, both in terms of regional development and tourism (Queen, 2006; O'Sullivan et al, 2009; Getz et al, 2010; Litvin et al 2013; Organ et al, 2015; Vestrum, 2014). Additional studies focus on the profile of participants (Prentice and Anderson 2003; Song et al. 2014), while others specifically focus their motivations, levels of satisfaction and loyalty (Schofield and Thompson, 2007; Trindade et al, 2018; Teixeira et al, 2019).

In the field of motivations, attention has been focused on the analysis of the main motivational factors, as well as on the development of segmentation strategies of the participating public (Wilson et al, 2017). According to Lee and Kyle (2014), the perception of the nuclear motivational factors should be used to influence the design of festivals leading to higher levels of organizational efficiency and marketing communication and, consequently, higher levels of satisfaction of the participating audience (Crompton and McKay, 1997; Pulido-Fernández and Sánchez-Rivero, 2010; Yolal et al, 2012; Dolnicar, 2015). In turn, the level of satisfaction of festival participants is a key element in determining their future behaviour (participation). Monitoring and measuring the level of satisfaction thus becomes an important task in assessing intentions to recommend and return to the next edition of the festival (Kim et al, 2011).

Different strategies can be used in order to have a better understanding of the characteristics and motivations of the various segments of the public. Motivations are generally diverse and briefly depend on factors such as size and location of the festival, the genre of music, and the demographic characteristics of the participants (Li and Wood, 2016). For Saayman and Saayman (2016) the music industry has several categories of consumption, these being influenced by different socio-demographic and motivational factors. For Abreu-Novais and Arcodia (2013) the motivational dimensions of music festivals audience can be synthesized: in cultural activities, in socialization, in the opportunity to bring the family together, in the novelty of the event, in the relaxation, and in the enjoyment. Kruger and Saayman (2016) expand motivations to nine dimensions, adding to the six previous ones: music/artists/program, knowledge/training, and complementary experiences during the festival. Capture these motivations and the consequent intention to participate will be the effectiveness of marketing communication, so understanding the most effective ways of communicating and reaching the different target audiences of a festival seems to be a key theme.

Marketing communication has been identified in the literature as a key factor toward events' success (Getz, 2005; Masterman and Wood, 2005), and according to Turner (2017) this success can be identified in two complementary directions - the immediate response to the event in terms of audience volume; and the medium/long-term involvement of the audience with the event.

The communication marketing environment has been expanding and changing rapidly in all markets, and the events and music festival markets are no exception. Prakash and Sharma (2010) suggest that event marketing is facing massive challenges in this field, in order to set up awareness, create brand identity, win sponsors, attract the target audience to the festivals and create engagement. With a multicultural and fragmented audience, the emphasis is increasingly placed on the segmentation of communication (Beaudoin, 2009). This requires changes in the way marketing communication management has been working (Seric et al, 2014). The recent technological developments in this area, the diversity of channels and the growing need for communication guidance for a demanding customer, make it clear that only one tool/media is currently not enough to deliver the communication objectives described above (Kitchen et al, 2004; Kitchen and Schultz, 2009; Kliatchko, 2009; Seric et al, 2014). Therefore, Integrated Marketing Communication (IMC) has been identified as a bet that offers greater efficiency and communication sophistication allowing a prompt response to the latest changes in the

marketing communication panorama (Seric et al, 2014). According to Einwiller and Boenigk (2012), IMC has evolved from a client-centred concept to a concept that involves all stakeholders and all forms and means/channels of communication that an organization can use. IMC aims to achieve more complex communication needs and overcome the problems of audience fragmentation, by gaining trust and reputation across segments, providing competitive advantages, and improving the global performance of communication (Eagle and Kitchen, 2000; Einwiller and Boenigk, 2012; Schultz and Kitchen, 2004).

Despite this, some papers recognize a limited importance to marketing communication, compared with other factors that influence the decision of the participants in an event. In the case of Gitelson and Kerstetter (2000) work, it was concluded that previous experience is for most participants the main driving force in the decision-making/participation process. In addition, Getz and Fairley (2004) suggest that, while formal marketing communication works primarily towards creating awareness, it became clear that the predominant role in the success of an event is through word-of-mouth (WOM). The role of WOM is reinforced by Hede and Kellett (2011), the authors argue that although traditional marketing communication tools are still widely used, such as printed material (e.g. brochures) and mass media advertising (e.g. TV/radio), they have been losing their effectiveness with digital media. Thus, alongside WOM, Electronic word-of-mouth (E-WOM) and digital communication in general, such as online advertising, are becoming increasingly effective. In particular social media platforms such as Facebook, Youtube, Twitter, or Instagram are increasingly relevant digital communication channels. Right from the start, these channels are used in a pure marketing logic to better understand the past and current expectations and experiences of festival participants (Gyimóthy and Larson, 2015). From the marketing communication standpoint, these channels should be used to communicate not only before the purchase - raising awareness, attractiveness and encouraging participation; but also during and even after the festival - creating involvement and loyalty (Hudson and Hudson, 2013).

Identifying how traditional and digital media influence festival participants, will help organisers develop the most effective marketing strategies to take advantage of the capability of each of these channels to create attraction and involvement to festival participants. The following discussion is based on the importance and the need to understand the most effective forms of marketing communication and those that prove to be more adequate for the different segments of music festivals' audiences.

3. Research Questions

To evaluate the main communication channels of the NOS Primavera Sound music festival, the first step consisted in the segmentation of the festival audience using two criteria: their loyalty/engagement to the festival (based on the participation in the previous edition of the festival) and the appreciation of the type of music (based on the type of ticket purchased: a day or 2 or 3 days pass). This raised the first research question: Q_1. What is the audience segmentation of a music festival? After that, the intention was to verify if each segment is different in accordance to their sociodemographic characteristics. Another question emerged: Q_2. The segments of music festivals differ considering their sociodemographic characteristics? In addition to the sociodemographic characteristics, the motivations and satisfaction with the festival were evaluated, and thus the two following questions arose: Q_3. The segments of music festival differ considering their motivations to participate in the festival? Q_4. The segments of music festival differ considering their global satisfaction with the festival? As the focus of this research is to evaluate the main communication channels of the festival, other research question was considered: Q_5. Which communication channels are most promising in reaching (specific segments of) the music festival participants?

4. Methodology

The 2018 edition audience of the festival was analysed. In data collecting, it was used a convenience sampling process. The survey was conducted during the three days of the event (7, 8 and 9 July 2018). The respondents were approached during the event through direct and personal interview by student interviewers prepared for this purpose and the respondents' anonymity was guaranteed. It should be noted that, in order to avoid biases related to questionnaire structure and wording, was performed a pilot survey was performed to test the questionnaire.

The questionnaire was applied during the 3 days of the festival and 1.170 complete answers were obtained. This edition of the festival had an approximate audience of 100.000 visitors. The questionnaire was divided into several parts, and each one was intended to collect specific data: the sociodemographic characteristics of the

visitors, whether the visitor attended the festival in the previous edition, the motivations to assist, the type of ticket bought, the main channel of communication through which the participant obtained knowledge of the festival and the global satisfaction level with the event. To evaluate the audience motivations it was used a 5-point Likert-type scale ranging from 'nothing important' (1) to 'extremely important' (5). For the global satisfaction level with the event, the subjects were asked to rate their level of global satisfaction on a 5-point Likert-type scale ranging from 'not at all satisfied' (1) to ' very satisfied' (5).

Regarding the data analysis technique, firstly it was performed a segmentation of the festival's audience considering two criteria: the loyalty/engagement, and the participation intensity. Secondly, the differences between the segments were tested, considering sociodemographic characteristics, motivations, communication channels and global satisfaction factors, through the application of the non-parametric Chi-Square test.

5. Results

5.1 Sample description and segmentation

A convenience sample produced 1170 useable questionnaires. As Table 1 shows, there was a predominance of the female gender (60,2%, compared to 39,8% of male). The festival attracts a young group, with an average age of 28,07 years old. This result could explain why 80,0% were single. It was also found that the festival attracts a highly educated audience, as 62% had a master or a PhD degree. Considering the professional activity, the sample majority was constituted by active professionals (paid employment or self-employed). Finally, 77% of the respondents were Portuguese and 23% foreigner. Admitting the possibility of sample extrapolation to a total of 100.000 participants (95% confidence interval), and admitting the festival was the main reason for the visit, it could be concluded that this event brought to Oporto a minimum number of 21.850 foreign visitors.

Table 1: Audience sociodemographic characteristics

Variable	Description	Min.	Max.	Mean	Std. dev
Gender	1 – female, 0 – male.	0	1	0,60	0,49
Age	Continuous variable.	14	71	28,07	10,52
Marital status	1 – single, 2 – married, 3 – divorced, 4 – widow.	1	4	1,25	0,53
Educational qualifications	1 – elementary studies, 2 – secondary studies, 3 – Degree, 4 – master's/PhD degree.	1	4	2,74	0,78
Work position	1 – employed, 2 - self-employed, 3 – unemployed, 4 – retired, 5 – housekeeping activities, 6 – student.	1	6	3,43	2,11
Nationality	1 – Portuguese, 0 – foreigner.	0	1	0,77	0,42

In scope of audience segmentation it was contemplated the loyalty/engagement to the festival (whether the visitor was present or not in the previous edition) and the commitment to the festival edition, assessed by the participating intensity (based on the type of ticket purchased: daily or for 2 and 3 days). As presented in Table 2, four segments emerged: 'Festival's debutants', 'Faithful to the festival', 'Interested by festival' and 'Festival lovers'. The 'Festival's debutants' (36,0%), the most representative group, were not in the previous edition and attended the festival only for 1 day. The 'Faithful to the festival' (13,8%), the least representative group, were in the previous edition and attended the festival only for one day, too. The 'Interested in the festival' (26,5%), the second most representative group, which may include newcomers (because they did not participate in the previous edition) and attended 2 or 3 days of the festival. The 'Festival lovers' (23,7%), were in the previous edition and attended 2 or 3 days of the festival.

Table 2: Audience segmentation - Past experience and Type of ticket bought

		Ticket bought	
		1 day	2 or 3 days
Previous edition participation	No	Festival's debutants 36,0%	Interested in the festival 26,5%
	Yes	Faithful to the festival 13,8%	Festival lovers 23,7%

Thus, the answer to research question Q1 was successfully achieved with this categorisation of the audience. However, replying to question Q2, it allows the complementarity of the segmentation process with the

characterization of each segment with the sociodemographic data. In all sociodemographic characteristics, with the exception of marital status, it was found that the Chi-square test was significant, confirming the conclusion that there were statistical differences between groups. The data presented of Table 3, highlights that the 'Festival's debutants' and 'Interested in the festival' groups are very similar, with the predominance of women between the ages of 18 and 25, single, with a degree, self-employed, and Portuguese. It should be stressed that these two groups have in common that they did not participate in this festival's previous edition and therefore some of them may be absolute newcomers to the festival. The 'Faithful to the festival' and 'Festival lovers' are the loyal groups to the festival, they differ in some sociodemographic characteristics, namely educational qualifications and work conditions. The 'Faithful to the festival' group is represented by young students who only have secondary studies.

Table 3: Audience segmentation considering the sociodemographic characteristic

	Variable	Festival's debutants (%)	Interested in the festival (%)	Faithful to the festival (%)	Festival lovers (%)	Total (%)	Chi-Square test (p-value)
Gender	Male	34,4%	50,0%	31,1%	45,2%	39,8%	31,262 (0,000)***
	Female	65,6%	50,0%	68,9%	54,8%	60,2%	
Age	<18	5,5%	4,3%	16,7%	7,4%	9,8%	77,558 (0,000)***
	18-25	53,4%	35,4%	46,2%	43,3%	43,9%	
	26-35	19,0%	26,1%	17,2%	29,5%	22,8%	
	36-50	18,4%	28,2%	16,5%	17,9%	19,9%	
	>50	3,7%	6,1%	3,3%	1,9%	3,6%	
Marital status	Single	77,9%	73,9%	82,8%	82,1%	79,8%	14,008 (0,122)
	Married	19,0%	20,0%	14,4%	13,1%	16,0%	
	Divorced	3,1%	5,7%	2,8%	4,5%	4,0%	
	Widow	0,0%	0,4%	0,0%	0,3%	0,2%	
Educational qualification	Element. studies	6,7%	2,5%	6,4%	2,6%	4,5%	54,918 (0,000)***
	Secondary studies	33,1%	23,6%	42,9%	29,8%	33,5%	
	Degree	45,4%	50,4%	40,1%	48,1%	45,4%	
	MA/ PhD	14,7%	23,6%	10,6%	19,6%	16,6%	
Working conditions	Employed	19,0%	19,6%	12,5%	23,1%	17,9%	91,166 (0,000)***
	Self-employed	38,0%	52,9%	30,7%	36,5%	38,5%	
	Unemployed	6,7%	3,2%	2,6%	5,8%	4,2%	
	Retired	0,6%	0,4%	0,0%	0,0%	0,2%	
	Housekeeping activities	0,6%	0,4%	0,2%	0,0%	0,3%	
	Student	35,0%	23,6%	54,0%	34,6%	39,0%	
Nationality	Portuguese	86,5%	81,8%	83,3%	59,9%	77,2%	72,986 (0,000)***
	Foreigner	13,5%	18,2%	16,7%	40,1%	22,8%	

Significant at *** p < 0,01.

5.2 Motivations and global satisfaction of each audience segment

To further explore the profile of each segment, the description of each one considering the participation motivations and overall satisfaction with the event is provided in Table 4. The groups are relatively different from each other, with significant results for Chi-square test in all motivations. The 'Festival's debutants' have greater representativeness into the degree 'very important' in all motivational items, with exception to 'previous experience (Oporto)'. This could suggest that this group's elements followed the recommendations of the participants who have been in the previous edition. The other three groups provide major weight to the degree 'extremely important' in the motivational items. Of these three groups, 'Interested in the festival' and 'Faithful to the festival' are similar in relative terms, the group which differentiates a bit is 'Festival lovers'. This last group is distinguished in the items 'surprise/a unique festival', 'schedule of concerts' and 'amusement/socializing/meeting people' giving a higher percentage to the 'very important' mark on scale. This result could be expected because this is the most loyal group to the festival, and thus the surprise factor is no longer significant; 'the schedule of the concerts' is an important motivation for this group, but there are even

more important factors as 'amusement/socializing/meeting people' is important but the most important factors are the 'festival's reputation' and the 'line-up'. These results allow the answer to question Q_3, thus leading to the conclusion that, in relative terms, the groups have their own motivations regarding their participation in the festival.

Table 4: Audience segmentation considering the motivation and the global satisfaction

Variables		Festival's debutants (%)	Interested in the festival (%)	Faithful to the festival (%)	Festival lovers (%)	Total (%)	Chi-Square test (p-value)
Line Up	Nothing importante	1,3%	1,8%	3,9%	2,7%	2,7%	27,158 (0,007)***
	Not importante	3,9%	3,3%	1,6%	6,3%	3,6%	
	Indifferent	12,5%	17,9%	13,2%	13,0%	14,2%	
	Very importante	42,1%	30,0%	40,0%	32,3%	35,7%	
	Extremely important	40,1%	46,9%	41,3%	45,7%	43,7%	
Festivals reputation	Nothing important	2,0%	2,2%	2,6%	2,0%	2,3%	30,219 (0,003)***
	Not important	6,7%	1,9%	2,4%	3,1%	3,0%	
	Indifferent	10,0%	8,2%	7,9%	11,5%	9,2%	
	Very important	41,3%	28,3%	40,2%	30,5%	34,8%	
	Extremely important	40,0%	59,5%	47,0%	52,9%	50,7%	
Surprise/a unique festival	Nothing important	4,7%	1,5%	2,7%	1,7%	2,4%	32,941 (0,001)***
	Not important	7,4%	5,7%	3,0%	2,1%	4,0%	
	Indifferent	12,2%	15,1%	17,5%	21,9%	17,4%	
	Very important	38,5%	28,7%	35,8%	38,7%	35,2%	
	Extremely important	37,2%	49,1%	41,0%	35,6%	41,0%	
Concerts Schedule	Nothing important	2,0%	1,9%	4,0%	4,8%	3,4%	18,858 (0,092)*
	Not important	6,0%	3,0%	6,3%	6,6%	5,5%	
	Indifferent	17,9%	19,4%	19,0%	24,6%	20,4%	
	Very important	41,1%	36,9%	31,9%	32,5%	34,6%	
	Extremely important	33,1%	38,8%	38,8%	31,5%	36,0%	
Amusement/ Socializing/ Meeting people	Nothing important	2,0%	1,2%	2,7%	2,7%	2,2%	16,732 (0,160)
	Not important	4,8%	4,7%	3,8%	6,8%	5,0%	
	Indifferent	16,3%	14,3%	18,0%	18,8%	17,1%	
	Very important	41,5%	31,8%	37,4%	36,5%	36,4%	
	Extremely important	35,4%	48,1%	38,2%	35,2%	39,3%	
Friends suggestion	Nothing important	9,8%	14,5%	9,4%	8,0%	10,3%	34,771 (0,001)***
	Not important	3,8%	4,7%	5,8%	8,4%	6,0%	
	Indifferent	24,8%	15,3%	14,7%	14,5%	16,2%	
	Very important	36,1%	21,3%	33,9%	30,5%	30,3%	
	Extremely important	25,6%	44,3%	36,1%	38,5%	37,3%	
Previous experience (Oporto)	Nothing important	1,4%	2,4%	27,8%	26,7%	14,4%	176,342 (0,000)***
	Not important	2,1%	0,8%	2,4%	6,7%	2,7%	
	Indifferent	12,1%	5,2%	15,3%	14,5%	11,3%	
	Very important	36,9%	21,7%	27,3%	22,4%	26,2%	
	Extremely important	47,5%	69,9%	27,3%	29,7%	45,4%	
Previous experience (Barcelona)	Nothing important	16,7%	30,9%	44,4%	37,5%	34,7%	48,522 (0,000)***
	Not important	9,5%	3,7%	3,6%	6,9%	5,4%	
	Indifferent	16,7%	21,3%	16,6%	18,1%	18,2%	
	Very important	34,5%	10,3%	18,3%	12,5%	17,3%	
	Extremely important	22,6%	33,8%	17,2%	25,0%	24,4%	
Global satisfaction	Very dissatisfied	0,6%	1,4%	0,9%	0,6%	0,9%	20,717 (0,055)*
	Unsatisfied	3,1%	1,1%	1,4%	1,0%	1,4%	
	Neutral	8,6%	6,4%	6,8%	5,1%	6,5%	
	Satisfied	40,5%	30,7%	42,0%	44,2%	39,7%	
	Very satisfied	47,2%	60,4%	48,8%	49,0%	51,4%	

Significant at *** p < 0,01 and at * p < 0,1.

In relation to global satisfaction, 91,1% of the respondents indicated they were satisfied or very satisfied with the festival. This percentage differs slightly between segments. The most satisfied segment is 'Festival lovers', with 93,2%, followed by 'Interested in the festival', with 91,1%, 'Faithful to the festival', with 90,8% and finally, although with a high percentage, but still the lowest of the four groups, is 'Festival's debutants' with 87,7%. It was also verified that the Chi-square test was statistically significant. This result answers to question Q_4.

5.3 Communication channels used by the music festival

Digital media (e.g.: internet, social networks, newsletter) were the most effective communication channels to

reach the audience across all segments. As presented in Table 5, for 64,3% of the sample, digital media were the communication channels that have improved the festival's awareness. The groups with the higher average percentages were: 'Festival's debutants' and 'Faithful to the festival'. Although with a considerable distance from digital media, word-of-mouth (WOM) was the second most important communication path, pointed out by 23% of the respondents. The groups with the higher average percentages were: 'Interested in the festival' and 'Festival lovers', which are the groups that spent more time at the festival. Statistical significance was only obtained in the word-of-mouth communication channel. These two communication channels' prominence were clearly identified, together with the predominance of digital media, as the main communication marketing tools for the festival pointed out by the study. This conclusion answers the Q_5 question.

Table 5: Communication channels influence by groups

Communication Channel/ Path	Festival's debutants (%)	Interested in the festival (%)	Faithful to the festival (%)	Festival lovers (%)	Total	Chi-Square test (p-value)
Digital (e.g.: internet, social networks, newsletter, e-wom)						
Yes	68,7%	60,4%	66,5%	62,5%	64,3%	4,620
No	31,3%	39,6%	33,5%	37,5%	35,7%	(0,202)
TV						
Yes	8,6%	6,4%	9,7%	5,8%	7,7%	4,758
No	91,4%	93,6%	90,3%	94,2%	92,3%	(0,190)
Radio						
Yes	6,1%	2,9%	5,2%	3,2%	4,2%	4,522
No	93,9%	97,1%	94,8%	96,8%	95,8%	(0,210)
Print materials (e.g.: Non-specialist newspaper/magazine, Specialized magazines, Flyers/Billboards)						
Yes	1,2%	3,9%	3,1%	3,2%	3,1%	2,586
No	98,8%	96,1%	96,9%	96,8%	96,9%	(0,460)
Word-of-mouth						
Yes	16,0%	28,2%	17,9%	29,8%	23,2%	22,998
No	84,0%	71,8%	82,1%	70,2%	76,8%	(0,000)***

Significant at *** $p < 0.01$; it was a multi answer question.

6. Conclusions

All research questions were successfully confirmed by the study. Based on two complementary segmentation criteria, four distinct audience groups emerged from this study. The first criterion was loyalty/engagement related with the past experience with the festival, and assessed by the participation on its previous edition. As pointed out by Gitelson and Kerstetter (2000) the past experience is an important factor which could define, not only the festival's awareness, but also the participation interest. The second criterion expresses the commitment to the festival edition, assessed by the participating intensity. The study confirmed that the four segments are different in sociodemographic characteristics, motivations to participate, and satisfaction level with the festival. This conclusion reinforces the literature clue on music festivals audience heterogeneity (Li and Wood, 2016; Saayman and Saayman, 2016), and justifies the interest in adapting the marketing communication channels to each segment (Beaudoin, 2009).

Regarding the focus of this research, and as Hede and Kellett (2011) have argued, the digital media (e.g.: internet, social networks, newsletter, and e-wom) have been overtaking the traditional channels as the most effective path to communicate with the festival's audiences. In this study, digital media were the most effective communication channels to reach the audience across the four segments. Although with a considerable distance from digital media, WOM had the second highest percentage as a communication path. Thus, the present study's results clearly stated that WOM has a significant importance influencing the music festival's public (Getz and Fairley, 2004; Hede and Kellett, 2011). This general information allows the music festival´s organization to identify patterns across segments of festival music participants and use more effective ways in order to reach them.

There are two research limitations that could be highlighted; firstly, only one edition of the NOS Primavera Sound music festival was studied. A comparison between editions, permitting a longitudinal study, would be interesting

in order to assess potential differences, or to reinforce this research conclusions. Secondly, because of a lack of information, the relation between the use and preferences of the audience regarding the different means of communication was not considered. These limitations could be considered and overcome in future studies.

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